



**PARTNERS** *of the* **AMERICAS**

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# **Strategic Planning**

## **2019 - 2023**

A Partners Approach

# What is a Strategic Plan?

- A set of statements describing the purpose and ethical conduct for an organization together with the specific strategies designed to achieve the targets set for each of these.
- More simply put, it is a roadmap telling you:
  - What you do
  - Why you do it
  - How you do it
  - When you arrive



# Definitions

- Strategic Planning
  - Operational Planning
  - Organizational Development
- 
- *It's important to understand these definitions as we talk about strategic planning.*
  - *We need to understand the differences and be consistent with our vocabulary and our techniques.*



# Strategic Planning

The process by which an organization determines what it intends to be in the future and how it will get there. To put it another way, they develop a vision for the organization's future and determine the necessary priorities, procedures, and operations (strategies) to achieve that vision.





# Operational Planning

Operational planning is a subset of a strategic work plan. It describes short-term ways of achieving milestones and explains how, or what portion of, a strategic plan will be put into operation during a given operational period:

- Operational plans should establish the activities and budgets for each part of the organization for the next 1 – 3 years;
- They link the strategic plan with the activities the organization will deliver and the resources required to deliver them;
- Operational plans should be prepared by the people who will be involved in implementation.



# Organizational Development

A planned effort to increase the organization's effectiveness and capability. Organizational development brings changes to the attitudes, values and beliefs of the organization, so that people can adapt to new technologies and challenges of the business.

- OD involves following four components: organizational reflection, system improvement, planning and self-analysis.



# What does a strategic plan include?

- **MISSION**
  - Why we exist
- **VALUES**
  - What we believe in and how we will behave
- **VISION**
  - What we want to be or accomplish
- **STRATEGY**
  - What our competitive game plan will be
  - This includes Goals, Objectives, Strategies, Activities
- **MONITORING & EVALUATION**
  - How we will monitor and implement that plan



# Mission / Vision

- Statement(s) of purpose and the primary reason for which plans and resources, including administrative and programmatic staff, are directed. Should be general and not include measurable goals which may be subject to change.
- The mission aims to realize / achieve the vision.





# Goals

- General statements about what you need to accomplish to meet your purpose, or mission, and address major issues facing the organization.
- Achievable after implementing a series of actions within the timeframe of the strategic plan.
- Softer & more general than objectives, and something you want to achieve that can be described “subjectively”.



# Objectives

- Specific descriptions (ie. different *outcomes* or *results*) an organization would *like to achieve* in their work in order to achieve their goals, using precise & non-emotional terms.
- These should be SMART (S – Specific; M – Measurable; A – Achievable ; R – Realistic; T - Time bound).
- An organization usually has a maximum of ten objectives.



# Goals vs Objectives

- Use “**Goals**” initially, to express the physical and emotional outcomes you seek to achieve.
- Then, use “**Objectives**” to describe the more detailed specifics that your action or implementation plan is designed to achieve.
- Goals are abstract; objectives are concrete.
- Goals are general; objectives are precise.
- Goals can’t be validated as is; objectives can.



# Strategies

- Specific approaches that must be implemented to reach each goal / objective.
- Strategies are often what change the most as the organization eventually conducts more robust strategic planning, particularly by more closely examining the external and internal environments of the organization.
- Small organizations might not refer to strategies and, instead, go the next step about action planning for each goal & objective.



