



Strategic Planning Guideline for National Society





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Executive Summary

National Societies operate in fast-changing environments. Some changes are sudden, others are gradual. Some are small and incremental, others disruptive and transformational – but all affect how National Societies meet the changing needs and deliver on its mandates, and manage their resources.

Strategic thinking and strategic planning help National Societies stay focused, make better decisions, and adapt to future challenges.

- Strategic Planning is a structured process to set medium and long-term direction and define priorities.
- It results in a Strategic Plan – a shared vision and set of goals that guide the National Society’s development and humanitarian work.
- Strategic thinking is broader – it is a mindset and daily practice that helps leaders and teams make choices aligned with long-term goals, even during crises. This capacity is often needed to navigate unexpected events and change what the organisation is doing and how it operates.

Without this kind of thinking and planning, National Societies risk making short-term decisions that damage their long-term sustainability and relevance.

This National Society Strategic Planning Guideline is based on the experiences of 41 National Societies. It highlights common challenges and provides practical advice, tools, and case examples. It supports National Societies to lead inclusive, realistic, and purpose-driven strategic planning processes.



The guideline outlines a basic strategic planning process and highlights areas that National Societies have found most challenging, based on interviews and shared experiences.

- Strategic planning is a scheduled process of shared strategic thinking involving people inside and outside the National Society. It offers a moment to collectively step back, review what the organisation is trying to achieve, reflect on how things are done, and identify what needs to change to become more effective.
- It is not just about setting priorities and direction – it is also an opportunity to strengthen dialogue, build internal cohesion, and engage the wider organisation in shaping its future.
- When done well, the process can unify leadership and staff around common goals and clearly communicate purpose and direction to external partners. National Societies that foster shared long-term thinking and collaboration – both internally and with external stakeholders – are generally better prepared to face future uncertainties and crises.

This guideline is built around common issues identified by National Societies and is structured along a typical strategic planning cycle. However, the ideas and tools are also useful for any National Society looking to strengthen strategic thinking at any stage of the strategic planning cycle.

“ The result of our first strategic planning exercise helped us identify a new area of work with social inclusion. This is today a very important domain for the National Society. In the second one, climate change came out. It is today central to our way of working. ”


“ Myanmar Red Cross Society developed a strategic plan to better define our long-term goals, enhance decision-making and improve resource allocation. ”
– Director, Organisational Development Department, Myanmar Red Cross Society

“ We should strive to create a culture in which we recognize strategy as being about choices and focus. It is about setting a direction and sticking to it. ”
– Under-Secretary General, Lebanese Red Cross

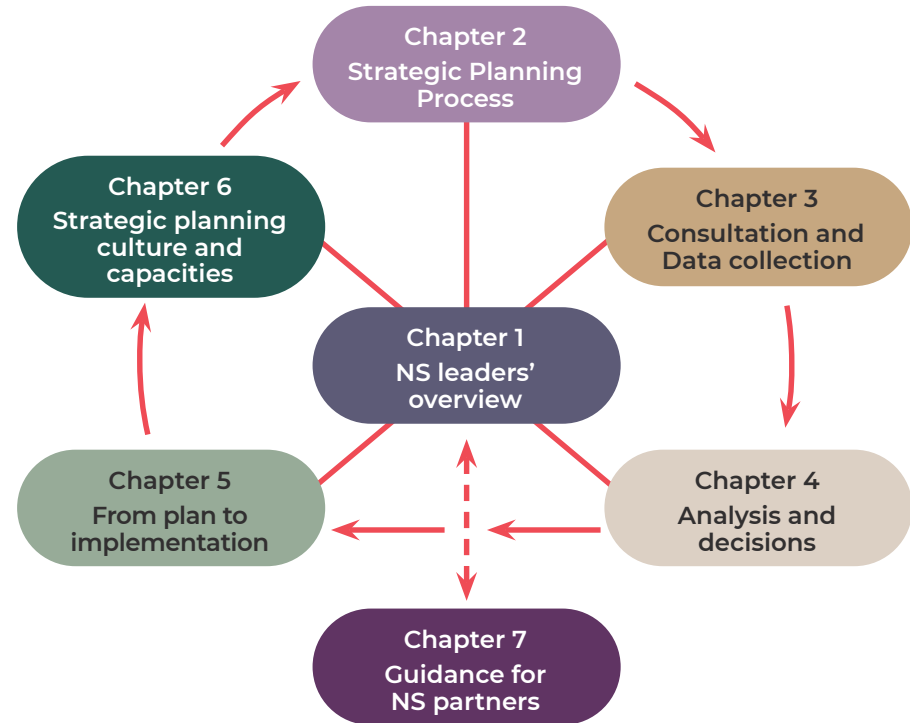
How to use the guideline

Who is this guideline for, and how is it structured?

This guideline is intended for **National Society leaders, technical staff**, and **partners** involved in strategic planning. It is organised around seven chapters that follow the Strategic Planning cycle – from preparation and consultation to implementation. Each chapter includes tools, examples, and case stories that can be adapted to different contexts. While the entire guideline may be useful, different chapters will be especially relevant depending on your role:

 Access the Strategic Planning toolkits from [here](#).

	Audience	Relevant chapters
National Society Leaders	Responsible for setting direction and making strategic decisions – from defining the parameters of the planning process to deciding what the organisation will or will not do in the future. The guideline highlights key choices and includes examples of how others have approached them.	<ul style="list-style-type: none"> • Chapter 1: High-level overview of strategic planning • Chapter 4: Leadership roles in decision-making and signing off the Strategic Plan • Chapter 6: Approaches to strengthen overall capacity and culture for strategic thinking.
National Society technical staff	who support and coordinate the strategic planning process, including preparing, implementing and following up. It offers ideas, tools, and examples to support design and implement effective processes.	<ul style="list-style-type: none"> • Chapters 1–6: All chapters are relevant for staff responsible for proposing processes, and supporting leaders to make decisions for Strategic Plans.
Partners	including peer National Societies and Movement actors who may offer financial, technical, or strategic support.	<ul style="list-style-type: none"> • Chapter 7: How partners can support effectively



Navigating the guideline

This guideline is not a step-by-step manual. Each National Society has different needs depending on its context, capacity, and experience. The content is meant to inform and inspire – not prescribe.

It can be used at any point in Strategic Planning – whether you are just starting to explore the need for a strategy, designing a process, or reviewing implementation. Not every chapter will be equally relevant at every stage, so it's helpful to focus on what is most useful for your current situation.

A good starting point is to:

- **Reflect on what the National Society needs from strategic thinking and planning at this moment;**
- **Scan the guideline to identify the most relevant sections;**
- Use those to **define key questions or draft a process outline for discussion** with senior management or the Board.
- It is also strongly recommended **to think through their own capacity**, reach out to peers and IFRC support structures to learn from others' experiences.
- Whether starting for the first time or looking to strengthen existing practice, learning from what others have done – and how they've done it – is one of the most effective ways to enhance your own approach.



Definition used across the guideline

To support clarity and consistency, the following terms are used throughout the guideline:

Plans and Planning	
Strategic thinking	Ongoing process of reflection and decision-making that aligns day-to-day actions with long- and medium-term goals. It is the mindset and capacity that underpins effective strategic planning.
Strategic planning	<p>A collective process to think through how the National Society should evolve over time. It brings together people and perspectives across the organisation to define future direction and priorities.</p> <p>It is the main tool for leadership to shape the future of the organisation and guide its overall development.</p>
Strategic plan	<p>The outcome of the strategic planning process – a document that defines a shared vision and direction, outlines key priorities and guides both operational and developmental plans and decision-making.</p> <p>It creates alignment across the National Society and is the key reference document for Movement and non-Movement partners seeking to support and or engage with the organisation.</p>
Operational plan	A short-term (typically annual) plan and budget that translates strategic priorities into concrete activities. Often developed by departments and branches, then consolidated at the national level.
National Society Development (NSD) plan	A plan that typically turns organisational priorities identified in a strategic plan into a series of activities.

Data collection methodologies	
Survey	A structured tool to gather insights from individuals or groups. Can be used internally or with communities and partners.
Focus group	A small, facilitated group discussion among of diverse participants, to explore perceptions, experiences, or needs in depth on a specific topic. It helps gather opinions and potential solutions around a particular theme.

Organisational structure	
Red Cross Red Crescent Branches	An organisational entity, which serve as a neutral space offered to community members to self organise, facilitate volunteering opportunities to deliver humanitarian assistance, enhance community resilience, and create a platform to mobilise local support. (Source: Branch Development framework)
A project	A time-bound set of coordinated activities aimed at achieving specific objectives within defined time, cost and performance parameters.
A programme	A coordinated group of projects implemented to meet broader objectives.
A service	A long-term activity, delivered and resourced sustainably, and for which the National Society is accountable to its members and to its constituency.

Chapter 1

Strategic planning – a leader's overview

Strategic thinking and strategic planning are essential leadership tools that help National Societies respond to immediate humanitarian needs while also preparing for the future. They support adaptation in a changing world and are a core responsibility of leadership at all levels of the National Society.

This chapter is designed for National Society leadership as an audience, and introduces the concepts of strategic thinking and planning, explaining how they work together to guide long-term direction, strengthen decision-making, and build resilience.

1.1. Strategic Thinking: A leadership mindset

Strategic thinking is the ongoing capacity to reflect on long-term goals while making everyday decisions. It allows National Society leaders and teams to stay focused on their mission while adapting to a changing environment.

This mindset becomes especially critical during unexpected events – such as natural disasters, political upheaval, or sudden funding opportunities – when decisions must be made quickly but still align with the organisation’s long-term direction.

When leaders think strategically, they help ensure that short-term choices don’t undermine long-term sustainability. This way of thinking supports the development of the National Society across all areas – from services and staffing to positioning and partnerships.

Many National Societies stress the importance of building a **culture of strategic thinking**: an environment **which empowers and encourages people across the National Society, but particularly leaders, to think strategically.**



Five suggestions for how National Society leadership can promote this culture are explored in **Chapter 6: Building long-term culture and capacities for strategic planning.**

“ Myanmar Red Cross Society RCS developed a strategic plan to better define our long-term goals, enhance decision-making and improve resource allocation.
– Director, Organisational Development Department, Myanmar Red Cross Society ”

1.2. Strategic Planning: turning thinking into action

Strategic planning puts strategic thinking into practice. It is a structured process of shared strategic thinking where it involves stakeholders inside and outside a National Society to shape its future direction and define long-term priorities.

It is a moment to:

- Collectively **step back**, look again at what the organisation is trying to achieve, reflect on current performance, and identify what needs to change to become more effective.
- Involves looking at both **service delivery** and the **internal development** needed to sustain those services. This includes areas such as structure, systems, resource mobilisation, and external positioning.
- Define where your **priorities** are and **set directions**.

Identifying priorities and setting direction, the process is a vital opportunity to:

- Promote dialogue across departments, branches, and governance
- Strengthen cohesion and shared ownership within the organisation
- Communicate purpose and direction to external partners

The outcome is a strategic plan: a shared vision and institutional roadmap that connects long-term goals with the means to achieve them. A well-run process not only clarifies where the National Society wants to go, but also helps unite people around how to get there.



Tools

For National Society leaders:

- [How good are we at strategic thinking?](#)
- [What is and What is not a Strategic plan?](#)
- [Do we need a Strategic Planning Process?](#)
- [Link: IFRC Strategy 2030](#)
- [How to relate to S2030 during a Strategic Planning Process](#)
- [What do we want from a Strategic Planning Process?](#)
- [What is the partnership architecture of your National Society?](#)

When might capacity for strategic thinking be helpful?

National Societies are faced with regular strategic decisions that do not coincide with the strategic planning cycle. Examples of when strategic thinking capacity is relevant include:

- In shaping major humanitarian responses
- In entering into significant new partnerships
- In identifying critical organisational changes
- In closing or opening new services
- In revising the engagement with public authorities.

Different types of strategy

Although National Societies go through similar strategic planning processes, strategic plans can have very different purposes and contents, depending on the context and the needs of a National Society at any given point. For example:

- A transition strategy sets out a programme of major change within the National Society;
- A consolidation strategy focuses on strengthening what already exists;
- A strategy of managed downsizing reduces National Society commitments in a managed way;
- An expansion strategy assumes the National Society will grow what it is doing and its resource base.

Why is strategic thinking and planning so important for National Societies?

Strategic planning requires reflection on what the National Society will do, and how it will do it, and the relationship between these things. National Societies that do not regularly ask critical questions about their current and future operations and organisational development risk failing to adapt to changing environments, becoming less relevant in their domestic context, and struggling to inspire volunteers, members and potential partners to give their support.

Those that foster a culture of shared, long-term strategic thinking – and that collaborate internally and externally – are typically better equipped to navigate uncertainty and respond effectively to unexpected crises.

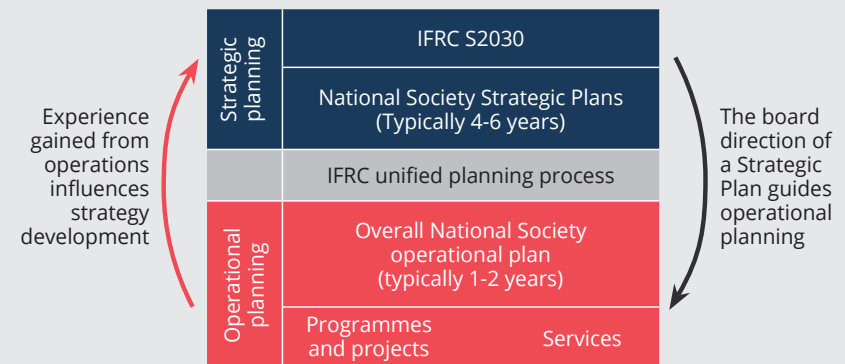
Relating IFRC Strategy 2030 to a National Society strategic plan

IFRC Strategy 2030 presents a framework of:

- Three overall goals for the IFRC network,
- Five global challenges facing all or most IFRC network members, and
- Seven transformations which are likely to be essential for the network to respond to these challenges.

