



Planning for the Future of Your Organisation

Planning is the key to the successful operation of any organisation. Without it, there is a danger of losing sight of the “bigger picture”, becoming preoccupied with internal operational matters, and potentially missing the possible threats and opportunities that may be on the horizon. It helps to develop a stronger sense of direction and purpose, highlight user needs and the best way to meet them, and improve service quality.

Creating a written plan that everyone understands and “buys into” is not just about creating a shiny, impressive-looking document that you can send to funders. It is the process of formulating the plan, regularly reviewing your progress against it and adjusting your plans as you proceed that is important – and this needs to be a continuous cycle. There are important differences between strategic and business planning.

The purpose of strategic planning is to set overall goals for your organisation and to develop a plan to achieve them. It involves stepping back from your day-to-day operations and asking where the organisation is heading; is it still on track towards achieving its original mission, to what extent is the external environment changing and what should your priorities be? The process of strategic planning is about determining the direction in which you want to take your organisation. A strategic plan is typically focused on mid to long-term goals and sets out the basic strategies for achieving them.

By contrast, the purpose of a business plan is to provide the detailed route map that will take you in your desired direction. The business plan is typically a short-term and more concrete document than the strategic plan and it tends to focus more closely on operational details. A business plan is about setting short or mid-term goals and defining the steps necessary to achieve them.

If you can ensure that your strategic plan informs your business plan, you'll go a long way to ensuring its implementation.

Effective strategic thinking requires you to shift your focus from the day-to-day concerns of your organisation (i.e. “how we do things now”) and to consider your broader and longer-term options (i.e. “how could / should we do things in the future?”). You will need to collect and analyse a wide range of information about your organisation - both about how it operates and about how conditions are developing in your current and potential ‘markets’.

- **Where is your organisation now?** This involves understanding as much about your organisation as possible; including how it operates internally, what drives its success or effectiveness, and how it compares with “competitors”. Be realistic, detached and critical.
- **Where do you want to take it?** Here you need to set out your top-level objectives. Be clear about your vision, mission, objectives, values, and goals. Where do you see the organisation in five or ten years? What do you want to be the focus of your organisation? What advantage do you have over others doing similar work?
- **What do you need to do to get there?** What changes will you need to make in order to deliver on your strategic objectives? What is the best way of implementing

those changes? Will the structure and financing of your organisation need to change and what goals and deadlines will you need to set for everyone involved? Would collaboration or merger with other organisations in the field be the best way of achieving your objectives?

You should balance your vision for the organisation against the practical realities of your current position. You need to take into account the implications of your ideas and plans. For example, you may believe that “success” would mean your organisation owning or leasing its own premises, but is this a realistic goal in the current climate?

Remember that strategic planning may involve making both organisational and cultural changes to the way your organisation operates. Involve people who show the kind of analytical skills that successful strategic planning depends upon. Ideally this will involve a mix of creative thinkers and those with a solid grasp of operational detail.

Involve users of your services in informing and influencing your plans. Take on board the opinions of all staff, board members and volunteers, as well as those of external stakeholders who have – or might have in the future - an interest in your work.

There is no set blueprint for how to structure a strategic plan, but it is good practice to include the following elements:

- Analysis of **internal drivers** – what are your strengths, weaknesses, opportunities and threats – also called an internal SWOT analysis.
- Analysis of **external drivers** – what is changing in your environment, what is on the horizon, what key local and national policy changes will impact on your current and future work, what are potential funders interested in funding. This would be an external SWOT analysis.
- **Vision statement** – describe what “success” for your organisation would look like in years to come
- **Top-level objectives** - these are the major goals that need to be achieved in order for your vision to be realised. These might include expanding into different areas of work or developing different services in order to meet emerging needs
- **Implementation** - this involves setting out the key actions (with desired outcomes and deadlines) that will need to be completed to attain your top level objectives.
- **Resourcing** - a summary of the implications your proposed strategy will have on your resources. This will reflect financing requirements, as well as factors such as staffing levels, premises and equipment.

The key to implementing the objectives identified in your strategic plan is to assign goals and responsibilities - with budgets and deadlines - to responsible ‘owners’ - key members of your board or staff team, for example. Monitoring the progress of implementation and reviewing it against the plan will be an ongoing process. The ‘fit’ between strategy and implementation may not be perfect from the outset and it may be necessary to ‘tweak’ your plans as you progress.

If you would like support in developing a strategic or business plan, please contact Manchester Community Central on 0333 321 3021.