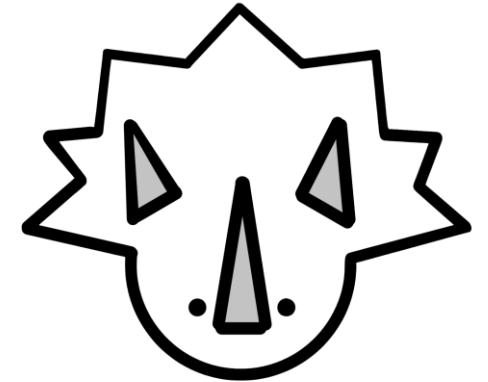


Organisational Strategy

Housekeeping

- Be polite
 - Get involved
 - Mics off, cameras on... if possible
 - Network and chat
-
- Learning format
 - Post course feedback



Triceratops Training and associated individuals accept no liability for the actions or results of delegates after this training.

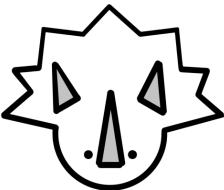
Benefits of Being Strategic

Quote from the business world

"The three most highly rated benefits of strategy are:

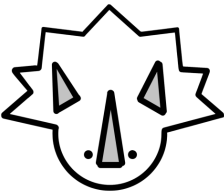
- a clearer sense of [an organisation's] strategic vision
- a sharper focus on what is strategically important
- an improved understanding of a rapidly changing environment"

Strategic Management and Business Policy – T. Wheelan et.al. (2015)

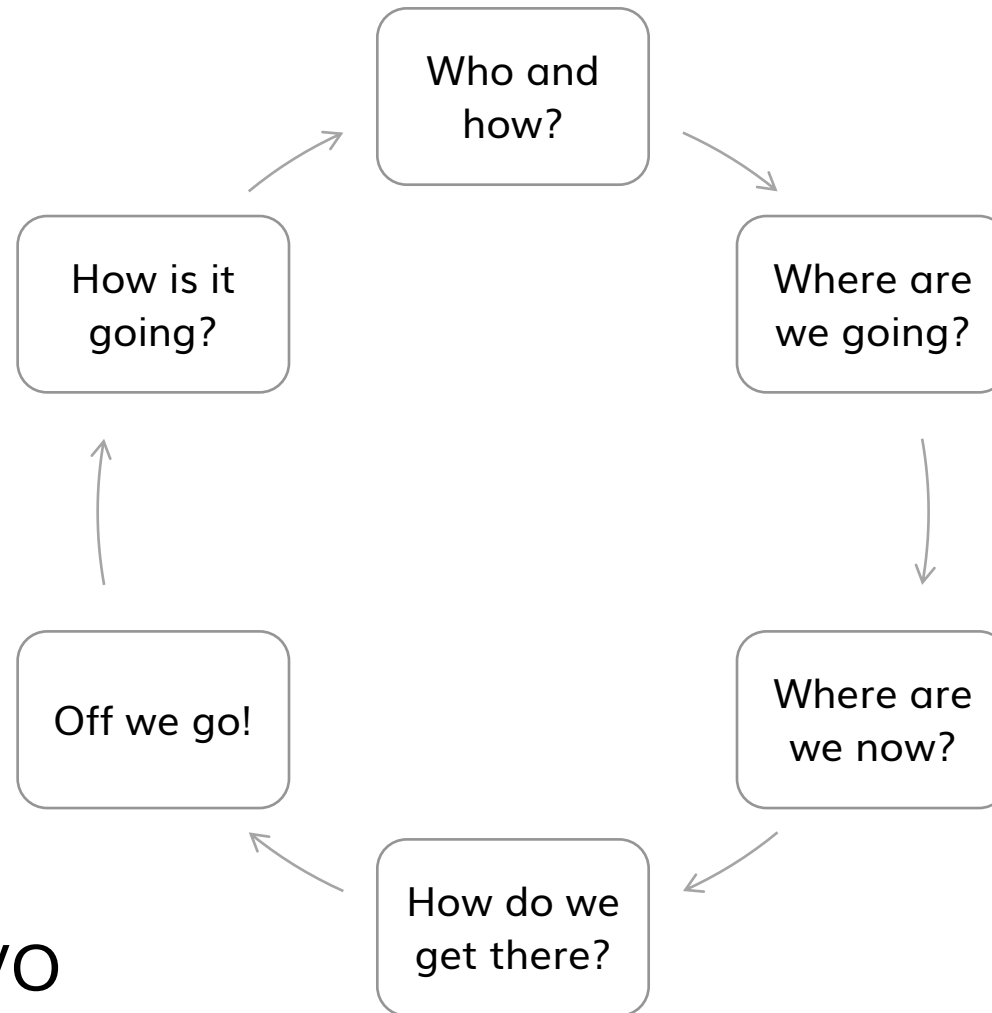


What is it we are aiming for?

