



USAID | **LEBANON**
FROM THE AMERICAN PEOPLE

Strategic & Action planning

Training workshop

BALADI CAP (Building Alliances for Local Advancement, Development, and Investment – CAP)

Prepared by: Rania Skaine

“This publication is made possible with the support of the American People through the United States Agency for International Development (USAID). The content of this publication is the sole responsibility of the contractor and does not necessarily reflect the views of USAID or the United States Government.”



Training objectives

By the end of this workshop the participants will:



Gain skills on how to develop a strategic plan for a civil society organization



Develop skills for writing an action plan for the defined strategy



USAID
FROM THE AMERICAN PEOPLE

LEBANON

Agenda

09:30-09:45 **Welcome and workshop introduction**

09:30-09:45 **Pre-assessment**

09:45-11:00 **Introduction to strategic planning: Vision and mission**

Objective: Gain skill for writing a vision & mission for Civil Society Orgs.

10.00-11.15 *Coffee break*

11.15-13.00 **SWOT analysis and formulation of strategic objectives**

Objectives: - Develop skills for conducting a SWOT
- Gain ability to derive strategic objectives

13.00-14.00 *Lunch break*

14.00-15.45 **Presentation: Action planning**

Objective : Gain skill on how to develop an action plan

15:45-16:00 **Wrap-up and post-assessment**



USAID | **LEBANON**
FROM THE AMERICAN PEOPLE



A. Introduction to strategic planning

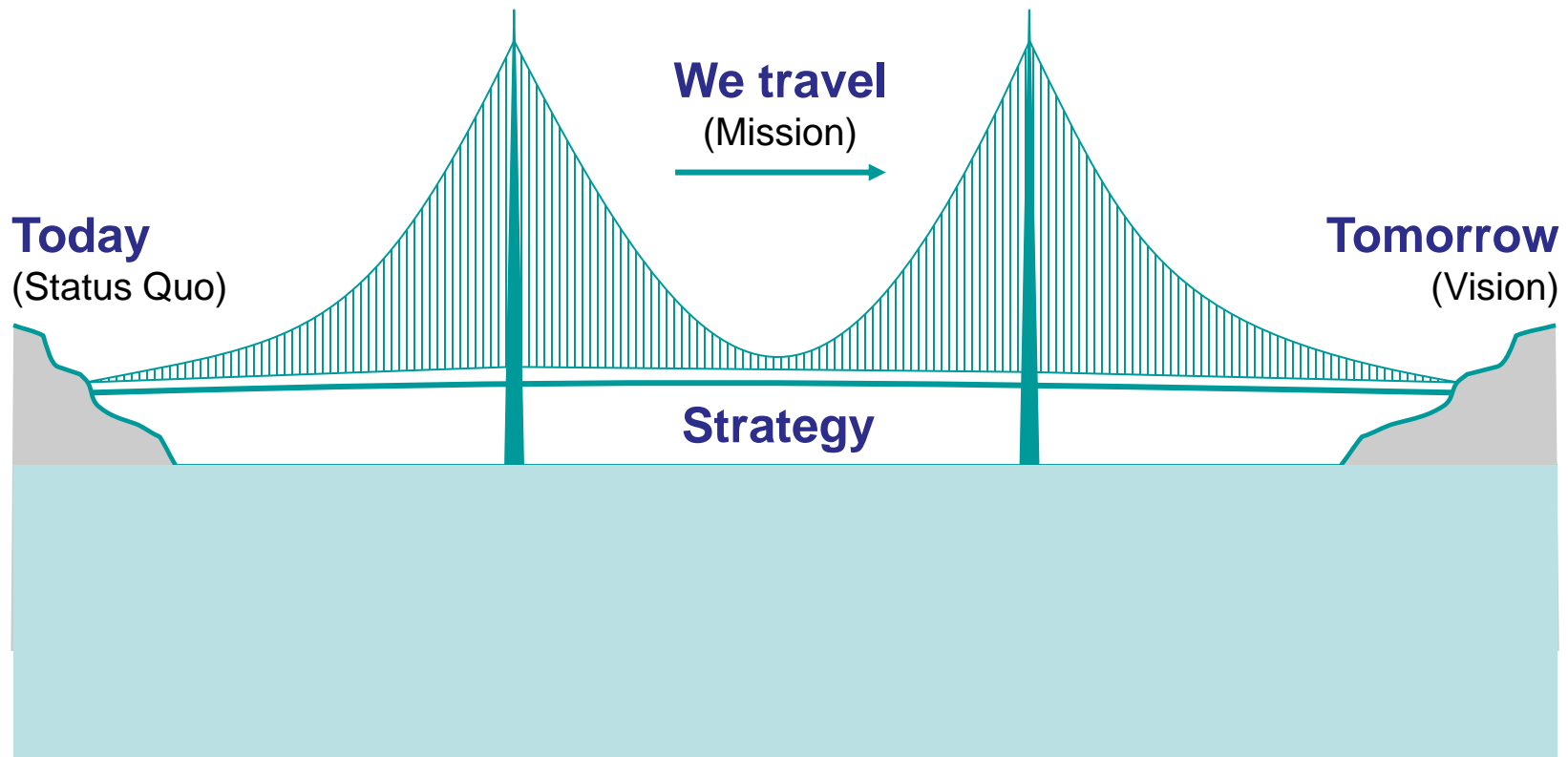




USAID
FROM THE AMERICAN PEOPLE

LEBANON

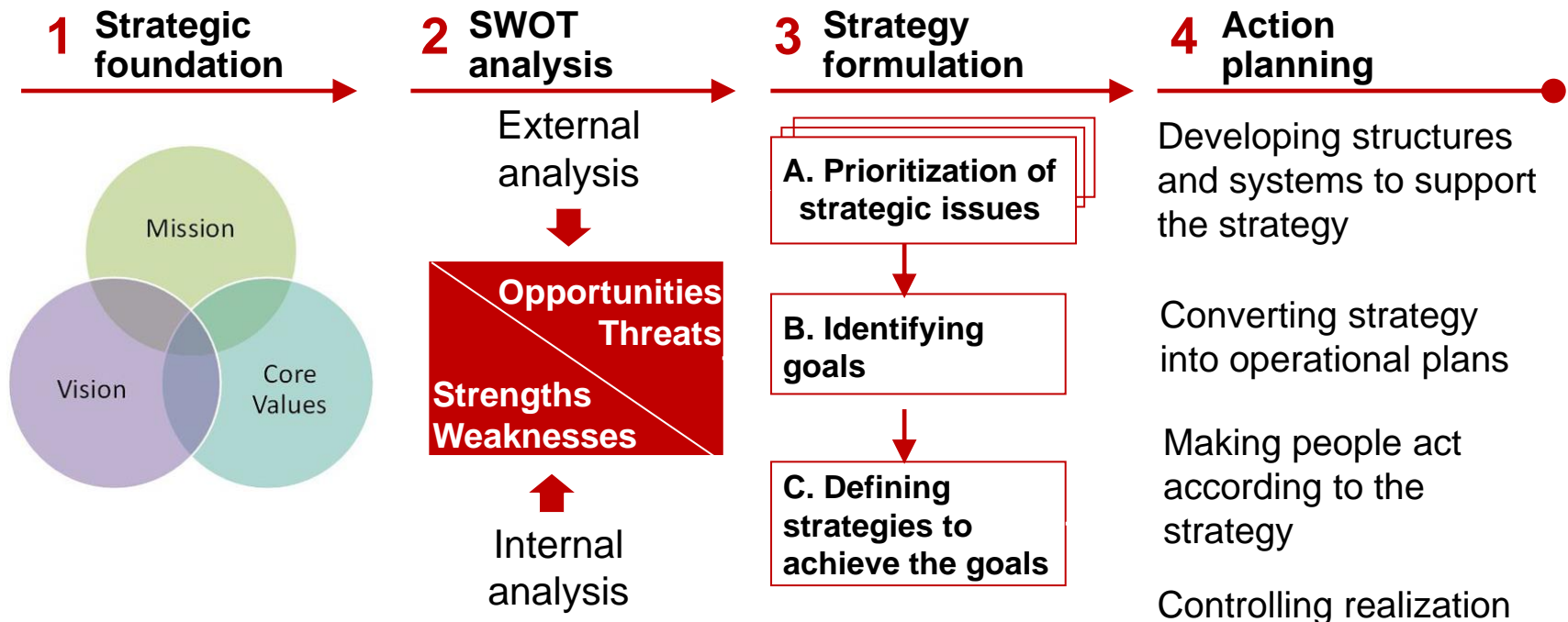
**Strategy is the bridge between today and tomorrow –
Vision states our image of tomorrow and mission is
the roadmap**





