Strategic Planning, Monitoring & Implementation

Your NAME
Position, Organisation

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Introduction

# Why strategic planning is necessary?

- It forms the direction in which the organisation is heading
- It brings everyone in the organisation on the same page, working towards the same vision and goals
- It helps prioritize the organisation's work

- It creates synergy across the organisation (cross-team collaboration)
- It helps "tell the story" – within and outside of the organisation.

World Scouting's Mission

The Mission of Scouting is to contribute to the education of young people, through a value system based on the Scout Promise and Law, to help build a better world where people are self-fulfilled as individuals and play a constructive role in society.

Vision 2023

By 2023 Scouting will be the world's leading educational youth movement, enabling 100 million young people to be active citizens creating positive change in their communities and in the world based on shared values.

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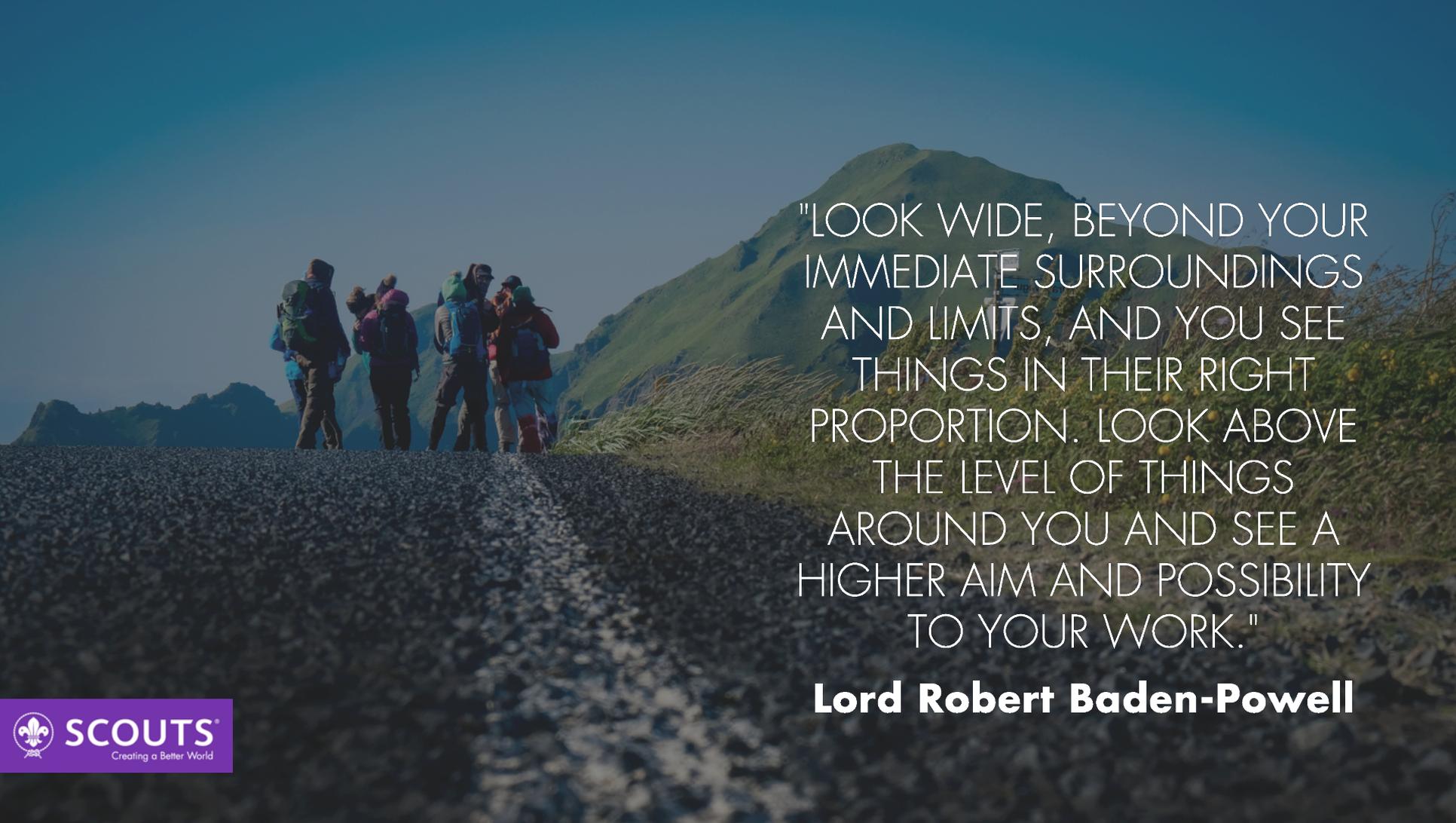
"LOOK WIDE, BEYOND YOUR IMMEDIATE SURROUNDINGS AND LIMITS, AND YOU SEE THINGS IN THEIR RIGHT PROPORTION. LOOK ABOVE THE LEVEL OF THINGS AROUND YOU AND SEE A HIGHER AIM AND POSSIBILITY TO YOUR WORK."

