Strategic Planning in Partnership

Strategic planning is a "disciplined effort to produce decisions that shape and define the character of an organization, what it does and why it does it."

All organizations are in a constant state of change—changes in human resources, changes in mandate, budget changes, the changing expectations of interested parties, changes in customers' needs, etc. An organization that is managed strategically is one that defines where it would like to be in the future and manages the required changes in a structured way in order to achieve its vision of the future.

STRATEGIC PLANNING INVOLVES THE FOLLOWING COMPONENTS:

- Discussion of the environment in which the organization operates and analysis of trends and factors that influence the way in which it operates.

- Analysis of the issues and challenges the organization is dealing with.

- Clarification of the organization's objectives and formulation of the organization's vision of the future.

- A reexamination of mandate, values, tasks, products, services, customers, financing, structures, processes, management, etc.

THE ROLE OF STRATEGIC PLANNING IN THE PARTNERSHIPS

Strategic planning is meant to help the Partnership achieve four main goals:

a. **Effectiveness**
   Reformulation or revision of goals, which will help the Partnership to achieve the objectives defined by its partners and to measure the extent to which they are achieved.

b. **Efficiency**
   Strategic planning can help to allocate the resources that are available to the Partnership, such that the Partnership will be able to achieve its goals efficiently.

c. **Involvement and Satisfaction**
   The strategic planning process will facilitate the involvement of volunteers and partners in determining the goals and objectives of the Partnership and will raise the level of satisfaction from involvement in the Partnership.

d. **Innovation**
   The strategic planning process will enable partners to formulate creative and innovative ideas and to express them through the values and goals of the Partnership.

THE LIFECYCLE OF A PARTNERSHIP

Every Partnership goes through a "natural" lifecycle.

At every stage in the lifecycle, the Partnership must be managed and developed differently:

STAGE	PRINCIPLE EFFORT
a. Playing with an idea	Finding support for the ideas – "marketing of the Partnership."
b. Looking for partners (courting)	Adjustment of shared expectations.
c. Beginning of the Partnership (childhood)	Building confidence – improvement of communication.
d. Development of the Partnership (adolescence)	Positioning in the communities' consciousness through the implementation of projects.
e. Stabilization of the Partnership (adulthood)	Achieving results through projects and connections that have been created.
At this stage, strategic planning should be considered in order to renew the Partnership.	
f. Deterioration of the Partnership • Gradually (old age) • Suddenly (crisis)	To preserve what exists to whatever extent possible. Start of a process of intervention.
g. Closing of the Partnership (winding down)	Drawing conclusions and a respectful closing of the Partnership.

The stage of "adulthood" is usually characterized by a feeling that the Partnership has arrived at a stable situation in which it is achieving its goals and there is an unwillingness to think about and develop new lines of activity and to come up with creative ideas. However, it is this stage that is the best time to carry out a strategic planning process, in order to avoid stagnation and winding down or a crisis in the relations between the partners.

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FLOWCHART OF A STRATEGIC PLANNING PROCESS

STAGE	EXPECTED OUTCOME
a. Request from the Partnership/partners (one/ both sides) or from the headquarters to start a process of strategic planning in the Partnership	Examination of the needs, expectations, required resources, and choice of appropriate professional staff
b. Introductory meeting between the partners and the professional staff who will accompany the planning process	Getting to know one another and alignment of expectations
c. Formulation of an initial work agreement: professional ethics, work stages, schedule, mapping of main interest groups	Creation of a work plan for the planning process (including the diagnostic stage and the planning and development stage), and approval to start working
d. Diagnosis of the Partnership's situation (in an existing Partnership)	Ideas, focus groups and questionnaires
e. Presentation of the diagnostic results	A broad consensus around the existing situation and the desired situation of the Partnership. Generation of motivation to continue the work
f. Creation of a plan for continuing the process based on the diagnostic results	Finding the resources to continue the development work
From here on a "generic" process of strategic planning is described. The actual process will need to be modified according to the diagnostic results.	
g. Defining the core competencies of the Partnership	Agreement on the Partnership's core competencies
h. Renewal of the existing vision (or the creation of a vision if a new Partnership)	Broad support for the renewed vision
i. Designing an organizational structure that will help leverage the core competencies for achieving the vision	Design of the functional structure of the Steering Committee / subcommittees that will serve the Partnership
j. Designing a strategy that will leverage and harness the core competencies to achieve the Partnership vision	Formulation of a work strategy and work plan
k. Development of measures for the evaluation of effectiveness	Indexes for evaluating the effectiveness of projects and indices for evaluating the effectiveness of the Partnership itself
l. Assimilation of the new/renewed vision, core competencies and strategy among the staff and within the Partnership's work plan	Projects, staff and existing core competencies have been "adjusted" in the new direction of the Partnership
m. Drawing of conclusions from the process	Learning