S2030 is a culmination of the collective vision and priorities of the IFRC network. But it is important that each National Society contextualizes these and bases its own strategic plan on its own humanitarian context and National Society resources, capacities and priorities.

“ For Swedish Red Cross, IFRC Strategy 2030 was a useful inspiration to re-look at our work around Climate Change and how we were digitalising the National Society. ”
– Organisational Developer, Swedish Red Cross



1.3. Elements of strategic planning

The strategic planning process can be thought of as a leadership journey, structured around three essential questions:

1. Where are we now?

Understand and reflect on the National Society's current humanitarian impact, strengths and weaknesses, and the key events and decisions that have led to National Society's current state. This includes comparing what happened as the National Society implemented its previous strategic plan (if any) with what it thought would happen, and learning from this experience as a basis for future strategic planning.

2. Where do we want to go?

Think through what the future could look like, discuss the future the National Society wants and reflect on what it needs to do to better prepare for and bring about that future.

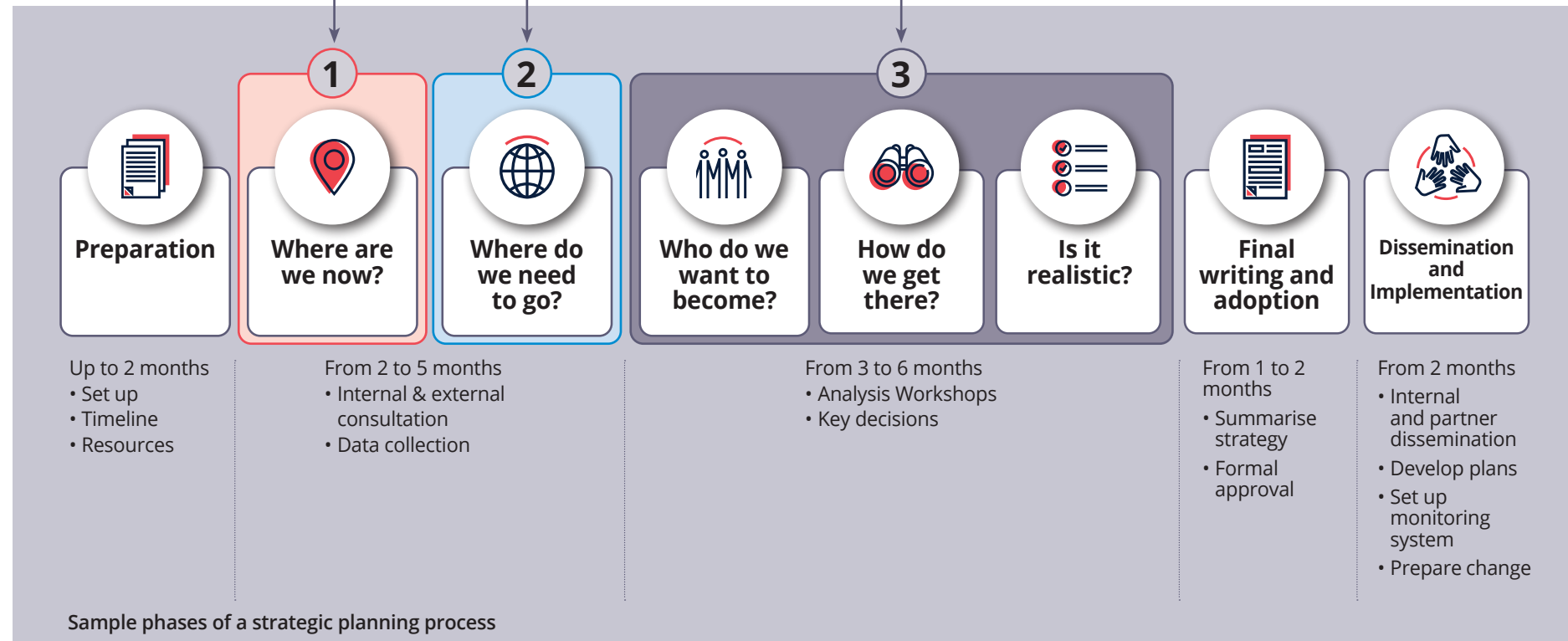
3. How will we get there?

Define priorities that will prepare the National Society to address future humanitarian needs with the resources it will realistically be able to mobilise.

Each phase requires strong leadership, inclusive consultation, and open dialogue across the National Society. These three questions also shape the structure of this guideline.



We explore this further in [Chapter 2: Developing a strategic planning process](#)



1.4. Designing a participatory process

The way a National Society carries out its strategic planning process will depend on its goals, resources, and context. But one principle applies across is: **the process should be participatory**. The final strategic plan should **result from a collective strategic thinking process, building on the participation of multiple stakeholders from within and outside the National Society**.

Why is it important?

Involving multiple stakeholders

- Brings in different perspectives and experiences
- Helps analyse internal and external trends and draw these into the collective strategic thinking;
- Increases the chances that stakeholders who may be asked to contribute their time or resources to implementing the final plan feel that they have been able to contribute to, and have some level of ownership over the plan
- Encourages commitment to implementation

Participation is not just about collecting input — it's about opportunity to create alignment across the National Society and build capacity to work and think strategically together

The role of leadership

The primary role of leadership is to create the conditions for inclusive, open dialogue.

This includes:

- Setting expectations for participation
- Foster an environment in which individuals can share viewpoints and feel connected to what is being discussed,
- Encouraging open, critical conversations
- Ensuring the process is transparent, focused, and related to real challenges

What timeframe makes sense for a strategic plan?

There is no fixed rule for how long a strategic plan should last. The right timeframe depends on the National Society's context, stability, and purpose for the plan.

While in the past National Society strategic plans tended towards timeframes of 5-10 years, the trend is for strategic plans to be of shorter timeframes of 4-6 years. This encourages National Societies to reflect more regularly on their strategic goals and adapt and align themselves more regularly to changing external environments.

Key factors to consider

- **Context and stability:** In more stable environments, a plan may last 4–6 years. In fragile or rapidly changing situations — such as during major emergencies — a shorter timeframe of 2–4 years maybe more practical.
- **Need for adaptability:** Shorter planning periods encourage regular reflection and adjustment. They can help National Societies stay aligned with fast-changing external realities.
- **Internal considerations:** Governance election cycles, donor expectations, or planning cycle of government or critical partner may influence the timeframe.

Whatever the timeframe chosen, it is important for the National Society to schedule regular strategic plan reviews to adapt the strategic plan to the changing National Society environment.

“ The process we employed was very participatory and iterative involving both management and governance, across the organisation from branches to regions to the HQ. This ensured comprehensive input and facilitated more ownership of the strategic plan that was developed.
– Former Deputy Secretary General, Kenya Red Cross Society ”

1.5. Process: Where are we now?

This element of strategic planning will involve defining questions that help the National Society to better understand itself and the environment in which it operates, and collecting data on the National Society's current situation from inside and outside the organisation.

Some assessments of National Society strengths and weaknesses may already exist such as:

- analysis of annual accounts – it will give a picture of the National Society's financial situation;
- recent programme evaluation,
- or completed an OCA(C) self-evaluation, or be in the process of supporting branches to self-assess.
- collected information on how many people it is reaching through services it can resource itself, as well as with the support of partners.

Other data relevant to the National Society will need to be collected through internal processes, such as:

- a mid or end-term evaluation of previous strategic plan implementation
- researching external sources
- gathering perspectives and opinions from within the National Society as well as from its partners and peers, and the communities it serves.



Tools

– [Challenging questions for National Society leadership](#)



More explanation can be found in **Chapter 3: Asking good questions, gathering useful data**

“ During the strategic planning process, we discussed how the domestic situation in Sweden had changed, with greater humanitarian needs, and a general political shift away from support to immigrants and refugees. We realised that our members were people who wanted to take action and speak out about these issues: if we were silent and did not advocate in these areas, we were at risk of being seen as a government agency, and losing our members' support. ”

– Organisational Developer, Swedish Red Cross

1.6. Process: Where do we need to go?

This element of strategic planning discusses how the National Society imagines the future and its own future role. There are a variety of structural approaches to exploring the future, and helping the National Society to explore questions such as:

- [How is the National Society's environment changing?](#)
- [What humanitarian needs are emerging from communities?](#)
- [How is volunteering changing, or the National Society's partnerships with its public authorities?](#)

There may be existing trends that are likely to continue and have implications for how the National Society wants to evolve.

The National Society may also identify risks or opportunities that might not happen, but would have profound implications for what it should include in its strategic plan.

When thinking about the future there's no right answer. What is important for strategic planning is that the National Society takes time to think through what priorities it will address in the future, and what it can do to make itself as able to adapt to the future as possible.

It is the discussion and analysis that is important: what actions over the timeframe of the strategic plan will give the National Society the best chance of being more effective and minimising its risks, no matter how the future takes shape?



Tools

- Link: [The-Strategic-Foresight-Book](#)
- [Mapping of future tools and relevant links](#)

“ The economic situation is now worse than during the conflict, with 16.7 million people needing humanitarian support. Many parts of the community are affected. SARC is seen as one of the most reliable humanitarian actors – but we do not have resources to do everything, and some activities for instance, provision of water to 80% of the population are not tasks which the Red Crescent should carry out in the long-term. So we need to ask: which services can we stop, and how do we phase them out without harming our reputation? These are the kinds of challenges that make a strategy essential. ”

– NSD and Strategic Planning Unit Manager, Syrian Arab Red Crescent

1.7. From data to analysis

Data on their own are however not enough. The key to strategic planning is in building a bigger picture of the National Society, its environment and its needs through analysis. For instance:

- How does the National Society's relationship with local authorities affect its capacity to access and support local communities?
- Does the image of the National Society inspire people to become members and volunteers?
- Are these services the National Society is offering the most relevant?

This kind of analysis helps clarify **why certain challenges exist**, and **what is changing in the world around the National Society**.

Most importantly, this should be a **shared conversation** – not an exercise owned by a small group. Involving people from across the National Society helps build cohesion, trust, and stronger ownership of the strategy..



Tools

– Link: [Digital Transformation resources](#)



Data analysis during strategic planning processes is explored further in the **Chapter 4: Analysing data and making decisions**

The opportunities and limitations of Artificial Intelligence

Artificial Intelligence (AI) offers opportunities to automate certain tasks in strategic planning, freeing up resources for work that requires human input.

AI tools are evolving quickly, and while their full potential is still emerging, it's important not to assume they can solve every problem or replace tasks that require human insight.

AI is generally useful for:

- Carrying out data collection
- Summarising information (e.g. who is doing what in a specific field)
- Transcribing recordings of meetings or survey responses
- Synthesising data to create summary background documents
- Helping writing indicators for the implementation monitoring framework
- Supporting monitoring processes. For example, analysing a range of data to identify evidence for progress towards targets.

AI is less effective when:

- Judgement, experience, or political sensitivity is needed
- Multiple factors must be weighed and / or have a political dimensions considered
- Reflect questions for which a standardised response is not appropriate.

AI is also unlikely to build a sense of understanding and ownership of strategic priorities – these come from participatory processes that connect volunteers, members and staff to the strategy. Any computer-generated outputs should be checked by a person to ensure they align with Red Cross Red Crescent values, language, and context.



1.8. Defining strategic priorities

A **strategic priority** is a critical area of action that a National Society must focus on to reach its humanitarian goals. It may relate to programmes, organisational strengthening resource mobilisation, or positioning — and often requires change or growth.

Priorities should be **ambitious but realistic**. Even when everything feels urgent, some issues matter more — such as responding to critical needs or addressing major risks to the National Society. Focusing on what matters most increases the likelihood of success.

There is often a temptation to list every activity as a priority. But if everything is a priority, leadership may struggle to focus — and available resources will be spread too thin to make meaningful progress.

The National Society must **consider what resources it can realistically mobilised both internally and externally** over the strategic plan period. A strategic plan filled with un-resourced ambitions is less likely to inspire confidence — internally or with partners. Donors are more likely to support plans that are focused, realistic and have clarity how the National Society plans to drive the process.

Defining priorities is likely to be a negotiation within the National Society. This is the point at which National Society leadership will need to make potentially difficult decisions about what the National Society will do.

Particularly difficult decisions include those:

- That impact the scope of programs and services (for example shutting down a service)
- That affect resource allocation between different parts of the National Society;
- That involve restructuring activities or structures;
- That involve new or different partnerships;
- That involve balancing ambition with what the National Society can realistically achieve.

“ If you do not make choices, you cannot use the Strategic Plan as a decision-making tool as it should be. Your strategy needs to be able to convey what it is you do not do, not just what you intend to do.

