

**BIHDUMLEM HUMANITARIAN ASSOCIATION OF PEACE  
AND HOPE (BIHAPH)**



Email: [bihaphhumanitarian@gmail.com](mailto:bihaphhumanitarian@gmail.com) –Facebook: @bihaph -Website: [www.bihfoph.org](http://www.bihfoph.org)  
-Tel: +(237) 677 80 21 34

**BIHAPH STRATEGIC PLANNING PRE-PROCESS WORKSHOP  
INTRODUCTION TO STRATEGIC PLANNING**

**MARCH: 2020**

**POOLING RESOURCES TOGETHER FOR COMMUNITY AND  
SUSTAINABLE DEVELOPMENT<sup>1</sup>**

<sup>1</sup>PRE-PROCESS WORKSHOP TOWARDS STRATEGIC PLANNING

## STRATEGIC PLANNING

### 1. General Introduction

Non-governmental organizations (NGOs) are playing an increasing role in the development arena, as responsibility to service provision continues shifting from the public sector to the private sector. This has made delivery capacity improvement being seen as a prerequisite to a strong civil society and often as the missing link to sustainable development.<sup>†</sup>

Improving organizational capacity and therefore performance of an existing organization such as **BIHAPH** calls for effective analytical and diagnostic mechanisms from which problems can be identified and solutions designed.

As BIHAPH embarks on an **organizational development process**, the strategic planning process is proposed as an effective approach or framework with which to diagnose and plan for **BIHAPH'S** future direction.

A strategy, very simply put is a plan for winning. We can think of strategic planning as planning with success or winning in mind. Put in another planning that helps an organization succeed in attaining its objectives in a given situation or environment. As such strategic planning or thinking calls for an organization to clearly define/understand what definition of success is; what it wants to achieve (goals/ aim) what will take to meet its objectives, understand environment, then map out the most effective ways at attaining the set objectives (strategies)/ strategic priorities.

As simple as this may appear, it calls for very careful analysis and planning. **Firstly**, there is need to have clear goals that are attainable; the best amongst other options (vis-a-vis the organization's aspirations and capabilities. The goals should be measurable otherwise how will the organization know it has attained them)

**Secondly** planning strategically requires the organization to understand the environment or territory within which the objective is to be attained in order to identify threats or opportunities. Understanding of these will help the organization take advantage of the opportunities and undertake measures to ward off the threats or be prepared for them with the right arsenal.

**Thirdly** the organization must seek at understanding itself, know its strengths and weaknesses in order to take optimal advantage of its strength, be aware of weaknesses to either address them or avoid strategies that expose the weaknesses.

Finally, the organization thus equipped is in a position to map out the cause of action or path to take in order to succeed in the most effective way. A plan is then developed, implemented and evaluated. This is strategic planning essence.

It can be defined technically as a: -

**Managerial process of development and maintaining a viable fit between an organization's objective resources and changing environmental opportunities in the<sup>‡</sup>organization's pursuit for success or optimal benefit.**

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Strategic management/ planning has been used by the military for thousands of years. It surfaced in the field of business management in the 1970s spurred by increasing global business competitive in a rapidly changing environment.

Since then the practice has evolved and proven effective in enhancing organizational performance and survival. During the 1990s the NGOs sector and more recently the public sector have adapted strategic planning as they strive towards performance improvement and stronger organization. Its adoption to local NGOs sector, Cameroon is still very new and **BIHAPH** may be among the few venturing towards its adoption.

### **Adapting Strategic Planning in NGOs Sector**

It has taken the private sector many years to effectively adapt strategic management, its concepts and tools. Needless to say adapting these in the NGOs sector can be challenging. The daily pressures of managers attempting to undertake complex tasks with limited resources can put strategic management at the bottom list of many NGOs managers' priority risk, and divert attention from critical strategic questions. Indeed, many organizations will continue with business as usual and never adapt strategic planning. This is unlike the private sector where competitive pressures at market place drive and force organizations to think strategically or die. Such pressures to survival are weak in the NGOs sector. There is yet less pressure to performance improvement much less threat to survival.

