STRATEGIC PLANNING

in political parties

Innovative Methodology and Experiences for the Inclusion of Party Members in Decision-Making

NDI

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INTRODUCTION

Today, political parties face various challenges in the democratic decision-making processes within their structures. Three of the most prevalent challenges are described below.

The **first challenge** relates to **inclusive representation**, as it is increasingly common to hear testimonies evidencing little transparency and openness of party leadership to take into account the plurality of voices of citizens and party members in joint decisions.

The **second challenge** relates to the **lack of institutional strength** in decision-making. Although some political parties show political will for more inclusiveness, there are no regulations, tools, formalized mechanisms, or internal activities that allow for decision-making through democratic processes.

Finally, the **third challenge** relates to political parties' **lack of planned action**. Many of them act in an improvised and reactive manner based on various situations in a given country, with relatively poor results that may disappoint citizens and party members who rely on them.

In response to such challenges, the **National Democratic Institute for International Affairs (NDI)** developed this document to offer political parties of all ideologies a methodology encouraging them to take strategic action at different levels and to be more inclusive in decision-making so that they strengthen their legitimacy before party members and citizens.

This document is structured in three chapters. **Chapter 1** identifies the fundamental notions of strategic planning: definition, use, and different steps of its methodology. Namely: a) Identifying and/or Updating the Mission and Vision; b) Definition of Strategic Objectives; c) Development of Strategies; and d) Definition of Indicators for Monitoring and Evaluation.

Once the fundamental notions of strategic planning have been outlined, **Chapter 2** analyzes the case study of the Education and Training Secretariat of the National Action Party (Partido Acción Nacional - PAN) in Mexico, which developed a virtual strategic planning process to build the party's training plan from a participatory approach.

Chapter 3 analyzes the case study of Radical Change (Cambio Radical). This Colombian political party implemented a virtual strategic planning process to redefine its political line and priorities to consolidate itself as a modern 21st-century political party.

Both case studies describe the steps followed, their duration, the party bodies, the virtual tools, the activities implemented to facilitate discussions, and the lessons learned.

This document is intended to be a guide for all political parties seeking to reflect, be reformed, and reconnect with citizens and their party members under an inclusive approach that may strengthen them as a cornerstone of the democratic system.

Strategic Planning:
Definition and Methodology

CHAPTER 1

This chapter describes the fundamental steps of strategic planning: definition, use, and the suggested methodological steps to conduct this process in political parties.

1.1. What is Strategic Planning?

In the broadest sense, planning means intentionally tracing a path from the present to the future to reach a goal.[1] Planning implies defining options for the future and identifying the necessary means to achieve them.[2]

Strategic planning has the exact nature of "planning." However, its "strategic" nature involves an increased demand in terms of **analytical work** to view different options and allocate sufficient means **so that the achievement of said scenarios is as optimal and rational as possible.**

In practice, **strategic planning** is defined as "a management tool for the decision-making of organizations based on their current activity and the path they must follow in the future to adapt to the environment changes and demands and achieve the best efficiency, effectiveness, and quality of all goods and services provided".[3]

According to this definition, the following aspects should be highlighted:

A. Strategic planning is a **management tool** because—unlike other types of abstract and poorly organized planning—this is a methodological model[4] consisting of several steps aimed at a goal.

These steps are: i) defining or updating a Mission and Vision, ii) identifying objectives, iii) formulating strategies, and iv) designing certain indicators and goals to monitor and assess specific results.[5]

B. The analysis of the aforementioned steps must be a flexible and practical guide that facilitates **decision-making** processes and, therefore, the allocation of resources in the political party.[6]

C. One of the **goals** of strategic planning is to encourage reflection on the current activity of political parties so that they can conduct comprehensive, exhaustive, and rational analyses of what they are in the present, where they want to go in the future, and how to transform themselves to accomplish this.[7]

D. Its **purpose** is to outline the most **efficient, effective, and quality** guidelines. The achievement of this goal will reflect the essence of this type of planning, demonstrating to the political parties the most "strategic" courses of action to reach a "desired future,"[8] either over a medium or long term, to overcome complexity and uncertainty.[9]

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1 Tello, Miklos, and Ma. Elena Tella, Planeación prospectiva: una estrategia para el diseño del futuro, México, Limusa, Centro de Estudios Prospectivos de la Fundación Javier Barros Sierra, 2007, p. 59; extracted from: https://bit.ly/3uQsEb3

2 Idem

3 Armijo, Marianela, Planificación estratégica e indicadores de desempeño en el sector público, ILPES/UNECLAC, Budget Policies and Public Management Department, 2011, p. 5; extracted from: https://bit.ly/3rjQF8J

4 Schwarz, Max, Breve historia de las herramientas de gestión, Peru, University of Lima, School of Business and Economic Sciences, 2018, pp. 7 and 11; extracted from: https://bit.ly/2NGc9Np

5 Armijo, op. cit., pp. 9 and 11.

6 Van Den Berg, Caspar, et al., Planificación estratégica para partidos políticos: una herramienta práctica, IDEA Internacional, Netherland Institute for Multiparty Democracy (NIMD), 2015, p. 19; extracted from: https://bit.ly/3rebjVX

7 Burgwal, Gerrit, and Juan C. Cuéllar, Planificación estratégica y operativa aplicada a gobiernos locales. Manuel de Facilitación. Ediciones ABYA/YALA, Dutch Service for Development Cooperation, 1999, p. 36; extracted from: https://bit.ly/3lJP5dt

8 Armijo, óp. cit., pp. 6.

9 Van Den Berg, Caspar, et al., Planificación estratégica para partidos políticos: una herramienta práctica, IDEA Internacional, Netherland Institute for Multiparty Democracy (NIMD), 2015; extracted from: https://bit.ly/3rebjVX

1.2. Why Implement Strategic Planning in Political Parties?

For many political parties, strategic planning should be implemented only by the offices in charge of designing the "political or election" strategy. Although this idea is not wrong, it is not entirely true either, as strategic planning may be implemented in all aspects of party activity.

Strategic planning can be applied to any party space where "strategic decisions" are made. Therefore, general strategic planning processes may involve the entire party structure **(see Chapter 3)** and strategic planning exercises developed by bodies of the political party to address specific issues **(see Chapter 2)**.

So, why should a political party implement a strategic planning process? This question can be answered based on various arguments. However, some of the most relevant answers include:

A. To be prepared for context changes.
The only "certain" thing about the political context is the constant change political parties face, as said context is continually affected by the decisions and actions of all the political actors sharing the same space and by—often unpredictable—economic, political, social, and other factors that can take place at any time in a given country (e.g., the COVID-19 pandemic).

While political parties cannot see the future, they can plan their long-term actions and design alternative scenarios for unexpected situations.

B. To strengthen institutional capacities. There is no particular moment when a strategic planning process should be implemented. Some reasons may be to deal with an internal crisis, to "reinvent" after an election, or to maintain a consensus between the political party and its elected candidates in terms of political agenda, values, and principles.

Regardless of the needs, political parties should not act spontaneously. Strategic planning is a tool that tends to "improve" the actions of political parties and strengthen their institutional capacities while carefully assessing and responding to the political parties' interests, objectives, and strategies and never acting hastily.

C. To guide and strengthen the political party's integrity. Also, strategic planning is a valuable instrument for political parties to be reinvented through processes of modernization and reform. These processes may include strengthening the organizational structure and culture, analyzing and selecting candidates, including minority groups in decision-making, and the party's fundraising and financial management.[10]

D. To consolidate and strengthen the party's internal democracy. Political parties are often co-opted by small groups who make decisions for their benefit without consulting the party members or citizens.

In light of this fact, today—more than ever—political parties' leaders must regain the trust of the party members and citizens by developing institutionalized mechanisms for real participatory democracy.

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10 To learn more about how to use strategic planning in terms of strengthening the political party's integrity, please see: *Win With Integrity: Earning Citizen Trust in Political Parties*, National Democratic Institute (NDI), 2021.

Strategic planning is part of these mechanisms because one of the strengths of this tool is to facilitate deliberation and collective decision-making.

1.3. Strategic Planning Methodology for Political Parties

There are planning methodologies with quite different approaches,[11] with only differences in step number or name or type of tools used. Regardless of the differences, the strategic planning process of most methodologies is developed in four steps **(see GRAPHIC 1)**.

These steps generally consider the analysis of the Mission and Vision and the definition of a future goal, leading to the construction of strategies. Finally, criteria must be identified to monitor and assess the correct project implementation and propose modifications in the courses of action considering context changes.

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11 Armijo, óp. cit., p. 11.

GRAPHIC 1.
Steps for Strategic Planning for Political Parties

STEP 1 IDENTIFICATION OR UPDATING OF MISSION AND VISION

STEP 2 DEFINITION OF STRATEGIC OBJECTIVES

STEP 3 FORMULATE A STRATEGY

STEP 4 DEVELOP A MONITORING AND EVALUATION MATRIX
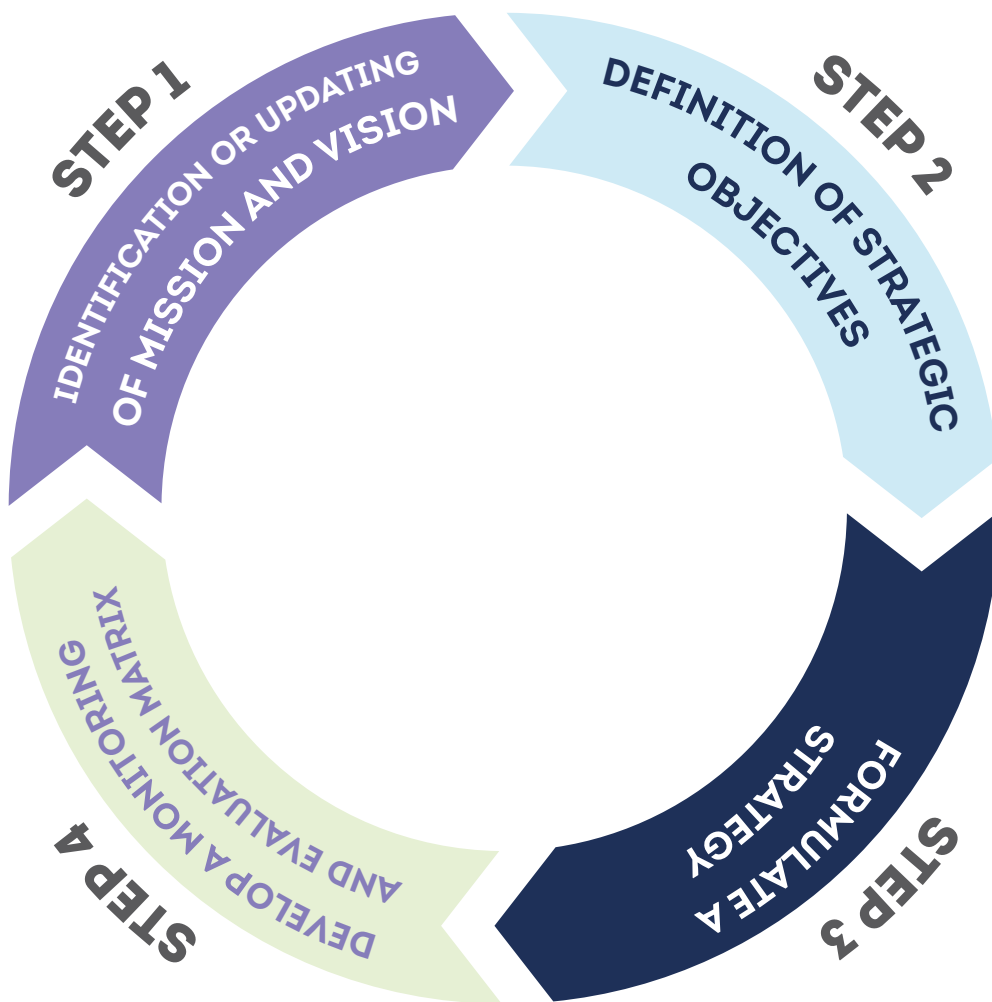
Source: Designed by NDI

Below is a detailed explanation of the four steps for the strategic planning model promoted by the NDI:

STEP 1. Identification or Updating of Mission and Vision

The strategic planning process starts with identifying the political party's Mission and Vision. Generally, democratic political parties are pluralistic, and their members have very different interests. Consequently, political parties must identify a focal point unifying all members, regardless of their interests.

The focal point must define today's political party based on its ideology and philosophy. Also, it must portray the political party's collective aspiration and guide it in all its actions. Therefore, while referring to both present and future scenarios, the first step of strategic planning focuses on identifying the Mission and Vision.

The Mission "is a description of the purpose [of the political party]–it establishes its institutional "activity;" the key functions that make it different and justify its existence."[12]

To define or update the Mission, political parties must answer these guiding questions:[13]

- Who we are
- What we do
- Who we work for
- Our impact

Here are example extracts of the Mission of some political parties answering the previous questions:

Political Party:
Democratic Revolutionary Party of Panama
(Partido Revolucionario Democrático de Panamá)

REVOLUCIONARIO
11
DEMOCRATICO

Guiding questions:
- Who we are
- What we do
- Who we work for
- Our impact

Extract of the Mission (answer to guiding questions):

Transform Panama's political, economic, social, and cultural structures to create more and better-distributed wealth, setting an overall participation structure with a shared human development project in each community. [...]

The PRD defines itself as a revolutionary party as it promotes progress changes in Panamanian society. It is a democratic party because it seeks consensus in society without exclusion.

Source: "Ideology" section of the official website of the Democratic Revolutionary Party of Panama [https://bit.ly/3zRorZh]

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12 Armijo, óp. cit., p. 29.
13 Own questions prepared under the document Planificación estratégica e indicadores de desempeño en el sector público, ILPES/UNECLAC, Budget Policies and Public Management Department, 2011, p. 31; extracted from: https://bit.ly/3rjQF8J

Political Party:
National Party of Honduras
(Partido Nacional de Honduras)

Guiding questions:
• Who we are
• What we do
• Who we work for
• Our impact

Extract of the Mission (answer to guiding questions):

We are a democratic political organization with transformative leaders and a modern ideological agenda, linked to all social sectors to generate growth and well-being for the Honduran people.

Source: Official Facebook account of the National Party of Honduras [https://bit.ly/3QjEgh6]

On the other hand, the Vision "relates to the organization's desired future. How the party wants to be regarded and how it represents the values on which its public actions are based".[14]

To define or update their Vision, political parties must reflect on these guiding questions:[15]

• How do we want to be? How do we want to be seen?
• What values govern our political party?
• How should our work be? What impact do we want to achieve?

Here are example extracts of the Vision of some political parties answering the guiding questions:

Political Party:
Liberal Party of Honduras
(Partido Liberal de Honduras)

Guiding questions:
• How do we want to be? How do we want to be seen?
• What values govern our political party? How should our work be?
• What impact do we want to achieve?

