

Business and Strategic Planning

for voluntary organisations

Alan Lawrie



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About the author

Alan Lawrie has worked as a full-time independent consultant for 20 years and specialises in strategy, business planning, and commissioning and organisational development.

Before moving into consultancy Alan worked as a development worker, trainer and manager in the voluntary sector and then moved into management roles in the public sector.

He is the author of *Managing Quality of Service* (1984 and 1995), *Developing Your Organisation* (2000), *The Complete Guide to Business and Strategic Planning* (1988, 1994 and 2007), *Managing Contracts: A Resources Pack* (1988 and 1994), *The Complete Guide to Creating and Managing New Projects* (1999, 2002 and 2010) and co-author of *The Complete Guide to Surviving Contracts* (2008) and *Collaborative Working* (2013).

Alan has helped many organisations to develop strategies and worked with them to create successful business plans.

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About the Directory of Social Change

The Directory of Social Change (DSC) has a vision of an independent voluntary sector at the heart of social change. The activities of independent charities, voluntary organisations and community groups are fundamental to achieve social change. We exist to help these organisations and the people who support them to achieve their goals.

We do this by:

- providing practical tools that organisations and activists need, including online and printed publications, training courses, and conferences on a huge range of topics;
- acting as a 'concerned citizen' in public policy debates, often on behalf of smaller charities, voluntary organisations and community groups;
- leading campaigns and stimulating debate on key policy issues that affect those groups;
- carrying out research and providing information to influence policymakers.

DSC is the leading provider of information and training for the voluntary sector and publishes an extensive range of guides and handbooks covering subjects such as fundraising, management, communication, finance and law. We have a range of subscription-based websites containing a wealth of information on funding from trusts, companies and government sources. We run more than 300 training courses each year, including bespoke in-house training provided at the client's location. DSC conferences, many of which run on an annual basis, include the Charity Management Conference, the Charity Accountants' Conference and the Charity Law Conference. DSC's major annual event is Charityfair, which provides low-cost training on a wide variety of subjects.

For details of all our activities, and to order publications and book courses, go to www.dsc.org.uk, call 08450 777707 or email publications@dsc.org.uk.



Foreword

‘Would you tell me, please, which way I ought to go from here?’

‘That depends a good deal on where you want to get to,’ said the Cat.

‘I don’t much care where—’ said Alice.

‘Then it doesn’t much matter which way you go,’ said the Cat.

‘—so long as I get *somewhere*,’ Alice added as an explanation.

‘Oh, you’re sure to do that,’ said the Cat, ‘if only you walk long enough.’

Lewis Carroll, *Alice in Wonderland*

- What are you trying to achieve?
- Where will your charity be in five or ten years’ time?
- How are you going to get there?
- What difference do you make?

These are four questions that I find myself being asked on a regular basis by our beneficiaries, by our supporters, by key stakeholders and by the media. If you don’t have answers to these questions in today’s charity landscape, you’ll meet barriers and problems.

Of course the voluntary sector has done quite a few spectacular things without having a proper strategic plan. I doubt the Anti-Slavery society spent ages working out their business model, or that the founders of Samaritans, Crisis, ChildLine or Oxfam started off with a detailed five-year plan. They just saw a social need and set about doing something about it. But sooner or later, there comes a point where you have to articulate your vision, and how you’re going to go about achieving it. Sometimes it’s because funders want to know how their money is going to be spent, sometimes it’s because people inside the organisation aren’t quite clear what they’re there for, and other times it’s just because your charity has reached that moment where it needs to decide what it doesn’t do, as well as what it does.

Having reached that moment, the prospect of setting a strategy can be terrifying. Who do you ask? Who decides? What’s the structure? Where do you start? Some organisations spend a fortune creating their strategy only to discover that they’d forgotten something crucial, or their plans were turned upside down by an event outside their control. We have a strategy at Mind (which is available on our website); it’s quite ambitious but well thought through, and wholly informed by the views of people with mental health problems. So far it’s going quite well. We won’t achieve everything (and we’ve over-achieved on some others!) but it lets all our stakeholders know what we’re planning and how we can help.