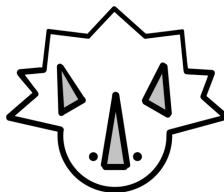
- We are aiming for a document
- It is an important document
- It sits under your governing document
- High level planning for the next 3 – 5 years
- It informs your budget, fundraising strategy and case for support



Strategic Planning Cycle



Adapted from NCVO

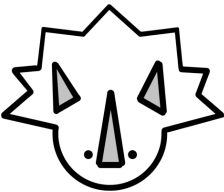


Who and how

RASCI

- R – Responsible
- A – Accountable
- S – Support
- C – Consult
- I – Inform

Populate this in a table and you have your team – easy!



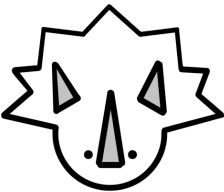
Activity One

- 1) Say hello to each other
- 2) Start to populate the RASCI table in your worksheets
- 3) Are there any common groups you may all include?
- 4) At what stage of the cycle will you need their input?

Where are we going?

Vision Statement

- It should be a single sentence.
- It should be memorable.
- It should be about the world you want to see.
- It should inspire (the right people).
- It should generate intrigue.
- It should not tell us what you do.





Our vision for a just world

Vision

We dream of a just world, in which every person enjoys the right
to dignified living conditions



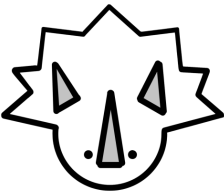
WHO WE ARE

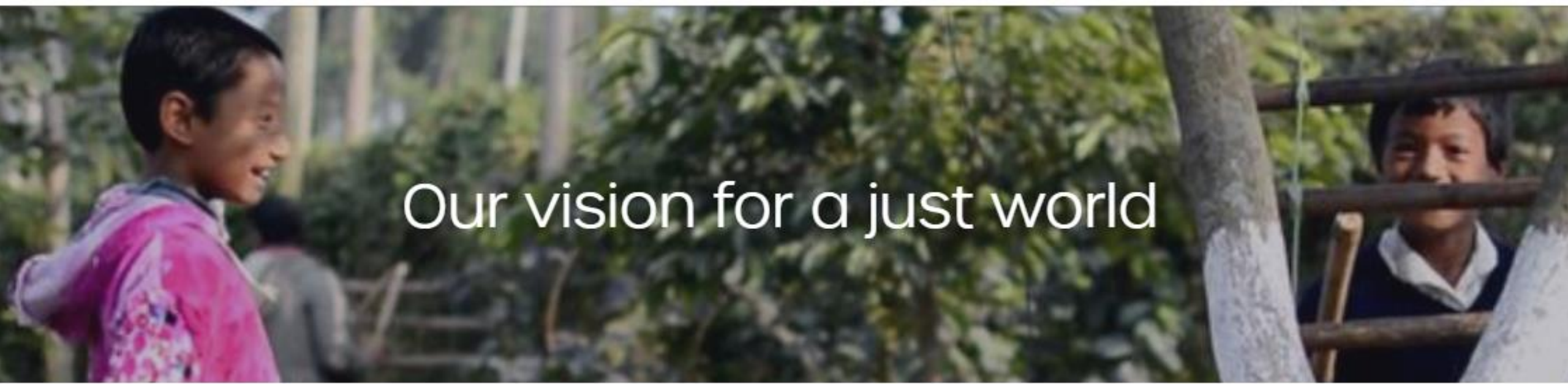
Our vision

Our vision is to always be the world's largest and best-in-class provider of suicide prevention and crisis intervention services for LGBTQ youth, and serve as a leading voice in education, advocacy, and research related to LGBTQ youth and mental health.

Your Mission Statement

- It should be a single sentence... maybe two or three.
- It should be memorable.
- It should be about what you do.
- It should inform (the right people).
- It should generate intrigue.
- It should not tell us too much or answer too many questions.