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DESCRIPTION OF THE COMPONENTS OF A STRATEGIC PLANNING PROCESS

DIAGNOSIS

Diagnosis of the existing situation is a necessary condition for the success of the strategic planning process.

The **goal** of the diagnosis is to create consensus among the partners in the Partnership around two main points:

1. The **current** situation of the Partnership and

2. The desired/possible direction for the development of the Partnership in the **future**.

In addition, the diagnosis assists the accompanying professional staff to understand the processes occurring in the Partnership, its methods of decision making and how the various processes unfold in the Partnership.

Part of the diagnosis involves an in-depth and comprehensive investigation of the diversity of Partnership activities and their characteristics. The diagnosis will make it possible, in subsequent stages, to formulate a comprehensive strategy that will be appropriate to the needs of the Partnership and to its environment and will provide solutions to the problems identified in the diagnostic stage.

The **diagnostic process** is carried out by a professional who **interviews** and/or holds **focus groups** with key figures in the Partnership. A **key factor** in the success of the diagnosis is the honesty of the partners providing information. Therefore, the professional should be particularly careful in adhering to the rules of ethics (both in appearance and in practice).

Use can be made of a number of tools in the diagnostic process. The manner and extent in which the various tools are put to use will be determined according to the recommendation of the professional who is accompanying the process and together with the Partnership Director and the representative of the Partnership Unit.

- **In-depth personal interviews:** Position holders in the Partnership region and in the partner community, prominent volunteers, key figures in the partner community and the Jewish Agency, etc.

- **Questionnaires:** Specific questions that require a statistical analysis beyond an analysis of the answers themselves (for example, analysis of positions on a particular issue, satisfaction with an activity, etc.).

- **Focus groups:** With position holders in the Partnership, volunteers, program participants, etc. These groups are usually organized to complement the interview and questionnaires stages when necessary.

- **Observations:** If possible, this will involve participation in a meeting of the joint steering committee, the Israeli steering committee, a subcommittee, etc.

- **Reviews of existing sources of information:** for example, a summary of a previous planning processes, minutes of the joint steering committee meetings, the Partnership's work plan, project cards, budgets, etc.

Example set of questions for diagnosing the Partnership:

a. What are the strong points of the Partnership / what are its main achievements until now?

b. What are the weak points of the Partnership / what are the main failures in the functioning of the Partnership?

c. If you had a "magic wand" what are three things you would change in the Partnership?

d. Can you relate a success story of the Partnership and how that success was achieved?

e. Who are the main groups of interest that influence the Partnership / what are their expectations of the Partnership?

f. What are the expectations of the strategic planning process?

g. How does the Partnership advance the vision of the Federation and the local community?

IDENTIFYING THE CORE COMPETENCIES OF THE PARTNERSHIP

Research on the issue of strategic management has shown that one of the key differences between more and less successful organizations is in the development and leveraging of unique abilities – this starts with the identification of the core competencies.

Core competencies: These consist of a small number (between 3 and 5) of activities which the Partnership creates added value for the partners and the communities. In these processes, the Partnership must be the "best" (or at least strive to be). These activities are essentially processes that are unique to the Partnership and are difficult to copy. The core competencies are skills or bundles of knowledge and at least one of them must be directly related to understanding the needs of the community and serving them long term. Core competencies are developed over a long period and are usually taken for granted; however they are essentially processes that produce the Partnership's results/achievements.

A core competency is not a project: A successful project is the result of a core competency. A core competency is a process that combines resources (knowledge, time, manpower, budget, motivation, etc.) and a work method (decision making, forums, procedures and reports) in order to achieve some result.

A Partnership that wishes to carry out a strategic planning process must understand and properly manage its core competencies. In order to fulfill its vision, the strategy must be based on the core competencies; otherwise there is no basis (regardless of how good it is) for implementing it (a problem which is encountered in the case of many strategic plans) and there is the danger that the developed vision will have no connection to the actual ability of the Partnership to work towards achieving it. This situation is likely to hurt the motivation of the Partnership in the long run and may hinder the development of personal and staff capabilities.