Extract of the Vision (answer to guiding questions):

The ultimate goal of the Liberal Party of Honduras (Partido Liberal de Honduras) is to exercise public power through a democratic, representative, and participatory process, to maintain the integrity of the rule of law and reinforce it by benefiting people, ensuring freedom, justice, economic and social well-being, and the promotion of education and culture.

Source: "Mission and Vision" section of the official website of the Liberal Party of Honduras [https://bit.ly/3xlnGVg]

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14 Armijo, *óp. cit.*, p. 39.
15 Own questions prepared under the document Planificación estratégica e indicadores de desempeño en el sector público, ILPES/UNECLAC, Budget Policies and Public Management Department, 2011, p. 40; extracted from: https://bit.ly/3rjQF8J

Political Party:
Democratic Left of Ecuador
(Izquierda Democrática de Ecuador)

By the end of this step, the political party should be able to draft Mission and Vision statements. The order in which the Mission and Vision statements address the guiding questions is not essential. Nevertheless, they must be clear and straightforward, avoiding unnecessary and ambiguous information to understand party members and citizens.

Guiding questions:
- How do we want to be? How do we want to be seen?
- What values govern our political party? How should our work be?
- What impact do we want to achieve?

Extract of the Vision (answer to guiding questions):

Our vision aims to position the Democratic Left as the first political force in the country to take power to build an Ecuador which overcomes poverty and inequality. Well-being should be for everyone. We should build a country with solid institutions in which citizens place their trust, far from radical and confrontational policies. Our actions must be based on innovation.

Source: Government Plan 2021-2025 of the Democratic Left, Xavier Hervas, p. 11 [https://bit.ly/3Qmkf9k]

To keep citizens informed about the content and validity of the party's Mission and Vision, effective communication channels must be enabled, such as the party's website and social media, where party authorities post comments more often.

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STEP 2. Definition of Strategic Objectives

Once the party is clear about the Mission and Vision, the objectives that will guide the political party's actions must be precisely defined, which can be understood as the "achievements that [the political party] expects to attain in a given period".[16]

Although the Vision **(identified in STEP 1)** represents a future goal or guiding notion that the political party wishes to reach, it may be a comprehensive, philosophical, and long-term idea. Instead, the objectives must be focused on more specific tasks and topics and be achieved in the short- and medium-term. These objectives will help the political party fulfill its Mission in the present and guide it to achieve its Vision in the future.[17]

When conducting planning processes, the party often wrongly sets "spontaneous" objectives not meeting the challenges and problems faced by the political party at a given time. These objectives are not realistic and neither enrich nor strengthen the political party.

It is important to avoid setting unrealistic objectives beyond the capacities of a single political party, such as eradicating poverty or organized crime. Therefore, political parties must create a planning process with attainable goals and not a planning process aiming to improve all the problems of the country or region.

In the second step for the strategic planning process, **a participatory diagnosis** must be conducted so that all party members can set objectives related to real challenges and problems of party activity.

Some tools that can be used to conduct a participatory diagnosis are:

> **A.** The Problem Tree and the Objective Tree **(see the experience of Mexico in Chapter 2)**; and,

> **B.** NDI's Political Party Integrity Assessment Framework included in *Win With Integrity: Earning Citizen Trust in Political Parties* **(see the experience of Colombia in Chapter 3)**.

Why use one option or the other? Both options help diagnose political parties' problems and challenges, leading to reflection and collective work to define strategic objectives. The time needed for both may vary significantly depending on the number of participants and depth of discussions.

The document *Win With Integrity: Earning Citizen Trust in Political Parties* poses a series of guiding questions,[18] while the Problem Tree and the Objective Tree tools complement each other and perform under a brainstorming exercise. These last two tools are discussed in detail below.

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16 Armijo, *óp. cit.*, pp. 41.

17 Several texts suggest that the SMART criteria must be met, thus the objectives must be: Specific, Measurable, Attainable, Relevant, and Timely. See *Win With Integrity: Earning Citizen Trust in Political Parties*, National Democratic Institute (NDI), 2021, pp. 62 and 63.

18 To learn more about the Integrity Assessment Framework works, see: *Win With Integrity: Earning Citizen Trust in Political Parties*.

The Problem Tree and the Objective Tree

ECLAC defines the Problem Tree as "a collaborative method to develop creative ideas to identify problems and organize the information collected, resulting in a model of causal relationships".[19]

The structure of a Problem Tree is associated with the shape of a real tree with roots, trunk, and branches **(see GRAPHIC 2)**:

GRAPHIC 2.
Structure of a Problem Tree
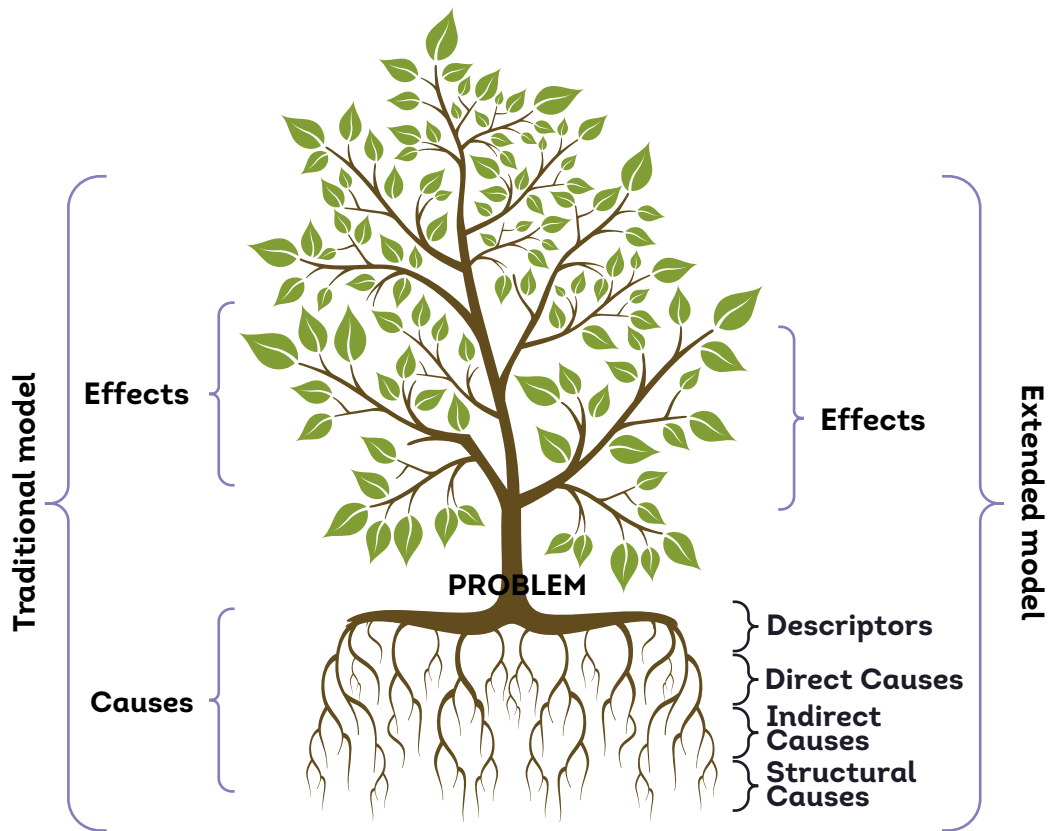
Prepared by NDI Mexico. Extracted from Burgwal and Cuéllar: 135, 1999

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19 Martínez, Rodrigo and Andrés Fernández, Metodologías e instrumentos para la formulación de evaluación y monitoreo de programas sociales. Árbol de problema y áreas de intervención, COMFAMA/UNECLAC, p. 2; extracted from: https://bit.ly/2T8MiAB

ECLAC has prepared several documents detailing the Problem Tree and Objective Tree tools.[20] Therefore, this section will only point out that the Problem Tree has three areas to be addressed in the following order:

A. First, the main problem or challenge the political party is facing must be identified and written down in the center of the diagram (the trunk of the tree), answering the question:

What is the main challenge/problem the political party is facing?

Some recommendations to draft the statement of the main problem or challenge are:[21]

- Defining it as a shortfall or deficit.
- Posing it as a negative situation.
- Expressing an actual situation, not a theoretical one.
- Affecting a well-identified target population.
- Not to be confused with the lack of any resource or service.

Example:

X political party neither offers the electorate clear proposals nor effectively represents the political views its party members identify.

B. Secondly, the causes originating the main problem must be identified and written down on the bottom of the diagram (roots of the tree), answering the question:

What causes originate the main challenge/ problem the political party faces?

Example:

- Poor coordination between the political party and the elected legislators, and hence the party's ideological line is not followed.
- No mechanisms to monitor the party's agenda and electoral platforms.
- No mechanisms to review and select candidacies in the party.
- Weakened party identity.
- Weak institutional capacity.
- The party's leadership is divided and, therefore, weakened.

Generally, there are many different causes of the main problem—political, legal, financial, social, or circumstantial. A reflection should be made to identify interrelated causes and those giving rise to other causes when addressing them.

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20 One of these documents is: https://bit.ly/2T8MiAB
21 Martínez y Fernández, *op cit*; p.2.

C. Finally, the effects caused by the main problem (branches of the tree) must be identified, answering the question:

What are the consequences or effects that originate the main challenge/problem the political party faces?

Example:

- Party members lack trust in their party.
- Most citizens consider that the party makes election promises but never delivers as promised.
- Most citizens abstain from voting for X political party because it does not represent them.
- Many candidates respond to the demands of citizens only when their personal interest is at stake.
- Legislators make decisions that are inconsistent with the party's ideology.
- Some party members have switched to other political parties where leaders unify, not divide.

As with the causes, there may be many different effects—political, legal, financial, social, or circumstantial. The interrelated effects and those giving rise to the other effects should be identified.

The answers obtained from the three sections of the Problem Tree (Main Problem, Causes, and Effects) must be structured in a diagram similar to the one below **(see GRAPHIC 3)**:

GRAPHIC 3.
Example of a Problem Tree for a Political Party

Effects caused by the main problem

> **Party members lack trust in their party.**

> **Most citizens abstain from voting for X political party because it does not represent them.**

Legislators make decisions that are inconsistent with the party's ideology.	**Some party members have switched to other political parties where leaders unify, not divide.**	**Many candidates respond to the demands of citizens only when their personal interest is at stake.**	**Most citizens consider that the party makes election promises but never delivers as promised.**

Main challenge/ problem of the political party

> **X political party neither offers the electorate clear proposals nor effectively represents the political views its party members identify.**

Poor coordination between the political party and the elected legislators; hence the party's ideological line is not followed.	The party's leadership is divided and, therefore, weakened.	No mechanisms to review and select candidacies in the party.	No mechanisms to monitor the party's agenda and electoral platforms.

Causes of the main problem

> Weakened party identity.

> Weak institutional capacity.

Source: Designed by NDI

24

Regardless of their location in the diagram, all Problem Tree elements represent a problem or challenge that the political party is facing. One of the virtues of a Problem Tree is that this tool clarifies that problems are not always the same and that problems (causes) give rise to other problems (effects).

This tool "is the positive version of the Problem Tree".[22] The Objective Tree respects the structure of the Problem Tree; the only change would be the "negative wording" of the identified problems into a "positive wording" starting with an infinitive verb[23] so that the new statements are **drafted as objectives**, reflecting the situation that the party expects to reverse, modify, or achieve.

Example:

Problem Tree Statement (Negative)
Poor coordination between the political party and the elected legislators, and hence the party's ideological line is not followed in Congress.

Objective Tree Statement (Positive)
Strengthen coordination between the party and its elected legislators so that the party's ideological line is followed in Congress.

Therefore, all elements of the Problem Tree are interconnected, so in order to facilitate the view of the causal relationship of one element with another, the causes should be vertically aligned with their effects, as shown in the previous chart **(see GRAPHIC 3)**.

Once the mapping of the different problems the party faces has been made, **alternatives must be identified to solve these problems.** The solutions are the strategic objectives formulated through a second tool: the Objective Tree.

Once all the elements of the Problem Tree have been thoroughly modified into their "positive version," the party will have a wide variety of objectives **(see GRAPHIC 4)**, so probably a question that will arise will be: How many and which of these objectives should the political party commit with?

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22 Martínez and Fernández, op cit; p.8.
23 Some infinitive verbs that can be used to redact objectives are: increase, promote, generate, train, publish, encourage, strengthen, collaborate, empower, etc.

GRAPHIC 4.
Example of an Objective Tree for a Political Party

Secondary Objectives

Increase members' trust in the political party.

Convince citizens to vote for X political party.

Ensure legislators make decisions consistent with the party's ideology.

Ensure party members remain in the party and support its leaders.

Support candidacies promoting the collective interest of citizens.

Meet campaign commitments.

Main Objective

Ensure X political party promotes a series of clear proposals and effectively represents the political views its party members identify.

Strategic Objectives

Strengthen coordination between the party and its elected legislators to follow the same ideological line.

Promote unity among party leaders.

Create internal mechanisms to review and select candidates.

Create mechanisms to monitor the government's agenda and the party's electoral platform.

Strengthen party identity among party members.

Reinforce the party's institutional capacities.

Source: Designed by NDI

There is no specific rule on the number of objectives established by a political party. However, a very long list of objectives should be avoided, as not having sufficient resources (time, money, human capital) to meet them would be risky for the party.

The party should focus its attention and resources on the **most strategic objectives**. In terms of the Objective Tree, the **most strategic objectives should be at the root of the tree**, and meeting them will allow addressing—from bottom to top—the main problem or challenge (located at the trunk of the tree) and, consequently, to mitigate the harmful effects found at the upper part of the diagram (branches of the tree).

At the end of this step, the party should prepare a limited list of strategic objectives representing feasible and accurate solutions to the problems and challenges that gave rise to them.

Win With Integrity:
Earning Citizen Trust in Political Parties

Win With Integrity: Earning Citizen Trust in Political Parties is an essential tool for diagnosing problems that later become strategic objectives. It consists of a series of aspects that allow incorporating elements of analysis of the parties' internal and external affairs.

This document suggests that the party undergoes a self-assessment of its internal processes and activities regarding integrity issues (organizational structure and culture, inclusive decision-making, review and selection of representative candidacy, finances, and transparency) to identify, prioritize, and plan courses of action for guiding the party towards an integrity reform.

Such reform proposals are the foundations for constructing the objectives in this STEP 2 for the strategic planning process. The objectives will be prioritized and categorized according to the topics mentioned above.

