

Strategic planning

A toolkit for small NGOs



This toolkit was produced by INTRAC. Funding for this toolkit is provided by the UK Foreign, Commonwealth & Development Office (FCDO) through a Small Charities Challenge Fund (SCCF) Capacity Development Grant.

About the author

Rick James is an organisational change specialist with more than 30 years' experience working with over 100 NGOs in Africa, Latin America, Asia and Europe. After working for a Honduran NGO for four years, he completed an MBA in the UK before joining INTRAC at its inception after 1992. Rick has trained, consulted, researched and written extensively on NGO capacity building and organisational development (OD) issues.

Rick spent 10 years in Malawi with INTRAC, where he trained a team of Malawian OD consultants, facilitated change with NGO support organisations, undertook research into leadership change issues and consulted for international NGOs on the monitoring and evaluation of capacity building. He has a PhD in NGO Management and is a Senior Teaching Fellow at Bayes Business School (formerly Cass), City, University of London.

Acknowledgements

This toolkit was designed based on the needs of the small charities that enrolled in the programme "Strengthening small organisations with Big Ambitions", and benefitted from feedback from some of them. Special thanks to...

Drawings by **Bill Crooks**

Graphic design by **Andy Johnson**

Programme coordination by **Annalisa Addis**



This toolkit is licensed under the Creative Commons Attribution-NonCommercial-ShareAlike 4.0 International License. To view a copy of this license, visit <http://creativecommons.org/licenses/by-nc-sa/4.0/>



This toolkit is part of a series of five for small charities released as part of the INTRAC programme "Strengthening Small Organisations with Big Ambitions".

Here you can access all of the toolkits including more accessible mobile-friendly versions.

Table of contents

- Section 01: Introduction
- Section 02: What is strategic planning?
- Section 03: Core components of a strategic plan
- Section 04: Learning from experience
- Section 05: Getting organised
- Section 06: Gathering information and analysing together
- Section 07: Making hard choices
- Section 08: Documenting and adapting

Section 01. Introduction

What is the toolkit about?

This toolkit demystifies the process of strategic planning for smaller NGOs. The aim is to make strategic planning become more meaningful, alive and achievable. It highlights the key components and essential approaches that INTRAC has found useful in our 30 years practical experiences of doing strategic planning with NGOs.

Who is it intended for?

This booklet is a complement to training and mentoring to respond to the needs of small UK-based international development organisations, as part of the “Strengthening Small Organisations with Big Ambitions” project. However, it can be used by any small NGO; those who make grants to partners and those who implement work directly with communities on the ground.

How should it be used, and what for?

Do read this booklet before embarking on a strategic planning process. It should help in thinking through the overall approach as well as signpost to useful tools. We know from our efforts, at home improvements the most important things are the skills, understanding and attitudes of the person using the tools. So we strongly recommend you focusing on the principles and processes of strategic planning, not just the tools.

Toolkit contents

The toolkit is organised into seven chapters:

1. What is strategic planning
2. Core components of a strategic plan
3. Guiding principles for an effective process
4. Getting organised at the start
5. Gathering data and analysing together
6. Making hard choices
7. Documenting, reviewing, learning and adapting

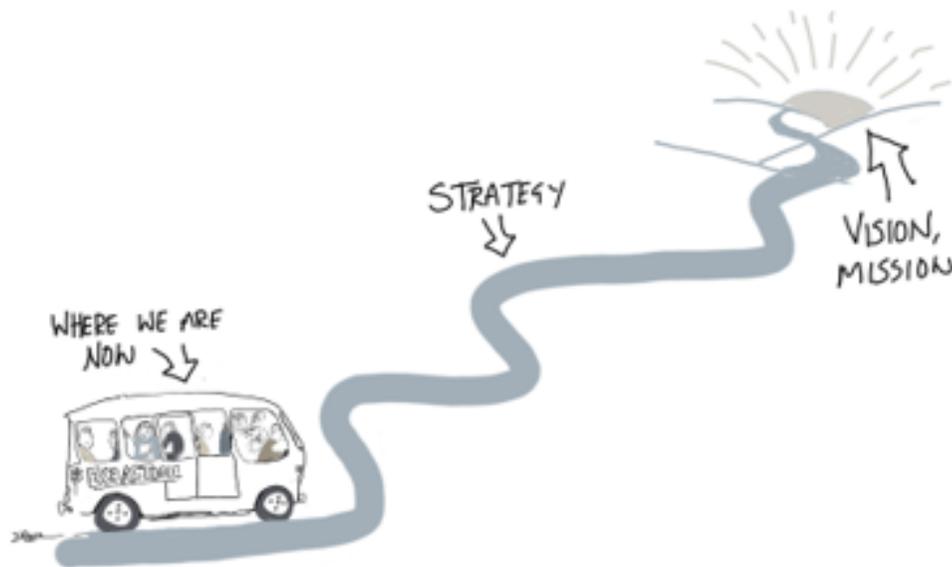


In his February 2022 blog "[The tyranny of tools](#)", INTRAC Principal Consultant Rod MacLeod wrote about the risks of over-reliance on tools.