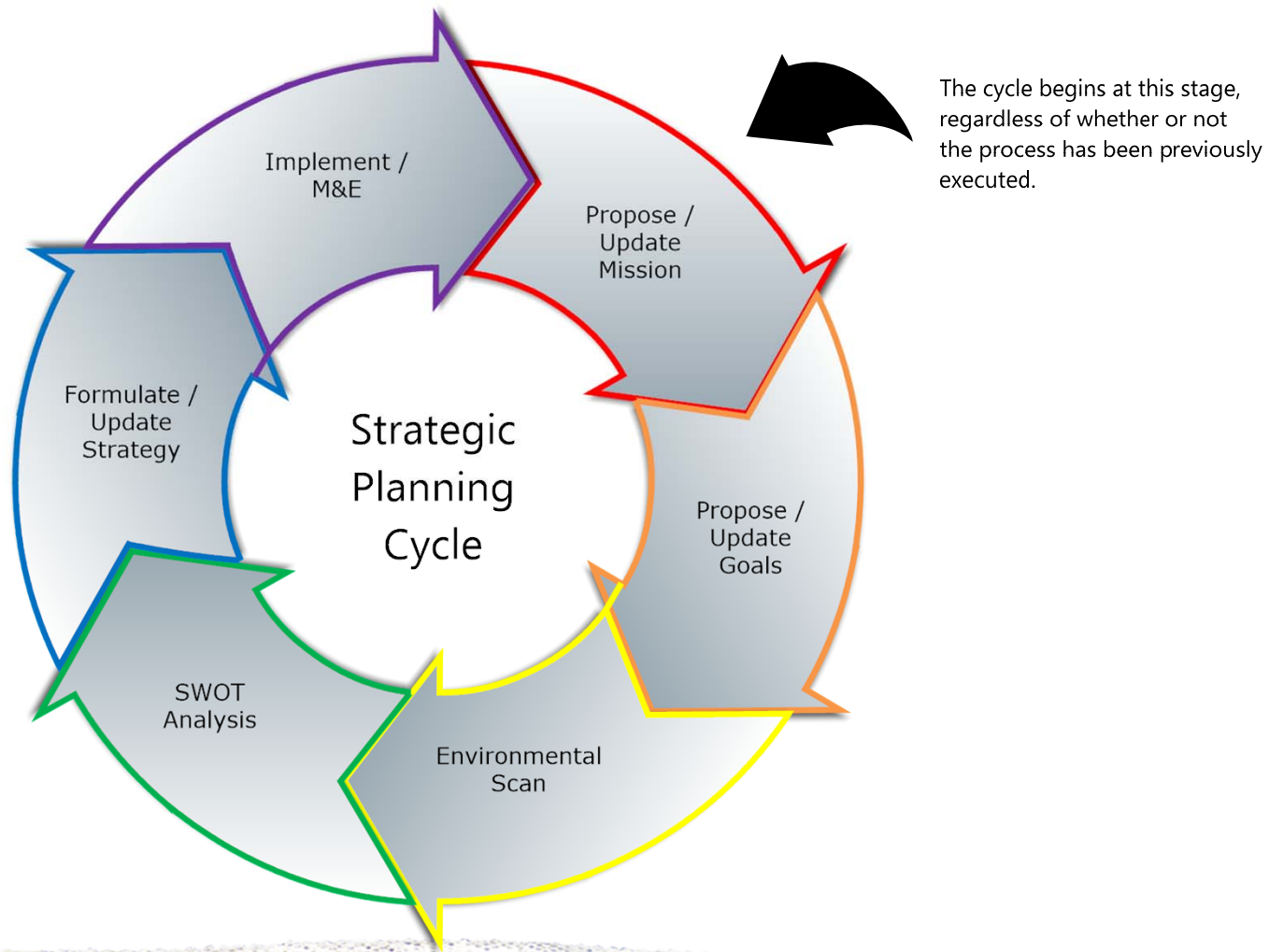


# Activities & Indicators

- Activities are actual tasks which are conducted in order to achieve the strategies and objectives;
- Indicators can be described as signs, measures, yardsticks, or benchmarks which help those involved in monitoring and evaluation to measure change and determine progress;
- A means of verification is used to determine whether the measurement of change was done appropriately.