Lord Robert Baden-Powell

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Vision 2023
Strategic Priorities

1. Youth Engagement
2. Educational Methods
3. Diversity and Inclusion
4. Social Impact
5. Communications and External Relations
6. Governance

- WOSM's Mission
- Vision 2023 Strategy for Scouting
- Triennial Plans 2014-2017, 2017-20, 2020-23
- WSB and NSOs joint efforts (core activities)

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11 Steps, from planning to evaluation

Step 1:   Choosing The Right Time

Step 2:   Building The Team

Step 3:   Reviewing Your NSO's
Mission And Vision

Step 4:   Analysing The Current
Situation Of Your NSO

Step 5:   Developing Your NSO's
Strategic Plan

Step 6:   Aligning Your NSO With The
New Strategic Plan

Step 7:   Creating An Operational Plan

Step 8:   Risk Management Assessment

Step 9:   Collecting The Right
Monitoring Information

Step 10: Monitoring And Evaluation

Step 11: Reporting On Your NSOs
Performance

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1 Choosing the right time

The best time to develop a strategic plan is:

1. Close to completing a current strategic plan
2. Has a strategic plan in place, however it has not been implemented/ does not correspond to the (future) needs of the organisation

3. Has never had a strategy
4. The leadership of the NSO has changed and insists on creating a new strategic plan.

Strategic planning process will **take 6-12 months**.

Building the team

- 5 - 7 people, 15 maximum
- A good range of volunteers/staff/board members
- Strongly understand the organisation
- Be well connected with members nationwide
- Diversity (particularly young people)

Appoint:

- Facilitator/Consultant
- Plan-monitor/champion

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What is a mission statement?

The overall purpose everyone in the organisation strives towards achieving

WOSM's mission statement

"The Mission of Scouting is to contribute to the education of young people, through a value system based on the Scout Promise and Law, to help build a better world where people are self-fulfilled as individuals and play a constructive role in society."

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SAMPLE MISSION STATEMENTS

 BOY SCOUTS OF AMERICA: The mission of the Boy Scouts of America is to prepare young people to make ethical and moral choices over their lifetimes by instilling in them the values of the Scout Oath and Law.

 BOY SCOUTS OF THE PHILIPPINES: To help the youth develop values and acquire competencies to become responsible citizens and capable leaders anchored on the Scout Oath and Law.

 THE KENYA SCOUTS ASSOCIATION: To educate young people to play a constructive role in Society.

What is a Vision statement?

- Describes the clear and inspirational long-term **desired change** resulting from an organisation or program's work.
- Usually lasts around 10 years and should span across several strategic plans.
- Ideally specify timeframe, as well as outlining a clear and comprehensible goal for that time period, with a measurable outcome.

WOSM's Vision statement

"By 2023 Scouting will be the world's leading educational youth movement, enabling 100 million young people to be active citizens creating positive change in their communities and in the world based on shared values."

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SAMPLE Vision STATEMENTS

SCOUTS NEW ZEALAND: Our vision is that in 2025, more than 25,000 youth will enjoy scouting adventures. They will come from every background with a place for all, shape their own experiences and make a positive difference for New Zealand.

