

Chapter 5:

Strategic planning



Front cover photo: Caritas Lebanon staff members conduct an assessment in a village in south Lebanon. From this assessment they learned that the village is without electricity or water. David Snyder for CRS.

© 2011 Catholic Relief Services – United States Conference of Catholic Bishops

228 West Lexington Street
Baltimore, MD 21201 – USA
pqsrequests@crs.org

Download this and other CRS publications at www.crsprogramquality.org.

WHAT FUNCTION DOES STRATEGIC PLANNING SERVE?

Organizations with long-term missions are designed to deliver services over time. Therefore, an organization's leadership should concern itself with how to position the organization to respond to changes in its environment, adjust its work accordingly, and compete effectively in the future. Such positioning calls for a long-term look at likely current and future opportunities and obstacles and how to deal with them if they occur. Strategic planning can help develop this long-term perspective.

Why strategic planning? Organizations operate in very fluid, dynamic and sometimes hostile environments. A strategic (big-picture) perspective can help predict and plan for the future. A strategic plan helps an organization to create and maintain a long-term view of what it wants to become, providing a framework for programs that help the organization better serve stakeholder needs. It also helps identify what changes may be necessary for the organization to compete effectively in the future.

During the strategic planning process, an organization defines its values and beliefs and how it will conduct business. With these value statements in perspective, an overall mission or purpose is developed. Goals and measurable objectives are then established for measuring progress. Activities are assigned to respective staff with time and financial resources allocated, and progress performance indicators are developed. The strategic plan, normally developed for a five- to ten-year period, is a "big picture" view, with the details provided by annual program and financial plans.

Strategic planning is an important function in overall organizational health. There are many excellent strategic planning guides available, so, rather than dedicate a chapter to duplicating others' good work, this section presents a selection of recommended guides by other authors. The guides referenced below are easy to access on the internet and provide clear and comprehensive advice on how to conduct a strategic plan. Following the suggested guides is a short list of websites that contain articles and resources on planning and on management generally.

STRATEGIC PLANNING MANUALS

Developing Strategic Plans: A Tool for Community- and Faith-Based Organizations

“Developing Strategic Plans: A Tool for Community- and Faith-Based Organizations was developed to enable community- and faith-based

organizations to develop sound, effective strategic plans which will guide their organizations and communicate their mission to external stakeholders.”

Developed by the International HIV/AIDS Alliance and Davies & Lee: AIDS and Development Consulting, CORE Initiative, March 2007. The CORE Initiative is a USAID-funded global program designed to support an inspired, effective, and inclusive response to the causes and consequences of HIV/AIDS by strengthening the capacity of community- and faith-based groups worldwide. Leading this initiative is CARE in partnership with the International Center for Research on Women, International HIV/AIDS Alliance, Johns Hopkins Bloomberg School of Public Health/Center for Communication Programs, and World Council of Churches.

<http://www.humanitarianforum.org/data/files/resources/713/en/AllianceStrategicPlanningTool.pdf>

Ten Keys to Successful Strategic Planning for Nonprofit and Foundation Leaders

“A successful strategic planning process will examine and make informed projections about environmental realities to help an organization anticipate and respond to change by clarifying its mission and goals; targeting spending; and reshaping its programs, fundraising and other aspects of operations.”

For over two decades, TCC has provided strategic planning, program development, evaluation and management consulting services to nonprofit organizations, foundations, corporate community involvement programs and government agencies. In this time, the firm has developed substantive knowledge and expertise in fields as diverse as community and economic development, human services, children and family issues, education, health care, the environment, and the arts.

http://www.tccgrp.com/pdfs/per_brief_tenkeys.pdf

Strategic Planning: A Ten-Step Guide

“The term strategic planning has become very popular in recent years. Many nonprofit organizations now talk about doing strategic planning rather than long-range planning. Yet the difference between the two is not intuitively obvious, nor universally agreed upon.”

Prepared by Emily Gantz McKay. Based on materials originally prepared for use with SHATIL, the technical assistance project of the New Israel Fund. Modified for the National Council of La Raza, and further modified for MOSAICA, May 1994 and July 2001.

http://siteresources.worldbank.org/INTAFRREGTOPTEIA/Resources/mosaica_10_steps.pdf

Strategic Planning

“Strategic planning is more than ensuring your association will remain financially sound and be able to maintain its reserves—it’s projecting where your association expects to be in five, ten, or fifteen years—and how your association will get there. It is a systematic planning process involving a number of steps that identify the current status of the association, including its mission, vision for the future, operating values, needs (strengths, weaknesses, opportunities, and threats), goals, prioritized actions and strategies, action plans, and monitoring plans.”

Community Associations Institute (CAI) and the Foundation for Community Association Research are dedicated to conducting research and acting as a clearinghouse for information on innovations and best practices in community association creation and management. As part of the Best Practices project, operations related to various function areas of community associations—including governance, reserve studies/management, financial operations, strategic planning, community harmony and spirit, energy efficiency, and transition—have been produced and are available at www.cairf.org as a free download or for sale in CAI’s bookstore.

<http://www.cairf.org/research/bpstrategic.pdf>

OTHER SOURCES OF INFORMATION

The Association for Strategic Planning, <http://www.strategyplus.org/>

“Founded in 1999, ASP is the only not-for-profit professional association dedicated to advancing thought and practice in strategy development and deployment for business, non-profit and government organizations. ASP provides opportunities to explore cutting-edge strategic planning principles and practices that enhance organizational success and advance members’ and organizations’ knowledge, capability, capacity for innovation, and professionalism.”

The Foundation Center, <http://foundationcenter.org/pnd/tsn/tsn.jhtml?id=60800001>

Philanthropy News Digest, article on strategic planning, 2004

The Philanthropy Journal, <http://www.philanthropyjournal.org/>

“The Philanthropy Journal is an independent voice and champion for nonprofits and their supporters. Through a daily website and free, weekly email bulletin, we deliver nonprofit news, resources, announcements and job listings. The Philanthropy Journal is a program of the Institute for Nonprofits at North Carolina State University in Raleigh, N.C. (USA).”

Alliance for Non Profit Management, <http://www.compasspoint.org/alliance>
“The Alliance is the national voice and catalyst for the field of capacity building. We improve the effectiveness of individuals, groups, and organizations helping nonprofits and communities achieve positive social change.”

Center for Non-profit Management, <http://www.cnmsocal.org/resources/management-and-supervision/faq-about-nonprofit-strategic-planning.html>
“The Center offers this useful reference for nonprofit professionals for frequently asked questions in fundraising, board management, leadership and other topics important to achieving your mission.”

Catholic Relief Services (CRS)
228 W. Lexington Street
Baltimore, MD 21201, USA
Tel: (410) 625-2220

www.crsprogramquality.org

