

STRATEGIC PLANNING - INPUT

INTRODUCTION

Strategy is the pattern in a stream of decisions that aims to make a reality the mission and vision of our organisation (Mintzberg). It orients (sets direction), focalises efforts, defines the organisations (it differentiates them and gives them meaning), it gives consistency (reduces ambiguity), and favours action. Developing and strategic plan consists in a process to help us come up with creative, comprehensive and integrated responses so we can fulfil our mission.¹

MAIN IDEAS

There is a lot of literature concerning strategic planning, and there are supporters and opposers to it. This concept that gained strength in the 1960s was first developed to provide institutions a competitive advantage in their sector. Since then the object of strategic planning has shifted, it is not seen as something that provides competitive advantage but which helps improve operations, increase commitment, fosters a strategic consensus, guides action, and helps in fulfilling the mission of the organisation.

Key elements of strategic planning: there are many strategic management schools, each with its concrete proposal². We suggest using the model developed by the experts at ESADE Business School (Parada, Carreras & Vernis), which is based in the model of Johnson & Scholes (1996) that offers an integral response to what we want to achieve. We have also updated the model by including some insights from Fr. Patxi Álvarez SJ and Christina Kheng PhD. The elements in this model are:



INTERIOR KNOWLEDGE & CONTEMP. OF REALITY



CREATIVITY & IMAGINATION



FREEDOM & GENEROSITY



Some questions that might help us in each section are:

STRATEGIC ANALYSIS: Where should we act?

- **External Environment:** What are the main opportunities and threats? What is the evolution of our sector?
- **Culture & Stakeholders:** What is the culture of our organisation? Which are our key groups of interest?
- **Internal Diagnosis:** What are our main strengths and weaknesses? What do we do better than the rest?

STRATEGIC DECISIONS: What strategic priorities should we follow?

- **Options:** Which are our main strategic options? What strategic priorities can we follow?
- **Evaluation:** What is the criteria to evaluate these options?
- **Selection:** Who and how will the decision be made on what priority will be chosen?

IMPLEMENTATION OF THE STRATEGIES: How do we take the strategy to practice?

- **Resources:** Which are the necessary resources and capacities? What would be the organisational structure?
- **Indicators:** What indicators systems will be applied to monitor the plan? Who will do it?*
- **Managing change:** How can we create a sense of urgency? Which are going to be the main resistances?

* During the evaluation of the response some of the areas that we are called to review are:

- **Transformation of the apostolic body:** Spiritual situation
- **Improvement of our faith-justice service:** Apostolic Service
- **Stronger lay groups and committed citizens:** Collaboration

We are invited to do this through an attitude of **gratitude** and **sorrow**

In a business environment we distinguish three levels of strategy, the corporate strategy, the business strategy, and the functional strategy. See the following table:

Management Level	Planning Level	Time Range
Upper	Corporate Strategy - What is the purpose of the organisation?	Long
Middle	Business Strategy - How should we act in our sector so that we can be sustainable?	Middle
Lower	Functional Strategy (Operations, Finances, Marketing, Human Resources, etc.) - How can the different divisions of the organisation aid the previous strategies?	Short

The higher level strategies should guide and inform the lower levels. You need to understand at what level you are working before starting an strategic planning process. Therefore, if you are in charge of the finances, communications, human resources, etc. of your institution, you should have present the highest strategic plan in your organisation in order to adapt to it. For example, if a key priority of your organisation is helping refugees and you are in charge of the communications department, you should see how you will include this priority in the strategic plan of your unit.