# Strategic Planning: 6-Cycle Model





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# Going from Good to Great

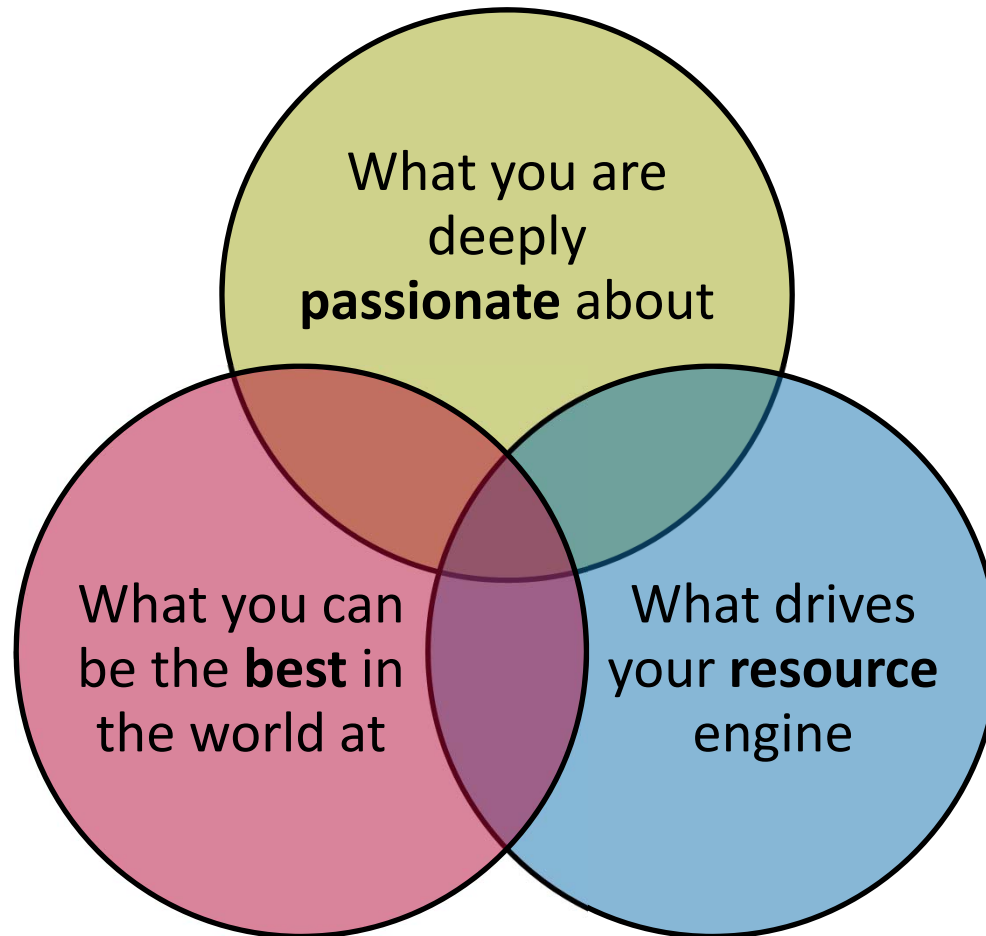
In the Social Sector

“Good to Great and the Social Sectors” by Jim Collins, discusses how nonprofits should focus on getting to great and why business thinking is not the [only] answer.

We will use this model to guide us during our strategic planning process.



# Social Sector Hedgehog Concept





# Hedgehog Concept

- “The hedgehog concept is about attaining piercing clarity about how to produce the best long-term results, and then exercising the relentless discipline to say “No thank you” to opportunities that fail the hedgehog test.”  
– Good to Great and the Social Sectors
- This will be explored in the following concepts:
  - Passion
    - Understanding what Partners of the Americas stands for (our Core Values) and why we exist (Mission & Vision)
  - Best at
    - Understanding what we can uniquely contribute to the people we touch
  - Resources
    - Understanding what best drives our resource engine, broken into three parts: time, money and brand



## Critical Step:

How does focusing on what we do best tie directly to our resource engine, and how does our resource engine directly reinforce our passion?



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# Good to Great

“Social sector leaders pride themselves on ‘doing good’ for the world, but to be of maximum service requires a ferocious focus on doing good *only* if it fits with your Hedgehog Concept. To do the most good requires saying ‘no’ to pressures to stray, and the discipline to stop doing what does not fit.” – Jim Collins



