THINK:
About whether you have a strategy that meets the needs of both ends of the link.

REFLECT:
on the inclusivity of the strategy planning process.

QUESTION:
Who owns the strategy?

Checklist:
- ✓ Does the strategy fit with the objectives in the agreement?
- ✓ Does it take into account the situation in both communities?
- ✓ Is it inclusive and comprehensible by all?
- ✓ Are the necessary financial, human and physical resources available?
- ✓ Will it achieve a measurable result and fulfil the stated goal?
- ✓ Can the progress be monitored and measured?
- ✓ Does the strategy provide for evaluation from the start?
- ✓ Is the planned timetable clear, reasonable, realistic and appropriate?
- ✓ Have you considered potential areas of conflict, constraint or difficulty?
- ✓ When are you going to review it?
- ✓ Are you clear about the roles and responsibilities?
- ✓ Has financial accountability been included at both ends of the partnership?

Next steps:
A good starting point is simply asking the questions: Who, Where, Why, What, When and How.

- Consider where you want to be in 3-5 years.
- Consider what specific actions you need to achieve your strategic aims.
- Draw up action plans setting targets and timetables.
- If there are several projects or activities you may need an action plan for each.

For each project or activity you could consider:
- Objectives/Goals:
- Main steps or tasks:
- Lead & roles & responsibilities
- Outcomes
- Timescale
- These will all require effective communications systems, a reviewing process, including resource implications and accountability procedures.

TOOLKIT
For Linking: Challenges and Opportunities

4b
Strategic Planning

What is strategic planning?

Strategic planning is the process in which long term goals and plans are formulated and evaluated. Planning enables a shared vision to be developed and realised and its progress to be reviewed.

A strategic plan should:
- Have a clear mission statement
- Have clear and achievable objectives
- Set a timetable to achieve these, and review progress
- Establish direction and priorities
- Identify type of partnership agreement
- Set clear expectations noting critical issues and constraints
- Build in evaluation from the outset
- Develop estimated timeline
- Identify resource needs: financial, human etc.
- Include necessary staffing and training

Strategic planning provides a framework directed towards a common purpose. It is a continuous process in which as many stakeholders as possible should be involved in order that all feel a sense of 'ownership' in the plan and its implementation. The more widely the planning process is shared the more effective the plan is likely to be. The process is as necessary and valuable as the plan itself which as with any such plan should be regarded as 'living documents'.

The plan is a framework, not a constraint. It requires regular review to ensure that it meets the needs of the partnership, and is flexible.

> A goal without a plan is just a wish.
> *Antoine de Saint-Exupery*

Successful linking, as in any other project or activity, requires thorough preparation and planning. In the excitement and enthusiasm of the early stages of forming a link planning is often not a priority. Starting the link, getting messages exchanged and making contacts tend to be the immediate focus of activity.

But establishing, let alone maintaining, an effective link is not an easy task, and planning is vital from the start. Planning is about organising the future and then making sure that everyone understands their role. All of these activities are necessary at both ends of the potential link.

The phrase 'Strategic Planning' can seem bureaucratic and off putting, but it simply means asking questions about: Who? Where? Why? What? When? How? Questions such as: 'What do we want to achieve?', 'How do we do it?' and 'Who is going to do what?'

Strategies specify the action steps which need to be taken. The process of planning should help both partners to gain a greater understanding of the needs and priorities of their partner community and help to reach a shared vision for the link. Successful implementation of a strategic plan depends on several factors. Difficulties can arise where there is a lack of commitment; or a lack of flexibility and the capacity to cope with unforeseen events. Particularly important is the need to engage with assumptions about our partner community from the beginning.

Connections must be made between the planning process and the day-to-day reality of both communities. Different communities may have different approaches. Effective communications, wide consultation and involvement will help ensure that the strategy is realistic. A number of key words used in strategic planning: Collaboration, Consultation, Consensus, Consistency and Change are also key words for linking. Targets reached through collaboration and consultation must be realistic and lead to clear priorities. The process should help to identify and allocate resources and clarify roles and responsibilities.