Section 02: What is strategic planning?

2.1: What is strategy?

Strategy is a clear and agreed direction of travel – a simple unifying idea of where we are heading. Strategy is like the path that takes us from where we are now to where we want to be: achieving the mission of the organisation at a particular time.



Section contents

This chapter is divided into four sections:

- 2.1 What is strategy?
- 2.2 What is strategic planning?
- 2.3 How can strategic planning help?
- 2.4 What challenges to face in strategic planning?

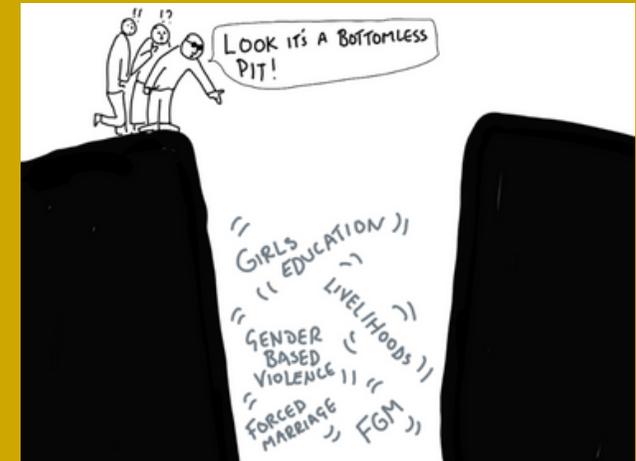


The best footballers run to where they think the ball will be, not where it is at the moment. It is the same with strategy. We move in the direction of we think the situation will be tomorrow, not what it is like today.

Many NGOs face strategy challenges as they encounter a bottomless pit of need. **They often find themselves over-stretched, trying to do too many things, and ending up doing everything poorly.** They may start off in girls' education, but then realise that to make a long term difference they also have to address health... and gender-based violence... and forced marriage... and livelihoods. Everything is inter-connected, so the list goes on.

When the contexts NGOs work in are turbulent, disrupted and uncertain, setting a long term direction of travel not an easy task for NGOs. Climate change and the digital revolution are powerful accelerants. **To remain relevant and effective, NGOs have to change as fast as their environments are changing.** This requires constant learning and adaptation. Otherwise they run the risk of becoming stuck in past models and ways of working that may have been effective in the past, but work less well today.

Strategy is also a challenge when funding sources are volatile. **NGOs may feel they have to shift direction to align with constantly changing funder priorities.** For the many smaller NGOs that operate a shoestring, survival may be at stake. They find themselves unable to say 'no' to anyone who will give them money – a condition known as strategic delinquency.



"Many NGOs face strategy challenges as they encounter a bottomless pit of need."



"NGOs may feel they have to shift direction to align with changing funder priorities."

2.2: What is strategic planning?

If *strategy* is a long-term direction of travel, *strategic planning* is the process of making and documenting these choices about strategy. **Strategic planning should make clear and often hard decisions about direction and prioritise resource allocation.** A strategic plan should not simply add new activities to what an NGO is already doing resulting in a 'shopping list' of activities. It identifies what the organisation will do differently; do more of and do less of. It is not necessarily about doing more, it is about doing better. The best strategic plans highlight what the NGO is not going to do in future.



This directional, 'big picture' strategic plan is not the same as a detailed operational plan. **An operational plan puts the strategic direction into practical, bite-sized chunks.** It focuses on shorter term goals, usually over 12 months, detailing core activities; who will do what; by when; what resource it will need and how success will be measured.



Strategic planning is the process of making clear - and often hard - decisions about the chosen direction.

Strategic plans should *not* be shopping lists.

Achieving the mission is the goal, not growth.

2.4: What challenges might be faced in strategic planning?

Many NGOs do not do strategic planning well. **They often miss the vital opportunity to listen actively and creatively to those they exist to serve** – to focus on which, of all the activities they are involved in, brings about meaningful change.