THE BHARAT SCOUTS AND GUIDES: By 2024, The Bharat Scouts & Guides will be a globally visible, consistently growing, self-reliant premium youth movement that is gender balanced, vibrant and responsive to trends. Providing young people with value-based, attractive and challenging youth programme, through competent leaders, effective communication, optimum use of technology and efficient management.

THE KENYA SCOUTS ASSOCIATION: By 2020, Scouting in Kenya will be the leading youth movement, enabling over 4 million young people to achieve their full potentials as responsible citizens and as members of their local, national and international communities through the Scout Method.

4 Analysing the current situation

- GSAT
- Competitor analysis
- Root cause analysis
- Stakeholder analysis
- PESTEL analysis
- SWOT analysis

GSAT

Global Support Assessment Tool
Launched in 2012

- Self-Assessment
- Global Support Assesment
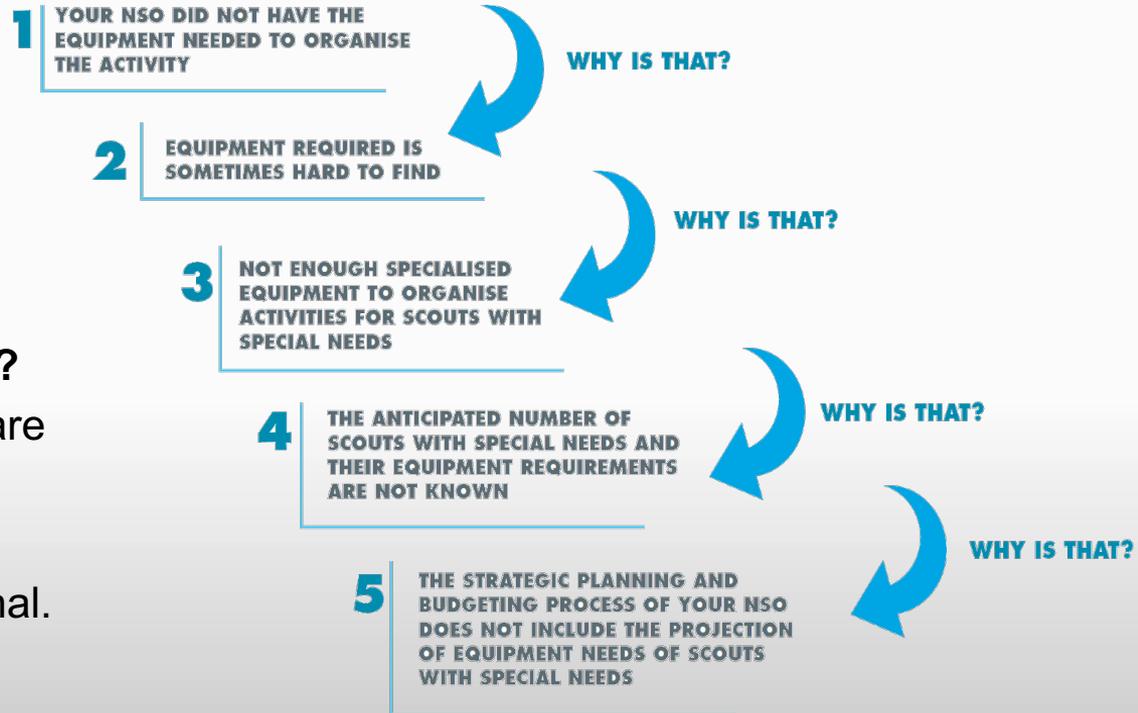- GSAT Third Party Assessment

https://www.scout.org/gsat

Competitor Analysis

- Who are our competitors? (Note: keep this broad, i.e. every organisation (NGO or for-profit) that provides educational or leisure time activities for young people, rather than just other youth movements)

- What threats do they pose?

- What is the profile of our competitors?

- What are the objectives of our competitors?

- What strategies are our competitors pursuing and how successful are these strategies?