Our vision for a just world

Vision

We dream of a just world, in which every person enjoys the right to dignified living conditions

Mission

To design with disadvantaged communities and empower them to create the world they dream of

Values

WHO WE ARE

Our mission

The Trevor Project's mission is to end suicide among gay, lesbian, bisexual, transgender, queer, and questioning young people.

Our vision

Our vision is to always be the world's largest and best-in-class provider of suicide prevention and crisis intervention services for LGBTQ youth, and serve as a leading voice in education, advocacy, and research related to LGBTQ youth and mental health.

Your Values

Values

Empowering

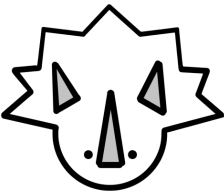
We enable people to realise their own potential; using design as a tool for sustainable development.

Participatory

We believe everyone has a contribution to make; providing opportunities for people to be involved in creating a more just world.

Committed

We stand in solidarity with disadvantaged communities globally; focusing our efforts on making a positive difference.



Our values



Respect

We will act with integrity in all that we do, being mindful and considerate to all. We respect and remember those who have died. Respect is a constant that embraces diversity and uniqueness of experience.



Hope

A feeling of trust in tomorrow. We embody, instil and empower a feeling of trust in tomorrow. Hope is the hand to hold. We have a vision that one day there will be a universal understanding of life-changing grief.



Holistic

Complete and all encompassing. We acknowledge and respond to the needs of the whole person: mentally, physically, emotionally and spiritually. We recognise the total experience of grief, promoting a holistic approach to bereavement care.



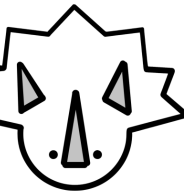
Support

Enabling with compassion and care. We provide responsive support that is appropriate, relevant and meaningful to each individual. Together in safety and strength. Encouraging society to respond appropriately to people facing loss and surviving bereavement.



Excellence

Embracing professional integrity and creative innovation. We are passionate about providing exceptional services and maintaining the highest standards in all that we do. Excellence is valuing people. We are committed to driving innovation and change.



Activity Two

- 1) Grade your vision and mission statements against the criteria.
- 2) Have a go at making them better, and share with the group.

Where are we now?

Internal and External Reviews

Internal

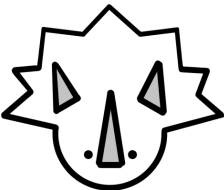
Uncovering what we are good at, and where we could be better.

SWOT / Healthcheck / Skills Audit

External

Considering what external factors may effect you

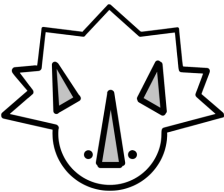
PESTLE / Stakeholder and Competitor (Peer) Analysis