– Under-Secretary General, Lebanese Red Cross



Defining a vision for the strategic plan

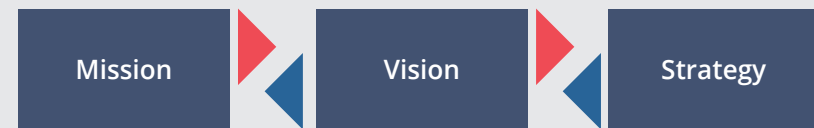
Strategic planning builds on National Society's **mandate and mission**, and can also be a moment to revisit or update them — especially if a statutes revision is underway.

A **vision** describes where the National Society wants to be by the end of the strategic plan period. It reflects the difference the National Society hopes to make for communities and is shaped by future trends and expected changes.

The vision for a strategic plan should be **aspirational but realistic** — bold enough to inspire, yet grounded enough to guide action.

A **clear and simple slogan** can help make the vision memorable and communicate it easily across the National Society and to partners.

If the mission or vision isn't already defined, the strategic planning process is a good time to create them.



Tools

- [Link: National Society Statutes Guidelines](#)
- [A time travel exercise for vision and mission setting](#)
- [The visioning exercise for drafting a vision statement](#)
- [Mission statement and Vision exercise](#)
- [Key external resources for writing mission and vision statements](#)



Decision-making during strategic planning processes is explored further in **Chapter 4: Analysing data and making decisions**

1.9. Finalising and approving the strategic plan

Once priorities are defined, National Societies often **share the strategic priorities** internally and with partners. Clear and appealing communication tools with the right level of details help make the plan accessible and engaging.

The strategic plan is usually **approved by the Governing Board**, and sometimes the General Assembly, before operational plans are developed and describing how branches and departments will put the Strategic Plan into practice.

Before approval, leadership should:

- **Ensure that the plan is realistic**, bearing in mind the resources that the National Society has, or is likely to be able to attract. Resources are not just financial, but include leadership, staff and volunteer time and knowledge. Creating a strategic plan that is unrealistic is likely to reduce a National Society's credibility with its partners, as well as causing confusion within the National Society.
- **Support alignment:** • Ensure that branches and departments can coordinate their efforts to achieve shared strategic goals.



Tools

– [Who is our Strategic Plan for and what do we want them to do with it?](#)



More explanation and tools can be found in [Chapter 4: Analysing data and making decisions](#)

“ Our structured approach to strategy implementation includes a strategic group, a Movement coordination group, and the PMER department. This gives us a clear system with defined roles and responsibilities. Each department has an action plan linked to strategic outcomes and indicators, and takes part in technical groups. Resources are allocated based on alignment with the strategy. This approach has clearly improved our ability to deliver results.

– Acting Executive Director, Yemen Red Crescent Society

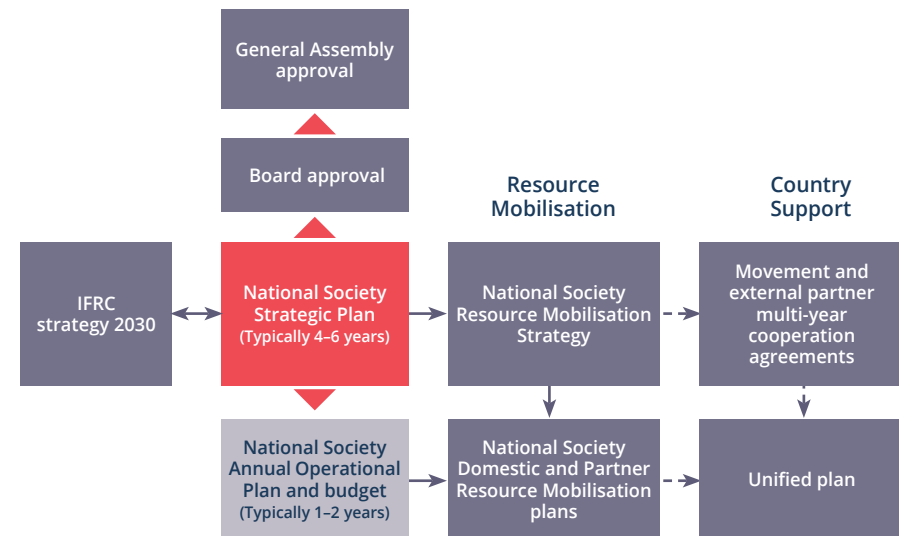


1.10. From approval to implementation

Formal approval is the beginning. It's the moment to **communicate the plan, inspire people** and start shifting how people work across the National Society.

Turning strategy into action requires **putting in place approaches to follow implementation and facilitate feedback** for ongoing adaptation based on learning and changes in the organisation and its context. This typically involves National Society leadership in overseeing operational planning and implementation progress, potentially approving any changes in the strategic plan.

National Society planning architecture



Tools

– [Assessing National Society planning architecture](#)



The themes of communicating and implementing a strategic plan within the National Society are explored in [Chapter 5: From Plan to implementation](#)

Strategic plans and operational plans

A strategic plan contains the high level priorities a National Society wants to achieve, in most cases for a time period of 4-6 years. But this does not describe the detail of what a National Society will do each year. For this, most National Societies have annual operational plans and budgets.

A strategic plan will usually contain:

- A high level vision for where the National Society will be at the end of the strategic planning period
- 3-5 high-level goals the National Society is trying to achieve, for example:
 - Contribute to the health and well-being of the population
 - Become more financially self-sustaining
- 3-5 priorities that are critical to achieving each high-level goal, for example:
 - Reduce malaria deaths in the country by 2%
 - Increase locally generated income by 20%

Priorities should be described in a way that makes it possible to collect data to measure whether they have been achieved.

- Main activities
 - Any important activities that can already be identified as critical to achieving the priorities, especially activities that the National Society has not carried out before, or involve changing ways of working. While it's tempting to include every activity the National Society will carry out, too much detail can make the strategic plan heavy and difficult to read. This level of detail is better contained in the operational plan.

An operational plan takes the priorities of the strategic plan and turns these into activities, indicators and budget, usually for a twelve month period.

1.11. Adaptive planning and leadership

No strategic plan can predict the future. A strategic plan is a framework for what a National Society would like to do in the most likely circumstances.

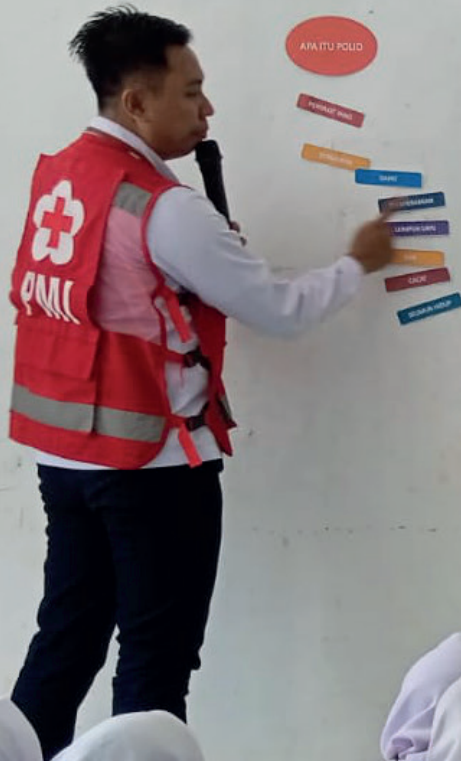
Leadership's role is to ensure that the National Society continues to adapt to its changing environment, and to keep checking that the strategic plan is still relevant.

Most adjustments will be minor and reflected in annual operational plans rather than in the Strategic Plan. In some cases, aspects of the strategic plan may need to be changed, or even a new plan developed, for instance in response to a major humanitarian crisis.

“ No plan will ever be implemented as it is. The problem comes when the focus is more on why we have deserted from the plan or what was planned to do than the result of a change of course or the impacts we are having. ”



Chapter 2



Designing a strategic planning process

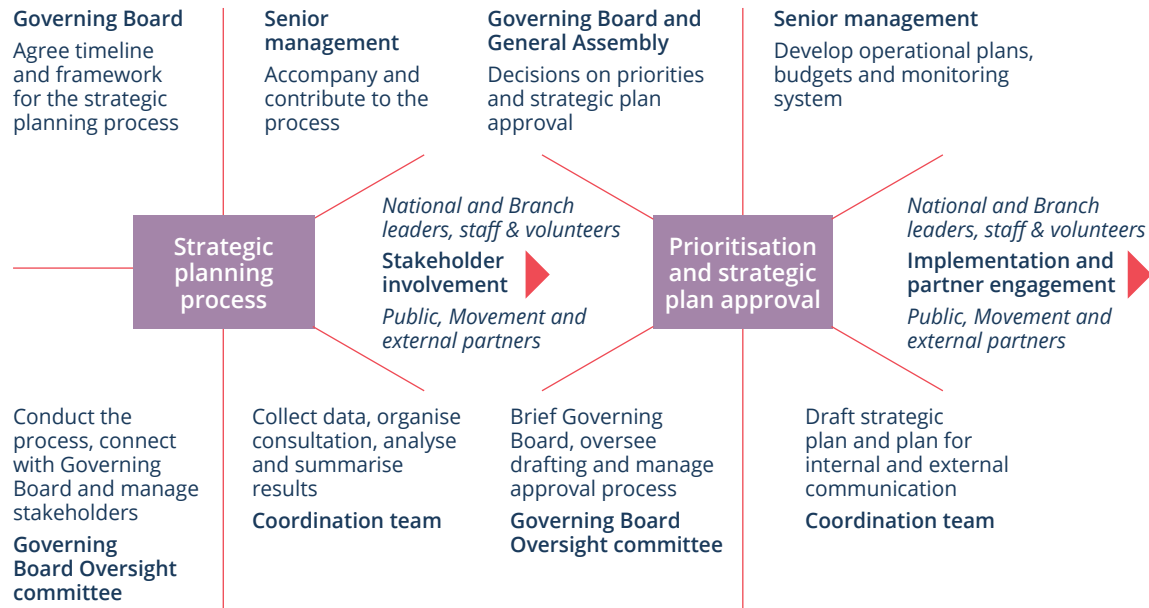
National Societies approach strategic planning in different ways. Their process depends on factors such as the humanitarian context, available resources, and development of the National Society. These variables influence both how strategic planning is carried out and what is included in the final plan.

This chapter outlines key elements that help design a strategic planning process that fits the National Society's specific context — ensuring the process is purposeful, inclusive, and well-structured from the start.

2.1. Importance of ownership and leadership role

Volunteers, members and staff across a National Society feeling ownership of a strategic plan is critical if it is to be understood and implemented over time. It is the role of National Society leadership to inspire and encourage all parts of the National Society to engage with both the strategic planning process and the finalised strategic plan.

Responsibilities of different organisational levels during the strategic planning process



National Society leaders need to decide on key aspects of the strategic planning process, such as:

- Define the roles and responsibilities of participants in the strategic planning process
- Agree on the timing and duration of the strategic planning process
- Design the process
- Make a plan and budget for the process
- Monitor the development of the process
- Develop effective feedback mechanisms.

An important first step will be to define a structure to lead and coordinate the strategic planning process.



Identifying a coordination team

Every strategic planning process needs a **core team** to lead the work, manage tasks, and support decision-making.

A basic team often includes:

A senior manager	with management accountability for the process, dedicating at least 20% of their time to overseeing the process and liaising with National Society governance as necessary;
A manager	who will expect to dedicate at least 80% of their time to the process, with administrative and possibly technical support from colleagues;
A branch leader	with capacity to dedicate at least 20% of their time, and able to liaise with other branch representatives when required.

The team size depends on the National Society's resources and needs. Larger Societies often involve senior leadership, such as an under-secretary general.

It is important to have a **diverse and inclusive team** and to ensure **branch voices early** so the process is not seen as driven only by headquarters.

Throughout the strategic planning process, the **senior management team will provide a level of accompaniment** to ensure that the coordination team can achieve its goals in an effective and timely manner.

“ It was important to involve branch leaders not only to capture their diverse views, but also to facilitate consultations and data collection. We created working groups where they played an active role. The commitment and presence of National Society leadership was key — it showed the importance of the process and helped ensure broad participation.

– National Coordinator of Management and Planning,
Argentine Red Cross

Constituting a Governing Board oversight committee

At Governing Board level, it is recommended to constitute a small committee to oversee the process, or to assign oversight of the strategic planning process to an existing committee. It would be important to ensure that the roles of coordination team, team members, and governing board oversight committee are defined at the start of the process to avoid confusion or conflict.