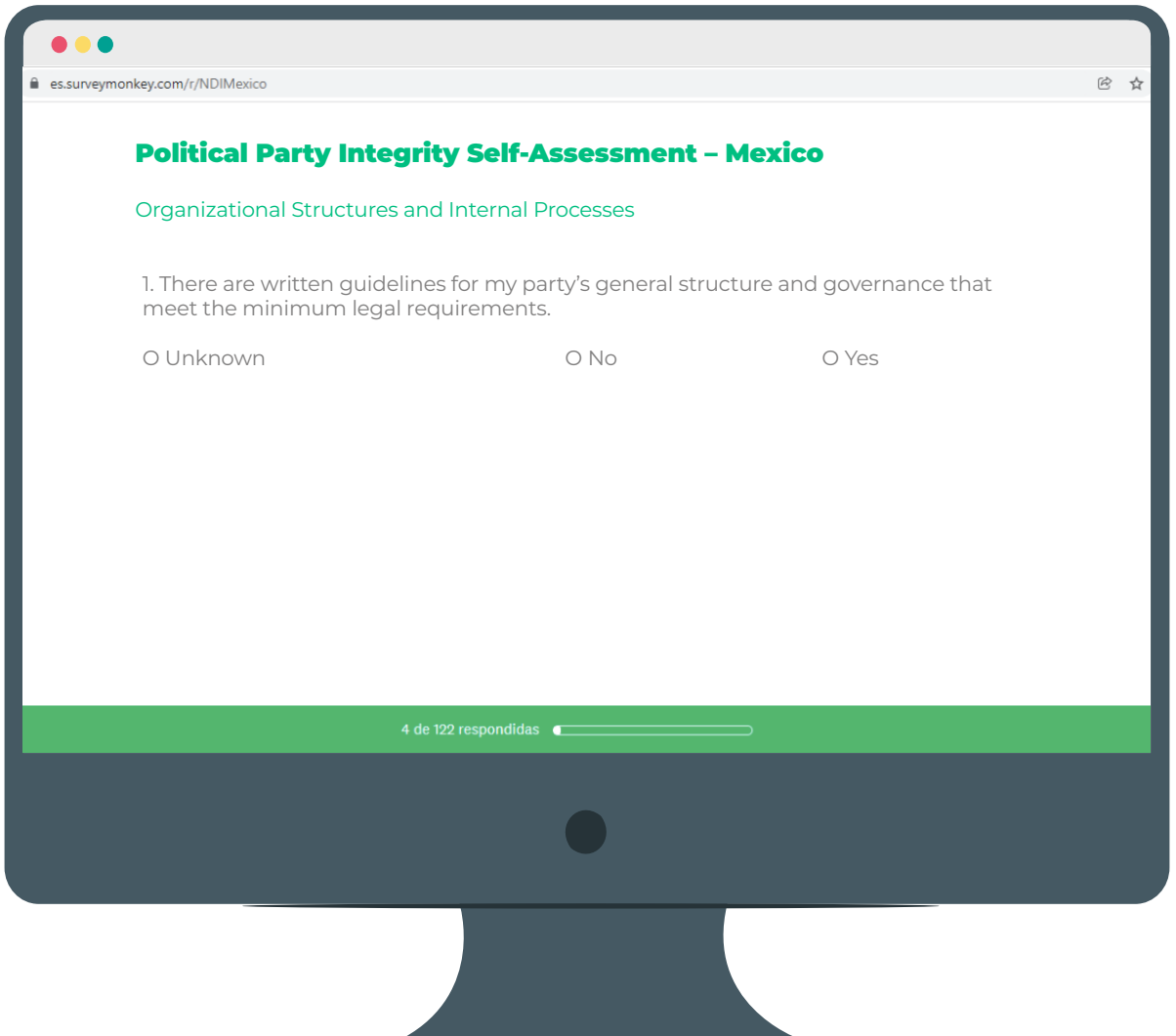The *Win With Integrity: Earning Citizen Trust in Political Parties* assessment is conducted through a digital survey with the participation of the political party's officials, members, and—if so decided—supporters.[24]

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24 During the design for the strategic planning, the party should define the different elements that will conduct the self-assessment of the *Win With Integrity: Earning Citizen Trust in Political Parties*

Political Party Integrity Self-Assessment – Mexico

Welcome!

Thank you for completing the Political Party Integrity Self-Assessment!

Please answer all questions honestly. By completing this assessment, you commit to investing time and effort in your party's integrity. Your answers will help improve various pillars of your party's integrity.

It is estimated that the time to complete the self-assessment ranges between 30 minutes and 1 hour. If necessary, you may complete it in multiple sessions. It will be saved by clicking the "Next" or "Done" button at the bottom of each page. Once you submit the completed assessment, your answers may not be changed.

NDI's work is most effective when political parties trust the Institute and openly share their operational concerns and challenges. Security, confidentiality, and privacy are a priority for NDI. Therefore, your answers shall only be shared with NDI. At the next pilot session, you may meet your party colleagues to discuss the integrity scores in a confidential and secure environment.

0 de 122 respondidas

View of the Digital Survey Designed by the NDI for Political Parties to Implement the *Win With Integrity: Earning Citizen Trust in Political Parties*

Political Party Integrity Self-Assessment – Mexico

Organizational Structures and Internal Processes

1. There are written guidelines for my party's general structure and governance that meet the minimum legal requirements.

O Unknown   O No   O Yes

4 de 122 respondidas

Win With Integrity: Earning Citizen Trust in Political Parties **Self-Assessment Questions**

The information collected is systematized through the digital survey.[25] Once the results are shown in charts, the political party can define its short, medium, and long-term strategic objectives based on areas that need reforms.[26]

STEP 3. Formulate a Strategy

Once the political party has identified the objectives, it must decide the actions it wants to take to meet the previously outlined objectives. The party wants to achieve one thing, but its abilities and circumstances are quite another. Therefore, the next step of the process is Formulate a Strategy.

Strategies are the "way of using the available resources to develop a series of planned actions to achieve the objectives previously outlined".[27]

Designing strategies involves a broad and discerning vision of the political party's decision-makers to consider all factors that either facilitate or hinder the achievement for the strategic planning objectives. There are many different factors—political, economic, social, legal, cultural, permanent, circumstantial, etc.

Two alternatives can be used to develop the strategies:

A. The SWOT Analysis—one of the most common tools in strategic planning **(see the experience of Mexico in Chapter 2)**.

B. Consensus-building and brainstorming exercises **(see the experience of Colombia in Chapter 3)**.

Both SWOT and brainstorming and consensus-building are tools implemented as a follow-up of the Problem/Objective Tree or the *Win With Integrity: Earning Citizen Trust in Political Parties* self-assessment, used to design strategic objectives, as explained in the previous section.

SWOT Analysis

The SWOT Analysis has two main functions. The first function is to identify and categorize all positive and negative factors to be considered for the construction of a strategy. These factors should be grouped into one of the following four categories:

S **STRENGTHS:** The political party's internal capabilities that could potentially be useful for achieving the stated objectives. Party members can start asking the following two questions to identify them:

What are the party's capabilities? Which capabilities could be helpful to achieve the stated objectives?

The following must be taken into account, among others:

A. Economic capabilities: the party's financial, material, and human resources;

B. Political capabilities: action plans, support from party leaders, harmony and collaboration among all areas of the party, party members in public office;

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25 The survey can also be conducted in hardcopy; however, the digital format is the quicker and accurate way to estimate data. See Section 2 of *Win With Integrity: Earning Citizen Trust in Political Parties*: https://bit.ly/3rZH1K7

26 To learn more about the digital survey to conduct the self-assessment see: *Win With Integrity: Earning Citizen Trust in Political Parties*.

27 Ligorria, Julio, Estrategia política. Secretos de la formación estratégica y marketing político, Mexico, Paidós, 2011, p. 20.

C.Technical capabilities: legal and transparency knowledge, gender perspective, comprehensive in-house training, digital tools, etc.;

D. Institutional capabilities: a legal framework that gives stability to the internal affairs of the party, protocols to deal with gender-based political violence among party members, permanent mechanisms for the review and selection of candidacies, etc.

WEAKNESSES: Shortcomings or negative situations within the party that can hinder and even prevent the objectives from being achieved. To identify Weaknesses, a party can formulate the following question:

What are the internal situations or shortcomings within the party that could hinder the achievement of the objective?

Due to their nature, Weaknesses are opposed to Strengths; for example, lack of budget and material resources, conflicts among the areas within the party, weak party leadership, no legal framework for internal activity stability, opaque finances, no mechanisms to review and select candidates, lack of expertise of party members.

OPPORTUNITIES: Situations related to the party's environment so that it may achieve its objective. In other words, while strengths are positive factors developed **within** the party and controlled by it, opportunities are also positive factors but developed **outside** the party and cannot be controlled by it. To identify Opportunities, a political party should formulate this question:

What are the circumstances or characteristics that the party could take advantage of to meet its objectives?

Some examples of Opportunities that a party could capitalize upon are a favorable public opinion; a weakened party opposition; engagement of civil society, young people, and minority or vulnerable groups to collaborate with the party while maintaining its autonomy; an electoral context positioning the relevant party in the lead of the popular vote, etc.

THREATS: Adverse situations related to the party's environment, which can hinder or prevent the objectives from being achieved. Threats are opposed to Opportunities. To identify them, a party can formulate the question:

What circumstances or characteristics could hinder the party from meeting its objectives?

Some examples of Threats are citizen distrust, strong opposition parties, adverse public opinion in the media, refusal of civil society organizations (CSOs) and the private sector to collaborate with the party, the party ranking relatively low in electoral preferences, etc.

If many **positive** (Strengths + Opportunities) **and negative** (Weaknesses + Threats) factors are identified, the recommendation is that only the most relevant factors **based on the objective** are selected. For example, if the objective is the following:

Strategic Objective: Strengthen coordination between the party and its elected legislators so that the party's ideological line is followed in Congress.

The factors that should prevail in the SWOT analysis are the ones related to the objective:

S **STRENGTH:**
The political party has political leaders respected by legislators.

W **WEAKNESS:**
After the elections, the party neither follows up nor trains its legislators to spread the party ideology.

O **OPPORTUNITY:**
Elected legislators are willing to dialogue and receive training from the party.

T **THREAT:**
The political agenda of Congress makes it difficult for the entire parliamentary group to meet with the party more than once a month.

Once the identified factors have been grouped into the four previously mentioned categories, the second step of the SWOT analysis is the creation of strategies by linking the information of the categories.

This linking should be made in pairs seeking the following correlation:[28]

> **A.** Take advantage of opportunities to enhance strengths (Opportunities + Strengths)
>
> **B.** Overcome weaknesses by taking advantage of opportunities (Opportunities + Weaknesses)
>
> **C.** Overcome threats by taking advantage of strengths (Threats + Strengths)
>
> **D.** Neutralize threats taking into account weaknesses (Threats + Weaknesses)

To facilitate the crossing of factors into categories, a matrix such as the one shown below can be used **(see GRAPHIC 5)**:

28 Silva, Ivan, Metodología para la elaboración de estrategias de desarrollo local, ILPES/UNECLAC, Local and Regional Development Management, Santiago de Chile, 2003, p. 72; extracted from: https://bit.ly/3slosxJ

GRAPHIC 5.
SWOT Analysis Matrix

	Strengths (Internal)	Weaknesses (Internal)
Opportunities (External)	**STRATEGY 1=** Opportunities (O) Strengths (S)	**STRATEGY 2=** Opportunities (O) Weaknesses (W)
Threats (External)	**STRATEGY 3=** Threats (T) Strengths (S)	**STRATEGY 4=** Threats (T) Weaknesses (W)

Source: Designed by NDI

According to the above example, the following strategies could be obtained from the crossing of the four SWOT categories **(See GRAPHIC 6)**:

GRAPHIC 6.

Example of a SWOT Analysis for a Political Party to Design Strategies

STRATEGIC OBJECTIVE: Strengthen coordination between the party and its elected legislators so that the party's ideological line is followed in Congress.

	Strengths (Internal)	Weaknesses (Internal)
Opportunities (External)	**STRATEGY 1=** **Opportunities (O)** **Strengths (S)** Example: Taking advantage of the respect for the party's leaders to maintain a permanent dialogue with elected legislators.	**STRATEGY 2=** **Opportunities (O)** **Weaknesses (W)** Example: Preparing a training program on party ideology for elected legislators to be taught after the elections.
Threats (External)	**STRATEGY 3=** **Threats (T)** **Strengths (S)** Example: Holding monthly meetings of the entire parliamentary group with the party's leaders.	**STRATEGY 4=** **Threats (T)** **Weaknesses (W)** Example: Holding monthly party legislator monitoring and training sessions.

Source: Designed by NDI

Before concluding this section, it is important to mention that—unlike objectives that are drafted starting with an infinitive verb (promote, create, prepare, disseminate, etc.)—strategies are drafted starting with verbs that end with the suffix "-tion" or "-ing" (promotion, creation, implementation, programming, etc.).

It is essential to keep these wording details in mind, as this will prevent the people in the strategic planning process from becoming confused between the inputs collected during the identifying objectives and designing strategies stages.

The party must design at least four strategies for each objective at the end of this step, based on the four combinations set out above. As with the strategic objectives, reducing the number of strategies in pretty similar statements should be considered. For example, strategies 3 and 4 of GRAPHIC 6 could be easily unified to create a single strategy, drafted as follows:

- **Strategy:** Programming monthly meetings with party leaders and training for legislators.

As mentioned before, it should be taken into account that a strategic planning exercise will not be better for having many objectives and strategies; on the contrary, if the party proposes many ideas, it would be risky if it might not follow them up in the future. Therefore, it will always be better to set a limited number of clear and achievable objectives and strategies.

Brainstorming and Consensus Building

Once a series of problems have been identified, and specific objectives have been set, a party should discuss and assess their appropriateness and relevance. To attain this, deliberation and consensus should be promoted to identify strategies that respond to the objectives according to the context.

The definition of strategies is constructed through brainstorming exercises, open to collective participation, in which questions involve aspects related to the vision of the future, the current state of the party, as well as national, regional, and municipal problems.

Multi-actor and multi-level exchanges must permeate into these discussion spaces to obtain a plural and inclusive vision of the political party's strategic routes to achieve its strategic objectives, assessing its internal conditions and the environment.

Based on the opinions gathered in the discussions, a strategy is built for each objective, with specific purposes related to the search for solutions to the most complex difficulties.

STEP 4. Develop a Monitoring and Evaluation Matrix

Many planning exercises outline guidelines in general terms, not specifying the expectations due to the outlined guidelines, a deadline, and, especially, how to know if the objectives and planned strategies are being fulfilled.

Strategic planning is a model aimed at achieving specific results. Therefore, despite monitoring and evaluation being conducted at the end, these steps are practically the most relevant of the entire process; here is where the parameters are set to follow up on the implementation of the project so—once the project is completed—it can be determined the extent to which the process was successful or unsuccessful.

Monitoring "is a systematic process to assess the efficiency and effectiveness of the project execution to identify achievements and weaknesses and recommend corrective measures to optimize the desired results".[29]

Evaluation "is a systematic reflection on the design, execution, efficiency, effectiveness, processes, and results (or impact) of either an ongoing or completed project".[30]

Monitoring is conducted during a project's implementation to make adjustments to courses of action, while evaluation is performed once the project is concluded.