Having a strategic plan is not enough. **It needs using as a basis for day-to-day decision making and also evolve.** Too often strategic plans are not living documents. They are simply ignored, left for dead on the shelf. At other times, they can also be used too rigidly. Rather than learning from experience, NGOs religiously stick to the plan. The plan itself can become the focus, rather than impact on the ground.

Effective strategic planning requires regular reviews and adaptations. In an increasingly volatile and uncertain world, it is hard to predict what will happen in five months time, let alone five years. COVID showed how dramatically and instantly the world can change. So instead of five-year strategic plans, set in stone, strategy must evolve based on learning from practice and periodic analysis of how the external environment is changing.

“Plans are useless, planning is essential”

In an increasingly uncertain world, NGOs would do well to heed these wise words of President Dwight Eisenhower.

Section 03: Core components of a strategic plan

INTRAC's experience highlights the importance of six core elements (though what activities they involve obviously depends on the size and location of the NGO):

1. Finding the strategy sweet spot
2. Predicting the changing context
3. Focusing on what brings change
4. Knowing who you are
5. Taking stock of resources
6. Making hard choices

3.1 Finding the strategy sweet spot

Of the many, many frameworks for strategy the three questions posed by Jim Collins (Good to Great 2001) are very helpful in defining strategic focus:

1. **What is the vision, what are the needs in the changing environment?** What are we most deeply passionate about?
2. **What are the unique strengths of our organisation?** What can we do best compared to others? What is our 'calling'?
3. **What drives our resources engine (human and financial)?** How are they changing?

The vision should be about the people who the organisation serves. It should be about developing positive potential. The resource question should not be simply financial. It is also about what people have energy for.

Section contents

This chapter is divided into four sections:

- 3.1 Finding the strategy sweet spot
- 3.2 Predicting the changing context
- 3.3 Focusing on what brings change
- 3.4 Knowing who you are
- 3.5 Taking stock of resources
- 3.6 Making hard choices



3.2 Predicting the changing context

Thinking through **the implications of future changes in the environment is an essential element of strategic planning**. It involves considering threats as well as identifying potential new opportunities. Tools like the PESTLE framework can help analyse how the environment is likely to change (see Section 5.2).

In the current turbulent context, scenario planning may be a useful approach as it identifies a range of different ‘realities’ of what might happen in the future. NGOs can then use these scenarios to discuss the possible impacts and the ways the NGO can proactively respond.

3.3 Focusing on what brings change

A good strategy process starts from knowing what brings change to beneficiaries or to policy environment. The project system in which NGOs operate encourages a focus on activities and deadlines, rather than on what actually brings change. In developing strategy it is helpful to consider what brings change and why. Many NGOs are finding it useful to explore their ‘theory of change’. This helps prioritise actions that make a meaningful difference to the people the NGO exists to serve.



For a thorough introduction to **theory of change**, [see the paper on this topic](#) that is part of INTRAC's M&E Universe.



3.4 Knowing who you are

A good strategic planning process **connects to the identity and mission of the organisation**. It obviously helps to be clear about questions like:

- Why do you exist?
- What is the unique contribution you bring to the world?
- What would be lost if you did not exist?
- Who are you?

Answers might have been clear at the start, but over time this can become fuzzy or obscured. Programmes may not have gone as planned. Different people may be on board... A good strategy process often involves ‘cleaning the mirror’, so we are clearer about who we are.



“A good strategic plan is both aspirational and realistic.”

3.5 Taking stock of resources - honestly

To plan well, it helps to know where you are starting from. An honest and open discussion about existing strengths and weaknesses (see also section 5.3) is an important element of strategy. Brutal facts may need confronting. Self-delusion does not help anyone. A good strategic plan is both aspirational and also realistic. It takes a hard look at how it will resource the plans, makes considered financial projections. A strategy should be read together with a financial plan. To be viable a strategy has to be resourced with both money and skilled people.



3.6 Making hard choices

A good strategic plan makes clear, prioritised choices about where the NGO will focus its energies. It is not a shopping list of good things to do, but identifies which are the best ones for the next few years. It points out what, if anything, will be different from the previous period? What has changed and why? What it will do more of, less of and better?



Remember: a strategic plan is *not* a shopping list of activities.

See also 1.3 above.

Section 04: Learning from experience

Every organisation is different. It is therefore impossible to say, this is 'how to' do strategic planning in every situation. There is no set process or template. Some strategy processes last three hours, others more than a year. Strategic plans range from one page to more than 100 pages. But despite the situational differences there are important 'how to' principles to follow and adapt to the specific context.