There should be no confusion between core competencies, core values and organizational capabilities.

Strategy is a Bridge

….Over troubled water…

Tactic   Strategy

Vision   Core Competencies

Future   Past

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Core values: These are fundamental values that guide the activity of the entire Partnership and/or the behavior of every partner in it. The core values do not need to be unique and not necessarily develop over time. Like their name, they relate to shared values that the partners view as directing policy and behavior. A core value relates to a normative realm of "permitted/prohibited" while a core competency refers to the functional area of "you have the capability to…and it is worthwhile." While core values are formulated in the form "do or don't do," core competencies are formulated in terms of ability to implement.

For example:

- Core value: strengthening Jewish identity.

- Core competency: the Partnership develops programs that strengthen Jewish identity.

Organization capability: This represents the integration of the tools, technology, process and knowledge that exists and is created in the Partnership. Organization capabilities are similar to core competencies with one difference: a core competency is unique and by nature are few in number while the Partnership may have many organizational capabilities.

Examples of organizational capabilities of the Partnership:

- Capability to recruit volunteers

- Capability to produce impressive events

- Capability to create a special status in the community

- Fundraising capability

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Example of a Partnership's core competencies:

Core competencies of a Partnership that underwent a strategic planning process:

"The Partnership has the ability to develop…"

a. **Enduring interpersonal relations:** The Partnership has the ability to develop sufficiently strong interpersonal connections such that its people will remain in contact even after completing their official function in the Partnership. These connections make it possible to discuss issues, to bridge over differences of opinion in an open and constructive manner and they advance the projects the Partnership has taken upon itself.

b. **Strengthening and development of the identity of each community in the Partnership:** The Partnership builds, develops and strengthens the identity of each community within it. These identities are expressed in the projects and achievements of the Partnership.

c. **Empowerment:** The Partnership empowers each community in the achievement of its goals and every individual in the Partnership to strive for achievements in areas related to the Partnership's vision.

RENEWAL OF THE PARTNERSHIP'S VISION AND MISSION

VISION

Vision is a short future-oriented declaration (up to one page) that describes how the organization will look in the future, once it has fully realized its potential. The vision expresses the goals that the Partnership strives to achieve in an "ideal" world. The vision is primarily a value-oriented declaration, which expresses the values of the Partnership (the values of the partners themselves: the community abroad, the community in Israel and the Jewish Agency).

MISSION

A mission is a brief but significant "activity-oriented" declaration of the reason for the Partnership's existence. The formulation of the mission is meant to answer the question of "What are we doing? And why?" The formulation of the mission relates to various interested parties (partners, beneficiaries of the activity, etc.) and describes how the Partnership brings value to the public. In this sense, the mission can be included in the vision, but not vice versa.

A good vision that has been implemented is highly important since it provides meaning to the partners, serves as a compass to indicate the direction to strive and also serves as a "boundary marker," i.e., what is within the realm of the Partnership and what is not. Finally, a good vision is able to generate energy among the partners to the benefit the Partnership. Research has shown that a good vision that is well implemented contributes immensely to the organization's efficacy.

Example vision (combined with a mission):

Partnership2Gether (name of city/ regional council / community/ies abroad)

Partnership2Gether seeks to maintain a **global Jewish community** among **four parties**:

- Residents of (**name of the city**).

- Residents of (**name of the regional authority**).

- Members of the Jewish community of (**name of the Jewish community abroad**) and

- Member of the Jewish community in (**name of the city abroad**).

The community will work jointly, will be led by volunteers, will nurture personal connections between its members and will operate out of mutual responsibility.

Partnership2Gether will constitute a living bridge between the Jewish communities in the Diaspora and those in Israel with the goal of advancing the Region and the communities, on a mutual basis, and according to the various needs to be defined by the Partnership. The Partnership will strive to strengthen Jewish identify and ties to the State of Israel.

The Partnership will strive to make decisions through consensus. Each of the Partnership's projects will aim for professional execution, maximizations of resources and objective evaluation.

It is important to emphasize that the vision is the overall goal of the Partnership and thus is meant to be long term-oriented and ambitious, almost impossible to achieve. From the vision will be derived the goals/objectives of the Partnership and they need to be both achievable and measurable.

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