



building
local
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Introducing: Pact's Strategic Planning Toolkit

The abilities of civil society organizations (CSOs) and their leaders to track and respond to changes in their environments is at the heart of **resilience and adaptive management**. This makes strategic planning an important tool in a CSO's toolbox. Indeed, a strategic or "big picture" orientation can be the difference between an organization that sustains itself over the long term and contributes to meaningful development and one that is unable to meet the demands of the people it seeks to serve.

A **strategic plan** transforms an organization by **establishing priorities** that better serve the current and emerging needs of end users (e.g., community groups, members, or other client organizations). In its simplest terms, **strategic planning determines where an organization is going in the near and long terms, how it is going to get there, and how it will know if it has arrived.**

Strategic planning (SP) is central to prioritizing local ownership, building the foundation for a more sustainable and impactful organization. The process helps organizations maintain their autonomy, preserve their mission-driven approach, and avoid excessive dependence on donors.

In order to support our staff and partners in their SP activities, Pact has developed a comprehensive **Strategic Planning Toolkit**. This guide of easy-to-use tools and activities encourages organizations to effectively **frame big issues, reflect on future directions, and identify clear steps for implementing the strategy.**

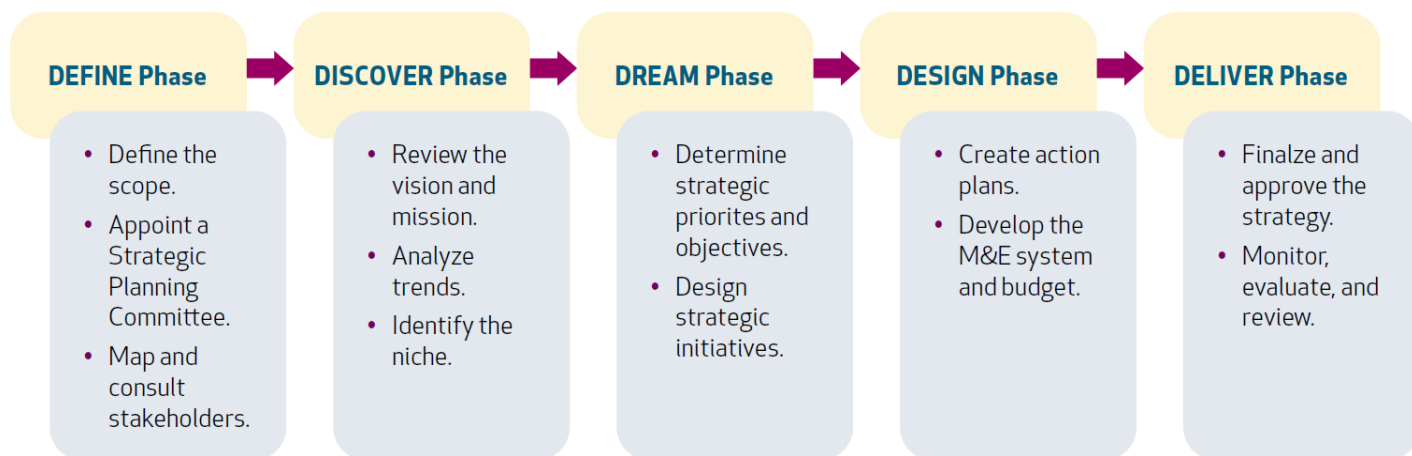
The overall SP approach outlined here attempts to reflect the values and overall ethos of Pact's capacity development approach, emphasizing participation, respect for existing knowledge, and client-driven activities. The module can be used to train a cohort of or individual practitioners using a training of trainers model to lead an organization through an SP process. This module also serves as a resource for facilitators to conduct SP training with individual organizations.

To limit the "universe" of strategic planning approaches that can be found globally, the Toolkit presents an SP model that:

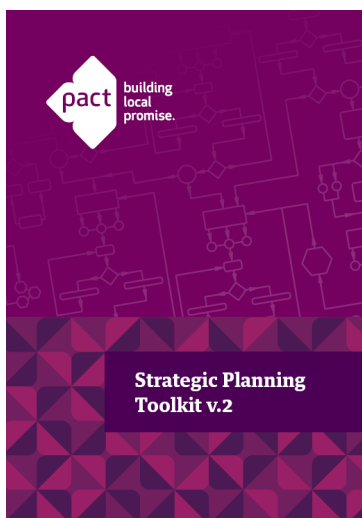
- ◆ Builds on the experiences of practitioners around the Pact world implementing it the wide range of organizations in different contexts
- ◆ Is asset based to maximize existing strengths
- ◆ Is designed for use with wide range of CSOs either at a variety of stages of development
- ◆ Can be implemented where the need for a reinvigoration of strategic thinking is great, but time and resources are somewhat limited

Steps in the Strategic Planning Process

While SP can take many shapes, there are common steps that are typically used for SP with CSOs. The Toolkit divides these **12 steps** into **five phases** that can be done either sequentially or with time in between to allow the organization to reflect and manage its ongoing commitments.



The phases draw from **Appreciative Inquiry**, a positive and strengths-based approach to organizational change and development that focuses on identifying and amplifying an organization's positive attributes and achievements to envision and create a desired future. Structuring the SP process around Appreciative Inquiry harnesses the organization and its staff's collective wisdom and positive energy.



The Toolkit outlines what is needed in each SP phase and step, model facilitation techniques for completing each step, and provides tips for mentoring an organization through the process if the organization will facilitate the process itself. Rather than following this guide strictly, each step should be adapted to best meet the organization's specific context.

For More Information please reach out to:

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