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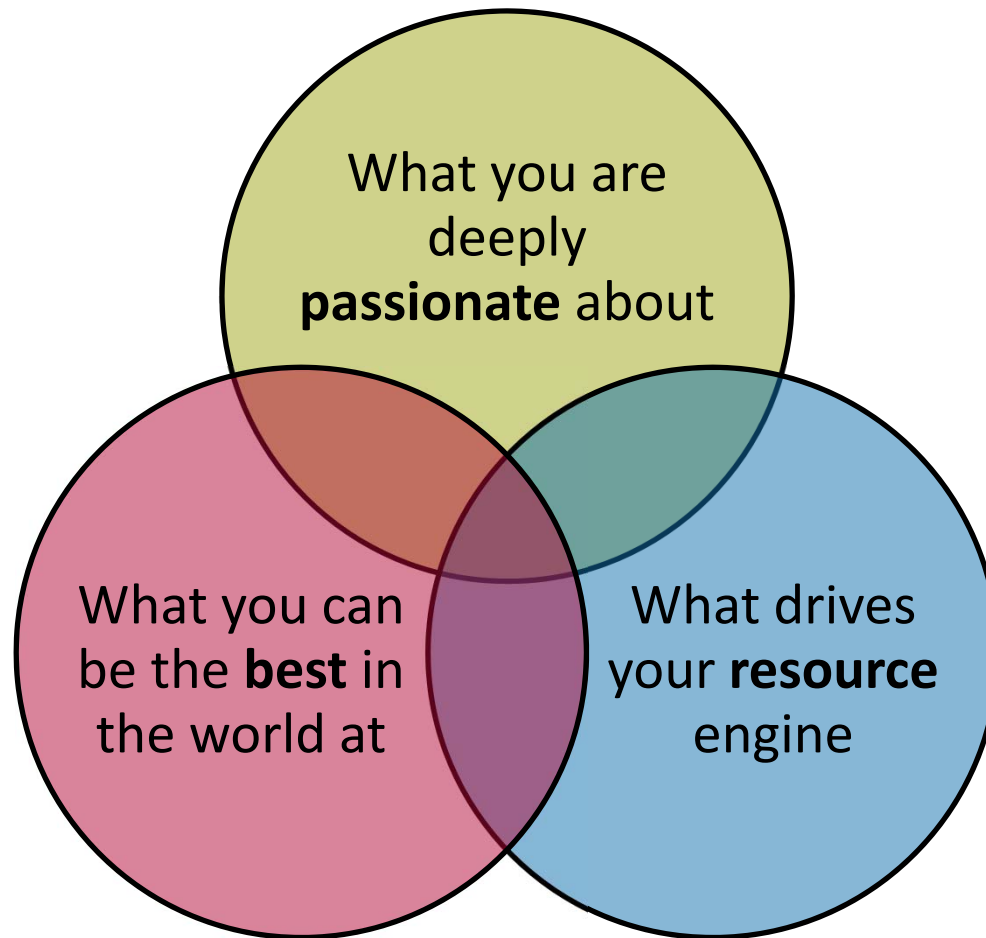


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# Starting the process ...





# What's our passion?

- What do we value? What is our reason, or what are our reasons, for doing the work we do?
- Does our mission continue to be to “connect people and organizations across borders to serve and change lives through lasting partnerships”?
- Where are we currently, and in which direction do we wish to go?
- **What will we look at:**
  - Developing Partners of the Americas Core Values
  - Review Mission
  - Develop our Vision: Where will we be in five years?



# What are we best at?

- What are our strengths?
- In which program areas do we have a history for doing excellent work?
- Who does what?
- What POTENTIAL exists for being best in other areas?
- **What we will look at:**
  - Organizational performance
  - Partners Value Proposition (surveys, analyses)
  - Internal SWOT analysis (strengths & weaknesses)