Systematic approach is used to develop the organization's strategy

Process of Strategic Management





USAID
FROM THE AMERICAN PEOPLE

LEBANON

The first step is to lay down the strategic foundation by defining the vision, mission, and values

1. Strategic foundation

2. SWOT analysis

3. Strategy formulation

4. Action planning



The vision embodies the goals that the organization aims at – It directly shapes the strategy



THE VISION ...

- ... expresses the organization's **optimal goal**
- ... describes the clear and inspirational **long-term change resulting from your work**
- ... Describes an **image of an ideal future** that the organization strives for
- ... Describes **what will happen** to the world, a country, a region, a community or a specific problem in a long-distance future **in case the NGO achieve its purpose**



Steps to develop the vision statement

STEP 1: DEFINE THE KEY PROBLEMS YOU WANT TO ADDRESS

STEP 2: IMAGINE AN IDEAL SITUATION IN THE FUTURE (PROBLEM SOLVED)

STEP 3: DESCRIBE THE IDEAL SITUATION WITH KEY WORDS OR PHRASES

STEP 4: DRAFT YOUR VISION STATEMENT



Examples of vision statements for non-profits



OXFAM
International

“A just world without poverty”



Save the Children.

“Our vision is a world in which every child attains the right to survival, protection, development and participation”



“Amnesty International’s vision is of a world in which every person enjoys all of the human rights enshrined in the Universal Declaration of Human Rights and other international human rights instruments”



“A hunger-free America”



A community free of alcohol and other drug addiction, misuse and related problems.



We envision a world where children and young people are empowered to make healthy decisions and live free of drugs.



We seek a world of hope, tolerance and social justice, where poverty has been overcome and all people live with dignity and security.



The mission statement summarizes the organization's basic reasons for being



Pivotal Elements of a Mission Statement

Our Cause

Whom or what it supports or where?

Our Actions

What we do (How it will support)

Our Impact

What it wants to achieve (the purpose)

... is a simple statement of the organization's purpose; a direct expression of its "raison d'être"



Steps to develop the mission statement

STEP 1: DEFINE GROUPS THAT WILL BENEFIT FROM YOUR NGO'S ACTIVITIES

STEP 2: DESCRIBE WHAT YOU WANT TO ACHIEVE LONG TERM

STEP 3: DESCRIBE HOW YOU WANT TO ACHIEVE YOUR LONG TERM GOALS

STEP 4: DRAFT YOUR MISSION STATEMENT BASED ON THE PREVIOUS STEPS



USAID | LEBANON

Examples of mission statements for non-profits



NCADA works to reduce or prevent the harms of alcohol and other drug use through education, intervention and advocacy.



Alleviate suffering, poverty and oppression by helping people build secure, productive and just communities.



To inspire hope and contribute to health and well-being by providing the best care to every patient through integrated clinical practice, education and research



The mission of Compass is to create healthier lives and safer communities. We achieve our mission through the delivery of effective prevention, early intervention, targeted and specialist services that build resilience and guide children, young people and adults away from risk and towards greater health and wellbeing.



Examples of mission statements for non-profits



"To create lasting solutions to poverty, hunger, and social injustice"



"American Red Cross prevents and alleviates human suffering in the face of emergencies by mobilizing the power of volunteers and the generosity of donors"



Values shape the internal and external interactions of the organization

CORE VALUES...