Sample task division between Governing Board oversight committee and coordination team

Governing Board oversight committee	Strategic planning coordination team
<ul style="list-style-type: none"> Identifies what the National Society wants to achieve with the strategic planning process Sets objectives and duration of the strategic planning process Guides the coordination team throughout the process Reviews analysis Participates in workshops Reports progress to Governing Board, and ensures early themes and decisions are debated by the Board Shares strategic planning process with partners, IFRC, ICRC and government Reviews draft Strategic Plan and submits the final document for approval 	<ul style="list-style-type: none"> Identifies methodologies that will be used during the process Recruits and manages facilitators and consultants (if needed) Identifies and invites stakeholders to be involved in consultations Mobilises resources required Organises field trips, meetings, and workshops Analyzes, synthesizes and shares the results of research and consultations Drafts and revises the Strategic Plan and shares for feedback Brings issues requiring decision making to attention of Governing Board

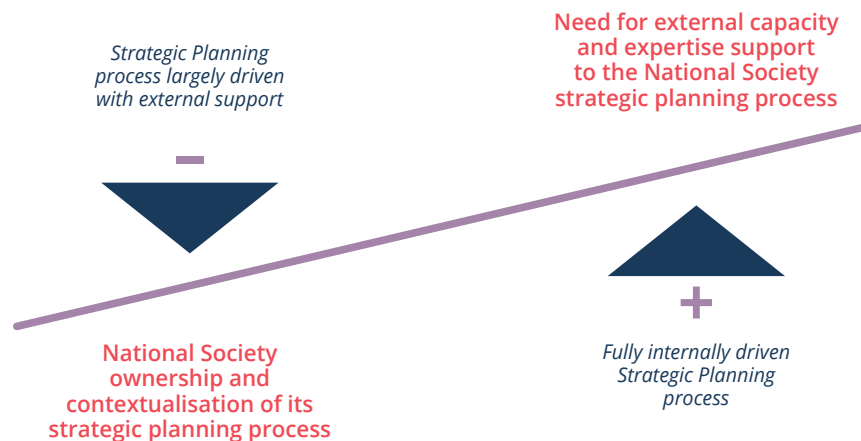
Mobilising external support

Some National Societies may decide to mobilise external support for their strategic planning process at an early stage. This might involve consultancy support, or support from peer National Societies, or other Movement or non-Movement partners.

Support from peers can be a valuable source of practical 'how to' knowledge and experience, reinforce a National Society's planning capacities and create new linkages between peer National Societies.

However, as in any partnership, if poorly managed external support can also reduce ownership within National Societies and create potentially unworkable plans.

How to find the right model based on the situation of each National Society?



Tools

- Involving a partner in a Strategic Planning process
- Contracting a consultant to support a strategic planning process
- Link: [IFRC NSD compact](#)

The role of consultants

A number of National Societies interviewed used consultants to support the strategic planning process. Some had good, and some had less good experiences. The approach could be effective if the consultant brought in new skills, and remained an adviser to the National Society which kept ownership over the process and its results. The key learning shared by National Societies is that it is crucial that the NS is fully engaged and leads the process whilst the consultant plays a facilitatory role.

In some cases, the consultant was expected to draft a strategy with limited understanding of the National Society and limited input from the National Society. In these cases, National Societies reported receiving strategic plans that did not address their concerns, and for which they felt little or no ownership.

The advice is to use consultants to:

- Advise the coordination team on process
- Bring in skills the National Societies does not have
- Facilitate key moments of the process as a neutral observer, if required
- Potentially, draft final materials based on the input of the coordination team.

“ When we developed our first strategic plan, we worked with a consultant who had limited knowledge about the Movement. While they identified some strategic challenges, they did not help us to figure out how to address strategic issues in line with our vision and mission.

It is advised not to use consultants to:

- Work without supervision
- Develop strategic plan content
- Work without a working knowledge of National Societies and key Red Cross / Red Crescent dynamics, such as volunteering, branches, service delivery.

- Performance and Partnerships Support Director, Syrian Arab Red Crescent ”

“ A consultant was contracted with terms of reference covering all the phases of the elaboration of the strategic plan. The consultant mostly worked alone on the strategic plan and, by lacking knowledge and experience in our country, ended up making proposals not adapted to our context. After their work, we had to largely revise and adapt the plan to our reality.

- Director of Programs, Central African Red Cross. ”

2.2. Defining an appropriate process

Defining a strategic planning process

The coordination team will propose an appropriate strategic planning process. The team will look at several dimensions, such as:

- The focus of the strategic planning process
- The timeframe of the strategic planning process
- Who to consult, and how
- The extent to which partners participate

“ Our first strategy was an interim, three-year strategy. When it came to our next strategic planning process, in 2022, we had much more experience. For instance, we knew we needed to make a strong link between strategic plan and operational planning ”

In designing the process, the team will assign time to the following activities, bearing in mind the environmental and budgetary constraints the National Society faces:

Promoting participation	<ul style="list-style-type: none"> • What existing National Society dynamics can the process build on / should be strengthened through the process? • In what ways can the strategic planning process strengthen cohesion with the National Society?
Collecting data and developing future scenarios	<ul style="list-style-type: none"> • How to gather data from inside and outside the National Society to enable good decisions to be made?
Learning and analysing	<ul style="list-style-type: none"> • Reflecting on previous experience as well as new data to develop an accurate picture of the National Society and its options.
Decision-making	<ul style="list-style-type: none"> • Developing consensus around how the National Society should move forward.
Prepare for implementation	<ul style="list-style-type: none"> • Ensure that the results of the strategic planning process are incorporated into wider National Society processes.



More information on the aspects related to consultation and data collection can be found in [Chapter 3: Asking good questions, gathering useful data.](#)

Defining timeline and budget

Strategic planning processes have financial and worktime implications. Having budget and timeline parameters defined will help the coordination team to design a realistic process, and help them to make decisions about what activities can be undertaken, and what activities will not be possible.

Some key considerations could include:

- When will the finalised strategic plan need to be approved? (typically at a General Assembly)
- What budget is available to support additional activities, such as branch meetings and consultations, additional research, board away days and similar?
- For how long can staff coordinating the strategic planning process neglect their other tasks?

In medium and large sized National Societies, strategic planning processes typically take 6-12 months; smaller National Societies are likely to need less time.



Tools

– [Example timeline for a Strategic Planning process](#)



Finding a balance between top down and bottom up

One of the difficulties of strategic planning is finding the right balance between consultation, and ideas coming up from communities and local branches, and centralised decision making.

Both are needed to produce a strategic plan that has buy-in from across the organisation, yet makes important choices and is realistic in terms of the resources available to the National Society. A role for leadership is to ensure that there is a dialogue between these two perspectives, and one does not dominate at the expense of the other.

Financing a strategic plan

The cost of a strategic planning process will depend on the activities proposed.

Expensive activities typically include:

- Travel and accommodation for face-to-face meetings
- Consultant fees (if engaging one)
- Staff time for the coordination team (and possibly their replacements in their other roles)

National Societies reported reducing costs through approaches such as:

- Digital, rather than face to face meetings
- Using existing processes and meetings to include elements of strategic planning

“ It took about 18 months from the start of the process until the strategy was approved - with some changes in wording - by the General Assembly.

– Organisational Developer,
Swedish Red Cross

”

“ When you enter a strategic planning process, it is important to anticipate the costs it will imply. For example, we had to request financial support from the IFRC when we wanted to mobilise external support.

– Director of Programs,
Central African Red Cross.

”



Understanding how National Society context and needs affect strategic planning processes

Some anonymised examples for how context can affect strategic planning based on interviews with National Societies.

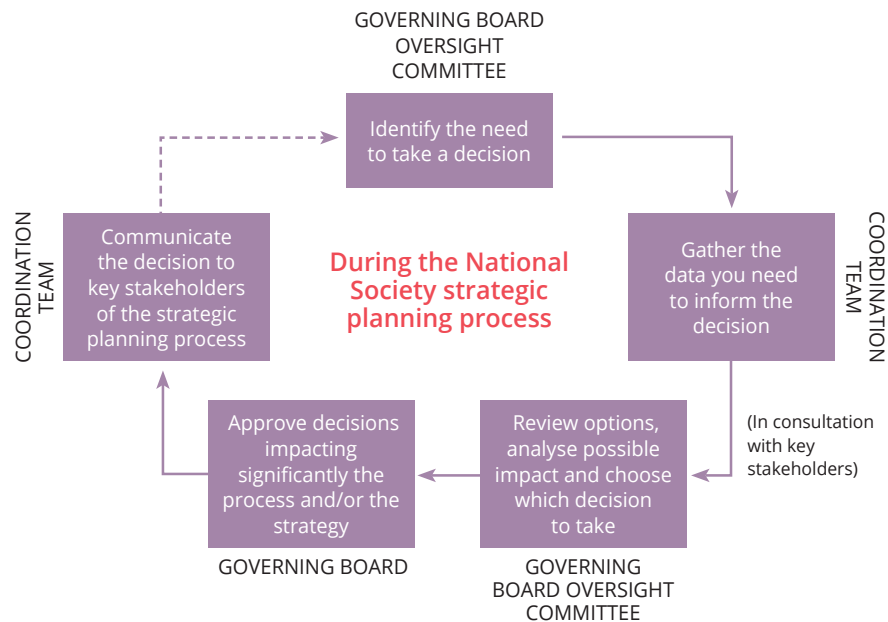
Example Context	Example limitations of context	What it meant for strategic planning process	What it meant for strategic plan content
Stable, with space for NS to adjust to a gradually evolving context and expand its services.	No major limitations, other than NS capacity and financial resources.	Opportunity to engage deeply with NS and external stakeholders to build consensus around a medium-term strategic direction.	Strategic plan timeframe can extend to 4-6 years. Opportunity to consider long-term NS service areas, strategic partnerships and capacity development needs.
Highly unstable: e.g. ongoing conflict	High levels of future uncertainty Challenges bringing people together Tension between elements of NS Number of new partners with little experience of context / NS Limited or no access to some parts of the country	Urgency of having a strategic plan in place rapidly Focus on scaling up in response to immediate operational needs means limited management availability Little time to engage with communities, consult widely within NS Importance of consultation with authorities and other key stakeholders	18-24 month strategic plan timeframe Focus on operations / NSD to support operations; scale back focus on peacetime services Focus on positioning NS as neutral / impartial humanitarian actor Deal with influx of funding in way to protect and reinforce core NS development
NS covering multiple small islands	Limited resources / donor interest Small, sparse population. Expensive to bring people together Lack of cohesion in NS because of physical distances	Low-budget strategic planning process - most consultation and data collection digital Limited opportunities to communicate with branches because of cost	Focus on activities the NS could mostly resource itself Focus on autonomy for branches to address local challenges through own initiatives. Need to be innovative on NS funding model
NS coming out of integrity crisis	Tension within NS makes some discussions very difficult Limited partner confidence / trust Potentially a new leadership team in place	Focus on bringing people together to rebuild relationships / develop shared understandings Focus on a transparent and participatory strategic planning process, including towards partners	Potentially 18-24 month strategic plan timeframe Focus on strengthening and demonstrating NS integrity
First time strategic plan	NS has limited strategic planning capacity in Reliance on partners for support / advice	NS trying out 'what works' New process of consultation for people within NS - learning how to think strategically	No automatic implications

2.3. Identifying likely decision points and transparent decision-making processes

While there is likely to be a formal sign off of the strategy by Governing Board or General Assembly, preliminary decisions often take shape at different stages of a strategic planning process - often because making one thing a priority will mean that another option will not be possible with available resources.

In some cases, a Governing Board may make very early decisions, and agree that the strategic planning process should be built around one or more priority: for example, becoming closer to communities, or becoming more financially sustainable.

Example of a possible decision making process



Defining how a National Society will reach preliminary decisions during the strategic planning process is important to ensure the process is efficient and transparent. Transparency helps everyone in the National Society understand how decisions are made and who is accountable for them. While not everyone may agree with every decision, a clear process makes it more likely that people will accept those decisions as legitimate.

It is recommended that the Governing Board oversight committee is responsible for:

- Monitoring the ongoing process and key areas of discussion
- Leading formal feedback sessions with the Governing Board
- Flagging potential major changes early and checking whether there is support among Board members for such changes

“ In our strategic planning process our overarching priority was localisation: getting closer to communities, strengthening branches and our capacities to mobilise local resources, becoming more focused on young people.
– Former Deputy SG,
Kenya Red Cross Society ”

2.4. Thinking through the final product

Strategic plans look very different from one National Society to another. Some are short and high-level, with broad goals and little detail. Others are very detailed and may be over 100 pages long.

There is **no single correct format in how a strategic plan should be design**. In general, National Societies use strategic plans as:

- Tool to build **coherence and unity** within the organisation
- Tool to engage **partner interest** in long-term development

It's important to create a plan that is both **visually attractive** and **easy to understand** – for both internal and external audiences.

The **level of detail** in the strategic plan depends on decisions made about planning architecture and content:

- A **shorter plan** may be suitable if priorities are clear, but how to achieve them is still evolving. In this case, the strategic plan can outline high-level priorities, and operational plans can provide the detail.
- A **more detailed plan** may work better in stable environments where changes are predictable, or if the strategy covers only a short time period.

As a general rule, it's **safer to keep the strategy high-level and flexible** – and adjust through yearly operational plans – rather than risk a detailed plan becoming outdated quickly.

Discussing this early helps leadership decide what kind of plan they need and who the intended audience will be.

How to write the final strategic plan?

A challenge reported by several National Societies was in writing and finalising the strategic plan. This is a key phase that presents the risks of not aligning the text with the results of the conversation and the decisions agreed by National Society leadership. Additionally, it may be a heavy phase for National Societies with limited capacities which may delay the process.

Different aspects should be considered to ensure alignment and finalization of the plan:

- Who will write it? E.g. setting up an internal writing team or contracting a consultant
- Who will oversee it? E.g. identifying a senior manager to oversee the process
- How will it be reviewed

AI may also be a useful tool in this phase.



Tools

- [What do we want our strategic plan to look like?](#)
- [Sample Strategic Plan model](#)
- [Example of Strategic Plan format](#)
- [Sample Strategic Plans from National Societies](#)
- [Link: AI in humanitarian sector and strategic planning and other digital material](#)
- [Link: AI is changing our humanitarian work – IFRC | Solferino Academy](#)

“ In 2012, we developed our first strategic plan only to respond to a [donor] requirement. In 2014, we had to put on hold the strategic plan and write an intermediary plan, more adapted to the context and the needs of the National Society, which gave us the time to conduct a proper Strategic Planning process and work towards a new Strategic Plan starting in 2016.