Trends however indicate increasing competitiveness as the sector's growth continues, coupled with diminishing funding as donor fatigue sets calling directly for improved competitiveness. Additionally, the increasing NGOs role as essential players in the development sector implies demand to strengthen the sector, make it more vibrant and effective, without which public confidence and trust will diminish. All these demand for prudent and serious organizations to reexamine their strategic position plan and act accordingly with the following as some of the possible benefits.

In doing so the following benefits will accrue:

- Enhance clarity on people's roles and how these fit into the wider organization task.
- People's commitment and motivation will be enhanced.
- Organization resources will be more effectively used.
- Users' needs will be understood and therefore met.
- Organization can better understand ways and means of maintaining or increasing their independence and strategic freedom (freedom to make informed choices)
- Organizations can develop new conceptions of them and revise their own view of their purpose.
- Process can help build new coalitions and unity around new priorities e.g. between board members, service management and staff among other benefits.

Overall better and stronger organization will evolve with clear goals/objectives, visions and mission.

## STRATEGIC PLANNING PROCESS

We can think of the strategic planning process as a top down process starting with the mission moving down through objective to strategy, action and finally performance monitoring.

Strategic planning process as proposed as in this workshop is analytical and participative in nature. Further we seek at looking at the organization holistically and how the organization fits in its environment.

As such it seeks to analyze, look or understand all aspects of the organization to include mission objective or goals, strategies, action and finally performance monitoring and their fit in the environment and as such chart out the organization's future.

Good participative analysis is important for effective performance. Quality analysis ensures well informed guided future decisions are made. Participativeness enhances understanding and unity in decision making, enhancing ownership of decisions made and therefore motivation towards their attainment.

The process therefore will involve:

- a) analysis and review of **BIHAPH** vision, mission and underlying values
- b) Analysis of **BIHAPH** environment external and internal to identify strengths, weaknesses, threats and opportunities.
- c) identification and prioritization of **BIHAPH** strategic chances/goals
- d) Development of action plan.<sup>§</sup>

## BIHAPH APPROACH TO THEORY OF CHANGE (TOC) IN SUSTAINABILITY.

### Aim of the Method/Approach

- Developing a plausible TOC clearly outlining the kind of assumptions and choices made, help initiatives/organization and other change actors to understand how their work and their relationship contribute to complex, long-term social change.\*\*
- It provides a framework which can be used to plan and update activities, conduct stakeholder dialogues, learn from experiences, and communicate the extent of, and reasons for, success and failure.

### When to use it?

This approach is useful mostly at the planning phase of an intervention, but if used properly, remains useful throughout the process.

### How difficult is it to use it?

Easy-moderate-for experienced users/facilitators

### Benefits

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- Forms a good basic for strategic and operational plans, and for M&E
- Helps to understand the challenges and opportunities available to an initiative/organization
- Helps to set realistic goals, clarify accountabilities and establish a common understanding of used strategies.

### **Issues to be aware of**

- Change is not linear. A TOC needs to be adapted over time in response to a changing context.
- Key stakeholders should be closely involved in developing the TOC as this creates ownership of the process and ensures that the initiative/organization is relevant and useful.

### **Description of the approach**

Theories of change TOC are the ideas and hypotheses (“theories”) people and organizations have about how change happens. These theories can be conscious or unconscious and are based on personal beliefs, assumptions and a necessarily limited, personal perception of reality’.

The theory of change (TOC) is a strategic process to make assumptions about how change happens. This can result on a TOC product, often visualized. TOC discussions may touch on areas such as how change in behavior happens (individually and in groups), how shift in the balance of power occurs, and the role of state and civil society. At the heart of a good TOC is the explicit inclusion of values underlying views or perspectives on how change happens and the assumption around change and the drivers of change.