- ... Shape internal behavioral norms
- ... Guide the organization's interactions with external stakeholders
- ... Guide work processes
- ... Are in line with the vision and mission
- ... Are influenced by the organization's industry and geographical location

CORE VALUES ARE NOT...

- ... Business strategies
- ... The organization's strengths
- ... Operating practices
- ... Changed in response to administration or market changes
- ... Wishful thinking

Core values need to be lived!



Example of core values



Respect

To consider worthy of high regard

Integrity

Adherence to moral and ethical principles

Teamwork & collaboration

Putting the needs of the whole over your own personal gain

Accountability

Acknowledgment and assumption of responsibility for actions and decisions

Stewardship

The careful and responsible management of something entrusted to ones care

Diversity

To better understand, present and serve our community



Integrity

Respect for Individuals

Customer Satisfactions,

Pursuit of Excellence

Positive Response to

Change

Stewardship



USAID
FROM THE AMERICAN PEOPLE

LEBANON

Next, a SWOT analysis needs to be conducted

1. Strategic foundation

2. SWOT analysis

3. Strategy formulation

4. Action planning



SWOT is a strategic planning method used to evaluate the Strengths, Weaknesses, Opportunities, and Threats

Strengths

(internal factors)

- What do we do well?
- How are we better than other organizations?

Weaknesses

(internal factors)

- What could be done better?
- What is being done in a weak way?

Opportunities

(external factors)

- What are the interesting trends?
- What are the opportunities that can be exploited?
- What are the factors outside the NGO that could help us do better?

Threats

(external factors)

- What obstacles are being faced?
- What are the factors outside the NGO that might be unhelpful to us doing better?



Three simple tips for conducting a successful SWOT analysis

- 1. Be honest with yourself.** And if you find that you are consistently building a SWOT based on what you want to do, or how you want to be, then ask members of your staff to independently do their own version. The results may open your eyes!
- 2. Take the time to actually do a careful SWOT.** I know that every nonprofit has limited time, but this is one exercise that, when done properly, could actually save your valuable time in the end. Imagine not wasting precious time or dollars on ineffective strategies, decisions or marketing plans because you spent the time upfront to build a solid SWOT analysis.
- 3. Make sure you have facts to back up your SWOT.** If you want your team to stand behind you then you need to provide solid data to support your SWOT analysis. Theories, hunches or gut feelings will only go so far in motivating a team.



USAID
FROM THE AMERICAN PEOPLE

LEBANON

This all leads to the formulation of the strategy

1. Strategic foundation

2. SWOT analysis

3. Strategy formulation

4. Action planning



Once you finalize the SWOT, you build on the findings to develop strategic goals

	Opportunities (external, positive)	Threats (external, negative)
Strengths (internal, positive)	Strength-Opportunity Use your internal strengths to take advantage of opportunities	Strength-Threat Identify ways that the organization can use its strengths to reduce its vulnerability to external threats
Weaknesses (internal, negative)	Weakness-Opportunity Improve weakness by taking advantage of opportunities	Weakness-Threat Identify ways to prevent weaknesses from making the organization susceptible to threats



And strategic goals and strategies are identified accordingly

- **Goals** are your organization's aspirations. Goals can be set at the organizational level, the program or department level, or the individual employee level. A goal is a broad primary outcome. Using a road trip as an analogy, a goal is traveling from Chicago to New York.
- **Strategies** are approaches or ways to achieve goals. Usually, more than one option exists. You can travel to New York by several methods: plane, train, automobile, bicycle, or on foot. After considering the costs, your schedule, and your hiking ability, you decide to travel by car.