- General Director, Salvadoran Red Cross



2.5. Integrating strategic planning processes with other National Society processes

A Strategic Planning process does not happen in isolation. The more it is integrated into ongoing processes within the National Society, the more effective it is likely to be. As part of planning the strategic planning process, it's worth thinking through how the eventual strategic plan will fit into other National Society processes.

For instance:

- How will the strategic plan be communicated inside and outside the National Society?
- How will the strategic plan be translated into activities at national and branch level?
- How will the strategic plan be used to influence partner support and support resource mobilisation?
- How will strategic priorities be reflected in organisational structures and integrated into National Society human resource cycles?
- How will the National Society collect data to see how the strategic plan is progressing?
- How will the Governing Board review progress, and make formal decisions to adapt the strategic plan, if needed?

When governing Board and senior management takes time to reflect these links earlier, it is more likely to implement the plan quickly and effectively once it is approved.

Dealing with messiness

No process is perfect. Particularly if this is the first time that a National Society carries out a strategic planning process, there will be gaps. It will take time for people inside the National Society to understand what is being asked of them, and to get used to some of the ways of working. Once the strategic plan is developed, the National Society will need to learn how to implement it.

“ Our first strategy was an interim, three-year strategy. When it came to our next strategic planning process, in 2022, we had much more experience. For instance, we knew we needed to make a strong link between strategic plan and operational planning.”

Consulting communities and other stakeholders, gathering useful data and creating ownership

Strategic planning is not just about writing goals – it's about **asking the right questions, collecting meaningful data, and listening to people inside and outside the National Society.**

The coordination team plays a key role in:

- Defining which questions need to be answered to respond to current challenges and prepare itself for the future
- Identifying and collecting useful data and what it already has

- Planning process to consult stakeholders as part of data gathering p
- Making sense of these data, to support make strategic decisions

This chapter explores how National Societies can engage stakeholders, gather and analyse data, and create a shared sense of direction. Internal insights and external perspectives are both essential. Consultations provide space for reflection, shared reflection, help align priorities, and strengthen commitment across the organisation.

3.1. Asking good questions

To make good strategic choices, National Society leaders need to ask good, and often difficult questions that help the National Society to look at itself critically to see where it can or must change and improve to adapt to the current situation and be prepared for the future. Sometimes these discussions are not comfortable: they may involve looking at significant response gaps to humanitarian needs, or deep-rooted challenges within the National Society. However, very often, these are the issues that stop a National Society from moving forward, so if they are not addressed, the strategic planning process may not be successful.

Some of these challenging areas can include:

- National Societies mandate and adherence to the Fundamental Principles
- National Societies humanitarian positioning and geographical coverage
- National Societies identity and image
- National Societies governance and management structures and internal coherence
- National Societies management and administrative capacities
- National Societies partnerships and key relationships
- National Societies financial sustainability
- Effectiveness of National Societies services and overall humanitarian performance
- Inclusion and diversity within the National Society

It is suggested that a list of 5-10 key questions is developed as the initial basis for data collection, and signed off by the Governing Board. It may be that data collection around sensitive themes is led by one Governing Board member rather than the coordination team.



Tools

- [Strategic questions linked to the Fundamental Principles](#)
- [Questions linked to common challenge areas](#)
- [Sample questions on where we are and where can we go](#)
- [Analyzing the sustainability of NS activities and capacity](#)

Strategic planning and the Fundamental Principles

Including reference to the Fundamental Principles through the strategic planning process can both reinforce the National Society's identity, and underline the unique status of the National Society compared to other national humanitarian actors.

3.2. What data are already available?

All National Societies collect data. As much as possible, these data should be used as the basis for strategic planning. Having data over a period of time means that long-term trends can be identified and understood.

Some common types of data that a National Society will hold:

- Service and project figures showing the number of people reached
- Data on satisfaction, feedback and complaints by people served by the National Society
- Financial records and accounts from branch and national levels
- Figures on volunteer, member and supporter numbers, and hours volunteered
- Survey data on volunteer happiness and motivation
- Organisational and operational self-assessment data; data from service and project evaluations and National Society follow up
- Monitoring of previous strategic plan, including mid-term evaluation when available
- Governing Board and General Assembly minutes highlighting key issues and challenges
- Records of meetings with public authorities and other key partners.

While some data sources will be a couple of years old, they are still likely to have relevant insights.

“ Building on the experience of the previous strategic planning processes, in our last one, we decided to have a more granular analysis of our context and therefore include new data sources and expand our data collection, particularly on the community side. However, it means processing and analysing potentially a lot of data. We had to mobilise our humanitarian observatory center to help us analyse and summarise it. This can often be a challenge for National Societies.

– National Coordinator of Management and Planning, Argentine Red Cross ”

“ The process of consultation and decision is necessary but should happen all the time, not only in times of strategic planning process. It contributes to making people and therefore the organisation change. In those exercises, what matters is to ask and try to respond to difficult questions.

Mapping of common tools or sources that might be used to collect data

NS finance and organisation	<ul style="list-style-type: none"> • Annual report • Risk mapping • Audit • Financial accounts • HR data • Volunteer survey 	NS assessments	<ul style="list-style-type: none"> • OCA(C) • PER • SAF • BOCA 	Community needs assessments	<ul style="list-style-type: none"> • CA • CEA • Field data collection tools
Previous NS strategic plan	<ul style="list-style-type: none"> • Monitoring results • Mid-term / final evaluation • Governing board minutes 	NS Partner data	<ul style="list-style-type: none"> • NS project evaluation • Project people reached • Partnership meeting 	Humanitarian research studies	<ul style="list-style-type: none"> • Local and national • Global trends
NS operations	<ul style="list-style-type: none"> • People reached • People feedback • Financial analysis 	Public humanitarian and national data	<ul style="list-style-type: none"> • Public authorities • National demography • International organisation • Private sector giving 	Social media and crowdsourcing	<ul style="list-style-type: none"> • NS perception • Brand image

In addition to internal data and stakeholder input, there are multiple sources of freely available data to inform a National Society's background data collection.

These may include:

- Reports from public authorities and international organisations (e.g. World Bank) on topics such as health, disasters, and demographic data
- Studies on trends in areas such as volunteerism or private sector giving
- Insights from past activities such as partnership workshops or strategic brainstorming
- Easily accessible government or sector-specific data (e.g. from the Health Ministry or humanitarian forums)

Using these sources can enrich the strategic planning process and help place the National Society's work in a broader national or global context.



Tools

- Data needs mapping
- Series of questions to structure midterm review of a strategic plan
- Link: [IFRC Framework for Evaluations 2024](#) | IFRC

“ As part of our Strategic Planning process, we reviewed key industry documents (including IFRC's Strategy 2030), government guidelines and the Sustainable Development Goals. ”
– Former Deputy SG, Kenya Red Cross Society

How much data is 'enough'?

One of the challenges for the team coordinating a strategic planning process is to know how much information is helpful. Too little information risks making decisions in the dark; too much becomes expensive and time-consuming to collect, and can be overwhelming, or end up not being used.

- How many people in the National Society should be consulted?
- How much detail is needed of humanitarian trends?
- How many domestic and international partners should be consulted?

Strategic planning is about the big picture, so a suggested measure for how much data to collect is 'good enough', is to answer the following question: Do the data give a 'good enough' picture of the National Society to base long-term decisions on? If so, then that's probably enough data collection – at this stage.

For all proposed data collection, it is worth asking:

- What do we want to learn from these data?
- What is the cost of collecting these data:
 - o In terms of time
 - o In financial terms
- What are the risks of not collecting these data?
 - o Will important learnings and insights be missed?
 - o Will volunteers, staff, key partners feel ignored and / or disempowered?

3.3. Undertaking an organisational assessment process

National Societies often carry out an organisational self-assessment process in the run-up to a strategic planning process. A strategic plan is a powerful organisational development tool for many National Societies, as it defines where a National Society will focus, and how it will allocate resources. IFRC tools that National Societies regularly use to assess the whole organisation include OCA(C)¹, BOCA², and PER³. A range of sector-specific assessment tools also exist which may help individual areas to identify priorities, for example in IT, or Protection, Gender and Inclusion.

Strategic questions that emerge from organisational assessment could include:

- Do we have a good organisational structure to deliver on our humanitarian priorities?
- Do our existing capacities allow us to respond to the humanitarian needs we have identified?
- Do our existing capacities protect us against reputational or other risk?
- Do we have adequate resources to achieve our strategic priorities?



Tools

- Link: [IFRC Assessment and Development process](#)
- Link: [IFRC NSD material](#)

- 1 The Organisational Capacity Assessment (and Certification): OCA(C) is a comprehensive process that enables National Societies to assess all the key elements of a strong organisation by examining both their capacity and performance within their country context. Its primary objective is to help National Societies gain a clear understanding of their strengths and weaknesses, measured against the minimum standards that define a modern, well-functioning organisation, and to support them in defining their development priorities.
- 2 The Branch Organisational Capacity Assessment (BOCA) is a self-assessment tool developed for NS branches to identify and assess their strengths, limitations and challenges in relation to a wide range of organisational capacities. It can be used as the first step in a branch development process.
- 3 The Preparedness for Effective Response (PER) is an approach that enables NSs to strengthen their local preparedness capacities to ensure timely and effective humanitarian assistance in line with the NS auxiliary role and mandate. It considers all hazards (natural, biological, technological, among others) and flexible to be used in different contexts. The process guides NSs to systematically measure, analyse, prioritise and plan preparedness for response actions.

How can OCA(C) be an important assessment tool for strategic planning?

OCA(C) invites National Societies to take a structured look at their organisational capacities, using a series of benchmarks tested by over one hundred National Societies. The process invites perspectives from a range of stakeholders from within the National Society. In addition to contributing to the consultation, it provides a strong basis for a strategic planning process.

“ Our 2014-2018 strategy was largely built on the OCA(C) results. If the right people are participating, dare, and are allowed to speak out, then it can be a powerful tool. ”



3.4. Identifying stakeholders for consultation and data gathering

It can be challenging to decide who to consult and how to do it well.

Consultations take time, but many stakeholders – such as communities volunteers and staff – expect to have a voice in shaping the strategy, especially if it will affect them. Even if the data doesn't change much, lack of consultation may affect people's willingness to accept and align themselves with the finalised strategy. Strategic planning is a chance to build internal cohesion and strengthen support across the National Society.

A good first step is to use a **stakeholder mapping tool** to identify key groups and then prioritise engagement based on available time and resources.



Tools

- Stakeholder analysis and mapping
- Stakeholders analysis and engagement approach in SP

Facilitation tools

There are many methodologies for with groups of stakeholders to gather data and / or surface opinions. Sometimes facilitation by someone from outside the National Society can be helpful - particularly if discussion areas could be controversial. Good facilitation both ensures that all perspectives are heard, as well as helping participants to reframe discussions in ways that lead to new perspectives, and eventually solutions. Sometimes this involves encouraging people out of their comfort zones.

“ One challenge we faced was that participants in our strategic planning process tended to retreat into their comfort zones and repeat what they had always been doing as what they wanted to do in the future. ”

– Former Deputy SG, Kenya Red Cross Society

“ Beyond being a source of important and legitimate data on the National Society capacities and state, the OCAC process has been a positive participatory experience with the branches. It has set a precedent and created expectations from the branches to be similarly involved in other processes. It helped having branches actively participate in the strategic planning process. ”

– National Coordinator of Management and Planning,
Argentine Red Cross



How will we involve communities?

Listening to communities is a key part of being accountable. A strategic plan that is not built on an analysis of humanitarian risk and does not take into account the views of communities risks being irrelevant to the people the National Society is meant to serve.

Ideally, branches will already have ongoing dialogue with local stakeholders. This helps the National Society understand:

- Whether it is trusted by communities
- If its services are seen as relevant and good quality
- Where there are unmet needs that the National Society – or others – should address

If this dialogue isn't already in place, the National Society should find new ways to connect, especially with groups it may not usually engage.

Data collection methods can include interviews, focus groups, complemented by national or local data on vulnerabilities.

When collecting data, it's important to:

- Respect the dignity and experiences of individuals and communities
- Be aware of power dynamics within communities and avoid putting anyone at risk
- Avoid creating false expectations that the National Society cannot fulfill



Tools

- Link: [Enhanced Vulnerability and Capacity Assessment – PrepareCenter](#)
- Link: [Community Engagement and Accountability \(CEA\) toolbox](#)
- Link: [IFRC data protection approach and policy](#)
- [Sample questions for communities](#)

“ In our previous strategic planning process, community needs were reported through the branches. This time, we used a project to collect data directly from selected communities, in coordination with the branches. It helped us create a strategic plan that's much closer to the realities on the ground.

– National Coordinator of Management and Planning,
Argentine Red Cross ”

How will we involve our public authorities?

Ideally, a National Society has regular dialogue with public authorities at both local and national levels. This helps it understand:

- Is it perceived as a trusted organisation by the public authorities?
- Are its services seen as relevant and good quality?
- Are there unmet needs that the National Society could help address?
- Are there chances to strengthen relationships with public authorities, locally and nationally?
- Is there a need and opportunity to improve communication or strengthen the legal framework (Auxiliary Role) that supports this relationship?

In some cases, the National Society may need to identify key contacts within public authorities, both locally and nationally. At the national level, this usually means engaging with multiple Ministries.