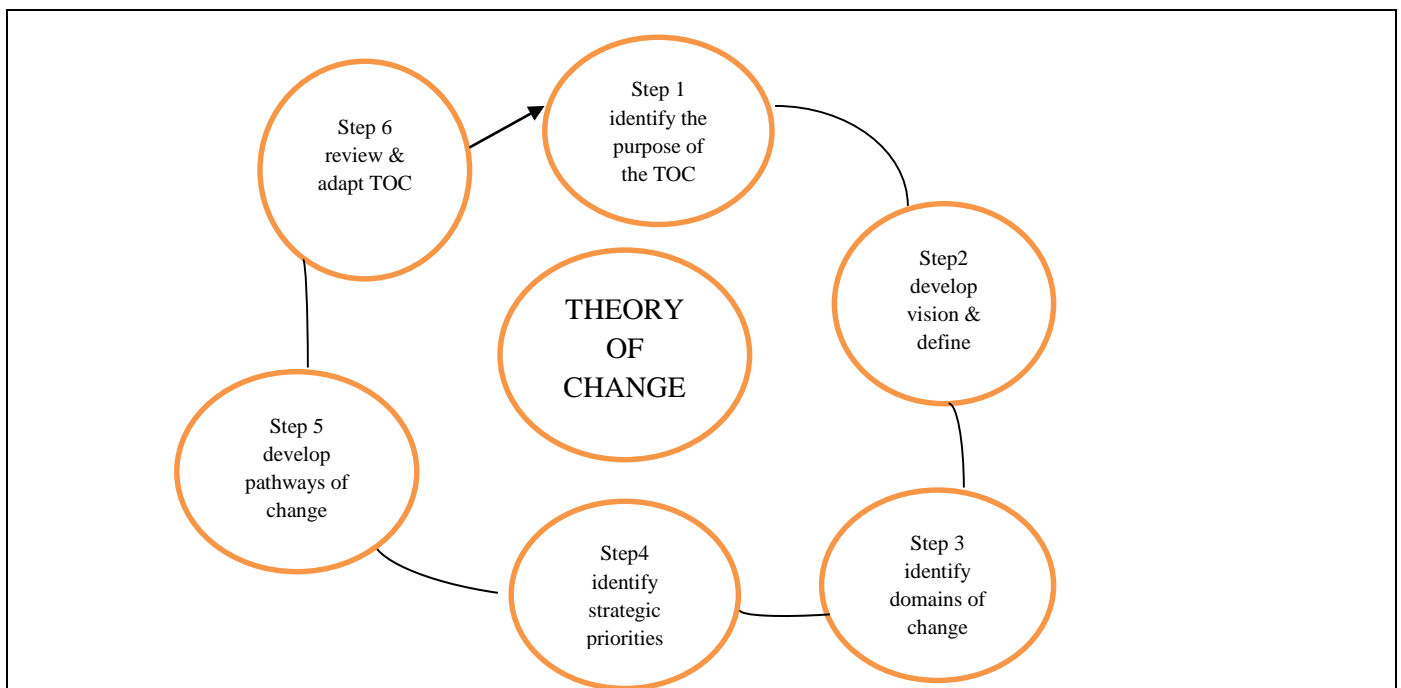
Assumption explains our thought processes, reasoning and how we arrive at certain conclusions. They are hard to articulate because they are deeply held perceptions that have been taken for granted. There are types of assumption about:

**Causal links:** there are links between changes at different level in the change pathway (more related to the internal logic input –activities-out-activities-outcome-impact pathway). They are fairly obvious and easy to make explicit. Example: providing agriculture extension will lead to improved agricultural production.

**Operation and external context:** for example, there may be assumptions about (lack of) political stability or freedom of expression and what might happen in the future based on trends and development.