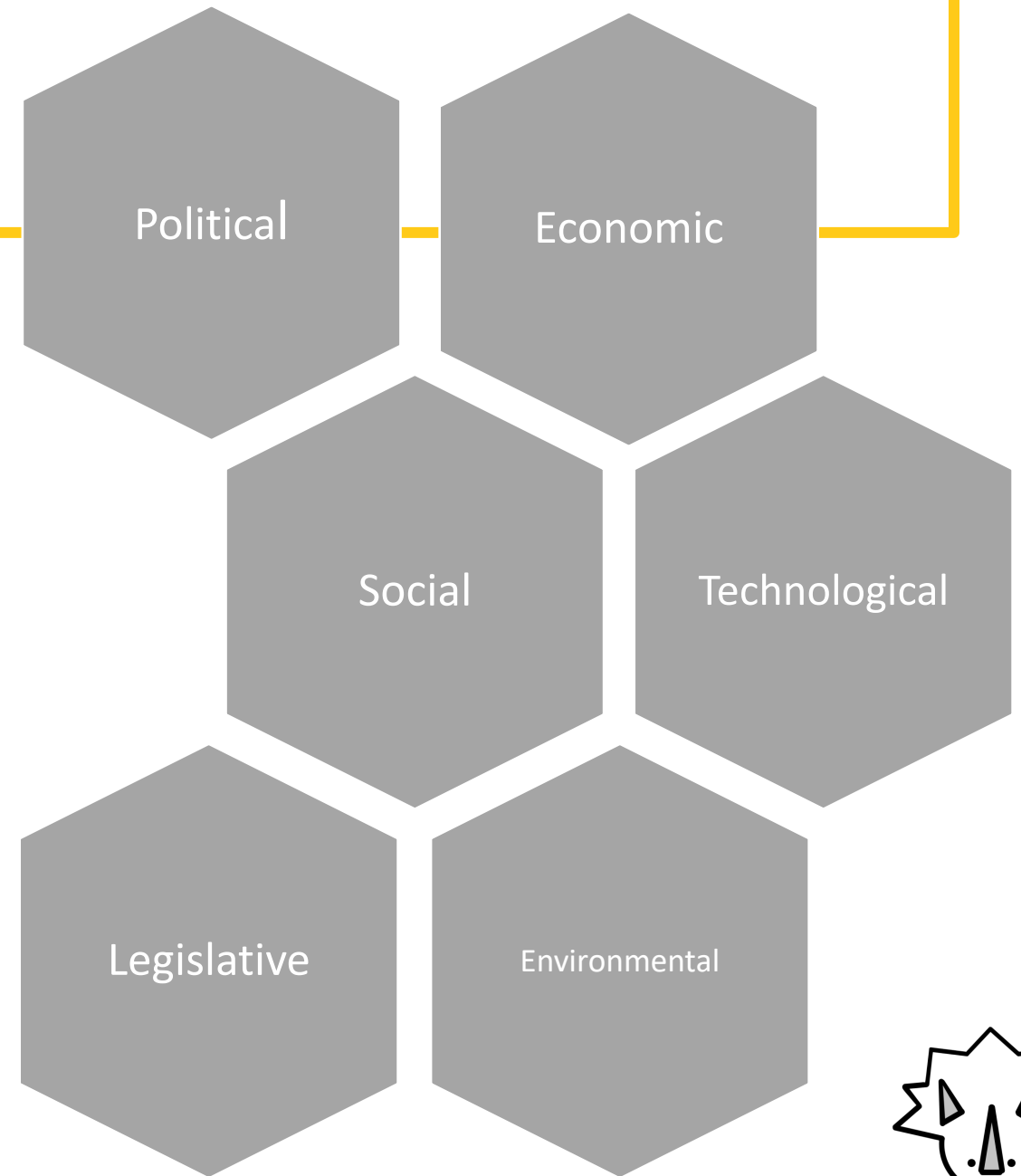
~~SWOT~~ Hot Air Balloon



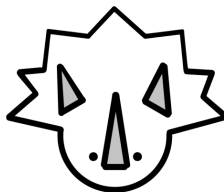
<https://metroretro.io/templates/the-hot-air-balloon-retrospective>