Monitoring and evaluation can be made through the Logical Framework Approach (LFA) tool to register the fulfillment of all the steps previously established in the strategic planning, i.e., the main problem or challenge of the party, the objectives, and the strategies.[31]
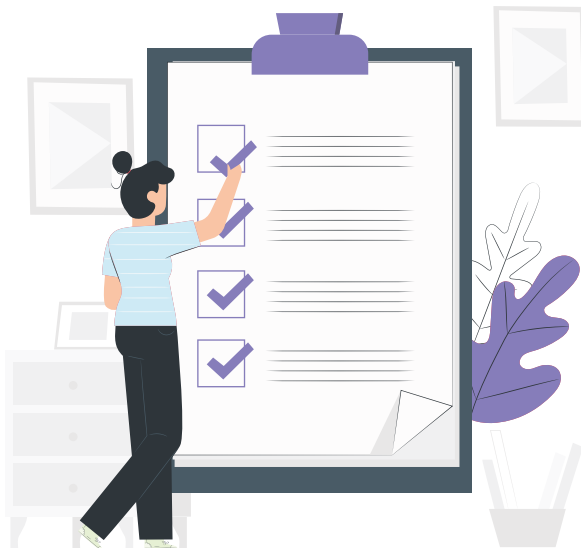
There is a wide variety of technical manuals explaining the characteristics and use of the LFA in detail. Thus only some general aspects of the tool will be discussed in this section.

The LFA tool has the following structure, and its components are defined below **(see TABLE 1)**:

---

29 Ortegón, Edgar et al. Metodología del marco lógico para la planificación, el seguimiento y la evaluación de proyectos y programas, ILPES/UNECLAC, 2005, p. 47; extracted from: https://bit.ly/3rhwwOL
30 *Ibídem*, p. 48
31 *Ibídem*, p. 16.

TABLE 1. Logical Framework Approach

	Narrative Summary The inputs collected in the different stages of strategic planning are entered in numerical order into this column.	Indicators Criteria that make it possible to measure the project's progress at different levels.[32]	Means of Verification Available databases or documents to prove that the indicator has been achieved.[33]	Assumptions "Key factors [external to the political party] that influence the achievement of results at each step of the project."[34]
Ultimate Goal of Strategic Planning The main objective of the Objective Tree.	1	6	7	8
Strategic Purpose or Objective "Statements accounting for the changes or impacts sought to be achieved with the execution of the plan."[35]	2	6	7	8
Component or Strategy "The way to use the available resources to develop a series of planned actions to achieve the previously outlined objectives."	3	6	7	8
Activities "Set of operations or tasks"[36] to be carried out based on the strategies.	4	6	7	8

5   9 →

Source: Designed by NDI.[37]

The numbers of the cells refer to the order in which the LFA must be completed. According to said numbering, the "Narrative Summary" column must be the first one, followed by the "Indicators" column, then the "Means of Verification" column, and, finally, the "Assumptions" column.

---

32 Örtengren, Kari, The logical framework approach, Swedish International Development CooperationAgency (SIDA) ,2004, p.15; extracted from: https://bit.ly/3lGpJNw
33 s/a, An introduction to the logical framework, Wisconsin Economic Development Corporation (WEDC) / Loughborough University, 2011, p. 9; extracted from: https://bit.ly/2OZfNCN
34 s/a, Critical Assumptions Analysis, National Democratic Institute.
35 Burgwal y Cuéllar, óp. cit., p. 205.
36 Real Academia Española, Diccionario de la lengua española; extracted from: https://bit.ly/31aIUFF
37 The design was based on the proposal of Saravia, Jorge A. Guía para la elaboración del marco lógico, Cali, Universidad Autónoma de Occidente, Oficina de Planeación de y Desarrollo Institucional - Área de proyectos, 2007, p.5.

Although its name suggests it, it should be emphasized that the LFA is an exercise in logic since the information entered in each cell is the cause or consequence of some other adjacent cell. Therefore, all cells in the same row or column must be a logical correlation. This is because steps 5 and 9 of the LFA demonstrate that the LFA can be read in either a vertical (Step 5) or horizontal (Step 9) way and that interpretation must have a logical meaning.

Conducting an LFA certainly implies spending a lot of time and effort on its design. However, the success of strategic planning largely depends on its preparation and use. To facilitate monitoring and evaluation discussions within political parties, below is presented an LFA again with the guiding questions that must be answered so that the information entered is beneficial for the political party. For illustrative purposes, an example is shown in red (see TABLE 2):

TABLE 2. Example of a Logical Framework of a Political Party with Guiding Questions

	Narrative Summary The inputs collected in the different stages of strategic planning are entered in numerical order into this column.	Indicators Criteria that make it possible to measure the project's progress at different levels.[38]	Means of Verification Available databases or documents to prove that the indicator has been achieved.[39]	Assumptions "Key factors [external to the political party] that influence the achievement of results at each step of the project."[40]
Ultimate Goal of Strategic Planning The main objective of the Objective Tree.	**1** What is the ultimate goal for the strategic planning conducted by the political party? EXAMPLE: X political party promoted a series of clear proposals and effectively represented the political views its party members identify.	**6** The ultimate goal of strategic planning must be measured: (1) Quantity? (2) Quality? (3) Time? EXAMPLE: (1) The positive public opinion of the party members of the leadership increased by 20% (2) by (3) July 2024.	**7** (1) Source? (document, website, database) (2) Verification method? (analysis, collection, verification) (3) How will it be analyzed? (quantitatively or qualitatively) (4) Follow-up frequency? (5) Follow-up responsible person? EXAMPLE: (5) The National Leadership of the political party (4) annually conducts a (3) quantitative (2) verification of (1) the statistics of the party members' public opinion (please paste survey link).	**8** What factors–unrelated to the political party–must exist for the ultimate goal of strategic planning to be sustainable? EXAMPLE: Most party members take part in developing the public opinion survey of the political party within the next few years for an accurate reference.
Strategic Purpose or Objective "Statements accounting for the changes or impacts sought to be achieved with the execution of the plan."[41]	**2** What is the goal or objective for the strategic planning conducted by the political party? EXAMPLE: Coordination between the party and its elected legislators was strengthened so that the party's ideological line was followed in Congress.	**6** The goal or objective must be: (1) Quantity? (2) Quality? (3) Time? EXAMPLE: (3) By July 2022, the parliamentary group has (1) a legislative agenda (2) approved by the senior party officials based on the party's ideology.	**7** (1) Source? (document, website, database) (2) Verification method? (analysis, collection, verification) (3) How will it be analyzed? (quantitatively or qualitatively) (4) Follow-up frequency? (5) Follow-up responsible person? EXAMPLE: (5) The Liaison Office, together with the Legislative team of X political party, conducts one (2) review of the contents of the (1) legislative agenda document (please paste document link here) (4) one month before the beginning of the legislative period.	**8** What factors–unrelated to the political party–must exist so that the goals may contribute to fulfilling the ultimate goal of strategic planning? EXAMPLE: The political agenda of the Congress do not modify the beginning of the legislative period.
Component or Strategy "The way to use the available resources to develop a series of planned actions to achieve the previously outlined objectives."	**3** What is the result/deliverable product that the party wants to develop from the activities? EXAMPLE: Strategy 2. A training program on party ideology was prepared for elected legislators to be taught after the elections.	**6** The product must be: (1) Quantity? (2) Quality? (3) Time? EXAMPLE: There is (1) a training program on party ideology (2) completed and approved by the National Leadership by (3) January 2022.	**7** (1) Source? (document, website, database) (2) Verification method? (analysis, collection, verification) (3) How will it be analyzed? (quantitatively or qualitatively) (4) Follow-up frequency? (5) Follow-up responsible person? EXAMPLE: (5) The training body of x political party conducts a (4) quarterly (3) qualitative (2) verification of the development of the program until the (1) curricular subjects are fully completed (please paste the curricular subject link with contents).	**8** What factors–unrelated to the political party–must exist so that the components may lead to the successful fulfillment for the strategic planning goal? EXAMPLE: After the elections, all legislators receive training on party ideology.
Activities "Set of operations or tasks"[42] to be carried out based on the strategies.	**4** What activities must be conducted to create the component? EXAMPLE: Activity 1. The contents of the training program were created. Activity 2. Trainers were hired. Activity 3. A calendar was	**6** Resources to complete the activity? (budget, time, staff) EXAMPLE: Activity 1. One month Activity 2. $10,000 per trainer Activity 3. Two weeks	**7** Was the activity completed–yes/no? *In this cell, a checklist with the completed activities should be made. EXAMPLE: - Activity 1 -Activity 2 -Activity 3	**8** What factors–unrelated to the political party–must exist so that the activities may successfully fulfill the components of strategic planning? EXAMPLE: The trainers expected to be engaged should align with the party's budget.

5

9

Source: Designed by NDI

38 Örtengren, óp. cit., p. 15.
39 WEDC, óp. cit., p. 9.
40 s/a, Critical Assumptions Analysis, National Democratic Institute.
41 Burgwal y Cuéllar, óp. cit., p. 205.
42 Real Academia Española, Diccionario de la lengua española; extracted from: https://bit.ly/31aIUFF

An LFA must be created for each strategic objective defined by the party. Only one strategy was included in the example shown in TABLE 2; however, each LFA must contemplate activities, indicators, means of verification, and assumptions for each strategy. Hence the importance of being strictly straightforward in STEPS 2 and 3 of strategic planning, as formulating many objectives and strategies may complicate the creation of the LFA.

The information entered in all cells must be drafted in the past tense (for example: it was made, it was strengthened, it was engaged, it was prepared, it was programmed, among others) because the LFA is an instrument to be used in the future—once the strategic plan begins to be executed; and not in the present—when the design of the plan is still underway. Thus, when conducting the Monitoring and Evaluation process using the past tense, it will be easier to understand and determine what has already been achieved and what has not as the project progresses.

Finally, as GRAPHIC 1 illustrates, strategic planning is a cyclical process since once the party has already designed and executed its strategic plan in a certain period, it must conduct an evaluation and reflect on the lessons learned to repeat the strategic planning process over and over again, until the party can always act strategically and not just reactively and aimlessly to unpredictable changes in the political context.

The Experience of the National Education and Training Secretariat of the National Action Party (Partido Acción Nacional - PAN) in Mexico

CHAPTER 2

Beyond describing the experience in historical terms, this chapter aims to present the critical aspects implemented by the PAN's National Education and Training Secretariat to execute the four steps for the strategic planning methodology (digital tools and activities performed). The purpose is that political parties consulting this document may learn what actions they can carry out to facilitate internal discussions and make joint decisions.

CONTEXT

The PAN's National Education and Training Secretariat (SFyC, in Spanish) already implemented a training plan. Still, they decided to use the strategic planning methodology for strengthening purposes and thus build, in a participatory manner, a multi-year training plan for the PAN.

Although the full training would initially be a face-to-face process, the outbreak of the COVID-19 pandemic had an impact, but the SFyC continued with virtual activities. This was the first participatory planning exercise conducted virtually in the party's history.

"At the PAN's National Education and Training Secretariat, we knew that training plans were not only something that "had" to be completed yearly—these plans had to be the result of a real medium- and long-term planning exercise involving significant indicators, resources, allies, setting the Mission and Vision, and the links to other areas of the party and state training secretariats."

Margarita Martínez Fisher
National Secretary for Training and Education, PAN

STEP 1

Identification of Mission and Vision

1. Purpose of this Step
Define the Vision and Mission of the PAN's National Education and Training Secretariat (SFyC).

2. Methodology
Brainstorming based on guiding questions **(see Chapter 1)**.

3. Methodology Tools
For the PAN's SFyC, this was the only face-to-face step. Materials included:

- Flip chart
- Different colored markers and pens
- MS PowerPoint

4. Participants
Leaders from the SFyC and other PAN areas interested in the party's training (around six people).

5. Total Duration of Activities
One three-hour session.

6. Activities Performed in this Step

A. First, as part of the presentation, the concept of Mission and Vision was explained.

B. The guiding questions to identify the information making up the Mission and Vision (see Chapter 1) were formulated.

C. Some examples of the Mission and Vision of other political parties were shared with the party leaders.

D. Then, the guiding questions were projected and analyzed to identify the Mission and Vision of the SFyC.

E. The answers of the party leaders were written on flip chart sheets.

F. The facilitator analyzed all the ideas with the party leaders, and in the end, there was only one answer per guiding question.

G. According to the answers to the guiding questions, the PAN's SFyC Mission and Vision text was also included.

H. The text was read out so that the party leaders could adjust it to make perfect sense.

7. Lessons Learned

A. To facilitate the discussion, guiding questions should be used so that party leaders and members may accurately identify the information that the Mission and Vision must include.

B. Also, examples of Mission and Vision from other political parties should be used so that the public may know how to draft the Mission and Vision statements.

C. Even when a party body intends to define its Mission and Vision, they must be aligned with the institutional Mission and Vision of the political party because—in the end—they are part of the same entity.

Session to Draft the Mission and Vision of the SFyC, CEN of the PAN. March 2020

STEP 2

Definition of Strategic Objectives

1. Purpose of this Step
Formulate the strategic objectives of the PAN's National Education and Training Secretariat (SFyC).

2. Methodology
Problem Tree and Objective Tree **(see Methodology in Chapter 1)**.

3. Methodology Digital Tools
In this step, the following digital tools were used:[43]

- Mentimeter
- Google Drive spreadsheets
- Lucidchart

4. Participants
Around 20 people participated in this step. Some participants were:

- Core team of the PAN's National Education and Training Secretariat
- Leaders from other PAN areas around the country
- Members of the PAN's Education and Training Secretariat in the states

5. Total Duration of Activities
Two sessions of about two and a half hours each.

6. Activities Performed in this Step

A. First, the definition of a strategic objective was explained through a presentation.

B. The party members, through the Mentimeter tool, were asked: What is the main problem (challenge) faced by the PAN's SFyC? **(See GRAPHIC 7)**:

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43 The APPENDIX presented at the end of this document lists some advantages and disadvantages detected when using these digital tools. These details should be considered for the organization of the work sessions throughout the entire strategic planning process.

GRAPHIC 7.