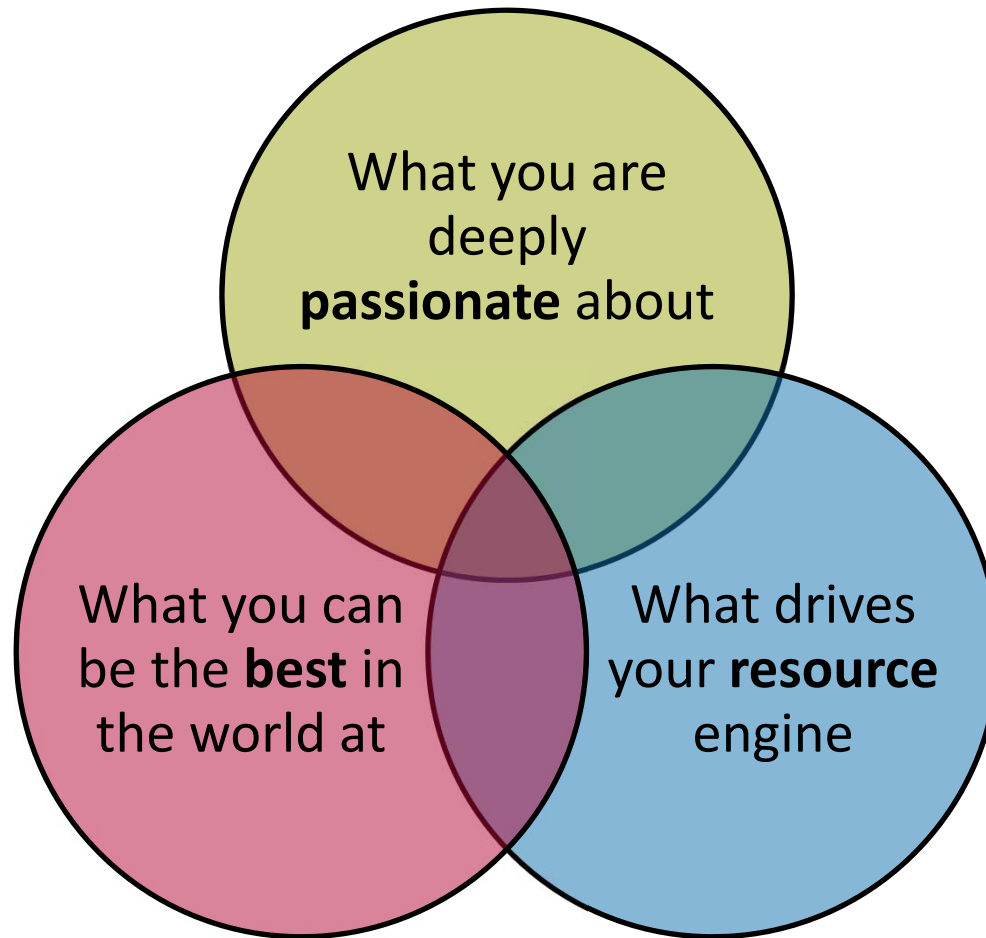


# What drives our resource engine?

- How do we define the three basic components for our resource engine?
  - Time: How well you attract people willing to contribute their efforts for free or lower rates
  - Money: Sustained cash flow
  - Brand: How well the organization can cultivate a deep well of emotional goodwill and mindshare of potential supporters
- What opportunities could have a significant impact on this resource engine?
- **What we will look at:**
  - External landscape analysis
    - Partnerships & alliances
    - Funding
    - Political, economic & social trends
  - External SWOT analysis (opportunities & threats)



# Where does it all intersect?





# How do we achieve this with our structure?

- The success of our strategic plan will depend on our structure, both its strengths and its limitations. We will have conversations as follows:
  - Looking forward:
    - How does the current structure move us in the direction of our vision? How does it strengthen our core values?
    - What should be changed, added or removed to further strengthen our vision and core values?
  - Looking within:
    - How does the current structure support us and our needs?
    - What limitations do we see?





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# Next Steps

... Getting to Great from Good

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... Getting to Great from Good

- A series of Strategic Planning Kick-off meetings were held to orient the process
- Sub-committees have been formed to address each area (co-chaired with one staff & one board member)
  - What is our **Passion**?
  - What are we the **Best at**?
  - What drives our **Resource Engine**?
- Planning sessions will follow to review and analyze information gathered from the subcommittees and used to develop Goals, Objectives, Strategies, M&E
- Dissemination & Promotion will follow
  - What Works San Antonio – high level overview
  - Website, Materials
- Implementation / Action Planning





# Be Involved

... in Getting to Great from Good

- Be responsive to upcoming email communications from the committees and the Partners office regarding the process and solicitation of information
- Specific questions can be addressed as follows:
  - Overall **Strategic Plan** guidance: John McPhail
  - **Passion** Sub-committee: Denise Decker & Ukiah Busch
  - **Best at** Sub-committee: Heather Martinez & Melissa Golladay
  - **Resource Engine** Sub-committee: Ashish Abraham & Mike Christopher
- For contact information, please communicate with Renata Torres, Executive Administrative Officer at “R T o r r e s @ p a r t n e r s . n e t”



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# Partners of the Americas

We connect people and organizations  
across borders to serve and change lives  
through lasting partnerships