So here's a really easy-to-read and easy-to-understand (and inexpensive!) book that will help you create a great strategy and plan. It's friendly and informative. It gives you the right ideas and structures. It can't stop unforeseen events, but it helps you plan for them. By the time you've finished, people in your organisation should be able to answer those four questions and know they're going somewhere.

Paul Farmer, Chief Executive of Mind (www.mind.org.uk)



Chapter one

Introduction

If you don't know where you are going, you are sure to end up somewhere else.

Lawrence J. Peter, Yogi Berra and others

Developing a strategy and a business plan for a voluntary organisation should be a creative and dynamic process – an opportunity to stand back, review progress and generate a new sense of purpose and direction. It should ensure that the organisation is strong, clear about its priorities and able to make a convincing case for support. However, all too often planning is seen as a chore that takes people away from providing a service, and any plan that is produced is a collection of targets, budgets and intentions that have little grounding in reality.

What this book is about

This book's starting point is that business and strategic planning is an essential and useful process for any organisation. Its main theme is that those who are charged with managing a voluntary organisation must ensure that they set the direction, agree strategies for where they want to go, clarify their long- and short-term goals and make a case for why others should have confidence in their organisation.

In addition to strategic thinking, the book focuses on the process of putting the plan together and turning the ideas and strategies in the plan into action. Business planning is about much more than producing a neat and tidy document. Generating paper plans is easy compared with the hard work of managing change and making plans work in action. Furthermore, the book is concerned with not only producing a credible plan, but also ensuring that the plan feels real and relevant to people in the organisation. Whether it is called a business plan, a strategic plan or a forward plan is not important.

In a nutshell, the book:

1. aims to help voluntary organisations make clear decisions about their future direction and priorities;
2. introduces some tools for strategic planning and management;
3. explains how to draw up and use a business plan.

Some terminology

Different writers, and indeed different funders, use the language of strategic and business planning in various ways. Nevertheless, there are some generally agreed definitions out in the world and they will be defined here in a similar way to show how they are used in this book. In addition, there are many terms to describe the sector and those who benefit (or the positive impact created) as a result of organisations' work. The words chosen and the rationale behind these choices are explained briefly here also. The main point to remember about terminology is that the results matter rather than the names used.

Voluntary or not-for-profit?

With many voluntary organisations run largely or even entirely by paid staff, the term 'voluntary' may seem to be a misnomer and so an alternative term 'not-for-profit' is often used instead. However, it seems odd to describe an organisation by what it doesn't aim to do rather than what it is for. With this in mind, and the fact that there is no term which describes the sector perfectly, this book sticks with the term 'voluntary sector'.

Service user

This term has been used throughout the book for consistency purposes, but can be used interchangeably with 'beneficiary' or 'customer', or whichever word or phrase applies best in your organisation.

Vision, mission and objectives

- **Vision:** a clear, inspirational and memorable statement about what the world will look like if your organisation achieves its aspirations. For example: 'A clean sustainable world for our children'.
- **Mission:** a brief statement of long-term overall intent and purpose: what the organisation is doing to achieve its vision. It is what sets your organisation apart from others. For example, two organisations could have the same vision 'A clean sustainable world for our children' but quite different missions. One may focus on conservation 'to conserve our natural resources on which all life depends' and another on campaigning 'to campaign for action and effective changes in legislation to reverse global warming'.
- **Strategic aims:** a number of quantifiable activities to be completed which will help to achieve the mission and ultimately the vision. They are statements of the key priorities for the organisation in the immediate to medium-term future. Everything the organisation does should be related to a strategic aim.
- **Operational objectives:** these are detailed, costed and timed plans of what the organisation will do under each strategic aim. They set out a work plan for the organisation.
- **Values:** the shared beliefs within the organisation which create its culture and guide how people behave and make decisions.

Chapter 5 expands on these definitions and gives some advice on creating a vision, mission and values.