- What are the strengths and weaknesses of our competitors?

- How are our competitors likely to respond to any changes to the way we do business?

Root Cause Analysis (RCA)

1. Define the problem
2. Gather information and data
3. Find potential causal factors
4. Identify root causes
5. Implement solutions

Such questioning is **WHY IS THAT?** continued until all the root causes are found. Remember there are three basic types of causes:
Physical, Human, and Organisational.

1 YOUR NSO DID NOT HAVE THE EQUIPMENT NEEDED TO ORGANISE THE ACTIVITY

WHY IS THAT?

2 EQUIPMENT REQUIRED IS SOMETIMES HARD TO FIND

WHY IS THAT?

3 NOT ENOUGH SPECIALISED EQUIPMENT TO ORGANISE ACTIVITIES FOR SCOUTS WITH SPECIAL NEEDS

WHY IS THAT?

4 THE ANTICIPATED NUMBER OF SCOUTS WITH SPECIAL NEEDS AND THEIR EQUIPMENT REQUIREMENTS ARE NOT KNOWN

WHY IS THAT?

5 THE STRATEGIC PLANNING AND BUDGETING PROCESS OF YOUR NSO DOES NOT INCLUDE THE PROJECTION OF EQUIPMENT NEEDS OF SCOUTS WITH SPECIAL NEEDS

Stakeholder Analyses

1. Brainstorm and identify groups of people, organisations, institutions who have an interest in your organisation, and who can impact the organisation.
2. Analyse and clarify them into the chart, and identify 4 -6 key stakeholders.

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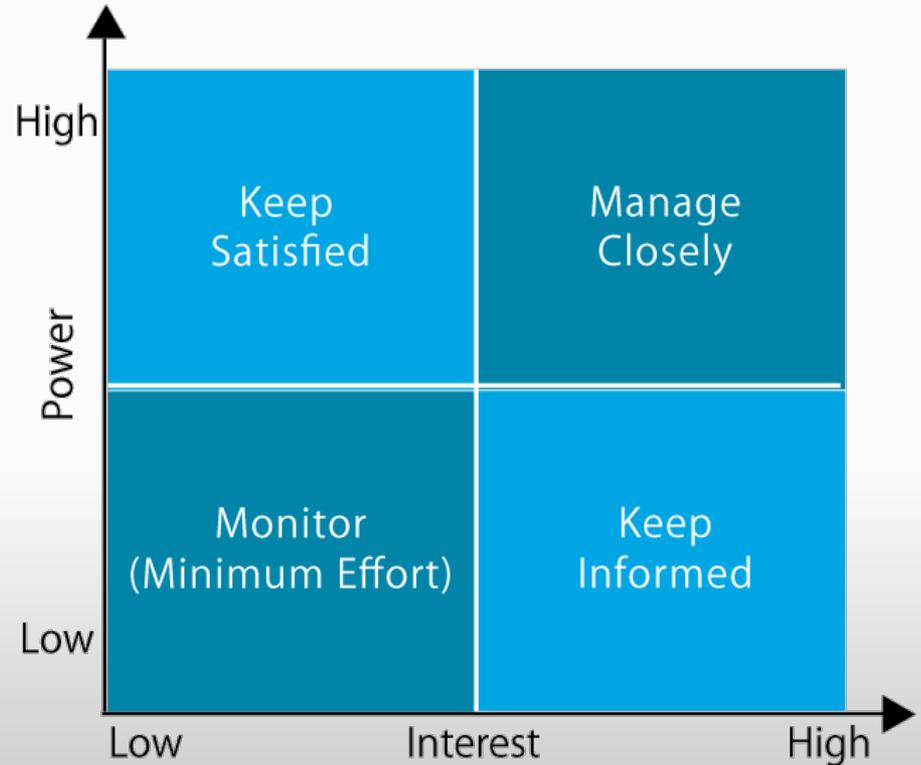
PESTEL Analysis