Brainstorming to Identify the Main Challenge/Problem of the PAN's SFyC

What is the main problem (challenge) faced by the PAN's SFyC?
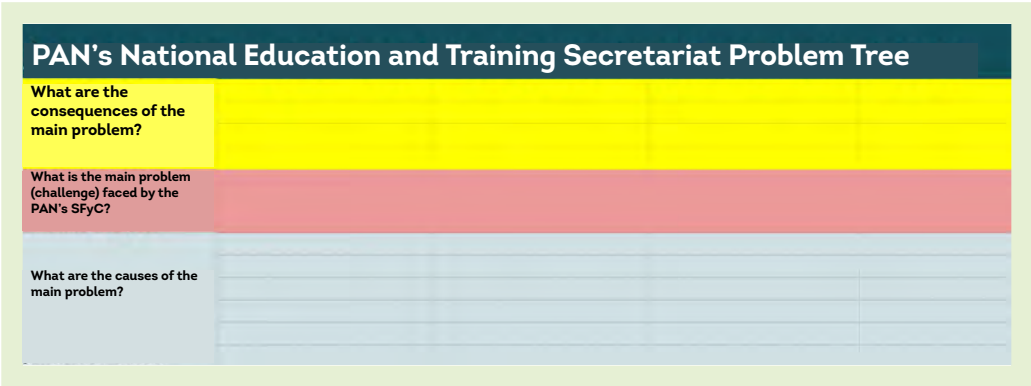
Source: Designed by NDI

C. In a plenary session, the facilitator in charge—together with the public—reviewed all the answers drafted.

D. A single statement was collectively drafted, including the main problem of the PAN's SFyC.

E. Then, the synthesized structure of the Problem Tree (Main Problem, Causes, and Consequences) was replicated in a Google Drive spreadsheet, as shown below **(see GRAPHIC 8)**:

GRAPHIC 8.
Development of the SFyC Problem Tree

PAN's National Education and Training Secretariat Problem Tree	
What are the consequences of the main problem?	
What is the main problem (challenge) faced by the PAN's SFyC?	
What are the causes of the main problem?	

Source: Designed by NDI

F. At the center of the chart (red section), the statement of the main problem faced by the PAN's SFyC was entered.

G. The Google Drive link was shared, and the participants were asked to write down the causes of the main problem. The public wrote their answers indistinctly in the cells of the blue section.

H. This procedure was also used to identify the consequences of the main problem (yellow section).

I. Based on the inputs collected during the exercise, the core team of the PAN's SFyC carried out a pretty specific classification of the information considering all the components of the Problem Tree. This new chart was created with the Lucidchart tool **(See GRAPHIC 9)**:

46

GRAPHIC 9.
## Final Version of the SFyC Problem Tree
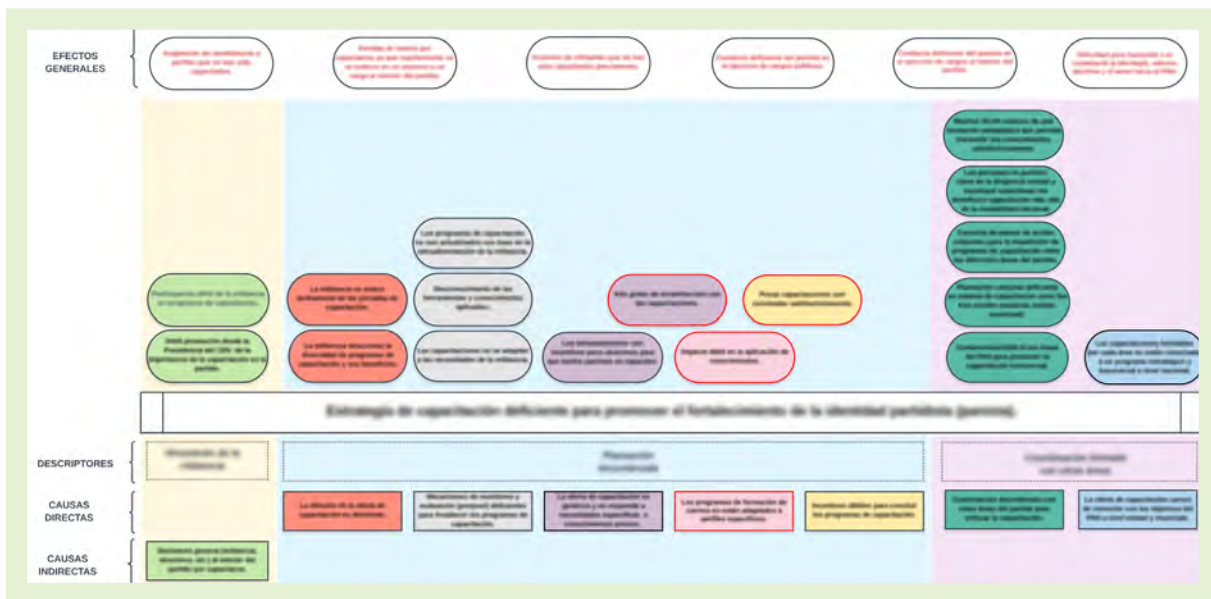
Source: Designed by NDI

J. The "positive version" of the Problem Tree, i.e., the Objective Tree, was created in Lucidchart.

K. Both the Problem Tree and the Objective Tree were presented to and then approved by different representatives of the state SFyCs and other PAN leaders.

7. Lessons Learned

> An optimal strategic planning identifies and focuses on only a limited number of objectives. Therefore, the number of objectives identified in this step should be limited, considering that creating many objectives will imply a more significant amount of work in the Strategy Step, as well as Monitoring and Evaluation.
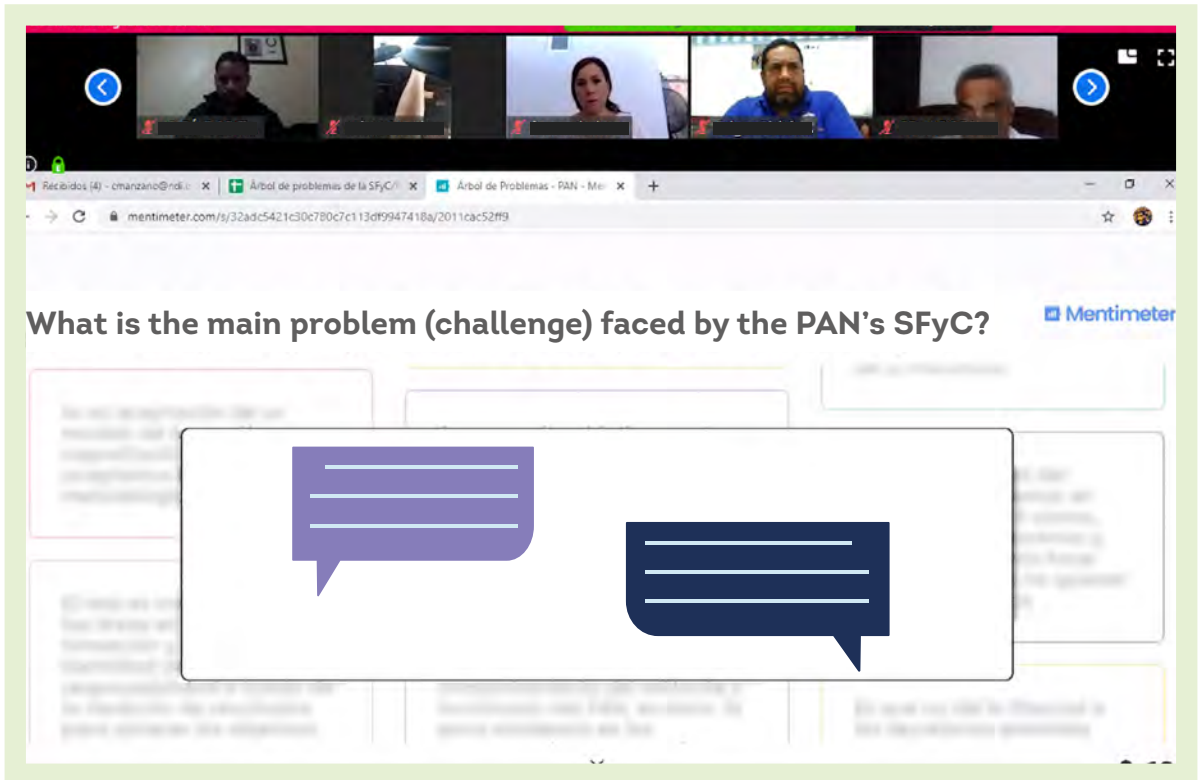
Online Discussion to Define the Strategic Objectives of the SFyC. March 2020

STEP 3

Formulate a Strategy

1. Purpose of this Step

Formulating the strategies for the PAN's SFyC to achieve its strategic objectives.

2. Methodology

SWOT Analysis **(see Chapter 1 to learn about the methodology)**.

3. Methodology Digital Tools

In this step, the following digital tool was used:[44]

- • Padlet

4. Participants

Between 20-25 people per session participated in the activities of this step. Some participants were:

- • Core team of the PAN's National Education and Training Secretariat
- • Leaders from other areas of the party
- • SFyC Trainers
- • Members of the PAN's Education and Training State Secretariats

5. Total Duration of Activities

Three Zoom sessions of two hours each were held to carry out the exercises and discussions of this activity.

6. Activities Performed in this Step

A. First, in a plenary session, all the participants learned about the strategies and the SWOT analysis.

B. Then, four work teams were created in a Zoom meeting (through the breakout rooms function).

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44 The APPENDIX presented at the end of this document lists some advantages and disadvantages detected when using this digital tool. These details should be considered for the organization of the work sessions throughout the entire strategic planning process.

C. Each team was assigned a Padlet board with a SWOT component (Team 1: Strengths; Team 2: Opportunities; Team 3: Weaknesses; and Team 4: Threats).

D. In the first activity, each team conducted a brainstorming exercise based on the component assigned through the use of Padlet sticky notes **(See GRAPHIC 10)**:
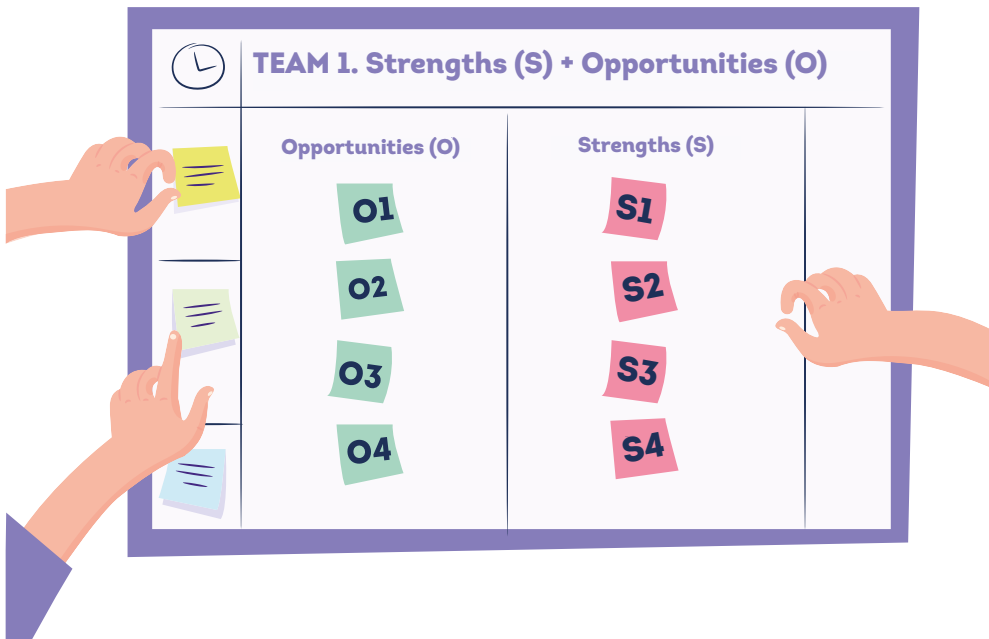
GRAPHIC 10.
SWOT Analysis Brainstorming

TEAM 1. Strengths (S)
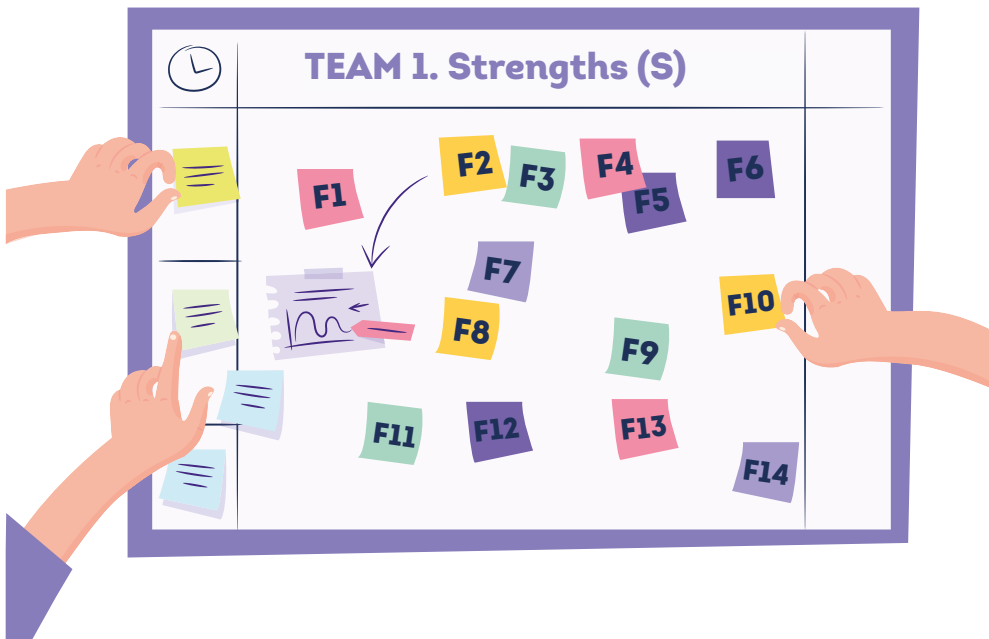
Source: Designed by NDI

E. Then, the work teams were dissolved, and the sticky notes with the ideas of each team were presented in a plenary session so that the rest of the participants could complement and approve the results.