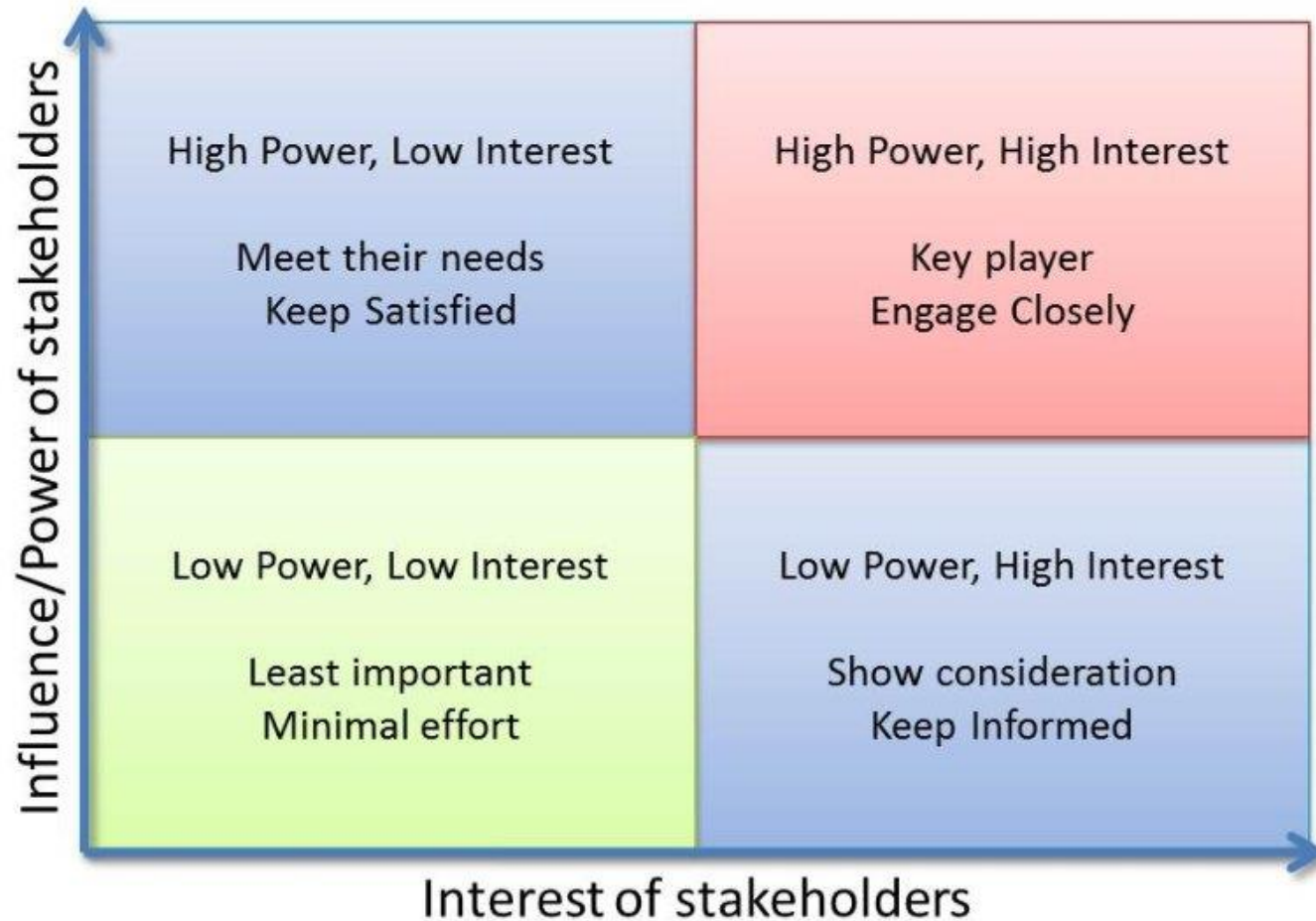
PESTLE



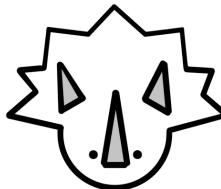
<https://knowhow.ncvo.org.uk/organisation/strategy/externalanalysis/pest>



Stakeholder Analysis



<https://knowhow.ncvo.org.uk/organisation/strategy/externalanalysis/circles>



Activity Three

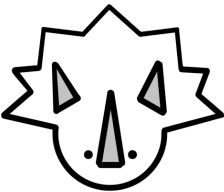
- 1) Have a go at a Hot Air Balloon activity for your organisation.

How do we get there?

Ideas – good and bad

- Record all ideas and options
- Refine and develop (with others)
- Prioritise ideas
- Ensure best practice is in place

- Your strategy does not need to go into granular detail about what you choose.



Moscow (MoSCoW)

<https://online.visual-paradigm.com/diagrams/templates/moscow-method/moscow-template/>



1. Non-negotiable
2. Minimum viable product
3. Unable to deliver the end product without this
4. Not legal with it
5. Unsafe without it
6. Without this project is not viable



1. Important but not vital
2. Maybe painful to leave out but the solution is still viable
3. May need some kind of workaround