4.1 Ensure leadership driving

Nothing will happen if the NGO's leadership are not driving the process. Reluctant, half-hearted commitment will not be enough to take difficult decisions let alone implement them. Leaders have to be fully on board as strategic planning requires organisational change. This can be a profoundly sensitive process, as an organisation's past strategies are often a reflection of what the leadership thinks is best. **To bring authentic strategic change may require leaders to change their views; their priorities and even themselves.**

4.2 Listen to those closest to the action

Strategic planning is an opportunity for NGOs to put into practice their aspiration to listen to those they exist to serve. It also helps to listen to people closest to the grassroots, where change actually takes place. This ensures that decisions are made based on field evidence, not simply distant international opinion.

Section contents

This chapter is divided into five sections:

- 4.1 Ensure leadership driving
- 4.2 Listen to those closest to the action
- 4.3 Keep it dynamic
- 4.4 Make the document short and simple
- 4.5 Find a good facilitator



Leaders have to be fully on board as strategic planning requires organisational change.

In management speak today they call this 'open strategy' - whereby you extend deliberations beyond the senior teams. Large firms like Amazon say they do this to stay ahead of disruption, become more agile and adaptive and cultivate commitment and ownership. Rapid advances in technology now enable NGOs to connect with people in the field in creative and meaningful ways.

4.3 Keep it dynamic – a living document

It is better to have the strategic plan as an imperfect, but living, adaptive document. NGOs work in fluid, fast-changing environments where even the best conceived plans are soon eclipsed by events. One NGO study calculated that it took 14 months on average to conduct strategic planning (by which time the environment will probably have changed). So avoid a strategy process becoming too protracted and expensive, especially given the limitations on what can be predicted accurately. More important than the document, is the process of regular reviewing learning from experience and adapting the strategy accordingly.



Strategic plans need to evolve. They should be living documents.

4.4 Make it clear and memorable

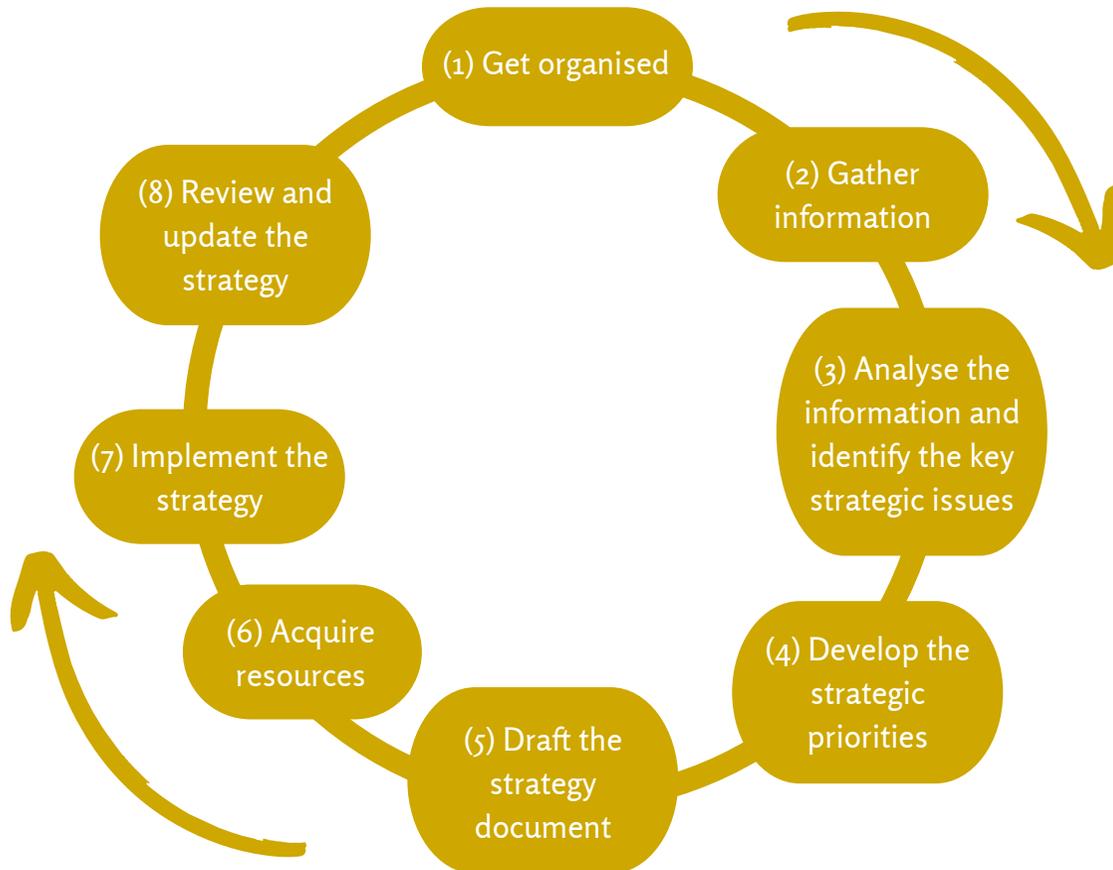
A good strategic plan is accessible and succinct. It often helps if you are able to **characterise strategic choices with some sort of metaphor or image**. Some NGOs have been able to characterise their strategy as being ‘bridge’; others as ‘yeast’ helping the dough to rise... Others represent their strategy in a simple diagram or even flow chart. What is important is that this image makes sense to the NGO and to those with whom it is trying to communicate. There is obviously no one right answer about length, though for most 5 - 15 pages should be enough to convey the essence of the direction.