Outcomes and outputs

- **Outputs** are what the organisation produces or delivers, such as 500 rights guides produced or 44 people trained.
- **Outcomes** are the difference that you make. Some outcomes are about creating a change; others are about preventing something negative from happening. There are short-term outcomes, such as 'people know their rights' and 'jobs created'. These can then lead to an organisation's long-term outcomes, i.e. the vision: 'a world without discrimination' and 'all people with equal opportunities'.

Chapter 5 explores outcomes in relation to inputs and gives advice on how to measure them (see page 55).

Strategic thinking, business planning and strategic management

<i>Strategic thinking and planning are about...</i>	<i>Business planning is about...</i>	<i>Strategic management is about...</i>
<ul style="list-style-type: none"> ● how the organisation can best meet its vision; ● learning and involve evaluating current activities, analysing the issues that your organisation is facing and identifying external trends and developments; ● developing ideas about how the organisation should develop, what its priorities are and what roles it should play in the future; ● goals and outcomes: what do you want to change, create or prevent?; ● getting focused and making sure that your goals are clear. 	<ul style="list-style-type: none"> ● putting the analysis and agreed direction into a formal planning format that can be used to guide the organisation; ● allocating resources to strategic priorities; ● showing/persuading others that the organisation has (or can get) the resources to deliver the strategy: that the plan is credible, achievable and worth backing; ● how the organisation will manage and use its resources to achieve the strategy; ● setting out the outputs that need to be delivered to create the desired outcomes; ● showing that the organisation has the capacity, resources and management ability to achieve the strategy. 	<ul style="list-style-type: none"> ● the process of creating the strategy and making it happen: ensuring that the business plan is implemented; ● monitoring progress and managing change.

Why bother making a strategy?

You cannot stand still and survive in a rapidly changing world

If an organisation is uncertain about funding, lacks a clear direction, relies on what was done in the past as the basis for deciding what to do next and has a vision that stops at the end of the current financial year, it can easily become motionless. It spends its time hoping that things will get better. In effect, it becomes governed by what it did in the past rather than what it wants to do in the future. It becomes predictable and paralysed in a rapidly changing world.

Nevertheless, however static an organisation becomes, it will naturally arrive at a point where decisions have to be made about its future. A director of one charity described her role as akin to 'riding a rollercoaster that never arrives anywhere, but only gets faster'. Changes in legislation, new funding, short-term priorities and new ways of working mean that organisations react to external events and become pulled into activities that either do not fit with the rest of the organisation or are a departure from their original aims.

Rather than being a hostage to the past or to outside forces, those charged with the management and direction of the organisation need to take a grip on what they are doing. They must be bold enough to suggest a direction to go in and to agree a plan for achieving it, not only respond to external events. They must clarify the aims of their organisation to decide what is and is not a priority, especially given voluntary organisations' limited resources, and to set out a direction for the organisation's future.

This kind of management is different from dealing with the day-to-day demands of making sure that the organisation continues to operate. Indeed, part of thinking strategically is to keep in touch with day-to-day realities and opportunities, but at the same time you need to focus on future needs and directions.

Emergent strategy and deliberate strategy

With this balance between developing emerging opportunities and setting a future direction in mind, an interesting idea to consider is the distinction between emergent strategy and deliberate strategy, as made by the management writer Henry Mintzberg. He outlines how a strategy may be fulfilled without it being intended at all or because other intended strategies were lost over time (Mintzberg 1978). In this way, all organisations are moving in some direction even if they do not know it or have not actively planned it: they respond to events, experiment and follow up opportunities and this forms a direction.

What organisations do is usually determined by a mixture of deliberate strategy (formal plans, budgets and written work programmes) and emergent strategy. Deliberate strategists like things to be under control, be structured and follow a clear pattern. Emergent strategists are prepared to let things happen, respond to opportunities and resist attempts to control or over-programme activities.

So, although we cannot always control the detail, an organisation is going to keep moving and changing anyway, and so it is better to chart its path than let it happen by accident. Both deliberate and emergent strategies have strengths and weaknesses. The trick is in getting a working blend between them. See the exercise on page 15 to explore your organisation's emergent strategies.



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