If the process is genuinely a shared experience then change will almost certainly be necessary. Flexibility is essential.
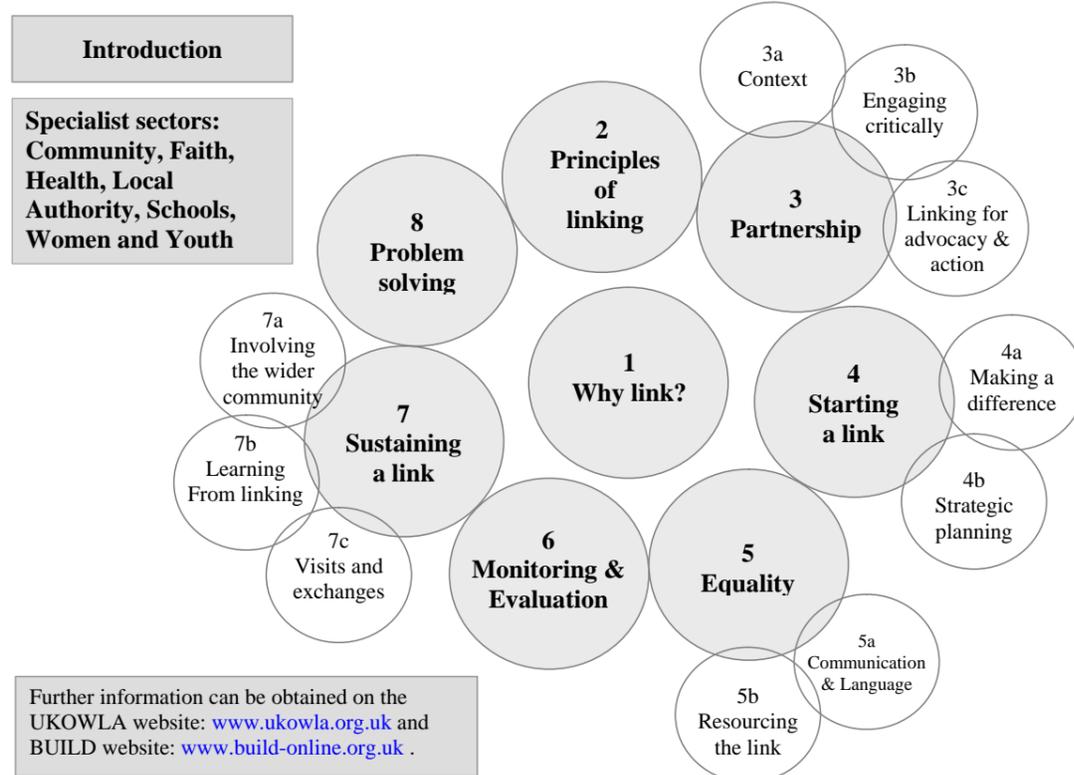
Sustaining a link requires collaborative leadership, effective management within partner communities, collective ownership and purpose and it is important that these are shared widely.

Toolkit for Linking leaflets

Introduction

Specialist sectors: Community, Faith, Health, Local Authority, Schools, Women and Youth

- 2 Principles of linking
- 3 Partnership
  - 3a Context
  - 3b Engaging critically
  - 3c Linking for advocacy & action
- 8 Problem solving
- 7a Involving the wider community
- 7 Sustaining a link
- 7b Learning From linking
- 7c Visits and exchanges
- 1 Why link?
- 4 Starting a link
  - 4a Making a difference
  - 4b Strategic planning
- 6 Monitoring & Evaluation
- 5 Equality
  - 5a Communication & Language
  - 5b Resourcing the link

Further information can be obtained on the UKOWLA website: www.ukowla.org.uk and BUILD website: www.build-online.org.uk .

Tools to help with your planning

When planning for your link you need to understand the current situation, or environment, within which your own community exists. Below are several tools or activities which can help with your planning.

SWOT (Strengths, Weaknesses, Opportunities, Threats) and STEP (Society, Technology, Economics, Politics) analyses:
Make a list of the relevant issues under each heading and use this information to help develop your strategic plan. *An example of each is given in italics.*

SWOT or SWOC		**STEP or PEST**	
Strengths *Grant obtained*	**W**eaknesses *Poor postal system*	**S**ociety *Literacy*	**T**echnology *Computer access*
Opportunities *Enthusiastic team*	**T**hreats/ **C**hallenges *Lack of electricity*	**E**conomics *Employment*	**P**olitics *Government stability*

STRIDE:
Situation,
Target,
Restraints,
Ideas,
Do,
Evaluate.

What is the current **S**ituation?
What is the **T**arget?
What are the reasons or **R**estraints preventing progress?
What are the key **I**deas needed to arrive at a workable strategy?
What exactly must be **D**one, by whom and when?
How will success be **E**valuated?