**Paradigm or world view:** this is about assumption at a much higher (macro) level, e.g. social change best occurs by civil society demanding and building responsive government. **Dominant belief systems in society:** dominant beliefs inform judgment about what is appropriate and feasible in a specific context e.g. in relation to the different role men and women play in society.<sup>††</sup>

## THE THEORY OF CHANGE PROCESS/STEPS.



### **1. Identify the purpose of the TOC**

Ideally, the purpose of your TOC is determined by you and key stakeholders before carrying out the situation analysis. Identifying the purpose will enable you to decide who to involve in the process, the level of detail of the TOC, and the questions you need to ask at each step of the process. According to a TOC, process can be aimed at different levels and used for different purposes, including: programmes and projects design; to review and improve an existing initiative and underlying assumption in response to internal and external change; as a basis for (collaborative) monitoring, evaluation (relation) learning; to review the suitability of scaling initiative; for strategic learning design and knowledge generation. An important part of identifying the purpose is to remain focused and realistic in what you set out to achieve.††

### **2. Develop the vision and define the desired change**

After the situation analysis, try to visualize, along with your stakeholders, the desired change you want to see in the future, taking into consideration the finding from the various analyses done earlier (e.g. Problems/ issues analysis, institutional and stakeholder analyses, identification of future trends and opportunities). The vision you create must be within the bound of possibility, reflecting the complex and dynamic nature of the environment in which the initiative/organization operates. Visioning, are tools used to create a shared vision, is particularly helpful.

### **3. Identify domains of change**

After having defined the change, try to identify domain of change, where you and your stakeholders believe change is mostly needed. These include medium-to long-term changes such as change in behavior, relationship, capabilities, formal and informal institutions. A key guiding question could be: who and /or what needs to change for the

envisaged change to come about? One way of going about this is to pick out for each domain the main factors that keep coming up for your discussions with stakeholders and see if they are in line with the capabilities and competencies of the initiative/organization.

#### **4. Identify strategic priorities**

This step is about strategically analyzing and deciding on priorities and the domains of change where you can have the most influence. It is about answering the question: what change can we best influence within the next few (say, three to five) years? Ritual dissent or stakeholders' analysis is an effective tool to help you explore and identify which strategic options will be most effective and how they can be improved.

#### **5. Develop pathway of change**

Once the strategic priorities have been identified, develop pathway of change that make explicit your assumption about how change happens. The pathway developed should show the relationship between the activities and intermediate and long-term change. To develop pathway, you need to work backwards from your desired future to what needs to be done to change your current reality. It means envisaging how the change process will develop overtime. The change management model can be used to identify pathway of change areas to implement organization change. Framework is also useful to identify the level of complexity and related strategies. Particularly for complex issues, where cause and effect relationships cannot yet be identified, it is important to prioritize a range of strategies or safe fail experiments, and monitor these closely in collaboration with stakeholders, so as to be able to adapt in response to what works and what emerges.<sup>§§</sup>

As mentioned earlier, you also need to check your assumptions regularly. Some **questions to ask include:**

- Are the strategic priorities identified the right ones?
- Do we need to revisit our expected change?
- Do we need to include other stakeholders?
- What kind of conditions and capacities do we need for the pathway of change to take hold?

After answering these questions, develop pathway for each strategic priority identified. Try to include text explanation to show the richness of the complexity.

#### **6. Review and adapt the theory of change (TOC)**

Each step in the process so far has not most likely resulted in change in the overall picture. It is typical for a TOC that is being mapped to be revised several times before it provides a complete and clear picture of your change effort. Test whether the most relevant change and strategies are included, that there are linkages between the strategies, short-term and long-term change are logical, and important assumptions are clear. If you didn't get the chance to develop the map along with (all) stakeholders directly involved in the change process, try to share the later version of your TOC with them. It is also worthwhile consulting experts in the field. Discuss whether your key stakeholders share your vision and main assumptions about the change process, the logic of linkages between strategies

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and results/outcomes, and choice of strategies. Based on the discussions, you might need revise your TOC.

For the TOC to be truly effective, it has to be firmly anchored into the strategic guidance process. This also entails using it as the basis for M&E as discussed in chapter 8 of the M4SDI book. In this way, the TOC can be in learning and decision-making, revised regularly and adapted to reflect change. Engaging stakeholders in the process is crucial for enhancing impact.

