A stylized illustration of a city skyline. A large magnifying glass is positioned over a building, with its handle extending downwards. The city buildings are simple geometric shapes in various colors like orange, white, and grey. There are wavy teal shapes floating in the sky, and a yellow flag on a pole to the left. The background is a light pinkish-beige color.

Strategies in charities and non-profits

Joe Saxton
October 2024

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What is a strategy and why have one?

- No charity can do everything
- The world is changing so priorities should also change
- A strategy should be the foundation of accountability
- A strategy looks forward, while the annual reports look backwards
- A strategy makes decisions easier and individuals less important
- Charities don't need to be large or have lots of staff to have a great strategy
- A great strategy is like having a bigger income

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Three ways to see the job of a strategy

- How will the organisation or its work, be different in three or five years' time?
- How will an organisation get from where it is now, to where it wants to be?
- What will remain constant over period of plan, and what will reduce and what will change?

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Preparing for a new strategy

- Form a project group to drive the strategy.
- Decide the respective roles of staff and trustees
- Review the last strategic plan.
- Rate progress in key priority areas since the last plan.
- Look at timings and key internal or external events on timing
- Ask key internal groups what they are expecting from the strategy
- Compile overview of recent research about stakeholders.
- Horizon scan the outside world for relevant info.
- Research views of key internal stakeholders.
- Research views of key external stakeholders.
- Give enough time to draft and redraft

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The components of a strategy



Components of a strategy part 1: the foundations

Mission, vision and values: what is the **change in the world** the organisation wants to see, what is **its role in making it happen**, and what are the **values and beliefs** that will permeate the way in which it gets there.

Theory of change: the approach that an organisation takes to turn its mission into change on the ground, through **services, campaigns and activities**. This typically involves defining **long-term goals** and then working backwards to identify the activities needed to deliver them

The external context:
what is happening in the **external** world that impacts on the organisation

The internal context:
what is happening **in the internal world** that impacts on the organisation

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Components of a strategy part 2 - the priorities

The goals and priorities -
what are the big goals or priorities for the organisation in the next few years.

Enablers - how will the organisation raise the **funds** to deliver the goals

Enablers - how will the organisation work with, and support, **staff and volunteers**, to deliver its goals

Enablers - how will the organisations build an infrastructure (**IT, offices, finance, communications systems and processes**) to support the goals

How achieve goals:
what are the ways that those goals will be reached

Timeframes & stages:
what are the timescales and stages in which those goals/priorities be reached

Measuring success: **how will the success** in achieving those priorities **be measured**, and how will the impact of the work be established

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What do people say about strategy?



Agreement with statements about strategy

■ Strongly agree
■ Agree
■ Neither agree nor disagree
■ Disagree
■ Strongly disagree
■ Not sure/don't know



"Please indicate how much you agree or disagree with each of the following statements: from strongly disagree to strongly agree e?"
 Source: Survey on strategy in charities and non-profits, Apr 23 | Base: Between 75 - 87

Some examples of great charity strategy



1

WE KEEP OUR PEOPLE SAFE

2

WE FOCUS ON WHAT WILL SAVE THE MOST LIVES IN OR NEAR THE WATER

3

WORKING WITH PARTNERS, WE INFLUENCE IMPROVED SAFETY ON AND BESIDE THE WATER

HOW WE WILL DO THIS?

- By giving volunteers and staff the training and tools to keep themselves safe.
- By improving the technology and equipment on our boats and beaches.
- By providing Trauma Risk Management and mental health first aiders.

- By ensuring we have the right people and assets in the right places.
- By upgrading our infrastructure, asset base and networks.
- By working with partners to understand and prepare for the lifesaving challenges of the future.

- By focusing on the highest-risk locations and activities at home and internationally.
- By forging and maintaining strong partnerships with like-minded organisations.
- By working together to build awareness, gather evidence and develop effective interventions.

HOW WILL WE KNOW WE ARE SUCCEEDING?

Measured by incident trends.

Measured by the effectiveness of our rescue service, including the number of lives saved.

Measured by reduction in coastal risk score in the UK and Ireland, and data related to our targeted international activities.