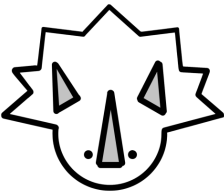
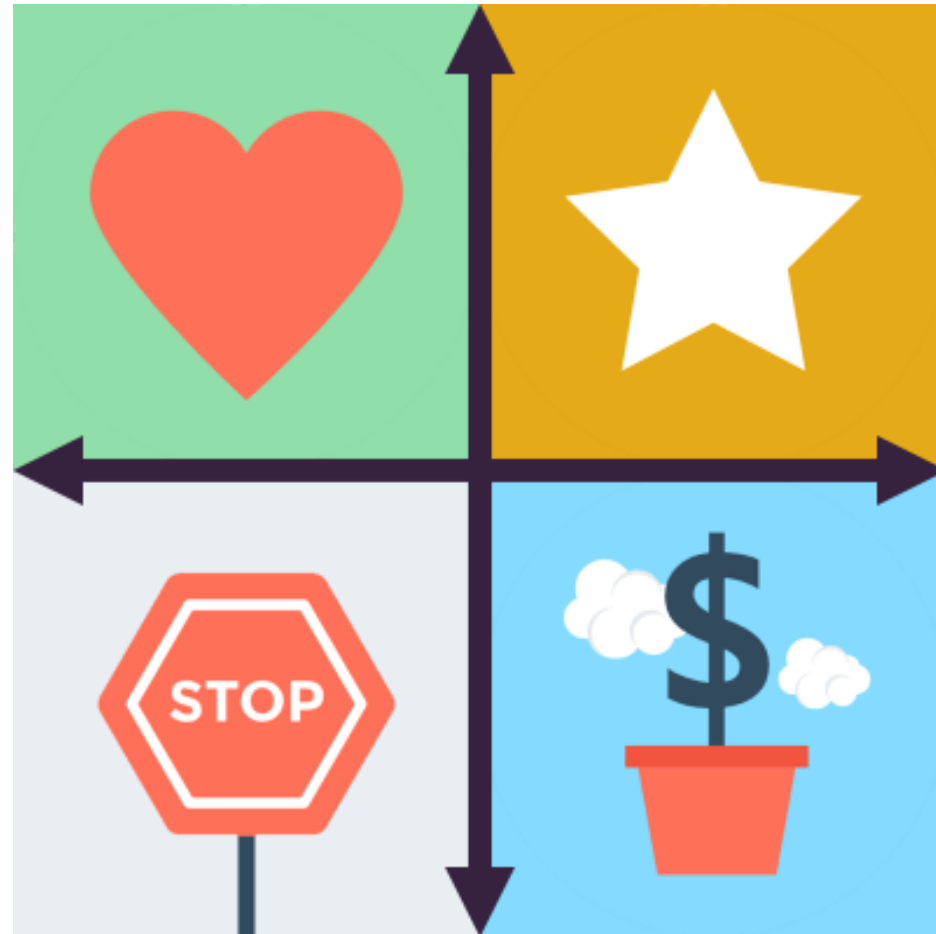


1. Desirable but not as important as Should Have
2. Only do if there is extra time and budget



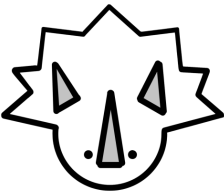
1. Won't have this time around at all
2. Out of budget
3. Nice to have but has no real impact

Mission / Money Matrix



Justifying Your Priorities

- Retrench
- Reduce costs
- Maintain
- Improve quality
- Experiment
- Expand quantities
- Expand boundaries
- New related strategy
- Switch strategy
- Piggyback
- Collaborating
- Unrelated expansion



Activity Four

- 1) List the activities and business functions of your organisation.
- 2) List some other activities you would like to do.
- 3) Use the Moscow tool to prioritise these – any you could let go to free up capacity?

Off we go! Strategic Goals

Setting Goals

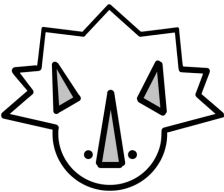
Strategic Objectives (long term)



Annual Goals (short term)

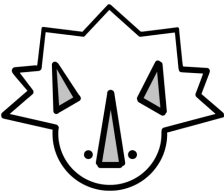


KPIs and Targets



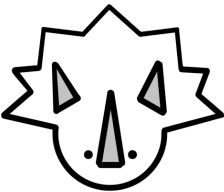
Strategic Objectives

Cause	Action	Impact
Developing areas, families, communities, local economies	Provide clean water, sanitation, education	Health, stronger communities, security, opportunity



Developing this...

- We help families in developing areas stay healthy by providing clean water and education
- Helping build safe, strong communities in the developing world through safe drinking water
- Through clean water, we promote security and opportunities in rural communities



Activity Five

- 1) Share your current strategic goals with the group (if you have them) – are they still relevant to your work?
- 2) Have a go at creating some high level strategic priorities (goals) using the template on your worksheet. Remember to keep them SMART!

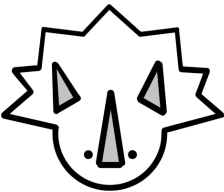
Off we go! Annual Plans

An Annual Plan

Objective	Planned outputs / outcomes	Key actions	Responsible	Resources or support requirements	Traffic light status

Budgeting

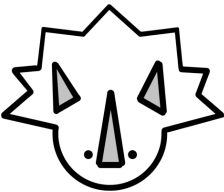
- The financial translation of your plans – often a standalone document, but occasionally an appendix.
- Not going into detail about raising funds – just headline needs.
- Use full cost recovery.
- Consider annual cost increases.
- Budgets can flex to the situation.