Useful tools include interviews or discussions with these key individuals. Public authorities often hold relevant data on current and future humanitarian situation and needs across different sectors.



Tools

- Link: [IFRC Legislative Advocacy Toolkit_Facilitators Guide](#)
- Link: [Guide to Strengthening the Auxiliary Role through Law and Policy](#)

“ In our second strategic plan, we used policies, strategies, and national plans from relevant government ministries as key references. We involved them throughout several steps of the process. This helped us align better with national authorities, strengthen collaboration, improve our positioning, and increase their financial support.

– Director of Programs,
Central African Red Cross ”

“ We conducted a comprehensive strategic planning process that engaged stakeholders at all levels, including local communities, authorities, partners, and our global network. This collaborative approach ensured a strong, needs-based strategy reflecting the realities on the ground. Despite facing challenges, such as navigating an unstable environment, our commitment to stakeholder engagement resulted in a well-defined plan.

– Acting Executive Director,
Yemen Red Crescent Society ”

How will we involve National Society volunteers, members and staff?”

Volunteers, members, and staff are central to any strategy. They not only implement the current strategic plan – they are the people the National Society depends on to deliver the future one. Consulting them a crucial opportunity to build ownership for the end product.

Ideally, the National Society regularly asks them:

- What motivates their engagement with the National Society?
- Are they satisfied with their engagement?
- What aspects of working with the National Society makes them feel proud and fulfilled, and what aspects leave them feeling negative and demotivated?
- Do existing tools and processes support their work, or is there scope to strengthen ways of working?

Ways to collect input include electronic surveys (including a mixture of qualitative and quantitative questions), focus groups to explore specific issues, and branch or national meetings. Some National Societies also invite people to submit short reflections or stories on any relevant topic, as a way to give people space to share their passions and concerns in a less structured manner.

“ In our second strategic plan, we focused more on clear results and local engagement. Because of earlier efforts to build internal capacity, branches and volunteers understood the planning process better. We worked closely with them through workshops and surveys, and made sure to include their perspectives before the plan was approved by the national governing board.

– Director of Administration and Finance, Salvadoran Red Cross ”

“ To develop our strategy, Swedish Red Cross held many meetings with volunteers at regional and branch levels. We also ran digital sessions on key topics like ‘engaging more people’ and ‘climate change.’ Each region met with its branches to review the last strategy and discuss what should go into the new one. A major meeting with regional and national governance was held a year before final approval. The whole process took about 18 months, and the General Assembly approved the strategy with some wording changes.

– Organisational Developer, Swedish Red Cross ”

How will we involve National Society branches?

Branches play a critical role in making a strategic plan work. National Societies vary in how much autonomy branches have, but regardless of the structure, it’s important to include branch perspectives throughout the planning process to build ownership and make the strategy relevant across the organisation.

In the best case, the National Society has a good oversight of questions such as:

- Do branch capacities allow them to carry out the National Society’s mandate?
- Does the current National Society internal regulation create a good balance between branch autonomy to meet localised needs, and the need to create a coherent across the National Society?
- Are there lessons from high-performing or innovative branches that could be relevant to Strategic Plan?

Common ways to involve branches include surveys, focus groups, as well as including reference to strategic planning in ongoing internal meetings.



Tools

- Link: [IFRC Branch Development Framework](#)
- [Example questions for internal discussion in branches](#)

“ A team from HQ visited all branches to sit with staff and volunteers and discuss plans and vision. Branches had the chance to contribute and were later invited to review the draft strategy.

– Branch Coordinator, Eswatini Red Cross ”

How will we involve National Society technical teams?

Technical teams often have the best overview of how programmes and services operate, along with knowledge of relevant policies, standards, and procedures in its areas of expertise.

They play a key role in turning strategy into action, so they should be actively involved and heard during the planning process.

At the same time, it's important to balance their input with the views of others – especially branches – to ensure that technical expertise doesn't overshadow broader needs and perspectives.

“ Our branches help develop the five-year strategic plan and then create their own annual plans. Normally we asked them what it is that they would like the NS to address, and how. We learnt that branches can do well and contribute positively if empowered and supported. With the right support, they've shown they can lead and shape the National Society's direction.

– NSD Practitioner,
Malawi Red Cross Society ”

“ We visited branches, collected data with new tools, and created action plan templates. We have learned a lot due to a very wide experience the branches have in the field, though follow-up and monitoring remain a challenge. The data collection tools and templates were very impactful.

– Senior Manager,
Iraqi Red Crescent Society ”



How will we involve our partners?

Partners – both national and international – are valuable not only for potential sources of funding, but also for their insights into the National Society's performance, long-term strengths and weakness. Good partnerships are built on open, two-way dialogue, where both sides act as “critical friends.”

Ideally, this ongoing exchange helps the National Society understand:

- What are the strategic priorities of its partners, and how are they evolving?
- How do partners perceive the National Society and its capacities?
- How well is the partnership working, and how could it be strengthened?



Tools

– [Example questions to ask external stakeholders](#)

Dealing with funding partners

A number of National Societies interviewed discussed the challenges of the funder - recipient relationship.

Some National Societies developing strategic plans were concerned that their new strategies needed to reflect partner priorities in order to continue to attract critical funding. In some cases, they felt under pressure from partners to include certain areas of work, even if these were not necessarily their first priorities.

Obviously these relationships can be very sensitive, in particular when National Societies are highly dependent on partner funding.



Further details can be found in [Chapter 7: Guidance for NS partners](#)

Bringing different stakeholder groups together

Bringing different stakeholder groups together can be very powerful. When well-managed, these conversations bring in diverse perspectives and often lead to creative thinking, whether in addressing a specific challenge or opportunity, or for broader reflection on the National Society's strengths and weaknesses.

Facilitation methods could include, **Working groups** to explore specific options, **Focus groups** on targeted themes, or **Open formats** like Open Space Technology for wider input and idea.

Mapping of tools to gather internal and external perspective with key stakeholders

Looking towards National Society external environment

PESTLE analysis

External Factor Evaluation (EFE)

Scenario Planning

SWOT analysis

Focus group on themes/issue

PORTER five forces

Looking towards internal National Society position

VRIO analysis

Internal Factor Evaluation (IFE)

Must Do, Can Do, May Do



Tools

- [Collective reflection tools to support internal external analysis](#)
- [How to use a SWOT tool](#)
- [Key facilitation skills to support stakeholder group engagement](#)
- [How to manage focus group discussions](#)

Looking for strengths as well as weaknesses

It's easy in discussions to focus on what does not work well. Especially when people come together there's often a tendency to criticise and be negative. This dynamic can be accentuated if one actor in the room (often a funder) is perceived to have more power than other actors, including the National Society.

While it is important to be realistic about doesn't work, it's also important to be clear about what is working. One approach to strategic planning is to build and invest further in what does work well and makes the National Society stand out from other humanitarian organisations.

3.5 IFRC and Movement decisions and policies

National Societies are bound by IFRC and Movement decisions and policies, so a strategic planning process is a good opportunity to identify areas where the National Society should better align with Movement strategies, norms and agreements.



Tools

- Link: [IFRC policies and key commitments](#)



3.6. How can we think about the future?

Improved strategic planning requires National Societies to think differently about the future and get better at interrogating evidence on the changes and challenges they face. Futures literacy and strategic foresight help National Societies navigate uncertainty, spot new opportunities, and prepare for a shifting environment.

These tools don't try to predict the future, but help explore how trends might unfold. Even if certain scenarios never happen, thinking them through helps the National Society the opportunity to better nuance its strategic planning, and stay ready for what may come.



Tools

– Link: [The Strategic Foresight Book](#)

“ It's important that National Society strategic planning includes scenarios that demonstrate how the National Society would prioritise their resources if they weren't able to secure the full budget ambition.

– International Strategy Lead,
British Red Cross ”

“ Planning is not static. We're preparing a mid-term review to see if updates are needed, and we're also using prospective planning to anticipate changes.

– Head of Planning and Institutional Development, Salvadoran Red Cross ”



3.7. Synthesising and presenting data

As the process continues, the coordination team will gather data from many sources – public reports, internal records, consultations, and scenario discussions – to answer key strategic questions.

One of the team's main tasks is to summarise this data clearly, so the National Society has a useful overview. This could take the form of short documents, presentations, or short youtube videos.

It's good practice to share summaries back with those who contributed. This builds transparency, encourages further reflection and comments.

This sort of feedback mechanism helps avoid a situation where people who have shared their opinions do not understand why a particular decision is made when the strategy is finalised.

Using Artificial Intelligence to collect and synthesise data

Advances in artificial intelligence (AI) mean that a lot of work that in the past would have been carried out manually can now be carried out by AI.

Examples could include:

- Collecting background data on a specific theme.
- Synthesising a range of data to create a short summary document.

Anything AI-generated should be checked by a human to ensure that computer outputs make sense and align with Red Cross Red Crescent usage and values; however it's likely that AI will increasingly be a relevant tool in supporting strategic planning processes.

Analysing data and making decisions

Strategic planning requires careful choices that can shape a National Society's direction, structure, and impact for years to come. Leadership plays a key role in weighing these choices, ensuring that decisions are thoughtful, informed, and aligned with the National Society's long-term vision.

To make sound decisions, it's important to go beyond surface-level issues and explore the deeper, underlying causes of challenges – not just the visible symptoms in day-to-day work.

This chapter offers guidance on how to analyse data effectively, identify root causes, and support leadership in making decisions that are both strategic and sustainable.

4.1. Approaches to data analysis

The National Society will have collected a range of data around the key questions it has asked itself.

It now needs to make sense of these data and understand:

- Where the National Society is now - the environment in which it operates, and how different stakeholders perceive aspects of its performance;
- What opportunities or threats it might face in the near future and how it could anticipate them
- What the root causes of any challenges it is facing are, how these challenges may affect one another and ideas for how they could be addressed;
- What future trends might affect the National Society; which ones it may prioritize;
- Ideas for what the National Society would like to achieve over the period of the strategic plan.

Data analysis can be a shared process, or carried out by a small team. In order to be credible, it's best for the results of data analysis to be shared transparently – perhaps through short written pieces or powerpoints that summarise the main points, and the options that the National Society faces.



Tools

– Mapping of tools for analysing causes and effects

Data gathering and decision-making: a conversation

Most decision-making in strategic planning comes from an ongoing conversation. Data gathered will include proposals from communities, branches, technical teams and partners for what the National Society could do. Leadership will listen to these, combine them, prioritise them, share back proposals and new ideas and get reactions to these. This ongoing conversation helps ensure that final decisions are both implementable at all levels of the organisation, but also have understanding and support from as many people as possible.

4.2. Effective prioritisation

As the National Society goes through the process of collecting and analysing data, some priorities may become very clear— for example, the need to strengthen the auxiliary role or invest in local resource mobilisation.

These types of decisions are often straightforward and may have been clear even before the planning process began. While some choices will have broad agreement, others may be more difficult and require deeper discussion.

It is the responsibility of National Society leadership to define **realistic priorities** for the future. If key decisions are avoided, the strategic plan risks becoming irrelevant or failing to address serious current or future risks. In such cases, the effort put into strategic planning becomes a missed opportunity.

Strategic choices must **balance operational priorities** that help the National Society fulfil its mandate **with the internal development needed** to sustain those operations over time.

It is recommended that the Governing Board oversight committee proposes the main outline of the strategic plan. This should be discussed and agreed by the Governing Board before the final draft is presented to the General Assembly or other decision-making body.

If the plan may involve a major shift in direction, it is useful to discuss this early with Board members to confirm there is support for that level of change.

“ One of the objectives of our 2020–2022 strategy was for the national headquarters to step back from implementation, and for branches to develop the capacity to take the lead.
– NSD and Strategic Planning Unit Manager,
Syrian Arab Red Crescent ”

Closing activities

The decision to close a service is always challenging. People benefiting from the service, staff and volunteers may all have legitimate interest in the service continuing, and service closures can attract negative publicity to the National Society, but National Societies need to ask themselves:

- Is this service in line with our mission and values?
- Are we best placed to deliver this particular service? Could another organisation take over the service?
- What is the impact on communities of not providing this service?
- Could we have greater humanitarian impact if we provide another service?
- Is there a synergy between this service and other services the National Society offers?

Foresight tools may help a National Society to reflect on its overall portfolio of services, and which ones are most relevant to the future of the National Society.

“ When I took over the branch, we had several projects. Soon after I started my board made the decision to review the projects run by the branch with a few things in mind:

1. Did the project fit with the RC strategy?
2. Was any other organisation running the same or similar projects?
3. Were we as a Red Cross branch responding to a need that no one else was addressing?

After going through these questions, we had some hard choices, closing and handing over projects that we had been running for a long time. We handed over two big projects. One to the city of Reykjavík, and another to an NGO. We closed down many small projects to make room for new projects.

– Branch leader, Iceland Red Cross



Strategic planning and financial sustainability

Many strategic plans include a focus on how the National Society will improve its financial sustainability. The plan should reflect the current business model and how it may need to evolve.

Key financial sustainability topics to discuss during the strategic planning process include:

- How well the current business model supports the financing the National Society's mandate
- Risks to long-term financial stability and capacity to carry out its mandate
- Internal financial management and transparency
- Opportunities to strengthen income
- Whether the strategic plan can be realistically resourced by the National Society.