F. Later, four work teams were formed again.

G. A new Padlet board with written sticky notes was assigned to each team. However, unlike the previous exercise, this board contained a compilation with the sticky notes of two SWOT components **(see GRAPHIC 11)**, arranged in two columns and with the following combinations:

- Padlet board 1: Opportunities + Strengths
- Padlet board 2: Weaknesses + Opportunities
- Padlet board 3: Threats + Strengths
- Padlet board 4: Threats + Weaknesses

GRAPHIC 11.
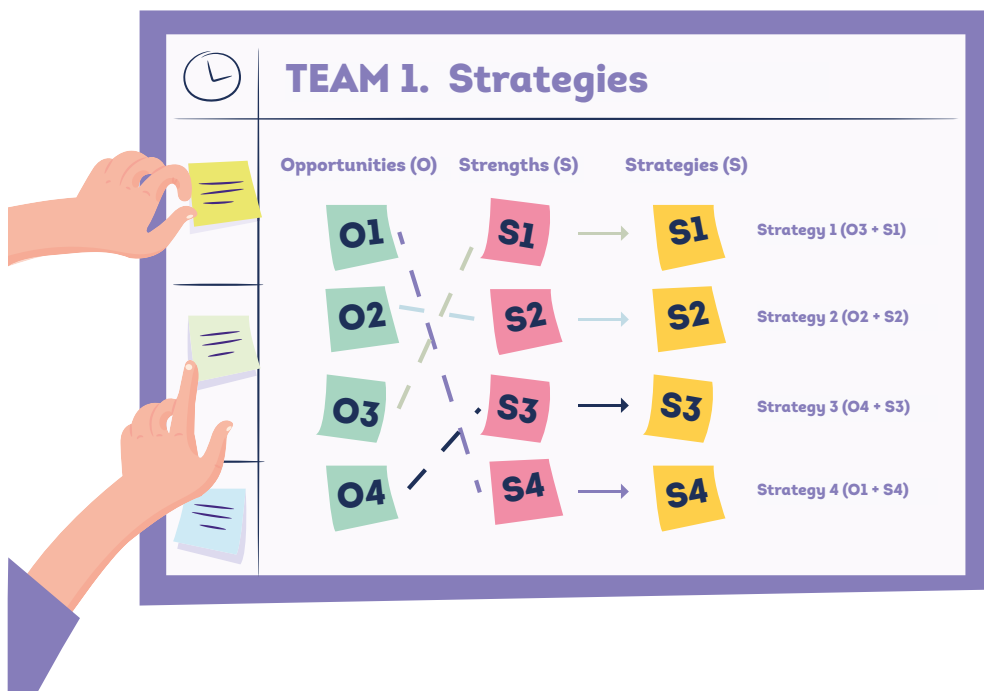**Grouping of two SWOT Components on the Same Board**

Source: Designed by NDI

H. The participants of each team were asked to combine the sticky notes from the first column with those from the second column as they would consider most convenient to formulate strategies **(see GRAPHIC 12)**:

GRAPHIC 12.
**Comparison of Components for the Formulation of SWOT strategies**

TEAM 1. Strategies

Opportunities (O)	Strengths (S)	Strategies (S)	
O1	S1	S1	Strategy 1 (O3 + S1)
O2	S2	S2	Strategy 2 (O2 + S2)
O3	S3	S3	Strategy 3 (O4 + S3)
O4	S4	S4	Strategy 4 (O1 + S4)

Source: Designed by NDI

I. At the end, participants returned to a plenary session again. Each team presented their strategies based on the two SWOT components assigned, and the whole group discussed them to provide feedback and approve them.

7. Lessons Learned

A. To conduct the SWOT analysis, people from the entire party structure must be included since each participant can identify the political party's Strengths, Weaknesses, Opportunities, and Threats of the political party, according to their expertise and their party roles.

B. To avoid collecting large amounts of unnecessary information, the exercise facilitator should constantly emphasize that identifying Strengths, Weaknesses, Opportunities, and Threats should focus not only on general terms but also on the objectives.

C. Only one or two strategies for each objective should be drafted—more strategies can complicate their monitoring and evaluation, as well as their fulfillment. The SWOT analysis exercise should encourage the group to summarize ideas in quite similar strategies.
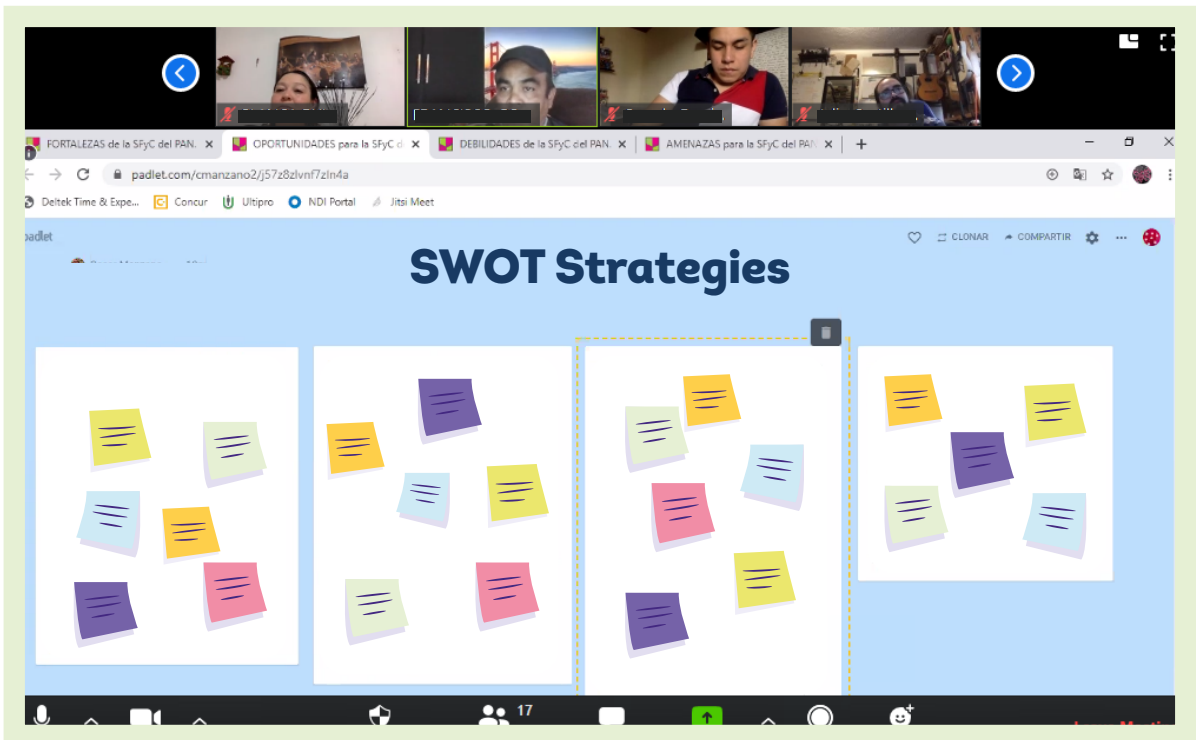
Online Discussion to Formulate SFyC Strategies. May 2020

STEP 4

Develop a Monitoring and Evaluation Matrix

1. Purpose of this Step
Create a matrix of indicators to monitor the execution for the strategic plan and evaluate the results.

2. Methodology
Logical Framework Approach **(see Chapter 1 to learn about the methodology)**.

3. Methodology Digital Tools
In this step, the following digital tool was used:[45]

- Google Sheets. (If Google Sheets is not available, similar tools like Windows Excel or Mac Numbers can be used.)

4. Participants
The core team of the PAN's Education and Training Secretariat (around six people).

5. Total Duration of Activities
Ten sessions of two hours each.

6. Activities Performed in this Step

A. Before the session, it was prepared in Google Sheet, replicating the structure of the Logical Framework, as follows **(see GRAPHIC 13)**:

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45 The APPENDIX presented at the end of this document lists some advantages and disadvantages detected when using these digital tools. These details should be considered for the organization of the work sessions throughout the entire strategic planning process.

GRAPHIC 13.
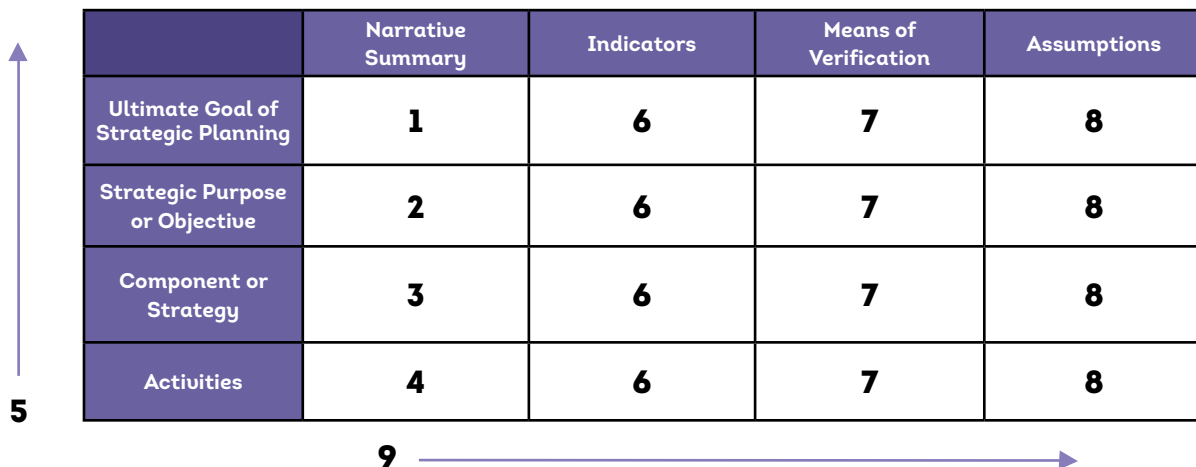## Logical Framework Applied to a Spreadsheet

	Narrative Summary	Indicators	Means of Verification	Assumptions
Ultimate Goal of Strategic Planning				
Strategic Purpose or Objective				
Component or Strategy				
Activities				

Source: Designed by NDI

B. To start filling out the LFA, the exercise facilitator used the screen sharing function according to the following numbering order **(See GRAPHIC 14)**:

GRAPHIC 14.
Suggested Order for Completing the Logical Framework

	Narrative Summary	Indicators	Means of Verification	Assumptions
Ultimate Goal of Strategic Planning	1	6	7	8
Strategic Purpose or Objective	2	6	7	8
Component or Strategy	3	6	7	8
Activities	4	6	7	8

5

9

Source: Designed by NDI

> **C.** The exercise facilitator used the guiding questions indicated in Chapter 1.[46] The guiding questions should be printed out or opened on another screen, but not on the same sharing screen—there are several questions, and a large amount of text can confuse the exercise facilitator and the public.
>
> **D.** As this step was performed with a small group of people (six people), breakout rooms were not necessary. Everything was discussed in a plenary session.

46 See page 38 of this document.

7. Lessons Learned

> An LFA must be completed for each strategic objective. Therefore, in Step 2 of strategic planning, the number of objectives should be limited as much as possible; many objectives will consequently multiply the number of strategies and Logical Frameworks.
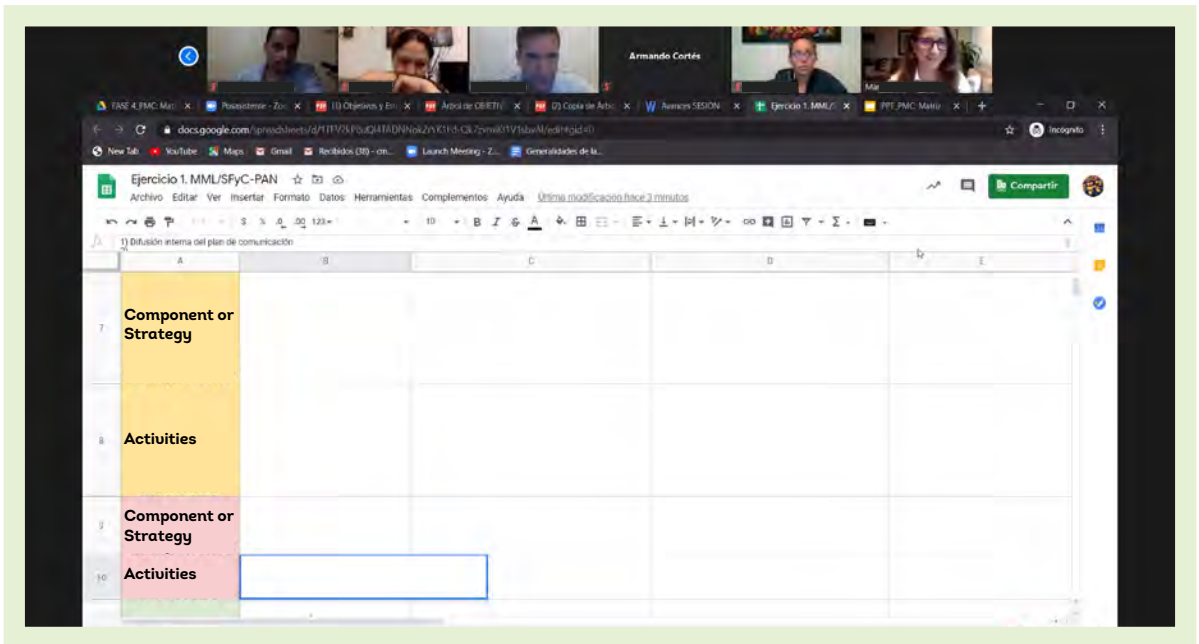
Online Discussion for the Creation of the SFyC Logical Framework. July 2020

After several months of hard work, the PAN's Education and Training Secretariat managed to complete the four steps for the strategic planning process. The document was drafted based on the inputs collected in each step, including the party's training guidelines. Finally, in February 2021, the SFyC presented this Multiannual Training Plan—as a result of the collective participation of the party members—to the Chairperson of the PAN's National Executive Committee, Marko Cortés.
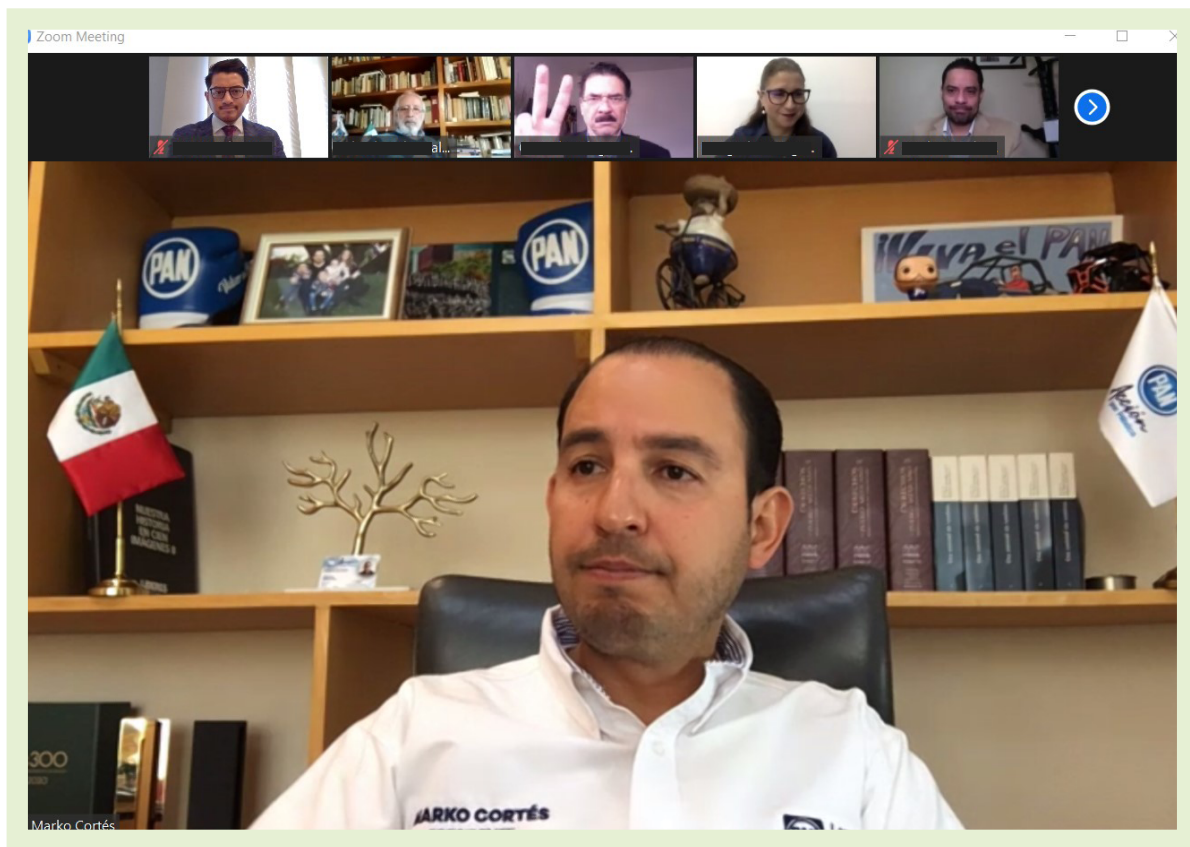
Official Presentation of the SFyC Multiannual Training Plan before Marko Cortés, National President of the PAN. February 2021

Radical Change (Cambio Radical) Experience in Colombia

CHAPTER 3

Beyond describing the experience in general terms, this chapter aims to present the critical aspects implemented by Cambio Radical to execute the first three steps for the strategic planning methodology[47] (digital tools and activities performed). The purpose is that other political parties consulting this document may learn about what activities they can carry out to facilitate internal discussions and make joint decisions, thus strengthening internal democracy.

