

## February 2010 – Strategic planning

### Katharine Moss, Charity Consultant

How many New Year resolutions did you make and why have you made them? Basic work / life balance planning models suggest that you resolve to do something new or better for you and your stakeholders which may typically include:

- You
- Your family
- Your workplace
- Your community.

Do you know what resolutions you made last year? Do you know what you achieved as a result?

Whilst you can't change the past, it has informed the present ie the here and now. You can use this information to shape the future, but of course, don't forget to seize the day ie live in the present as well as planning for the future, which you can change!

The same methodology can be applied to charities. Strategic planning is crucial in tough times. Strategy is the roadmap to the future and all planning needs to be aligned with the vision.

Take a commercial business with a £10million turnover which has (say) 5 clearly defined activities or divisions. It will have concrete success criteria and will measure progress using Key Performance Indicators as part of its regular Management Information.

Compare this with a similar sized charity which may undertake 50 activities or projects for a host of reasons. Does the charity have appropriate infrastructure to monitor and evaluate its success criteria? Will it struggle to report on outputs, let alone impact and outcomes, to its stakeholders? How can a charity report on what matters if it can't identify what matters and record how it tackled those issues?

I use a timeline graphic to illustrate the cycle or process which should be in place



There is a risk that if the strategic vision is not clearly articulated, then the charity will be tackling a variety of activities some which will be a distraction to the main purpose. So there is risk of mission drift.

I am working with an Oxfordshire brand consultancy. It has a proven track record in effective communication with external and internal stakeholders to ensure successful implementation of strategic objectives.

I can help your charity with strategic reviews by acting as lead professional to facilitate discussion and to ensure that appropriate specialist advice is taken where necessary. It will involve hard work, but your charity will be able to describe how it made a difference and what outcomes were achieved as a result.

**If you would like to discuss the above, or any other charity issues, please contact Katharine Moss on 01865 261100**