Tools

- Link: [IFRC National Society Financial Sustainability Framework](#)
- Link: [National Society Financial Sustainability Scenario Based Predictive Modelling](#) (IFRC Community of Practice)
- Link: [A step by step approach on how to collectively address National Societies Financial Sustainability](#) (IFRC Community of Practice)
- [Sample questions on who do we want to become](#)
- [Strategic option decision sheet](#)

4.3 Developing high level indicators for each priority

Once the National Society has drafted its strategic priorities, it can be helpful to develop high-level indicators for each one.

These indicators make the priorities more concrete and measurable, helping decision-makers assess whether the plan is realistic.

They also allow departments and teams to begin thinking about how to operationalise the strategic plan and shape their future operational plans.

4.4. Reality check before signing off the strategic plan

Before the strategic plan is submitted for formal approval by the Governing Board or General Assembly, it's important to carry out an **internal 'reality check'**.

This should involve some or all of the Governing Board and helps to:

- Ensure that each priority makes sense on its own
- Ensure the strategic plan works as a whole

This step confirms that the plan is coherent and has a realistic chance of being resourced.

Questions a Governing Board will need to ask include:

- Does the plan address major humanitarian needs in the context?
- Will it strengthen the National Society's visibility and positioning?
- Does it reinforce the Fundamental Principles and the National Society's identity as part of the Movement and IFRC network?
- Does it include attention to organisational capacity to deliver the strategic plan?
- Does the strategic plan prepare the National Society for the future?
- Have the views of key internal and external stakeholders been considered?
- Does the final strategic plan make sense as a whole?
- Are there sufficient resources to implement it? If not, what will be de-prioritised?



Tools

– Sample questions and tools to assess a draft strategic plan

“ When we share a partner National Society's strategic plan with our back donor, they're looking for realism and strong analysis. They want to know: Why is this National Society well-positioned to meet a specific need? And is the plan realistic, given its resources and commitments?

– International Strategy Lead,
British Red Cross

“ Once we had a solid draft of the strategic plan, we held interviews with public authorities, organisations from different sectors, and a few service recipients to check whether our direction made sense to them, or if we had missed something.

– Director of Administration and
Finance, Salvadoran Red Cross

Resource availability

One of the biggest challenges in implementing a strategic plan is resource availability. While financial resources are the most visible constraint, other important resource gaps often include:

- **Leadership time**, especially for managing change and new initiatives
- **Skills and knowledge**, which take time and money to develop
- **Volunteers**, whose numbers cannot grow overnight
- **Staff time**, as staff often balance current duties with new priorities

Management and governance must therefore be realistic about available resources before approving a strategic plan. It's normal to expect some growth and efficiencies, but approving a plan that is unrealistic from the start impose risk to implementation.

To better understand resource needs, a National Society may form a working group with relevant staff to:

- Structure the budget
- Identify resource gaps
- Plan and monitor resource mobilisation efforts

If the plan proves clearly unviable, it should be revised before moving forward, to avoid wasting time and effort on goals that is unrealistic.

Risk management

A useful approach in finalising the strategic plan is to develop a risk register that identifies some of the risks that strategic plan implementation faces, and what the National Society will do to mitigate these risks. The purpose is for the Governing Board to be able to review the strategic plan in light of any expected challenges, and ensure that good procedures are in place to mitigate risks.

4.5. Final drafting of the strategic plan and adoption

The final draft of the strategic plan is built on the analysis and decisions already made. Many background papers from earlier stages can support this step. The final text should clearly reflect those decisions in a way that is understandable to both internal stakeholders and partners.

The coordination team leads the drafting. The Governing Board Oversight Committee oversees the review process. The final version must be approved by the Governing Board, General Assembly, or other relevant decision-making bodies of the National Society.

Chapter 5



Moving from plan to implementation

A strategic plan only has value if it is put into action. Implementation means turning priorities into concrete activities, aligning them with other internal processes, and tracking progress over time.

This chapter explores how National Societies can move from planning to delivery - by embedding the strategy into daily operations, ensuring coordination across the organisation, and monitoring the plan's effectiveness as it unfolds.

5.1. Disseminating the strategic plan within the National Society

Once the plan is finalised, it is important to make it visible at all levels of the National Society so that volunteers, members and staff see what they have contributed to, and have the opportunity to understand changes that might affect them in the future.

Clear communication, especially from senior leaders, helps to motivate and inspire action. Reaching all volunteers and members takes time, and it's common for full internal rollout to take up to a year for national societies with large numbers of branches.

National Societies often use tools such as:

- An **attractive brochure** (digital and/or printed) summarising the strategic plan
- **Posters** displayed in offices and branches
- **Online and in-person presentations** to explain the strategic plan and answer questions or concerns that volunteers, members and staff may have about the strategic plan;
- **Briefing materials** for national and branch leaders that set out key messages from the strategic plan
- **Content for internal social media channels**

It's recommended to develop an **internal communications** plan alongside the strategy itself, to keep momentum strong after approval.

“ In the last Strategic Plan, we made the effort to have a shorter and lighter version and invested more in internal communication. For instance, we created a 6 square meters puzzle with a visual, that summarises the plan, that we played with volunteers. Today many make regularly reference to the Strategic Plan without necessary knowing it in detail.

– Undersecretary of Organisational Development, Argentine Red Cross ”

“ In the context of our first strategic plan, we shared it at the branch level but it remained among the respective governing bodies. For the second one, we made a short version to share with volunteers. Altogether it contributed to change the perspective of the branch from - 'what will the Headquarters give us?' - to 'how are we going to implement our plan?'

– Director of Administration and Finance, Salvadoran Red Cross ”

5.2. Planning for implementation

Once the strategic plan is approved, it is necessary to **confirm who is responsible** for implementation – both overall and for specific components. Accountability should be reflected in role descriptions and annual targets where appropriate.

As noted earlier, **budgeting and financing** are critical. A National Society may form a working group with key staff to structure the budget, identify gaps, and plan resource mobilisation efforts.

Each National Society will have its own planning architecture, but the next step is usually to develop operational plans that turn the strategy into concrete actions.

Operational plans are typically created for each unit and include:

- Actions to be taken
- Budgets
- Indicators for success
- Critical assumptions, such as support needed from other parts of the organisation



Tools

– Link: [Project/Programme Planning Guidance Manual](#) | IFRC

Translate the Strategic plan at branch level

Depending on each National Society's internal planning architecture, the engagement with branches will be critical to translate the Strategic Plan into plans that can be implemented locally. In most National Societies this will involve branches developing annual operational plans..

“ After years of experience with annual operational planning and monitoring at the headquarters level, and growing involvement from branches in strategic planning, we decided to support branches in developing their own local operational plans with budgets. We created a simple model that each branch could use.

– National Coordinator of Management and Planning, Argentine Red Cross ”

5.3. Sharing the strategic plan with partners

Internal communication tools developed for staff and volunteers can often be easily adapted for use with partner organisations.

In addition to the general strategy summary, partners usually find it helpful to receive more detail on:

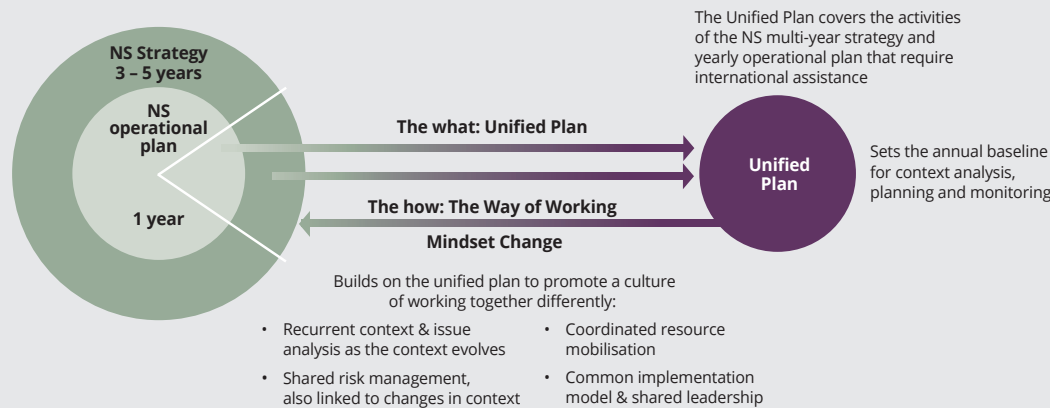
- What is the recent history of the National Society, in particular what it has achieved?
- How the strategy was developed?
- What are the National Society's defined priorities?
- Any implications of changes foreseen for how the National Society operates?
- Any specific requests for funding or collaboration?
- And if so, how much the National Society plans to resource the strategy with its own resource?

If the strategy will be used for fundraising or partnership building, it is recommended to develop a partner engagement plan to brief partners and present clear opportunities for support.

What are the IFRC Unified Planning and Way of Working (WoW)?

Unified Planning aims to bring together IFRC network members in a given country (the National Society, the IFRC and participating National Societies) to prepare a joint plan of international support aligned with the National Society's strategic plan and priorities and IFRC Strategy 2030.

The Way of Working is a multi-year collective approach to operationalise IFRC Strategy 2030 at the country level in a way that responds to National Society strategies and country-specific needs. It aims to achieve predictability and coherency across countries and regions as part of a "bottom up" and 'network wide' approach to strategic and longer-term support.



Tools

- Presenting your Strategic Plan to partners

“ Our strategic plan is a cornerstone of our engagement with partners and donors. We actively communicate its objectives through various channels, ensuring transparency and alignment. This clear communication, as evidenced by UNFPA incorporating our plan into their contract, fosters trust and facilitates resource mobilisation. ”

“ We have many projects with Movement partners. Our strategic plan helps us to negotiate with our partners and align the projects to our priorities. Today, the partners often ask for our plan before collaborating for alignment. ”

“ A direct impact of our strategic plan is the alignment of the IFRC unified plan and thematic priorities for the next three years to our programmatic priorities. ”

5.4. Managing change

Every strategic plan is likely to have some priorities which will change the way the National Society functions, and as such are likely to provoke fear or active resistance among some parts of the National Society.

Change management is the process of planning for and supporting people through significant organisational change. The bigger and more controversial the change proposed, the more important it is to reflect on how the change can be implemented effectively, and to put a change management plan in place. Finding ways to incentivise staff and volunteers to change how they work can be particularly challenging.

It is recommended that the senior leadership of the National Society review the risk register developed alongside the strategic plan, and identify areas where there is potential for internal resistance, and ensure that adequate change management planning is in place.



Tools

– Mapping of change management material and references

“ We found we needed a change of mindset in the National Society to help people make the link between the strategy and their daily work. People would ask us: ‘Does your strategy provide fuel to move cars?’. Our partners helped us to make that linkage.

– NSD and Strategic Planning Unit Manager, Syrian Arab Red Crescent ”

“ One of the things we realised through our strategic planning process was that we needed to work much harder on diversity and inclusion, so that the Swedish Red cross is not seen as an organisation for privileged people. It took more than one year to develop a sub-strategy for how SRC was going to work in this area after the main strategy had been approved.

– Organisational Developer, Swedish Red Cross ”

“ To empower our branch offices and drive strategic implementation, we initiated capacity building and change management programs. These programs focused on strategic thinking, initiative-taking, and resource attraction at the branch level. We also clarified roles and responsibilities between governance and management. These targeted interventions have strengthened our branch network’s capacity to execute the strategy.

– Acting Executive Director, Yemen Red Crescent Society ”

5.5. Monitoring, adjusting and learning

Putting in place an effective monitoring system for strategic plan implementation

It’s necessary for a National Society to be able to tell whether it is making progress with its strategic plan. This means setting a **few simple, key indicators** to track results.

Data gathered during the strategic planning process can serve as a baseline. From there, systems should be in place to collect relevant data for each priority area.

Many National Societies also conduct a **mid-term review**. A small team – internal or external – reviews progress, identifies challenges, and makes recommendations for adjustments to both the strategic plan and how it is implemented.

How to set up a system to measure a strategic goal impact individual?



Tools

– Link: [IFRC PMER guidelines](#)
– Link: [Federation-Wide Results-Based-Management Approach](#)

The Governing Board’s role in adapting plans as needed

Setting out **how and when the Governing Board will monitor strategy implementation** helps ensure mechanisms are in place to to adapt the strategic plan if needed.