4.5 Find a good facilitator

Given that strategic planning should be a participatory undertaking that keeps to deadlines, an external facilitator is often helpful, if resources allow (there are also a variety of pro bono offers). The skill is to choose the right one. Some NGOs prefer consultants with specific subject expertise. Others prefer a generalist but with some experience in the sector. The best consultants will challenge assumptions and act as a friendly sceptic. **They should be committed to listening to those closest to the action; able to ask the right questions; able to analyse and make sense of what they hear; and facilitate the client to make decisions for themselves.** Avoid people too closely tied to the work or who has a vested interest.

Section 05: Getting organised

5.1 Phases of a typical strategy process



Chapter contents

This chapter is divided into four sections:

- 5.1 Phases of a strategy process
- 5.2 Getting a team together
- 5.3 Identifying key questions
- 5.4 Deciding who to involve

5.2 Getting a team together

Strategic planning is not an individual exercise. It helps to bring together a task force to ensure the process is considered and comprehensive. This group may help identify:

- The key strategic questions and choices
- Who to listen to and how
- Who to ask for facilitation support

5.3 Identifying key questions

All organisations face different strategic choices at any point in time. These may be specific to the NGO or variants on common NGO dilemmas:

1. Do we give a little help for many or more intensive support for few?
2. Do we treat the symptoms or try to get to the cause?
3. Do we provide services or campaign for change in the systems?
4. Do we focus or do we diversify our services?
5. Do we hold virtuously to our beliefs or are we tempted by new resources?

While these choices may not always be so ‘either/or’ as they appear, simultaneously trying to do both poses considerable challenges.

“A goat cannot run in two directions at once without being torn in two.” - African proverb