## HOW BIHAPH WILL GET RESULTS

### 1) Presence in Communities

BIHAPH maintains a presence in many communities giving us direct and regular contact with the people who are best positioned to achieve sustainable peace and sustainable development. We do this by working closely with our partners. Most of our engagements are with communities in post conflict social reconstruction and project depending on availability of resources and desire by those communities to continue working on the project. For this reason, **BIHAPH** aspires to build the capacities of those partners to be able to continue on their own with trauma awareness and management, training and dialogues, building sustainable livelihoods, partnerships capacity development etc.

### 2) Lean Staff and Experts

**BIHAPH** staff are courageous and well prepared for their responsibilities. We have a good understanding of the project we undertake with partners including on women leadership in peace and governance, on mainstreaming gender in peace building and on trauma awareness and management. **BIHAPH** also has a pool of reliable experts who have extensive understanding of the various conflict contexts in Cameroon and bring with them extensive knowledge and experience in peace building, participatory research, development curricula and delivery of trainings , gender mainstreaming, women human right, trauma work and in the application of international legal instruments supporting peace building.

### 3) Networking and Partnerships

**BIHAPH** has a lean staff and relies on network of partners both at local community level for implementation of project and at national and international level for support on resource mobilization. Some of the partners include at national level peace women across the globe network and act! The local partners are located in Cameroon. This partnership inbuilt through action learning and accompanying partners on the ground where they address conflict and many issues. Experiences are shared through publications by **BIHAPH** and by organizing symposiums on thematic areas. The publication from partnership have been of benefit to our partners and others working on trauma in peace building, women building and training of trainers.\*\*\*



## WHAT BIHAPH WILL NEED IN BUILDING CHANGE

By now you will realize if you did not know it read, that the practice of facilitating change is not a set of easy procedures to learn and to implement. Here are some broad guidelines to remind **BIHAPH** of the essential work for a healthy change process:

- **Meet the organization where it is your practice must adapt itself to the organization process and condition of change.** Too often facilitations have one approach, one design, one tool, one hammer, that they know well and use for every situation (whether it is action, learning, appreciative inquiry, the U-process, a project cycle approach etc.). All of these are powerful designs but only if used in the right conditions
- Create a safe space to connect with people at all levels for all voices to be heard, all views to be expressed, and all ideas to be shared. Listen for the difficult and marginalized voices of people who experience and can see the deeper and more difficult issues that may hold the key for real change.
- Listen to the head, heart and feet. Look for change in what people think, feel and want. Use your own thoughts and feelings to guide you. But be careful that you do not impose your will, what you want.
- Seek guidance from people as a leader or facilitator. There will be times when you are not sure what to do next. It can be empowering for all involved to simply say you are not sure what to do next and to ask them, the ordinary members, what they think is happening and what ideas they have.
- Building authentic community through helping the organization to find new ways of speaking to each other, allowing for all voices to be heard, helping them to connect at a more human level beyond meeting procedure.
- Always looking out for what is working well and help people to see it. This gives balance and perspective to the problem people experience and bring hope and resourcefulness to the surface.
- Develop and encourage shared and distributed leadership. Shared or collective leadership can happen through good meeting or action learning processes where decisions are reached by consensus. Distributed leadership is where specific leadership mandates are taken by different individuals thus building up leadership experience amongst a wider range of people.<sup>†††</sup>

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<sup>†††</sup>PRE-PROCESS WORKSHOP TOWARDS STRATEGIC PLANNING (2020)