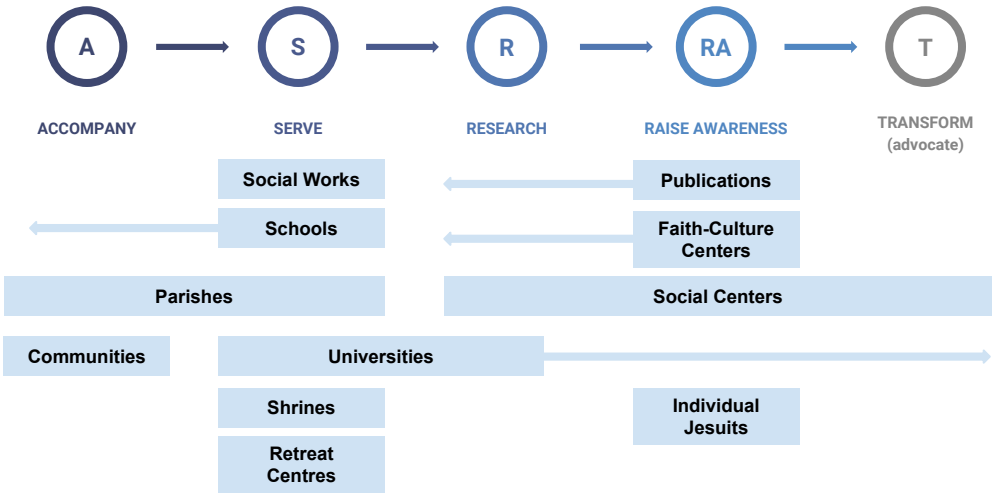
This division is also helpful for the Jesuit context where we could adapt the division to: **Upper Level** - General Congregations & Curia / **Middle Level** - Conferences, Provinces, Institutions / **Lower Level** - Divisions and Departments of the provinces and institutions

IGNATIAN NOTE

In the Society of Jesus, apostolic planning should greatly focus on the collaboration among apostolic works. Fr. Patxi Álvarez de los Mozos SJ former director of the Secretariat for Social Justice and Ecology, designed an interesting model called “**Process of the Mission: at the service of Faith and promotion of Justice**”. This process can help those provinces undergoing an apostolic planning process develop a comprehensive response in the different ministries. In addition, it can help individual institutions and the units in them understand where they fall in this process and help them “think out of the box” on how they can collaborate inside the ignatian family. The elements of the process are:



In what part of the process do institutions and individuals normally fall into?



For more information on “the process of the mission” we invite you to learn more about it through a powerpoint presentation you can find on the website ([link](#)) or through the issue of Promotio Iustitiae N. 120, 2015/4 p. 27-29 ([link](#)).

What Ignatian Characteristics help us in this process? Planning expert Cecilia Martínez suggests some of the following:

Characteristic	Explanation
Self-Knowledge	To foster personal development To attain internal and external freedom
Integrity, Honesty (mission)	Firm adherence to Ignatian values Seeing apostolic work as an agent for social transformation
Sense of belonging to an apostolic body	Responding together to the mission Solidarity among us
Contemplation of Reality - Study	To identify the signs of times To build partnership with other agents
Passion for a future full of life for all (mission)	Desire rather than goals and commitment rather compliance Providing a sense of discovery, direction and destiny
Magis - Creativity - Wisdom	Dreaming as well as analysing Listening more often than speaking Engage in Spiritual - Strategic Conversation To perceive and evaluate consequences of behaviour

Corporate Leadership	Imagining future with others; not alone Promoting leading bodies
Enact shared narrative (role, identity, values)	Engage staff and volunteers Promote participation Accompaniment and formation
Generate Apostolic Communities	Creating committed communities of shared purpose
Planning, Follow-up, and Evaluation	Internal processes: Identity and values permeate services, practices and behaviours. Evaluate contribution to society Discernment and decision making
Accountability	Ignatian Audit

The link between discernment and planning

“The positive tension between discernment in common and apostolic planning requires, according to the Ignatian vision, a spiritual examen of what we have experienced, so that we continually grow in fidelity to the will of God. Therefore, a systematic evaluation of our apostolates is not sufficient. We must supplement that systematic evaluation with the spiritual perspective of the examen, a practice by which Ignatius invites us to recognize the action of God in history, to be grateful for his gifts, to beg pardon for our failure to measure up, and to ask for the grace to be ever better collaborators in God’s work in the world.”

Fr. Arturo Sosa SJ - On Discernment in Common 2017/11

EXPECTED LEARNINGS AND OUTCOMES

1. Understanding strategic planning and the elements that constitute it
2. Creating an strategic plan for your unit/organisation
3. Learning about the different levels of strategy and the process of mission

“If one does not know to which port one is sailing, no wind is favorable”

Seneca

[1] In Ignatian circles we talk about apostolic planning instead of strategic planning to refer to the ways of proceeding of Jesus and the apostles. There are several differences to take into account between both concepts but for now we will use them interchangeably.

[2] See Mintzberg (1990) - Nine Schools of thought in Strategic Management