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47 As the experience of Cambio Radical is recent, this party mainly focused on updating its Mission and Vision, on a diagnosis to prioritize and define both its objectives and strategic lines, included in a work plan to be reviewed annually by each area based on the implementation progress. Therefore, Cambio Radical decided to deal with Step 4 (evaluation of the process) until that moment.

CONTEXT

The National Leadership of Cambio Radical was determined to reconsider the strategic performance of all the party areas. It used the strategic planning methodology to reach the regions that had little participation and visibility in the decision-making process of Cambio Radical.

This process started in March 2020—when the COVID-19 pandemic was declared a global emergency—and although the pandemic hindered some party activities, Cambio Radical adapted to the situation and broke new ground by using technology to broaden the participation of the different sectors of the party.

Germán Córdoba O.
National Director, Cambio Radical

"From the beginning, we stated that the party's organization should follow a series of orderly steps with clear short-, medium-, and long-term strategic goals. We must stop thinking only in the present and urgent matters rather than in the long term, outlining this party as an organization that is clear about its goals, prioritizing its members, and seeking decentralization of decision-making based on a structure, some forms, or a methodology."

STEP 1
Mission and Vision Update

1. Purpose of this Step
Reviewing and approving the Mission and Vision—previously established in the party's bylaws—to update them through a participatory process.

2. Methodology
Brainstorming based on guiding questions **(see Chapter 1)**.

3. Methodology Digital Tools
In this step, the following digital tool was used:[48]

- Jamboard

4. Participants
Different Units of the party (around 50 people). Some participants included:

- National Leadership
- Ethical Review Board
- Women, Youth, Ethnic Minorities, and other types of Committees established by resolution
- Citizen Oversight Committee
- National Political Commission (senators and representatives of the Chamber elected with the support of the party)

Administrative Units;

- National Legal Department
- Election Management Audit

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48 The APPENDIX presented at the end of this document lists some advantages and disadvantages detected when using this digital tool. These details should be considered for the organization of the work sessions throughout the entire strategic planning process.
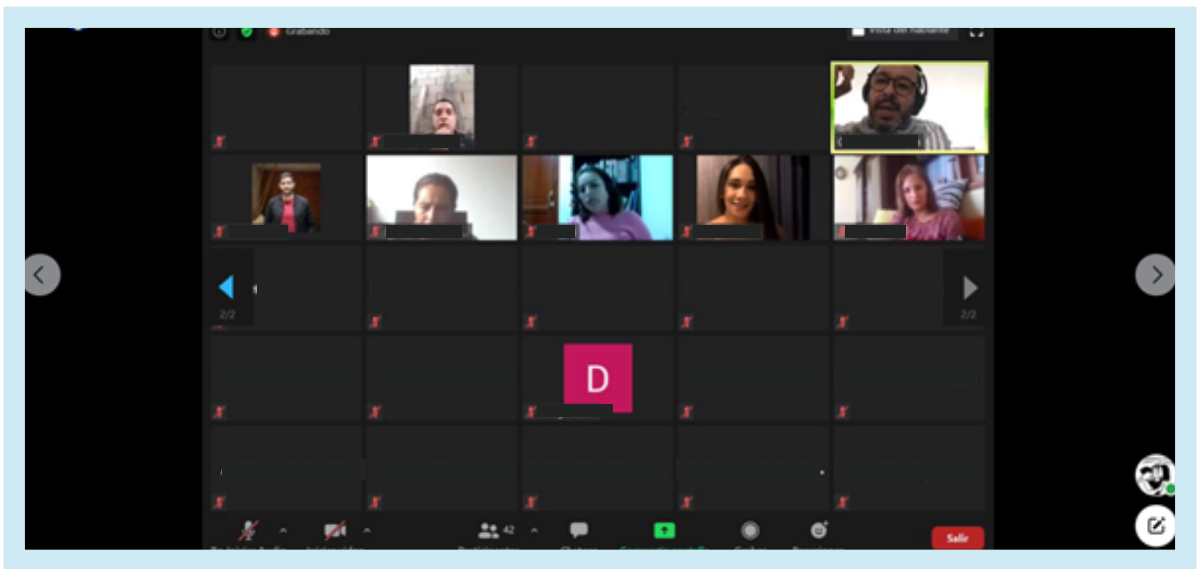
Update Session of Cambio Radical's Vision and Mission, 2020

5. Total Duration of Activities

Two hour-and-a-half Zoom sessions were required to complete the exercises and discussions of this step. The first session reviewed the current party's Mission and Vision and discussed opinions and proposals based on the brainstorming exercise. The second session consisted of a feedback exercise and reviewing the final proposal prepared in the first work session.

6. Activities Performed in this Step

A. In a plenary session, the facilitator stated the party's objectives—established in its bylaws—as well as the importance of strategic planning.

B. A roll call was conducted to identify the participants. Their names were entered on Jamboard.

C. The floor was opened for public comment. There were 2-minute timed interventions for each participant to answer the guiding questions (Chapter 1). Simultaneously, the answers were entered in the corresponding cells on the Jamboard.

D. After the questions, the attendees created a Mission and Vision proposal discussed in a plenary session.

E. Once the proposals were heard and discussed, a final debate was held to define—by consensus—a Mission and Vision text that would:

> I. Sum up all the ideas and opinions from previous steps, and
>
> II. Be aligned with the party's representations both at the national and regional levels (states and municipalities).

7. Lessons Learned

> **A.** There are two ways to approach this step:

1. **When the Political Party has not Defined its Mission and Vision.** Consensus should be established, as well as guiding questions to define how the party is viewed in the short, medium, and long term.

2. **When the Party Has Already established—in its Bylaws—its Mission and Vision.** Based on the current context at the country and party level, reviewing its Mission and Vision and questioning the validity and alienation of these items should be considered.

> **B.** It is important to define the levels at which the party wants to review the Mission and Vision, identifying the actors that will take part, as well as establishing a work plan. If the political party so decides, it should be a participatory process involving all party areas, both at the national and regional levels.
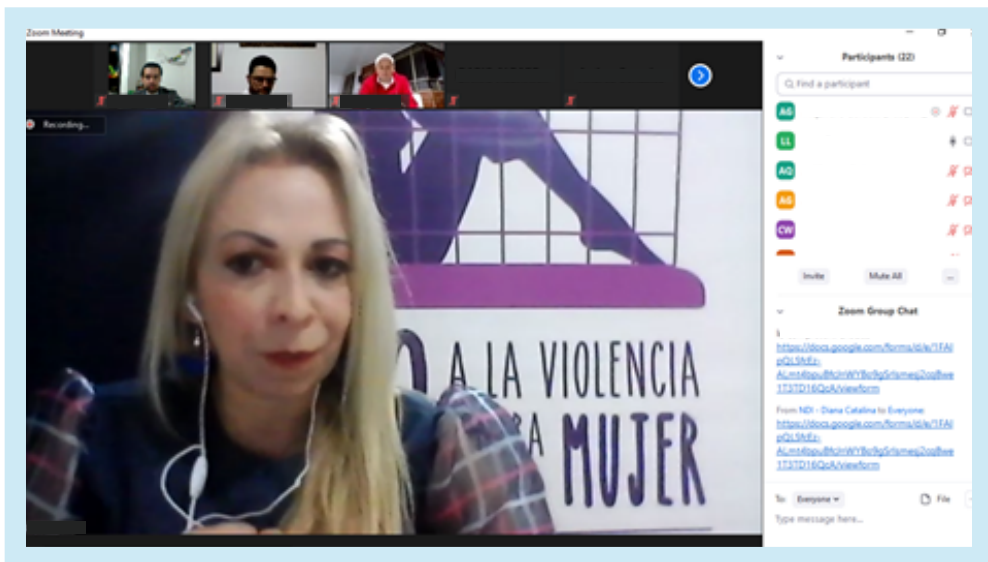
Update Session of Cambio Radical's Vision and Mission, 2020

STEP 2
Definition of Strategic Objectives

1. Purpose of this Step
Define and prioritize Cambio Radical's strategic objectives.

2. Methodology
Survey of the document *"Win With Integrity: Earning Citizen Trust in Political Parties"*: it is a tool to diagnose the party's challenges and problems–at the different levels–, defining the causes that hinder the fulfillment of the objectives, as well as strengthening the party's organizational capacity as follows:

- Organizational structures and internal processes
- Organizational culture
- Research processes and selection of candidates
- Assurance of the significant inclusion of stakeholders
- Political fundraising and financial management.

This methodology allows for prioritizing processes based on the responses and recommendations of the party members.

3. Methodology Digital Tools
In this step, the following digital tools were used:[49]

- Mentimeter

- Google Forms

- Jamboard

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49 The APPENDIX presented at the end of this document lists some advantages and disadvantages detected when using this digital tool. These details should be considered for the organization of the work sessions throughout the entire strategic planning process.

Exercises to Identify Cambio Radical's Current Trends and Challenges with the Mentimeter Tool, 2020

Brainstorming to Define Cambio Radical's Goals with the Jamboard Tool, 2020

4. Participants

Different Units of the party (around 50 people). Some participants included:

- National Leadership
- Ethical Review Board
- Women, Youth, Ethnic Minorities, and other types of Committees established by resolution
- Citizen Oversight Committee
- National Political Commission (senators and representatives of the Chamber elected with the support of the party)

Administrative Units;

- National Legal Department
- Election Management Audit

5. Total Duration of Activities

The exercises and discussions of this step were performed in a two-hour Zoom session.

6. Activities Performed in this Step

A. In a plenary session, a debate was opened on the party's internal situation and its relationship with the state or municipality of the locality.

B. Then, a brainstorming session started—with two-minute interventions—in which the participants answered the guiding questions:[50]

- What is the internal situation of the party in the state/municipality/locality regarding each aspect, and where is it located?
- What elements are required to improve the party integrity, and how should this be applied in the governing bodies and committees of the state, municipality, or locality?

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50 This exercise did not follow up to the Political Party Integrity Assessment Framework Survey at the national level. Instead, a battery of questions related to the party's objectives was applied—the understanding of the objectives within the party, deadlines and priority actions, and consistency between the national and regional level objectives.

C. Finally, the participants answered a two- or three-question survey (extracted from the document *Win With Integrity: Earning Citizen Trust in Political Parties*) through the Mentimeter platform to encourage a brainstorming exercise.

D. Once the previous activity was completed, participants were provided with a Google Form to complement, expand or, where appropriate, delve into the responses from the survey and the brainstorming activity.

E. Responses were discussed and classified into the following categories:

1. **Strategic:** Electoral, External Policy, Organizational, and Integrity.
2. **Management:** Capacity Building and Training and Knowledge Management.
3. **Operating:** Media and Press and Management of Information and Communication Technologies (ICTs).

NOTE: For each category, a Jamboard whiteboard was generated.

F. After the discussion, compilation, and classification of the party's problems and needs, a proposal of objectives was designed based on the statements and opinions collected throughout this process stage.

G. Once the proposal of objectives was designed, the participants reviewed and approved it.

7. Lessons Learned

- The exercises of this stage required delimiting the ideas previously mentioned in Step 1 and holding meetings to define a work proposal.

- In this step and throughout the process, a party leader should be connected at the national level or, where appropriate, at the regional level to earn trust among party members and make this an inclusive process.

- It is vital that the capacities of the party or the area in question be delimited and established so that the expectations of the participants are aligned with them, have consistency, and do not exceed the party's competition or, as the case may be, of the area both nationally and regionally.

- It is essential that facilitators focus efforts on the challenges according to the appropriate level (national, state, or municipal) to raise awareness that it is impossible to solve the party's problems at the national level, but only at the regional level and/or by area.

- Rules and guidelines should be established to promote a good dialogue based on respect and the participation of the attendees.

- The topics by level, structure, and actor should be classified for the problem diagnosis and analysis stage.

- The institutionalization of the process is critical to maintaining an ongoing planning culture. To attain this, the party incorporated a guideline in which the process must be in constant review to guarantee its sustainability. The party adopted the planning model within its procedures, and the valuation of the actions must be done annually, through resolution No. 029 of November 4, 2021: "By means of which the Cambio Radical's Strategic Planning Manual and Manual of Processes and Procedures are approved and adopted."

STEP 3
Formulate a Strategy

1. Purpose of this Step
Formulate Cambio Radical strategies to achieve the previously outlined objectives.

2. Methodology
Consensus exercise–two-minute interventions per participant–to specify alternative strategies for achieving the objectives set–in the previous stage– and to solve the problems identified in the diagnosis and problem analysis step.

3. Methodology Digital Tools
What digital tool was used?
In this step, the following digital tool was used:[51]

- • Zoom

4. Participants
Different units of the party (around 50 people). Some participants were:

- • National Leadership
- • Ethical Review Board
- • Women, Youth, Ethnic Minorities, and other types of Committees established by resolution
- • Observers
- • National Political Commission (senators and representatives of the Chamber elected with the support of the party)

Administrative Units:

- • National Legal Department
- • Election Management Audit

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51 The APPENDIX presented at the end of this document lists some advantages and disadvantages detected when using this digital tool. These details should be considered for the organization of the work sessions throughout the entire strategic planning process.

5. Total Duration of Activities

This stage required two Zoom virtual sessions (each lasting approximately an hour and a half). The first session identified and prioritized the options and strategic actions, and the objectives and actors were defined. In the second session, the steps to be developed by each area in the short, medium, and long term were set.