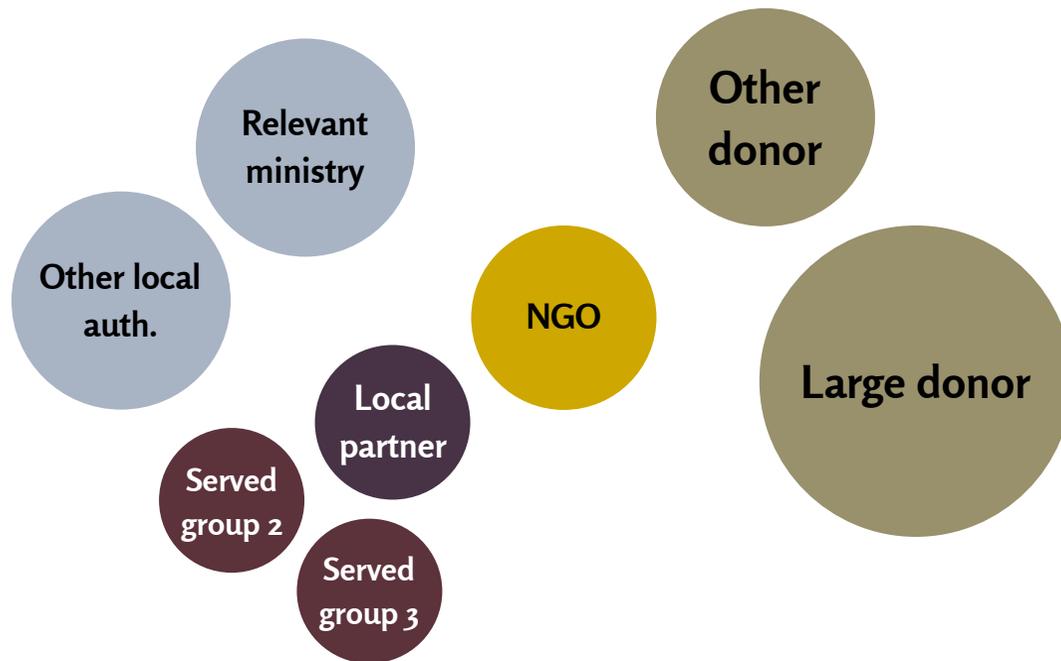
5.4 Deciding who to involve

Strategic planning provides an excellent opportunity to gather the views of the NGO's beneficiaries, staff, managers, donors, other NGOs and other stakeholders of the organisation. Participation creates a sense of ownership in the process of strategy development. Ownership encourages the commitment needed to put it into practice.

- The people and organisations the NGO seeks to serve (whether partners or ultimate beneficiaries) should be involved in any strategy process. They know best about change on the ground. All too often their voices are excluded when deciding what the NGO should focus on and how it should work.
- Boards can and should play an important role particularly with smaller NGOs. Ultimately the board has to approve the strategic plan, but how involved they are in the process depends on the situation. Where the NGO has few, if any, paid staff, the board usually has to be heavily involved.
- Any staff, whether working in the field or in management, should all be involved. They each have different perspectives to bring and complementary roles to play. Field staff may have the best view of what would work, but may have too much personal investment in the outcome. Because strategy involves hard choices, leadership will need to make tough decisions with board support.

A stakeholder analysis can be useful in deciding who should be involved in the strategy development process. More information about this is on the next page.

There are many variants on the simple stakeholder analysis. In its most basic form it involves identifying all those groups who have a stake or an interest in your work. These can be drawn as circles of different sizes (illustrating power to influence the NGO) and placed closer or further away from the NGO (illustrating the extent of or frequency of contact). You can draw your stakeholder analysis on a flipchart or by arranging sticky notes, but also with any "mind mapping" templates freely available on the internet.



Another tool for power and stakeholder analysis is detailed in [section 4.2 of the advocacy toolkit](#).

Section 06: Gathering information and analysing together

To find the **strategy sweet spot** (see also 2.1), requires hearing different perspectives on how the environment, needs and vision are changing; on what the NGO is best at; and on what they can resource with people and money. In an increasingly digital world, there are a wide variety of media for doing this, whether WhatsApp or Zoom calls, or collaborative tools like Mural or Google Jamboard. Technological advances afford new opportunities for hearing from a wide variety of people, taking an open strategy approach.

6.1 How to gather information

There are obviously many different methods for gathering data for a strategic planning process, including:

- Document review – such as any programme evaluations (particularly participatory ones that identify beneficiaries' perspectives); past strategy documents; reports to funders, minutes of leadership/board meetings
- Semi-structured interviews - with key informants are a powerful way of gathering individual perspectives from both internal and external stakeholders. It helps to have a set of key questions to adapt and ask respondents
- Focus group discussions – are a good way of hosting a dynamic conversation between different respondents
- Online surveys – such as Survey monkey can help bring a useful quantification of perspectives and opinions. With advances in technology, if surveys are clear and simple enough, this can help bring the perspectives of those closest to the ground into the boardroom.

Section contents

This chapter is divided into four sections:

6.1 How to gather information

6.2 PESTLE

6.3 SWOT

6.4 Prioritising the bees that are stinging



There are M&E Universe papers available on [interviews](#), [focus group discussions](#), and [surveys and questionnaires](#).

When gathering data from groups, two commonly used tools for strategy are PESTLE and SWOT.

6.2 PESTLE

In seeking to gather and interpret information about changes in the wider environment, PESTLE is a commonly used tool. It highlights the importance of identifying trends and anticipating changes in a variety of environments: *Political, Economic, Social, Technological, Legal, and Environmental*.

A clear understanding of the environment could influence an organisation's vision as well as whether and how to alter their strategy. It can help an organisation (re)position itself in a dynamic context.



Table 1: example of a PESTLE analysis. A [template is available to download here](#), or you can create your own.

Political	Economic	Social	Technological	Legal	Environmental

6.3 SWOT analysis

The single most familiar tool for developing strategy is the SWOT analysis (the letters represent Strengths, Weaknesses, Opportunities, and Threats). The purpose of the SWOT analysis is to assess the organisation and its external environment and identify the forces that are likely to help and hinder its ability to achieve its mission. In conducting a SWOT analysis, the NGO needs to consider all aspects of its internal functioning – the organisation’s ‘programme’ (what it does) and its ‘process’ (how it goes about doing it).

