



Resource Guide on STRATEGIC PLANNING

The Resource Guides constitute a continuously evolving project initiated by the Institutional Learning and Research Division (ILR) to enable SFCG staff to quickly and easily access and review a selection of practical and useful resources. Therefore, it is not meant to be a comprehensive bibliography. We welcome contributions of resources to ILR (ilr@sfcg.org).

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Introduction

This guide focuses on strategic planning at the organization-wide level, but resources listed are also useful for programme level strategic planning. Most materials cited are written for non-profit strategic planning, but some guides for small-scale companies are also suitable and therefore listed here. The definition of strategic planning varies, but essentially, it is a management tool that involves the following three elements:

1. Fundamental **decision-making** and action-planning to shape and guide an organization toward the **future**,
2. Preparing the best way to respond to the **environment**,
3. Focusing not only on the output (strategic plan document) but also the **process of reflection and communication**.

There are various methods to conduct strategic planning. The most popular (orthodox) method is based on **SWOT analysis**, which analyzes the organization's Strengths and Weaknesses, as well as external environments such as Opportunities and Threats. **Appreciative Inquiry methods** focus on positive aspects of the organization, such as success stories, in developing organizational strategy. **Future Search Approach** and **Open Space Technology** are less traditional and less structured methods for planning. Appreciative Inquiry, Future Search and Open Space methods build on highly participatory approaches, while almost all of the other methods also stress the importance of collaboration in the strategic planning process.

*****MUST READS*****

1. *Strategic Planning FAQ* by Alliance for Nonprofit Management (page 2)
2. *Strategic Planning: An Inquiry Approach* by CEDPA (page 3)

I. General Materials

Materials listed here provide basic explanations regarding what strategic planning is, why it's important, and its orthodox methodology. Often used is SWOT analysis, which analyzes the organization's Strengths and Weaknesses, as well as external environments such as Opportunities and Threats.

1. **Title:** *Strategic Planning FAQ*
By: Alliance for Nonprofit Management
Language: English
Description: 15 Q&As. 2 to 4 pages per question. Basic, easy-to-read introduction, which presents: What, Why, basic steps, and basic methods of strategic planning. An essential reading for the beginner of strategic planning.
Topics:
 - Mission statement and vision statement
 - SWOT assessment
 - Outcome studies
 - Cost/Benefit analysis
 - Competitive analysis (MacMillan Matrix)
 - Use of external consultants and retreats**Location:** http://www.allianceonline.org/FAQ/strategic_planning

2. **Title:** *Strategic Planning: A guide for Canadian NGOs*
By: CIDA (Canadian International Development Agency) (2004)
Language: English and French
Description: 62 pages. Clear and well structured introductory guide written specifically for NGOs working internationally. Step-by-step approach and the use of worksheets are helpful. More detailed explanation than the two materials above. Uses SWOT approach. Part II is a fictitious case study of a children's development and education program.
Location: English: http://www.acdi-cida.gc.ca/cida_ind.nsf/0/327282FE71B48DB785256E1C006FE1CB?OpenDocument,
French: http://www.acdi-cida.gc.ca/cida_ind.nsf/vall/613B7A0D9908737E85256E46005905F0?OpenDocument

3. **Title:** *"Community Tool Box" Chapter 8. Developing a Strategic Plan*
By: University of Kansas
Language: English
Description: Uses "VMOSA" approach, which defines vision, mission, objectives, strategies, and action plans step-by-step. Provides the basic concept and how-to guide for each step. Written for community organizations. This resource will be useful for program-level strategic planning.
Location: http://ctb.ku.edu/tools/en/chapter_1007.htm

II. Other methods & tools to conduct strategic planning

For preparing to start strategic planning,

1. **Title:** *Nonprofit Organizational Assessment Tools: Strategic Planning*
By: Andrew Lewis, University of Wisconsin Extension
Language: English
Description: 7-page. Concise and easy-to-use checklists to assess where the organization is before starting strategic planning. Useful for those who are just starting or thinking about starting the strategic planning process.
Location: <http://www.uwex.edu/li/learner/assess1.htm>

Appreciative Inquiry Method

Appreciative Inquiry (AI) is a qualitative approach which emphasizes discussion and participation. AI encourages organizations to focus on positive aspects of the organization, such as the best practices,

rather than “fixing problems.” The original AI involves four phases: Discover (collect and share common and differing capacities of the stakeholders), Dream (envision the image of possibility/better world), Design (discuss what needs to be done, institutionalize the vision), and Destiny/Delivery (inspire action).

- Title:** *Strategic Planning: An Inquiry Approach*
By: CEDPA (The Centre for Development and Population Activities) (1999)
Language: English, French, and Spanish
Description: 24 pages. Defines strategic planning from AI’s viewpoint and provides a step-by-step guide for strategic planning using the method. Clear and easy-to-read. Focuses on participatory methods. Written for administrators and managers of NGOs conducting programmes in developing countries. Contains many sample questions and statements for each phase. Note this is not a guide for AI itself.
Location: <http://www.cedpa.org/publications/pdf/stratplan.html>

Future Search Approach

Future Search is a method suitable for planning with large and diverse groups. It uses a structured meeting to facilitate “discovery, dialogue, learning and planning” about the past, present and desired future.

- Title:** Future Search Website.
By: Future Search
Language: English
Description: Website that offers overview of the concept and methodology of Future Search.
Location: <http://www.futuresearch.net/index.cfm>

Open Space Technology

Open Space Technology (OST) is a method applicable to any meeting or event. It is less structured than most other methods. There is no preset agenda other than the topic previously agreed to and the time allotted to the meeting. Although not specifically focusing on strategic planning, OST gathers a group of people and facilitates the use of their own knowledge and skills to solve problems, innovate and facilitate change.

- Title:** *Open Space Technology: Practice Resources for Inviting Organization*
By: Michael Herman Associates (2003)
Language: English
Description: 82 pages. A detailed training and practice workshop manual for Open Space Technology. Written in speaking language and easy to read. Useful for organizers of strategic planning, as well as anyone who facilitates any meeting/workshop.
Location: <http://www.globalchicago.net/ost/publications/downloads/PracticeGuide.pdf>

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Institutional Learning and Research Division, Search for Common Ground (January 2004).