Risk



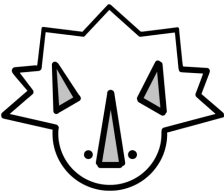
- Policy templates available online to modify
- What is the high level risk?
- How *risky* is it?
- What can you do to minimise this?



How is it going?

Management

- Set a calendar and prioritise 'check in' dates.
- Work with others on KPIs and reporting.
- Agree formats with Trustees (traffic lights)
- Share successes and struggles

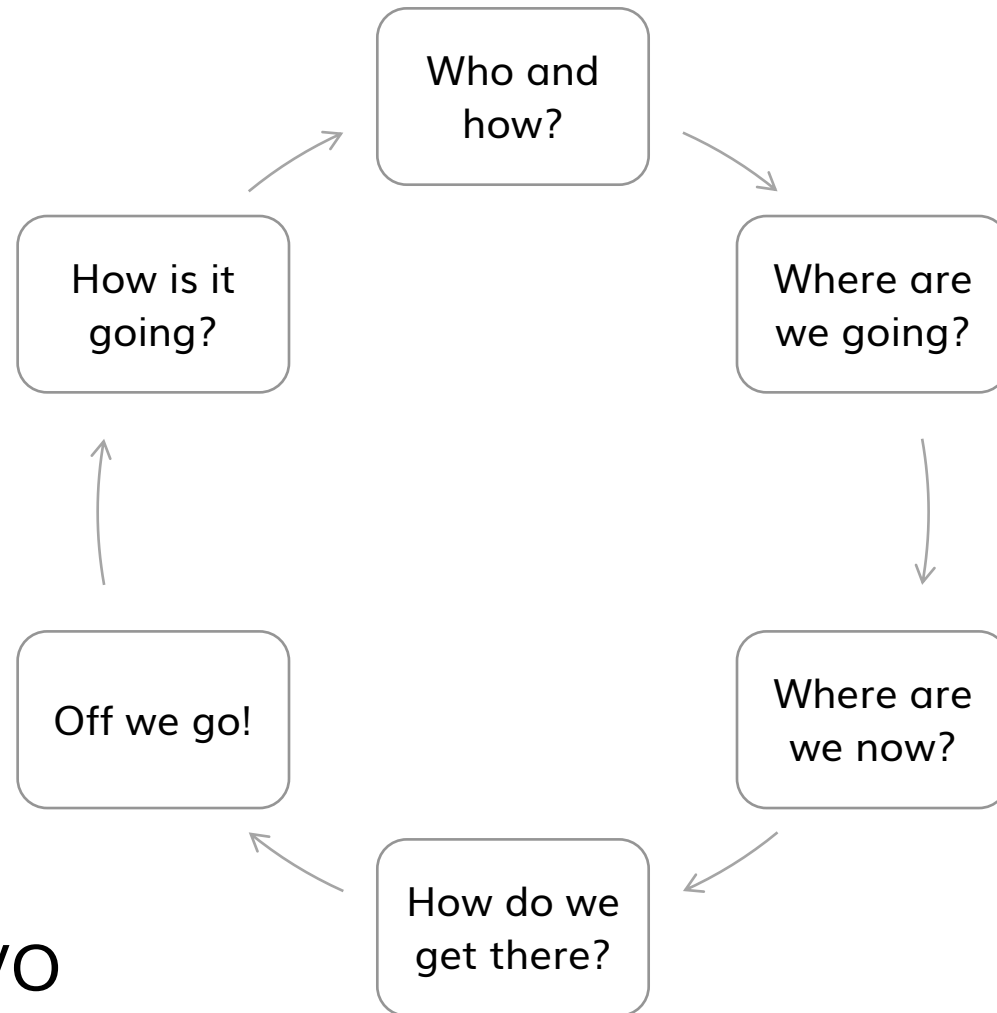


Activity Six

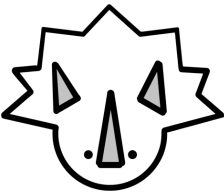
- 1) Who do you currently report to on progress?
- 2) How do you do that – does anyone have a more efficient or effective way?

Session Close

Recap



Adapted from NCVO



Triceratops Training

Accessible and Relevant Training for the Small Purpose Driven Organisations

Open

Network

One to One

www.triceratopstraining.co.uk