Strengths	Weaknesses
Opportunities	Threats



You can [download a SWOT analysis template here](#), or create your own.

6.4 Focus on the bees that are stinging

It is easy to become overwhelmed by information from so many different perspectives. It is critically important to be able to focus on the most critical issues. At some point it may be worth simply asking: 'What one thing could this organisation do differently to make more of an impact on achieving its mission?' Without prioritising, analysis can lead to paralysis. As the Malawian proverb colourfully puts it, "Many, many are the bees, but tell me about the ones that are stinging."



Section 07: Making hard choices

The essence of strategic planning is prioritising. It is about letting things go; about avoiding the temptation to simply add to the shopping list. There may be a need to close down programmes and perhaps have strategic funerals to celebrate elements of your work that have been good, but are no longer a priority. It may be important to mark endings. In a changing environment, prioritisation is crucial so that we can ‘take change by the hand and lead it where we want to go, rather than waiting for it to grab us by the throat and drag us where we don’t want to go.’ (John Adair 2002:221)

The more people are involved in these decisions, the better for ownership and commitment, though fewer people make decision-making easier and quicker.

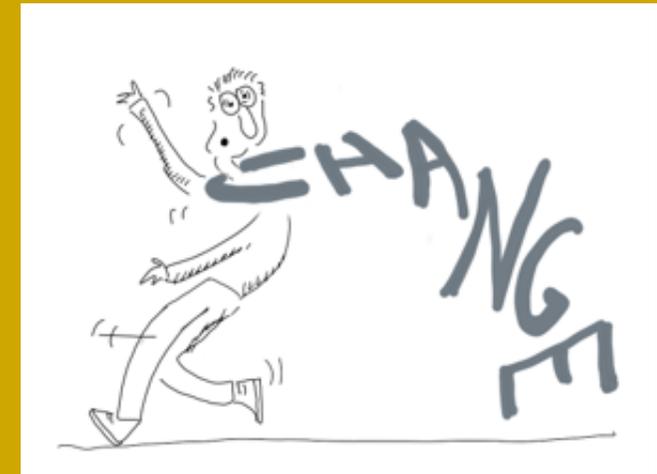
Although it may be more difficult to take hard decisions virtually without the nuances of body language and informal discussions, once again Google JamBoard and Mural provide useful online platforms for participatory discussions. In making hard strategy choices, the following three tools have often proved illuminating:

- Two simple questions
- Painful prioritising
- Portfolio Analysis

Section contents

This chapter is divided into three sections:

- 7.1 Two simple questions
- 7.2 Prioritisation
- 7.3 Portfolio analysis



7.1 Two simple questions

Much of strategic planning can be boiled down to two simple questions:

1. Who do you exist to serve?
2. If these people knew what you could offer, what would they ask you to do (so that their lives would be changed in the long term)?
For instance, they could ask you: “Help us... learn basic accounting / get a Fairtrade certification / get better access to clean water”... What would they ask YOU?

Getting NGOs to answer these questions through listening to stakeholders and then prioritising themselves is the essence of much effective strategising.

Notes 

Use this space to answer the two questions.

7.2 Painful prioritising

This exercise is helpful in bringing to light implicit priorities.

If running a face to face workshop: Write the names of all your programmes / projects on a flipchart or whiteboard. Get people to write these out on separate pieces of paper. Put out three buckets (or boxes or just identify three piles) on a table. Label them A, B, and C.

If you need to run a remote workshop, you could set up this activity on a virtual whiteboard, or have people express their preferences by using other virtual collaboration tools (follow the activity guide for further details and templates).

Then:

1. Ask the question, **“If revenue were to drop by 50%, which programmes would we stop doing first?”** Have each person put these in the bucket/box/area C.
2. Next ask, **“If revenue dropped by 75% and we had to move onto the next round, what would we stop doing?”** These will go in the bucket/box/area B.
3. Last ask, **“What would we never stop doing?”** Have each person put their response in the bucket/box/area A.

When everyone has finished, look at what’s in each bucket/box/area and discuss the results:

- **What is it clear that you should stop doing?**
- **What is it clear you should never stop doing?**



Here you [can download a guide to help you facilitate this activity](#), with options for both face-to-face and virtual meetings.