External trends analysis to identify threats and opportunities

Political Trends	**Economic Trends**	**Social Trends**	**Technological Trends**	**Environmental Trends**	**Legal Trends**
• Government Stability • War/Conflict • Corruption • Tax Policy/Benefits	• Unemployment Rates • Economic Growth • Disposable Income • Financial Fluency	• Population Growth • Age Distribution • Career Attitudes • Lifestyle Attitudes • Cultural Barriers	• Technological Awareness • Level of Innovation • Automation • Connectivity • Access to Information	• Weather • Climate Change • Environmental Policies • Food and Water Security	• Employment Laws • Discrimination Laws • Health and Safety Laws

SWOT analysis

- Helpful tool to examine all potential factors related to the organisation
- Use this tool after conducting previous analytical tools mentioned
- Stakeholder analysis will feed largely into the Strengths and Weaknesses boxes
- PESTEL analysis will feed largely into the Opportunities and Threats boxes.

	Strengths	Weaknesses
Internal		
	Opportunities	Threats
External		

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5 Strategic Plan development

1. Review Mission & Vision, and the Strategic Analysis
2. Identify 4-6 strategic priorities
3. Review WOSM's strategic priorities
4. Write an objective for each item
5. Come up with actions for each objective

- You may include more info (value, success measures)
- Consult with your stakeholders
- Use WOSM Priorities and other NSOs example

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World Scouting's Example

Strategic Priorities

- Youth Engagement
- **Educational Methods**
- Diversity and Inclusion
- Social Impact
- Communications and External Relations
- Governance

Educational Methods

- Youth Programme
- **Adults in Scouting**
- World Events
- Diversity and Inclusion

Adults in Scouting

Strengthen the implementation of all aspects of the life cycle of Adults in Scouting (including recruitment, training and retention), in accordance with the World Adults in Scouting (AiS) Policy.

- KPI: 80 NSOs will improve their internal processes for recruiting, training and retaining adult leaders, in accordance with the World AiS policy.

Ensure the safety of Scouts from harm.

- KPI: 35 additional NSOs will incorporate a Safe from Harm policy in their national policies and practices, inspired by the WOSM Safe from Harm policy.

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6 Strategic Plan Alignment

Adopt

- Formal approval and adoption

  e.g. by your General Assembly.

Launch

- Communicate to your members

  - Why
  - How
  - What

Implement

- Everything towards achieving the goals

  - Structures
  - People
  - Projects
  - Activities

7 Creating an Operational Plan

The operational plan outlines the:

- Activities your NSO plans to conduct to achieve your vision
- Time and place where they will be conducted
- Person (or team) responsible for the completion of each activity
- KPIs for knowing how you are doing against your strategic plan
  (Please refer to Step 9)

See Toolkit P.47-51 for some examples

8 Risk Management Assessment

- Identify the steps/places in the process where things might go wrong
- Describe some of the potential "failures"
- Describe the impact of those "failures" on your organisation's work and achieving your strategic plan

- What caused these "failures"?
- How much warning time do you have before these "failures" potentially occur (i.e. how much in advance is it possible to predict these "failures" happening)?
- What solutions can you come up with to mitigate or fix these "failures"?

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FMEA (Failure Mode Effect Analysis)

Risk Description	Impact	Likelihood	Total score	Accountability/ review frequency
Fall in interest among youth members for programme	4	3	7	Youth Programme team/annually
Low retention rates with adult volunteers	4	2	6	Adults in Scouting team/annually
Lack of financial resources for activities	3	2	5	Chief executive/biannually
Competition offering similar activities	2	2	4	Chief exec and communications team/quarterly

9 Collecting the Right Monitoring Information

Why need to measure?

- Ensuring conformity control
  (data for leadership)
- To external audiences (e.g. donors)
- Draw attention of external audiences
- Constant learning

What/How you measure?