## BIHAPH Leaders.

### Practical suggestions for implementing change

- If you are part of the leadership, consider taking the rest of the members into your confidence about the challenges and dilemmas of change, inviting their suggestions.
- Remember to build in frequent review sessions. These processes are extremely important to provide some certainty and security during time that can be quite chaotic. These review sessions can be built into an already existing rhythm like weekly or monthly meetings for members. The action learning process is also a good tool to use for many different processes to build an accurate picture of an ever changing situation and make the necessary adjustment to the plan. Sessions like this can help to chart a sensible course through chaotic times.
- Allow people to space ventilate their feelings to help diffuse some of the tensions that usually accompany a transition and to surface emotional depth.
- Sometimes a representative “change team” can be very helpful. Different programmes or sections could be asked to put forward a trusted colleague to represent their voice during the project and through whom to communicate progress and challenges.
- People may have anxious questions about the change and if their leaders do not respond they will find answers from someone, somehow but the will not be right answers. The importance of communication during transition cannot be emphasized enough. It should be frequent and involve all the members. This helps to deal with some of the gossip and rumors that are inevitably part of the natural resistance to change.\*\*\*
- Seek an outside sounding board. Leaders from other organizations who have had similar change experience are ideal counselors.
- Don't push change too quickly. Have big visions but don't hurry. Take small steps and bring everyone with you on board.
- Be guided by your values, principles and purpose.
- Remember to celebrate each achievement.

## **Definition and Discussion of Key Terms**

Organizations are more effective when they have clear vision and a strong sense of mission. These are powerful motivators that help people make sense of the organizations and ensure clarity in the direction the organization is going and encourage achievement of purpose.

Vision- concerned with the organization's view of an ideal world for its beneficiaries. Defined as a desirable future situation the organization would like to see. Defining the way, they want the world to be. Visions are powerful motivating factors on people. Founders and leaders often bring the vision and need to ensure it is sustained. Visions only change when they have been attained.

Mission- these define what the organization exists to do. Often NGOs have a strong sense of mission of what the organization feels it can do to attain its vision. Purpose closely related to mission describing why an organization exists and what it does.

Values- these are behind the beliefs that hold the organization together. Underlying beliefs that the organization holds in conducting itself, establishing policies and make decisions.

### **Creating and refreshing vision and mission.**

As previously stated organizations are more effective when they have clear vision and sense of mission, vision and mission of an organization needs to be addressed when;

- The organizational purpose and reason for existence are not clear or unfocused.
- When the organization has become directionless lacking a sense of its own distinctive competencies.
- When organization motivation is low.

Prerequisites for having and creating a strong sense of mission is having a group of people from all strata's of the organization who share similar aspirations and are willing to work together to make things happen.

- Another essential component is continuity of key decision makers.
- Responsibility for managing the mission is the board's. Participation of others is also needed in order to agree and strengthen the mission.

In developing an organization's vision and mission there is need to:

1. Define the purpose of the organization at the most fundamental and general level. By asking simple questions such as why do we exist for.<sup>§§§</sup>
2. Identify core values or what do we aim at achieving. What values do we as an organization believe and stand for? What is our philosophy in issues we address?

3. Clarify distinctive features or competencies. Identify characteristics that distinguish us from others in the same field.

Once the mission has been identified there is need to keep it alive and relevant to everyone's work, e.g. Annual General Meeting can be occasions to celebrate achievements' and plan further developments. Managers can draw staff attention to link between the mission and daily activities and remind people how their work is part of achieving mission.

Characteristics of good vision and mission statements

a) They should have been developed through a participative process of discussion and debate through the organization otherwise they will have little support.

b) **Good statement should tell the reader;**

- Who the organization exists for.
- What the organization's ultimate purpose is.
- What the organization stands for.
- How is the broadest sense it goes about achieving its purpose?
- Where it operates

c) **The statement should be;**

- Short and easy to communicate
- Understood throughout the organization
- Broad enough to last for a long time.
- Specific enough to differentiate the organization from others.

## OBJECTIVES AND STRATEGIES

### Goals/ Objectives

Once vision and mission of an organization are clear the organization needs to analyze its environment both internal and external in order to identify how the organization fits in its environment.

There are statements of aims for the organization that help different parts of the organization focus on achieving the mission. They concentrate on people's attention and guide their action.

Needs and opportunities to help in development work are so vast and varied that without clearly defined and selected goals to guide action it is very easy to drift away from primary purpose or to scatter scarce resources over too many activities and be ineffective in so doing.