Next, we develop strategies that will allow the organization to reach these goals

Strategic goals: *Expand geographical outreach throughout Lebanon*

Strategies *Open new representative offices*

Launch events in different areas of Lebanon

Strategic goals: *Broaden and strengthen our visibility as a regional resource, and promote the programs of our organization*

Strategies *Develop and implement a long-range public relations plan designed to increase awareness of the organization and its programs within the community*

Recruit a communication specialist to take the lead on this endeavor



USAID
FROM THE AMERICAN PEOPLE

LEBANON

After formulating the strategies, it is important to develop a clear and structured action plan

1. Strategic foundation

2. SWOT analysis

3. Strategy formulation

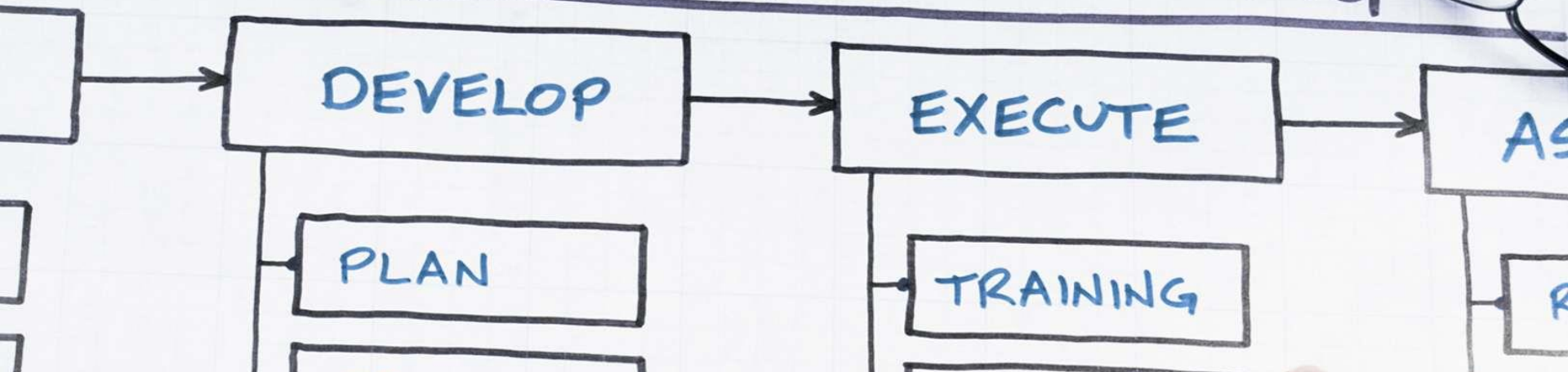
4. Action planning



USAID | LEBANON

FROM THE AMERICAN PEOPLE

STRATEGY \approx PLANNING



B. Action planning





Contents

1. Definition

2. Structure

3. Do's and don'ts



USAID
FROM THE AMERICAN PEOPLE

LEBANON

We will start by defining the concept of action planning

1. Definition

2. Structure

3. Do's and don'ts



Question: What is your definition of an action plan?









Definition of an action plan

An action plan is **sequence of activities** that must be performed to reach your goals. It clarifies what **resources** are required to reach the goal, formulates a **timeline** for when specific tasks need to be completed and defines clear **owners / responsibilities**.



The action plan translates the strategy into implementation steps

Roadmap for the future

-  Translates strategic goals into actionable tasks
-  Defines clear ownership and required resources for the tasks
-  Outlines the required timeline
-  Serves as a tool for tracking progress of strategy implementation



There are several reasons to create an action plan

REASONS TO CREATE AN ACTION PLAN...

ACTION PLAN			
WHO	WHAT	WHEN	HOW

- To lend **credibility** to your organization. An action plan shows members of the community (including grant makers) that your organization is **well ordered** and **dedicated** to getting things done
- To make sure **you don't overlook** any of the **details**
- To **understand what is and isn't possible** for your organization to do
- For **efficiency**: to save time, energy, and resources in the long run
- For **accountability**: To increase the chances that people will do what needs to be done.