Numbers/**quantitative**
- hours of service
- amount of financial resources spent
- numbers of participants

Non-numeric/**qualitative**
- social impact

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Design Key Performance Questions (KPQs)

- Choose one to three KPQs per strategic priority
- Performance related
- Create short and clear questions
- Should be open-ended questions
- Focus on the present and future

- Engage people in the creation of the questions
- They should be refined and improved along the way
- They should form the basis of developing your KPIs
- Use KPQs to report and communicate progress

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KPQ Examples

- How well are we delivering our new Youth Programme?
- How likely are our members to recommend Scouting to their friends?
- How do our local communities see Scouting?
- How well are we performing in developing partnerships with other NGOs?
- How effective is our new communications strategy?

- To what extent are we reaching out to marginalised communities in our country?
- To what extent have we improved our decision-making processes on national level?
- To what extent are we collaborating between units?
- To what extent are we impacting the lives of others in the local communities where Scouting exists?

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Designing Key Performance Indicators (KPIs)

KPIs is to collect information that will ultimately help us in:

- learning about the status of progress we're making towards achieving our strategy, and based on this knowledge

- making well-informed decisions that will lead towards improvement and better performance in our organisation

KPI checklist

- Do we have a KPQ to which this indicator is associated?

- Are there decisions this indicator would support?

- Can we collect meaningful data for this indicator?

- Does this indicator help us to answer our KPQ?

- Does this indicator help us to make better decisions?

- Are the assessment costs and efforts justified?

KPI/KPQ example

KPI	Strategic priority it corresponds to	KPQ it helps answer	Data collection method/frequency of collection	Person/team responsible for collection
By 2023, our Association will have increased membership in marginalised communities by 10%.	Membership Growth	How well are we reaching out to marginalised communities?	Census data from our local units/annual basis.	Membership Growth Task Force.
By 2023, 90% of our units will be implementing our new Youth Programme, that has a strong focus on catering for diverse needs of our members.	Membership Diversity	To what extend are we delivering a programme that caters for the diverse needs of our membership?	Annual survey with local unit leaders/biannual basis.	Youth Programme Team.

Monitoring and Evaluation

	Monitoring	Evaluation
Timeline	Continual collection of information, throughout programme/project	Periodic review at a significant point in the project. End of project, Mid-term and Change of Phase
Focus	Measures activity (Outputs)	Evaluates success (Outcomes)
Purpose	Progress tracker Asks whether the project is being implemented as planned – are we on the right track	Reflection and correction – Asks whether the activities (outputs) have resulted in achieving the objectives (outcomes) and contributed to the goal Whether the project is successful
Stakeholders	Often uses people inside the project	Uses a mix of people from inside and outside the project, including those who (should) have been impacted by the project
Results	May result in minor action to correct the situation	May result in major strategy change

Reporting on your performance

- Appoint a Plan Monitor/Champion
  - A strategic planning committee member
  - Report to the membership and the board in regular basis
  - Need to work closely with the leadership, committees, task forces

- Develop reporting framework
- Celebrate and showcase the success
- Performance driven culture

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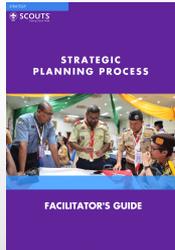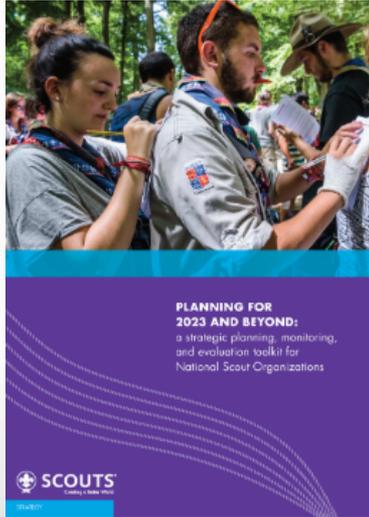**Step 7:** Creating An Operational Plan

Step 8: Risk Management Assessment

Step 9: Collecting The Right
Monitoring Information

Step 10: Monitoring And Evaluation

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Resources

- scout.org
  https://services.scout.org/about
- Toolkit
- NSO Examples
- Participant Workbook
- Facilitator's Guide
- E-learning module
- PowerPoint
- Videos
- One pager resources
- Infographic
- Templates

Q & A