### Types of goals;

A) Strategic goals- long term in nature. They focus the organization on achieving those things that are critical to its success-should be derived from a clear understanding of the organization's strategic position.

b) Overall organizational goals that determine or guide overall performance.

c) Derived from mission spell out in general broad terms means by which mission will be achieved.

d) Operational plans- shorter term in nature, may include departmental programmes and individual plan yearly, quarter etc. plan.

They are interpretation of strategic plan at operational level.

Strategies\*\*\*\*

Broad categories are not static they may evolve from experience, and learning that comes therefore

They can also be from a political process of bargaining and negotiation and tradeoffs between people with competing influence over an organization's overall strategy.

Strategy may also result from an analytical process of the organization's environment and current activities. The alternative leadership programme is a good example of a strategy **BIHAPH** has adapted to attain its organization goals.

## **STRATEGIC REVIEW**

This involves a process of monitoring change in the external environment and development within the organization so as to gain a deeper understanding of the organization's strategic position.

Involved is a process of collecting data about the world and organization and assessing the impact on these changes. Key strategic information is often not collected or is not available in a clear or appropriate format for use in decision making. This calls for the need to have effective information gathering and management system coupled with networking and collaboration effort with others aimed at keeping the organization updated and environment trends. Additionally, effective internal monitoring system are needed to keep track of changes within the internal environment.

Review of strategy strives to draw attention to strategically significant trends to those few things happening with potential to drive change. With this understanding an organization can assess its standing vis-a-vis its environment. The managers can be able to identify key strategic issues that need addressing or be responded to and plan made in order to help the organization react effectively and appropriately in the environment. Such reviews may generate vast amounts of information which then needs to be distilled and focused to those that are most relevant to the future development of the organization.

### **Strategic position**

This shows where the organization is in relation to its environment context. It is a summary of the internal and external environment review to show how they affect the organization. Some of the tools used to position an organization include gap SWOT analysis.

### **SWOT analysis**

### **Key strategic issues**

This is a distillation or summary of the key issues concerning organization's position that need to be addressed i.e. critical factors likely to impact the long term success of the organization. It is on these strategic issues that a strategic plan is developed.

To generate strategic issues requires comparing the organizational mission and objectives against strategic review findings.<sup>††††</sup>

### **Strategic choices**

It may be impractical to address effectively and at the same time all the strategic issues the organization may be facing. This means that they require prioritizing to identify fewer issues, as attempts to attain all emerging strategic issues may be impractical. Those selected from the many constitute the organizations strategic choices

Some pitfalls exist in making strategic choices. Some organizations may make choices based on opportunities, particularly where funding is available, a direction that exposes the organization to risk is becoming hostage and puppets of founders and their whims. On the other hand, organizations that gain control over their strategy begin to determine their own futures.

Other pitfalls include selecting a strategic belief that is so wide to the point of being ineffective. Others define their strategies ambiguous and general ways in an effort to avoid making hard choices and therefore reduce the value of the strategic management process.

### **Making strategic choices.**

Making choices amongst priorities is no easy task and should be done in a well thought out and systematic manner.

Each choice should be weighed for benefits, costs and risks. The process needs to be structured to encourage critical debate and clear decisions.

Some of the techniques that can be used include

1. Systematic review of options against the mission, to provide a national basis to identify priorities by important in relation to mission. This method on its own is not foolproof as sometime the mission may be irrelevant and itself need reviewing.
2. Attach a weighting to option competing for limited resource e.g. rating option against, critical strategic importance, important but not essential, pursue when funds become available.
3. Scheduling: similar to weighing where projects with greater priority are selected to take place before these with less priority importance.

4. Making choice based on organization recent experience of things that worked and which didn't.

As markets for funding becomes more competitive organization can compare themselves with competition and choose strategies that give greatest competitive advantage.

Finally, before final choices are made they can test by consulting relevant stakeholder for views.

In practice making strategic choices is a highly judgment process, techniques can help structure the problem but ultimately they experience and wisdom are needed to make effective choices.\*\*\*\*