Adaptation is normal – especially when trying something new. Plans may need to shift if:

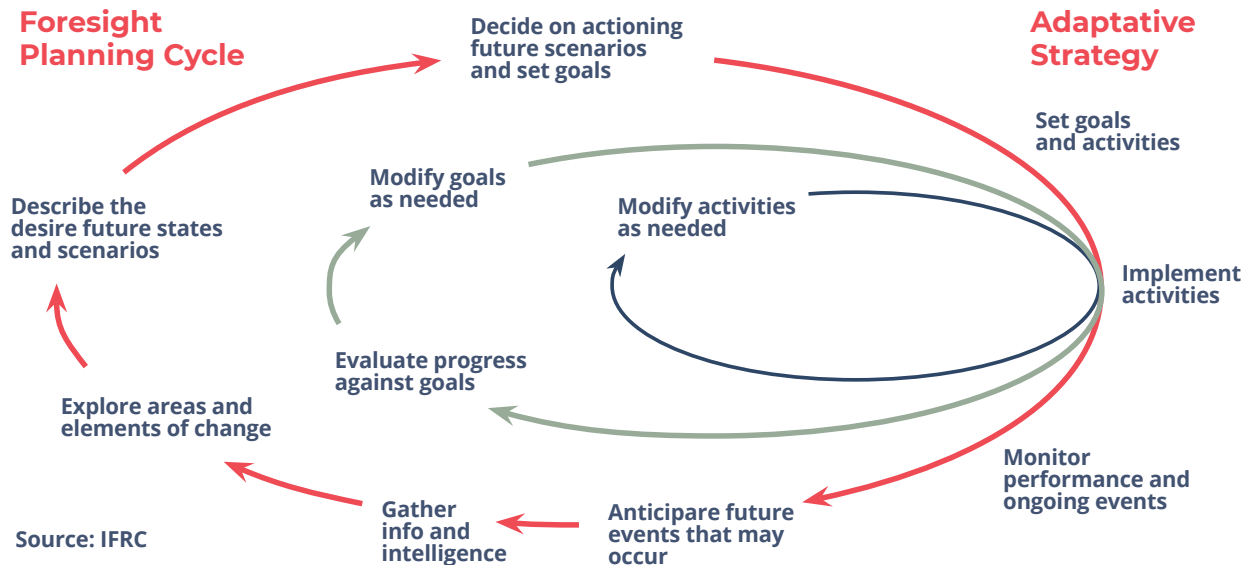
- Expected resources have not come through
- A crisis requires the National Society to refocus
- Certain priorities no longer make sense or are achievable

It’s recommended that Governing Boards **dedicate time each year to review progress**. In addition to tracking results, they should discuss:

- What has the National Society learned during implementation?
- Are there any priorities that are no longer relevant, or need to be adjusted?
- Are there priorities that are no longer achievable, and need to be adjusted?

It’s better to revise or even replace a strategic plan that no longer fits the context than to **continue with one that lacks relevance or support** from staff, volunteers, and partners.

Illustration of an adaptative strategic approach



“ Once a year, we hold a dedicated meeting with the Governing Board to review strategic plan implementation and set operational priorities for the year ahead. We analyse changes in context, progress made, and available resources. The Board decides on any needed adjustments, even new lines of work if needed.

– Undersecretary of Organisational Development, Argentine Red Cross ”

“ We adopted a flexible approach to our strategy, acknowledging it would need to adapt to changing circumstances. Our original plan was ambitious, but a mid-term review helped us adjust to the new context. That flexibility has kept the strategy relevant and impactful.

– Acting Executive Director, Yemen Red Crescent Society ”

Chapter 6



Building strategic planning culture and capacities

How do you build a culture in which people understand the importance of strategic planning, feel safe to think ahead to what might happen next and build their capacities to plan and adapt to the changing environment?

for National Societies to build ongoing capacity for strategic thinking and to become more agile in responding to their changing environments.

This chapter explores five dynamics that leaders could focus on to strengthen the culture and capacities of strategic thinking and planning around them.

6.1. Balancing focus inside and outside the Movement

It's easy to have attention caught up within the Movement. But so many of the important developments that affect National Societies take place away from Movement partners: these are in communities, in public authorities, in new technologies that create new opportunities and challenges.

In particular, staying in touch with communities and how their needs and resources are changing is a strategic task: communities drive National Society's focus and workload as well as providing many resources to the National Society.

6.2. Ongoing data gathering and analysis

Good use of data allows National Societies to observe and understand trends over time, identify challenges in National Society's plan implementation and build evidence for decision-making. They are a basis for good management and governance decision-making and ultimately therefore effective leadership.

Building systems that collect and analyse data on a regular basis is likely to encourage leaders to analyse trends over time, feeding into a culture of strategic environmental and organisational analysis and decision-making.



Tools

- Link: [IFRC Data Playbook v1](#)
- Link: [IFRC Digital transformation strategy](#)
- Link: [IFRC Data protection policy and guidance documentation](#)

““ While working on our strategic plan, we began setting up a planning system across three levels: strategic, operational coordination, and departmental. A key challenge was the lack of planning habits and capacity. We created a planning unit, supported teams in setting clear objectives, allocated resources, and built planning skills. With the new strategy in place, we introduced new ways of working to align everyone with the plan. Today, we have a much stronger planning culture and we're now moving forward by developing a quality management system.

– Head of Planning and Institutional Development, Salvadoran Red Cross ””

““ In our experience, gathering insights from branches would benefit from a more systematic approach. We have strong ambitions, but not always the right tools to achieve them. The same branches tend to participate, which is valuable – but we want broader representation. We're exploring ways to make engagement more diverse and accessible. For example, we tested a digital discussion forum to create a new, more inclusive way of involving branches in strategic and organisational development. ””

6.3. Model a culture of learning and innovation across the National Society network

“Learning” is the process of trying something, understanding what happens, and incorporating this experience into another activity. It can be formal or informal – something individuals reflect on regularly. In some contexts, learning can be difficult, especially when people are reluctant to acknowledge things that are not working or mistakes made.

Strategic planning often requires being able to find ways to test new ways of working, or identify and learn from parts of a National Society that is working better than others.

This also applies to the planning process itself. Many National Societies improved their approach over two or three strategic planning cycles. Conducting **mid-term or final reviews** helps capture learning and improve both current and future strategies.

National Society leaders play a role in enabling a culture of learning and innovation by:

- Encouraging individuals at all levels to try new things within the scope of their roles, and to share learning from what has happened.
- Encouraging peer learning between branches and units, and creating spaces – online and offline – for exchanging ideas and experiences
- Accepting that not everything will succeed, and promoting a culture where it is safe to try something new and fail, so long as learning from the failure is incorporated back into the National Society to improve future work

““ Our first strategic plan in 2003 followed a major crisis and marked the National Society's first big transformation. Since then, each planning cycle has been a learning process. Over time, we've improved how we involve and communicate with stakeholders. It has also driven a cultural change, especially in recognising the importance of uniting behind one common strategic plan.

– National Coordinator of Management and Planning, Argentine Red Cross ””



6.4. Building the planning capacities of individuals and branches

Several National Societies mentioned how training opportunities for individuals and branches in technical aspects of planning contributed to building confidence and capacity in planning, that then led to a growing culture of strategic thinking, as well as improved plans, budgets, implementation and monitoring.

Every National Society faces risks at all levels - in general, the better these are understood and discussed within the National Society, the better the National Society is likely to be able to take steps to take actions to avoid the risks, or mitigate the risks should they occur.



Tools

- Link: Relevant courses from IFRC e-learning platform: [Project/ Programme Planning \(PPP\)](#), [Monitoring and Evaluation Planning](#), [eTraining](#) and [Contingency Planning](#)

6.5 Model a culture of risk management

Every National Society faces risks at all levels - in general, the better these are understood and discussed within the National Society, the better the National Society is likely to be able to take steps to and actions to avoid the risks, or mitigate the risks should they occur.

“ The rotation of volunteers at the branch level during the timeframe of a strategic plan challenges our ability to support and monitor the implementation of the plan. Building their planning capacities and increasing their knowledge on the strategic objectives have been our priorities since our first strategic plan. It is an important factor for success. ”

As a partner, how can I support a National Society strategic planning process?

Strategic planning is the responsibility of the National Society. Partners play a valuable supporting role – always at the invitation and under the coordination of the National Society.

There's an ongoing balancing act for partners between positively contributing to and unduly influencing a National Society strategic planning process. It's important

that any potential financial interests that a partner has in a National Society working in certain ways, do not result in inappropriate pressure on the National Society.

This chapter outlines how partners, especially Movement actors, can contribute positively to the process while respecting the National Society's leadership.

7.1. Rules of engagement and mutual learning

Partners must strike a **careful balance**: offering meaningful support without exerting undue influence. A partner's financial interests should never pressure a National Society to act against its own priorities.

Involvement from a Movement partner can strengthen a National Society's strategic planning – but if not well-framed from the start, it may undermine ownership and limit the National Society's ability to make independent decisions. This relationship can be even more sensitive in contexts where the National Society is highly dependent on the funding of this partner.

Therefore, before deciding to involve a partner in a strategic planning process, a National Society should ask itself a series of questions, including:

- What might our partner's motivations be for engaging in this strategic planning process?
- Do any of their interests conflict with our own?
- What are the implications for us if the final strategic plan does not reflect the partner's interests?
- How do we ensure that the partner contributes to our strategic planning process in a way that respects the integrity and autonomy of the process and does not overly influence the process?
- How do we ensure that our partners' short-term agendas do not negatively influence our long-term thinking?
- How can a solid National Society strategy support our partnership in the long term?

National Societies shared that setting **clear expectations and agreeing on rules of engagement** before receiving any support from a partner helped manage risks and expectations, ensure mutual respect, and protect the partnership during the process.

The principles set out in the IFRC National Society Development Compact (2022) remain central to how partners can engage with a National Society's strategic planning process:

- Support should be based on the National Society's request
- Partners' priorities should align with the National Society's
- Ownership of any process must stay with the National Society
- Partners have a responsibility to strengthen, not control, the National Society

Strategic planning is an opportunity for honest, transparent **two-way dialogue**. When approached with honesty and mutual respect, the process can deepen understanding and strengthen partnerships, with both parties acting as critical friends, understanding each other's perceptions and interests.

Do's and Don'ts for partners willing to support a National Society strategic planning process

DO's	DON'Ts
<ul style="list-style-type: none"> ❑ Listen Actively: Understand National Society goals, challenges, and vision before offering suggestions; ❑ Build Trust: Establish trust and mutual respect through transparent communication; ❑ Understand Context: Take time to understand the local partner's operating environment, including cultural, political, and socio-economic factors. ❑ Co-create and Facilitate: Work together, facilitate, propose approaches contextually appropriate and aligned with their needs and priorities. ❑ Provide Guidance: Offer frameworks, tools, methodologies and best practices to help structure and conduct their planning process and engagement with stakeholders. ❑ Offer Resources: Provide access to relevant data, expertise, and funding opportunities to strengthen and sustain their planning efforts. ❑ Empower Decision-Making: Support their autonomy in making strategic decisions that align with their mission and context 	<ul style="list-style-type: none"> ❑ Dictate Solutions: Avoid imposing your ideas or solutions without considering their unique context and priorities. ❑ Micromanage: Allow them space to lead their planning process independently with your support as needed. ❑ Neglect Local Ownership: Ensure that the strategic planning process is led by the National Society with your support, rather than taking over decision-making. ❑ Neglect Communication: Maintain clear and consistent communication to ensure alignment with original expectations of support and space to address issues throughout the process. ❑ Overwhelm with Complexity: Keep tools and methodologies straightforward, simple and manageable to avoid overwhelming their capacities or complexify the process. ❑ Underestimate Local Knowledge: Respect their local expertise and insights, valuing their understanding of community needs and dynamics. ❑ Disregard Flexibility: Be prepared to adapt your support and the process based on evolving humanitarian situations, challenge of available capacity and feedback from the partner ❑ Focus on your organisational needs: Try to take a wider perspective of your partner's needs rather than focusing on your own organisation's areas of interest.



Tools

- Link: [NSD compact](#)
- Link: [Seville agreement 2.0](#)
- [Example of questions for external stakeholders](#)
- [Presenting your Strategic Plan to partners](#)

7.2. Forms of support

Partners can support a National Society's strategic planning process in several ways – always at the invitation and under the coordination of the National Society. Common forms of support include:

- **Peer-to-peer exchange** at leadership or technical levels, sharing experiences on strategic planning and decision-making
- **Financial support** to fund the planning process and future strategy implementation
- **Participation**, when invited, to contribute perspectives – including insights into donor expectations and observations on the National Society's strengths and weaknesses
- **Technical support**, such as helping design and manage the process

Once the strategic plan is finalised, partners can play a key role in:

- **Aligning their own strategies** to the National Society's strategic priorities
- **Advocate to their donors**, including public authorities, to support the plan; In this context, having a version of the strategic plan oriented towards communication with partners can be very useful.

Beyond alignment and funding, partners can also:

- Promote a **culture of strategic thinking**
- Support **capacity building** by offering training, tools, or facilitation for planning
- Help with **data gathering and analysis**, especially around partner-funded projects or sector trends
- Create **spaces for shared learning and innovation**, encouraging reflection, collaboration and co-creating solutions around strategic issues.

THE FUNDAMENTAL PRINCIPLES OF THE INTERNATIONAL RED CROSS AND RED CRESCENT MOVEMENT

Humanity

The International Red Cross and Red Crescent Movement, born of a desire to bring assistance without discrimination to the wounded on the battlefield, endeavours, in its international and national capacity, to prevent and alleviate human suffering wherever it may be found. Its purpose is to protect life and health and to ensure respect for the human being. It promotes mutual understanding, friendship, cooperation and lasting peace amongst all peoples.

Impartiality

It makes no discrimination as to nationality, race, religious beliefs, class or political opinions. It endeavours to relieve the suffering of individuals, being guided solely by their needs, and to give priority to the most urgent cases of distress.

Neutrality

In order to enjoy the confidence of all, the Movement may not take sides in hostilities or engage at any time in controversies of a political, racial, religious or ideological nature.

Independence

The Movement is independent. The National Societies, while auxiliaries in the humanitarian services of their governments and subject to the laws of their respective countries, must always maintain their autonomy so that they may be able at all times to act in accordance with the principles of the Movement.

Voluntary service

It is a voluntary relief movement not prompted in any manner by desire for gain.

Unity

There can be only one Red Cross or Red Crescent Society in any one country. It must be open to all. It must carry on its humanitarian work throughout its territory.

Universality

The International Red Cross and Red Crescent Movement, in which all societies have equal status and share equal responsibilities and duties in helping each other, is worldwide.

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