6. Activities Performed in this Step

A. A survey was conducted to put forward the final proposals of the objectives—formulated in Step 2—so that the participants could choose the objective they would like to focus on to identify and prioritize strategies and actions.

B. Once the objectives chosen by the participants were established, work teams were formed in Zoom (through the breakout rooms function).

C. Each team member was asked: What were the alternatives to solve the problems identified in the short- (maximum one year), medium- (one to three years), and long-term (over three years)?

Simultaneously, the answers were entered on a Jamboard whiteboard.

- The problems identified in Step 2 were indicated in red;
- in blue are the objectives built in Step 2 to solve the problems; and
- in purple are the potential strategies and actions to formulate in Step 3.

NOTE: This activity took 45 minutes.

D. After the breakout room discussions, the plenary session resumed—the teams submitted their findings and proposals, while the rest of the participants gave their feedback.

E. Then, a consensus exercise was conducted to define and prioritize two or three specific actions per area. These final actions were embodied in the party's strategic plan.

7. Lessons Learned

- Participation should be promoted in all sessions, mainly because issues of great relevance to the political party are addressed. The exercise facilitator should intervene only to channel the conversations.

- At the beginning of each session, a brief recap of the activities and conclusions of the previous exercises should be made to avoid losing the guiding thread of the process.

- It is important to present the final products of each session to the participants so that they can rest assured that their opinions and contributions are taken into account.

- The party must get fully involved in developing its strategic plan. External actors should only provide tools and methodologies, as well as support the review and feedback of the products resulting from each session.

- In defining and prioritizing strategies, it bears mentioning that the defined actions may depend on the collaboration of various party areas; therefore, a multi-stakeholder and multi-level awareness strategy should be formulated in all areas of the party and considering all its members.
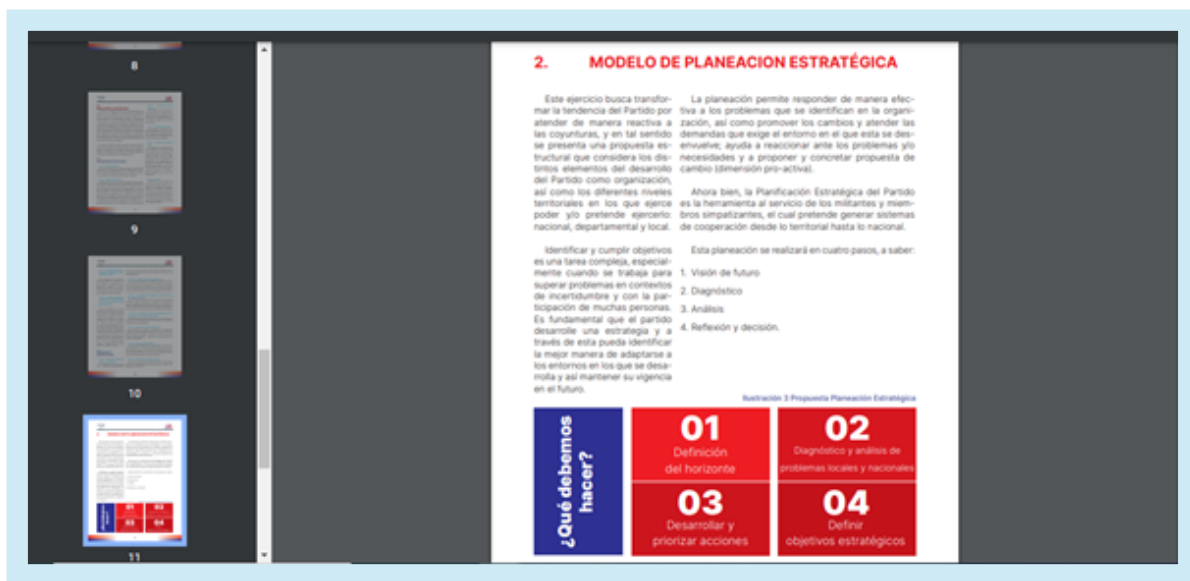

Document prepared by Cambio Radical to formalize strategic planning as a party practice, 2020

Cambio Radical's strategic planning process resulted in preparing a document (a plan) with strategic objectives, lines of work, and priority actions such as training programs and the creation and strengthening of the Women's Committee and the Youth Committee.

The party approved the plan and established its annual review, evaluation, and update through an internal resolution. Cambio Radical prepared a manual with the strategic planning methodology, highlighting key aspects such as the participatory approach for the inclusion of the different areas of the party at all levels, from the National Management to the Regional Governing Bodies.

CONCLUSION
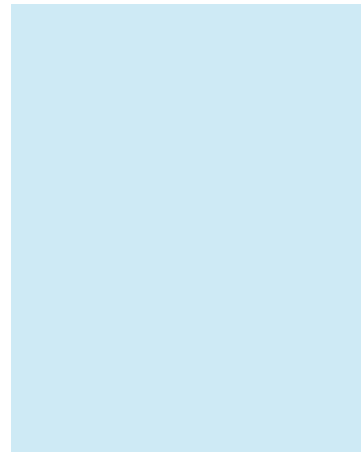
Some of the challenges political parties face were highlighted throughout this document, pointing out how ongoing strategic planning exercises can address these challenges.

The participation of party members and the representative inclusion of the different party bodies in all phases of strategic planning to make joint decisions is crucial for parties to develop high standards of integrity and strengthen their relationship with citizens.

Two-party experiences are presented and analyzed in two ways to create a strategic plan. While these strategies follow the same methodological route described in Chapter 1, both innovated in using different digital tools and implementing various activities to develop discussions within the political parties.

The experience of Mexican Partido Acción Nacional's Education and Training Secretariat was a hybrid strategic planning process combining face-to-face and virtual activities from a participatory approach to draft a Mission, Vision, and strategic objectives, as well as monitoring and evaluation strategies and indicators. The highlights of this experience are the use of methodological and virtual tools such as the SWOT Analysis, the Problem Tree and the Objective Tree, the Logical Framework Approach, and digital tools such as Zoom, Mentimeter, Lucidchart, etc.

As for Cambio Radical in Colombia, the strategic planning methodology was implemented in a virtual modality, defining the party's future goal as a starting point, as well as a diagnosis and analysis of problems, creation of objectives and strategic actions, and the incorporation of a benchmarking framework to implement and annually review the strategic plan based on the evolution of execution.

As PAN did in Mexico, Cambio Radical designed the different activities of the entire strategic planning process under a participatory approach. Therefore, the first step consisted of a diagnosis based on the NDI tool *Win With Integrity: Earning Citizen Trust in Political Parties*, and exercises such as brainstorming and consensus-building were conducted for the following steps. Similarly, we tried to innovate throughout the process by incorporating digital tools such as Google Forms, Jam Board, and Mentimeter.

Both experiences are considered critical lessons for parties that choose to work together with their members to strengthen the party's structure as a whole or as a specific body. Here are some of the most relevant learnings:

1. Planning Outside the Election Cycle. Although strategic planning exercises can be conducted at any time and in any context, they should be made when the political party leaders, members, and supporters are not pressured by an election context and/or relevant political situations. Otherwise, the process could not be finished, or the results could not bring any new improvement to the party.

Finding an appropriate time in the party calendar can ensure helpful reflections and broad participation, implying legitimacy and credibility in the various decisions made throughout the process.

In general, the most appropriate time to conduct strategic planning in political parties is within the months following election day, after the change of leadership in the party, or at least six months or a year before the party's Congress or National Assembly—generally when the party leadership approves internal reforms.

2. Involving Party Leaders in all Steps of the Process. Building political will is essential for the entire strategic planning process. Therefore, the leadership of the political party and, if possible, leaders influencing the party's decisions should be involved in all stages of the process so that: a) from the beginning, there is support in conducting an exercise of this nature and, b) the process does not lose relevance in any of its stages.

Also, the issues and actions arising from these conversations will require approval by the leadership to be able to start them. Therefore, with the direct participation of the party's decision-makers, it is easier to attain successful strategic planning.

3. Transversal Inclusion and Feedback. Consultation exercises for party members and citizens are often conducted as a simulation practice. Some political parties usually carry them out only to approve decisions that party leaders have already made and post photos on social media to convey the idea that they are "very democratic" parties. While this action seems to have no consequences, citizens eventually stop seeing these political parties as a real political option.

For this reason, it is important that strategic planning includes the participation of party members and/or citizens throughout all steps of the process, and not only at the end when decisions have already been made.

When participatory processes are conducted, the political party has the great responsibility to communicate with the people it consulted (party members and/or citizens) to show them in which part for the strategic plan their opinion was embodied, as well as the party's criteria to take into account some proposals and discard others. The party members and citizens must have the opportunity to give feedback to the party if an idea needs to be modified or complemented.

4. Constant Monitoring: Monitoring and evaluation are crucial to developing the strategic planning process, as the findings of the final assessment for the strategic plan could lead to the analysis or adjustment of the strategy. Both experiences have alternatives for approaching the analysis of the objectives and their fulfillment based on the proposed and prioritized actions.

Finally, it is important to mention that, to a great extent, the success of strategic planning will depend on the fact that party members identify themselves with the strategic plan and support the courses of action proposed therein. As mentioned before, this document intends to be a reference for leaders who wish to revitalize and strengthen the democratic system of political parties by changing activities within their own political party and making it a party closest to the members and citizens.

Digital Tools Used for Facilitating Strategic Planning Work Sessions

APPENDIX

This section includes some features (description, cost, advantages, and disadvantages) of the digital tools used to facilitate work sessions with political parties during the COVID-19 pandemic and applies the methodologies of the steps of the two strategic planning processes. The idea is to offer some alternative and valuable tools for political parties and facilitators of the process's different activities, especially for virtual sessions.

Padlet

Description: It is a digital tool to create collaborative walls with digital sticky notes for brainstorming exercises.

Cost: It has a free version, but it also offers different paid plans starting at $8/month.[52]

Advantages:
- Colored sticky notes are available, which makes the tool very educational.
- Sticky notes can be resized depending on the amount of text.
- Sticky notes can be dragged anywhere on the wall.
- Each sticky note can feature sounds, images, videos, links, or text only.
- A very intuitive tool.
- Users do not need a Padlet account.
- There is no limit to the number of users since the collaborative wall grows according to the number of notes created.

Disadvantages:
- Padlet's free version only allows creating up to a limited number of boards.

52 Padlet, Memberships; extracted from: https://bit.ly/3zuiuhj

Jamboard

Description: Jamboard is a digital and interactive whiteboard that lets users collaborate in real-time to share ideas and images.

Cost: It is free for Google users.[53]

Advantages:
- Adding images and text, facilitating the flow of ideas and, especially, communication in work teams.
- Remote and real-time collaboration through multiple devices.
- "Jams" (boards) are automatically saved in the cloud, minimizing the risk of losing information.

Disadvantages:
- Requires an Internet connection to operate in real-time.
- It has a cost and a management and support fee for Google Workspace for Education users.
- The creation of content in real-time is ideal when groups do not exceed 50 people since the information can be better organized on the whiteboard, as well as the user interaction.

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53 Jamboard, Buy Jamboard; extracted from: https://bit.ly/2W0Q6W6

Mentimeter

Description: Mentimeter is a digital tool that allows users to create interactive presentations with questions, surveys, quizzes, slides, etc.

Cost: It has a free version; however, it also offers different plans (Basic, Pro, and Enterprise) ranging from $9.99 to $24.99/month.[54]

Advantages:
- Creating interactive presentations.
- Interaction of a large number of people.
- Users are not required to sign in to participate in the activities.
- The results of the activities are saved in the user account from which the Mentimeter session was created.

Disadvantages:
- The free version allows users to create a limited number of activities. Also, the free version neither enables users to import presentations nor export the results in Excel format.

54 Mentimeter, Pricing; extracted from: https://bit.ly/3rxNRVf

Google Forms

Description: Google Forms is an online tool that allows users to create forms, surveys, and quizzes to collect and systematize relevant information.

Cost: Free

Advantages:
- Collects information quickly and efficiently.
- A Google account is required.
- It allows users to export information to spreadsheets that facilitate data analysis.
- Forms can be emailed or sent through social media and integrated into websites.
- No limit on the number of questions and answers on the form.

Disadvantages:
- Form customization is quite limited (colors and images).
- Internet is required to use this tool.
- The tool features are limited depending on the document's format: text capacity is up to 500 Kb; images 2Mb; and spreadsheets 256 cells or 40 sheets.

Zoom

Description: Zoom is a cloud-based video and audio conferencing platform that can be used for virtual meetings on mobile phones, computers, and other electronic devices.

Cost: It has a free version; however, it also offers different plans (Pro, Business, and Enterprise) ranging from $149.90 to $240/month.[55]

Advantages:
- The free plan hosts up to 100 participants.
- Video or audio conferencing can be accessed from various devices such as cell phones, computers, video game consoles, tablets, etc.
- Conferencing can be recorded and stored in a file, in the cloud, or on computers.
- A quite intuitive tool with the necessary functions (chat, session recording, screen sharing, breakout rooms, surveys, live broadcasting on social media, etc.) to make online meetings effective.
- To sign up, users only need an email account or telephone number.

Disadvantages:
- The free plan is limited to up to 40 minutes per session.
- Users are required to download the app on their electronic devices.
- Some functions (breakout rooms, unlimited session time, surveys, live streaming on social media, etc.) are only available for paid plans.

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55 Zoom, Plans and Prices; extracted from: https://bit.ly/3ARr1eS

Lucidchart

Description: Lucidchart is a web-based diagramming application that allows users to collaborate and work together in real-time to create flowcharts, organizational charts, website wireframes, etc.

Cost: It has a free version; however, it also offers different plans (Individual, Team, and Enterprise) ranging from $7.95 to $9.00 per user.[56]

Advantages:
- It features a cloud-based system allowing remote teamwork and immediate updates from any device.
- Through the real-time data linking function, automatic diagrams can be created easily.
- It features a Unified Modeling Language (UML) to forge common meanings of the forms and concepts used in the diagrams. Therefore, any user may understand the contents of the charts.
- Diagrams may be exported into different formats (PDF, PNG, and JPG).

Disadvantages:
- Only available in English.
- The free version only includes three templates.

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56 Lucidchart, Pricing; extracted from: https://bit.ly/3Asg4Rl

Google Sheets

Description: Google Sheets is a web-based spreadsheet application.

Cost: Free

Advantages:
- It features a cloud-based architecture for users to collaborate with anyone in real-time.
- Changes are automatically saved.
- Compatible with other Google applications such as Forms, Docs, Slides, Calendar, Maps, and Drive.
- It is compatible with any operating system (Microsoft, Linux, iOs, etc.)

Disadvantages:
- Automatic backups are only made with an Internet connection.
- It features an offline option; however, not all features are available.
- The application does not save the relevant information if two or more people work on the same cell unit.

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