Next we will define the structure of the action plan

1. Definition

2. Structure

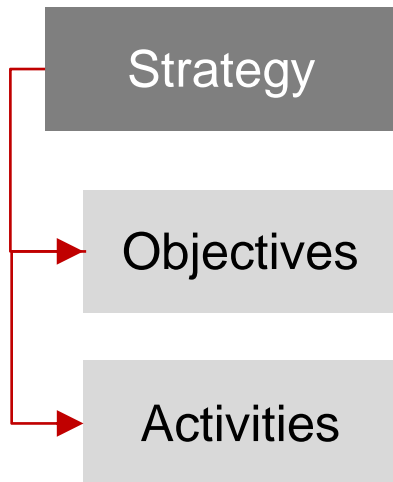
3. Do's and don'ts



The action plan should be well-structured to keep track of all activities

Structure of the action plan

Strategic goal



- Goal/target identified for the organization. A goal is a broad primary outcome.
- Approaches or ways to achieve goals
- Objectives planned to reach while implementing Strategy
- Activities/tasks to undertake to achieve the objective



The action plan should be well-structured to keep track of all activities – Example

Structure of the action plan

Strategic goal

- Reduce illiteracy among adults in rural areas of Lebanon

Strategy

- Design programs and strengthen participation of men and women in basic literacy and informal education programs

Objectives

- Educating 1000 adults in areas under scope through the provision of 5 reading/writing courses during 2015

Activities

- Survey the needs in each of the areas within scope
- Approach experts and align on program/schedule/etc.
- Announce/market the program

...



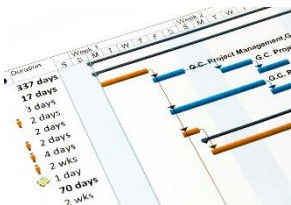
For each of the activities, resources, timeline and owners should be identified



Resources

What is the required funding? Facilities needed?

What type of expertise is needed?



Timeline

What is the time required to complete each of the identified activities?



Responsible

Who are the assigned personnel to take ownership of this activity?



This results in an action plan ready for implementation

Strategic Goal	Strategy	Objective	Activity /Task	Resources	Timeline	Responsibility
1. (Goal #1)	1.1 (first strategy to reach Goal #1)	1.1.1 (first objective to reach while implementing Strategy #1.1)	1.1.1.1 (first activity to undertake to achieve the objective)	(resources needed to accomplish that task)	(by when should the task be reached)	(who's going to accomplish that task)
		1.1.2 (second objective to reach while implementing Strategy #1.1)	1.1.2.1 (first activity to undertake to achieve the objective)	(resources needed to accomplish that task)	(by when should the task be reached)	(who's going to accomplish that task)
2. (Goal #2)	2.1 (first strategy to reach Goal #2)	2.1.1 (first objective to reach while implementing Strategy #2.1)	2.1.1.1 (first activity to undertake to achieve the objective)	(resources needed to accomplish that task)	(by when should the task be reached)	(who's going to accomplish that task)



Now we will highlight the main do's and don'ts of action planning

1. Definition

2. Structure

3. Do's and don'ts



Do's

- Complete an **action plan for each strategic goal**
- Identify **who** will complete each action and according to what **timeline**
- Ensure you use **SMART objectives** in action plans
- Ensure that **each individual contributes** to and agrees with their plans
- Revisit your action plans regularly** and follow the monitoring, review and evaluation requirements



USAID
FROM THE AMERICAN PEOPLE

LEBANON

SMART targets are key for successful action planning

Specific

clear and unambiguous

Measurable

quantity, time, cost

Achievable

realistic and attainable

Relevant

goals that matter

Time bound

within a time frame with a target date



USAID
FROM THE AMERICAN PEOPLE

LEBANON

Don't's

- X** Write **action plans on your own** with no involvement of other managers or staff.
- X** Leave **actions open-ended** in terms of time or who will be responsible.
- X** Allow plans to be developed **without reference** to the organization's **overall goals and plan**
- X** **Expect staff to follow** action plans **without** appropriate **support**



USAID | LEBANON

FROM THE AMERICAN PEOPLE

For more information

Building Alliance for Local Advancement, Development, and Investment – CAP

BALADI CAP

Follow us on

<http://baladi-lebanon.org/baladicap/>



www.facebook.com/Baladi.cap



@BALADICAP



<https://baladicap.wordpress.com>



@BALADICAP