7.3 Portfolio analysis

Some NGOs have used portfolio analysis to analyse and classify their different programmes into four broad categories:

(1) Stars	(2) Question marks
<p>Strong projects or activities with real potential for growth: dynamic, popular and creative. Stars may become ‘foundation stones’ or become short-lived ‘shooting stars’.</p>	<p>New or innovative projects but not yet proven. They might become stars and move into Square 1. Alternatively, they may fail and move into Square 4; they need to be monitored closely.</p>
(3) Foundation stones	(4) Dead ducks
<p>Reliable, safe projects or activities that provide the NGO with a degree of financial security and/or credibility; they provide a solid base. They may start by being popular with funders but may become less attractive later as they are not seen as innovative.</p>	<p>Take up management and financial resources and provide little or no added value for the effort required. Often organisations have problems dealing with such activities because they may be closely bound up with the organisation’s earlier history.</p>

In strategic planning it may be worth thinking:

- How well balanced is the portfolio (between, for example, creative but risky projects and stable projects)?
- How might each service or project move between boxes over the next year or so?
- How could your ‘question marks’ be turned into ‘stars’? Would it be worth the investment of time, effort and other resources?
- What should happen to the activities in Square 4 (e.g. invest in them, hand them over, float them off, close them down)?
- What are your NGO’s current plans for developing new areas of activity? Any NGO should be thinking about the future as well as the present.

Section 08: Documenting and adapting

8.1 Keep the plan short and simple

The best strategic plans are short, simple and visual.

There should be a one or two page summary that clearly states the direction of travel, communicating the chosen priorities for the future – what the NGO will do more of and less of. Staff should be able to identify these priorities and describe how their own work fits into the whole. It should be concise and memorable. Ideally it should be visual with an image that conveys the essence of the NGO's priorities.



Section contents

8.1 Keep the plan short and simple

8.2 Review regularly

8.3 Final thoughts

While there is no template for a strategic plan as each organisation is unique, these are some of the elements INTRAC expects to see in a strategic plan.

- **Executive Summary (one page only)**
- **Background**
 - When started & its development
 - Key supporters and funders
 - Achievements to date
- **Identity of organisation**
 - Vision
 - Mission
 - Values
 - Summary of theory of change
- **Strategy Process**
 - Briefly how done and who involved
 - Analysis of external environment
 - Analysis of strengths and weaknesses
- **Strategic Priorities**
 - Choices made - Prioritised core roles/programmes/approaches over next 3-5 years. Preferably described pictorially
 - Strategic aims - each with core areas
- **Implications of the strategy**
 - Implications for current programmes – stop, improve, start
 - Implications for organisation – e.g. structure, staffing, capacity building
 - Implications for funding and resources

A strategic plan is only useful in so far as it affects actions. The document itself, does not matter unless it is put into practice. Good intentions are not enough.

8.2 Regular reviews

Regular reviews enable the NGO to learn from what is working as planned and what needs to change. They are vital for adaptive, agile management.

In annual strategy review meetings, it is worth analysing:

- How has the environment changed in the last 12 months?
- What has been working well over the last 12 months?
- What is not working as hoped?
- What are we learning from this?
- What do we need to adapt and change and shift direction?
- What then are the priorities for the next 12 months?

"Culture eats strategy for breakfast."

Management writer Peter Drucker coined this famous quote to show that however good the strategic plan is, what really matters is what the organisation does with it. Organisational culture and behaviour ultimately matter much more than any document in determining direction.



8.3 Final thoughts

Strategic planning may not be an easy process. There are obviously many constraints and limitations, but also important benefits of a good process. Strategic planning helps NGOs look up from relentless activity to maintain their relevance and effectiveness in a rapidly changing world. Strategic planning may not be the answer to all NGO problems, but it certainly is a critical issue to address. While every situation is different, key principles of good practice exist:

1. Ensure leadership driving
2. Be inclusive of those closest to the action (beneficiaries and field staff)
3. Keep the pace moving
4. Find the right facilitator
5. Review regularly to let the plan evolve





This toolkit is licensed under the [Creative Commons Attribution-NonCommercial-ShareAlike 4.0 International License](https://creativecommons.org/licenses/by-nc-sa/4.0/). You can share and adapt this resource, as long as it is for non-commercial purposes, you give appropriate credit to INTRAC, and you share the resulting work under the same licence.



All the toolkits produced for the "Strengthening Small Organisations With Big Ambitions" [programme](#) are [available here](#).



We hope you have found this toolkit useful. [By completing this short survey](#), you can let us know what you think and help guide our future publications.