"**SMART**" objectives are also helpful:

Specific: clearly described and defined.
Measurable: clearly defined means of measurement.
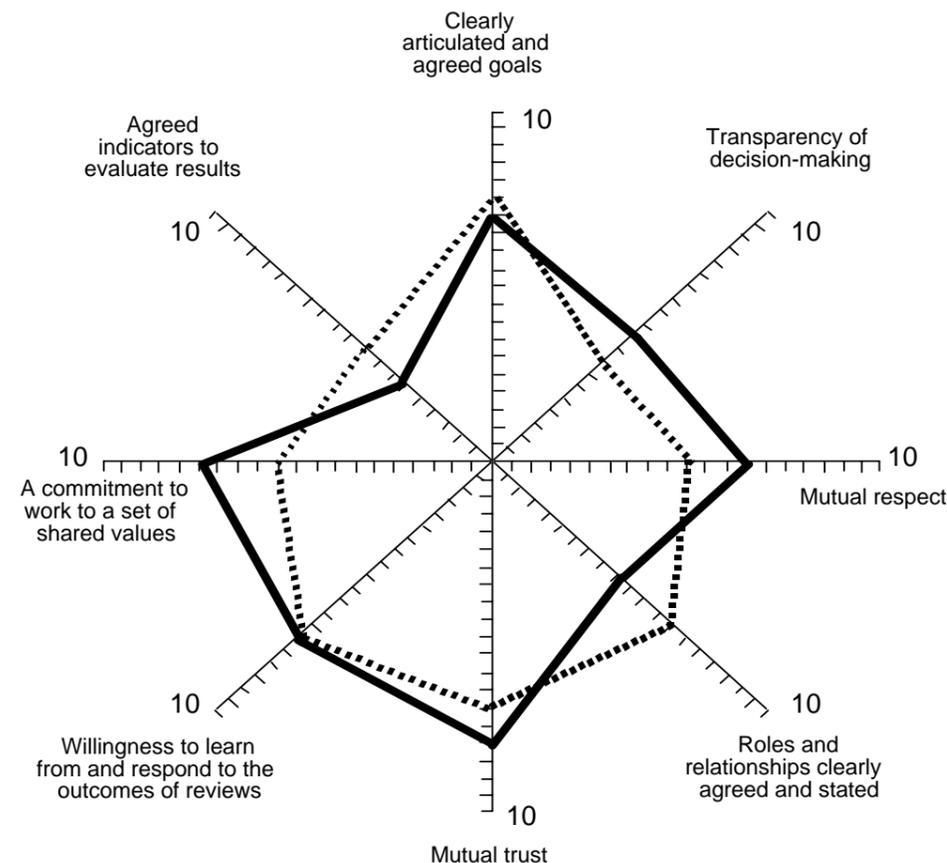**A**chievable: with the skills available in current environment.
Realistic: attainable with current knowledge.
Timebound: limited by dates based on real and known needs.

WWF-UK Partnership Monitoring Tool
This tool involves examining the partnership between organisations using eight criteria which you select jointly. The degree to which the partnership meets these criteria is plotted using a 'spider diagram' with eight axes. You and your partner independently mark on each of the eight lines where you think the link is. Then compare the results; and you may be surprised at how your perceptions differ.
[key: centre point 0; 1 very low to 10 very high; ━━ = partner A; ---- = partner B]

Clearly articulated and agreed goals
Agreed indicators to evaluate results
Transparency of decision-making
A commitment to work to a set of shared values
Mutual respect
Willingness to learn from and respond to the outcomes of reviews
Roles and relationships clearly agreed and stated
Mutual trust

Planning tools:

Jointly agreed simple indicators need to be identified so that both partners can monitor and evaluate the link.

SWOT and STEP analyses can identify opportunities and challenges or potential areas of difficulty.

The STRIDE exercise poses a series of key questions which help to ensure that emerging plans are realistic.

The SMART objectives help you to monitor and evaluate your link by providing clearly identifiable and measurable indicators.

Used regularly the WWF-UK Partnership Monitoring Tool can help ensure that consultation between communities remains at the heart of the link.

A reminder of why to have a Partnership Agreement or Memorandum of Understanding:

We all agreed that:-
- what was written in the MOU was as nothing compared to the journey of understanding we had been through together.
- we should have been through the process many years before.
- we had laid to rest many misconceptions and had learnt a huge amount about each other
- we must use the MOU as a 'living' document which would need revisiting at frequent intervals – we have, and it has occasionally rescued us.

All links ought to have one!

Nick Maurice, Marlborough/Gunjur Link

Note: For information on developing Partnership Agreements see *Starting a link* leaflet.