Objective setting from RNLI

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Building a strong, growing and sustainable organisation

3

We will increase our income to more than £4.5m annually by 2022

As our ambition keeps increasing, so does the need to safeguard our long-term future. We have always relied on the generosity of a small number of companies, donors and individuals, but now we need to generate more income from more places. This is critical to ensure we can deliver on our plans for women entrepreneurs. We will make this happen by:

- Forming closer partnerships with all of our donors, showing how our renewed ambition can deliver greater impact and by clearly measuring the value of ongoing support.
- Deepening corporate partnerships that help companies to meet their own business objectives while increasing women's economic empowerment.
- Building a global community of individual donors who share our goals and can fundraise through their own networks.
- Co-creating programmes of work with institutional donors, including projects that focus on vulnerable women and girls as our work in that area increases.
- Exploring the potential of creating a social enterprise business model to support the rollout of our products and services.

We will empower our people and ensure our culture reflects our mission

To achieve everything set out in this strategy, we need the way we work to evolve too. We will make this happen by:

- Recruiting, retaining and developing staff with the skills and belief to make our vision a reality. In particular we will focus on increasing our expertise in monitoring and evaluation, advocacy and supporting vulnerable women and girls.
- Creating a culture based on entrepreneurial spirit, so everyone connected to our organisation feels empowered and supported to achieve our goals.
- Strengthening our systems and processes with smart use of technology, and maintaining the highest ethics and standards of governance, so nothing distracts us from our mission to empower women to redefine the future.
- Updating our business model in response to the changing environment facing international development organisations.

Our target:

By 2022, we will have raised £10million for women entrepreneurs, strengthened our organisation so we have increased financial sustainability, strong systems and processes and a culture that fully empowers our staff.

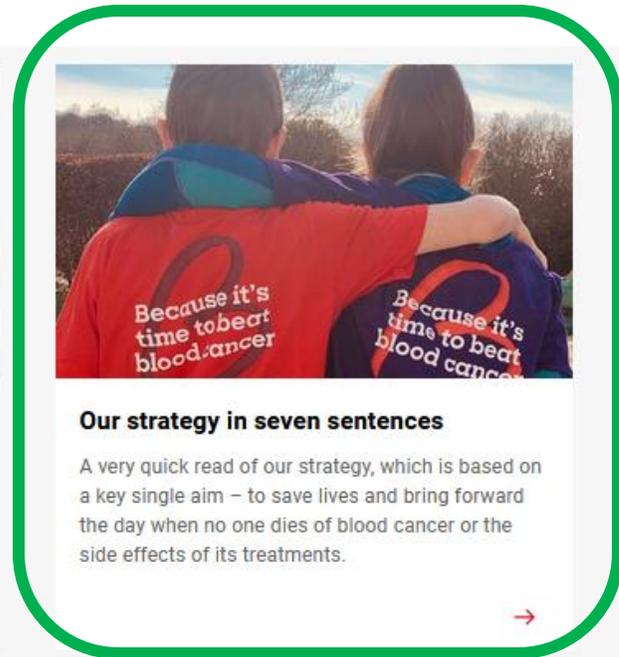
Income and people objectives from Cherie Blair Foundation

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A message from people with blood cancer

Find out what people with blood cancer believe the charity's priorities should be over the next five years.



Our strategy in seven sentences

A very quick read of our strategy, which is based on a key single aim – to save lives and bring forward the day when no one dies of blood cancer or the side effects of its treatments.



Because we want to change the world for people affected by blood cancer

Thanks to breakthroughs funded by us and others, a world in which no one dies as a result of blood cancer is within reach within the next generation.



Because if we want to change the world, we first need to change ourselves

Because for all our pride in who we are today, we know that we will not be able to deliver this strategy unless we continue to change.



Ten ways we'll know if we're on track

There are 10 measures that will tell us whether we're on track, and every year we will update our community on how we're doing.



How do we know this is the right strategy for people affected by blood cancer?

Find out how people affected by blood cancer have set the direction of this strategy and made decisions about the charity's future.

Putting strategy on the web

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Some final thoughts on strategy

- Please find the AoC strategy here <https://www.associationofchairs.org.uk/2024/07/23/our-new-strategy/>
- Do look at my report on strategy 'Where are we going?', its free to download: <https://www.heyheyjoe.info/post/where-are-we-going>

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**There are lots more
examples at
Heyheyjoe.info**
Any questions?

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