



Guide to Strategic Planning

Introduction

Strategic planning is an important process that all organisations should undertake. It is essential for clarifying what you want to achieve, for maintaining high quality services for beneficiaries and for ensuring the long-term sustainability of the organisation.

The complexity of your strategic plan will depend on the characteristics of your organisation, how large it is, how long it has been operating and the external environment you are working in. This guide will take you through the essential elements of the process and recommend further reading and resources that may assist. Also, please read the case study of Anytown Women's Centre which accompanies this guide and provides an example of an actual strategic planning process.

http://www.wrc.org.uk/includes/documents/cm_docs/2011/g/guidestratplancase_study_ng.pdf

What is strategic planning?

Strategic Planning can be defined a number of ways:

- "The process of clarifying the overall purpose or mission of your organisation and what you will do over the next 3-5 years (or whatever period the plan covers) to bring this about." (CES)
- "Strategic planning is the process of defining and presenting a clear, coherent and realistic view of what the organisation wants to achieve and a 3-5 year (or whatever period you need to be thinking about) overview of how it will achieve its aims and objectives"(Performance Hub)
- A strategic plan is a dynamic and useful tool for trustees and staff to monitor how the organisation as a whole is meeting its objectives.

What does it look like?

- It is about the big picture and the long term direction of the organisation.
- A strategic plan does not focus on the operational or daily tasks of the staff - these are short term work plans that feed into the strategic plan
- A strategic plan usually includes a mission statement, a statement of key

priorities and strategies for achieving these priorities, timescales and a procedure for reviewing progress and modifying the plan.

Why is it important?

Strategic Planning:

- Sets organisational priorities and ensures the purpose of the organisation is clear
- Ensures that beneficiaries are the focus of planning and setting of aims and objectives
- Provides the opportunity to ensure objectives are realistic, within a specific timeframe and within the organisation's capacity and resources
- Ensures that limited resources can be used for agreed priorities
- Assists an organisation to be proactive, as risks, strengths and weaknesses, and potential changes in the environment are identified and strategies to deal with them developed
- Ensures resources are allocated to the organisation's priorities, when done in conjunction with the budget process
- Shows that your organisation is thoughtful, understands its environment and is well managed; funding bodies often request a copy and it can be a great promotional tool
- Can promote closer relationships and improved understanding of different perspectives among staff, trustees and volunteers
- Can result in increased commitment by everyone in an organisation to its aims and objectives

What is the difference between a strategic plan and other types of plans?

Strategic plans focus on the overall purpose of your organisation and its long-term direction and aims. Strategic plans usually cover a 3-5 year period.

Business plans focus on how you will implement your strategic aims and the resources your organisation needs to achieve your aims in the medium-term. Sometimes, organisations will also do business plans for specific projects. Business plans usually cover a 1-3 year period.

Operational or work plans focus on the detailed tasks or activities that the staff in your organisation need to do to achieve your strategic aims. Operational plans usually cover a one-year period.

However, it is common for small to medium size voluntary and community organisations to combine strategic and business plans into one plan.