



## Strategic planning support

### What is strategic planning and why do we offer this support?

**Strategic planning** is a process where an organisation asks and answers key questions about itself, the landscape or environment it operates in, the vision it has for success, and how it will know it has achieved that success (its objectives).

A **strategic plan** or **strategy** is the shaped response to this process, often written down as a document. The organisation can refer back to its strategic plan over the coming years to ensure it stays true to its vision, its aims, and ensure it remains on track to achieve those.

Put simply, a 'strategy' (or 'strategic plan') is a plan of what your organisation needs to do to get from where it is now, to where it wants to be within a time period. A strategic plan is like a roadmap with a known destination: you need to know where you are going in order to know how you are going to get there. Having a strategic plan brings clarity and is a tool for assessing how much progress the organisation is making towards its goals.

A lot can change externally within a short period of time, therefore, it is generally recommended that organisations carry out strategic planning every three to five years in order to remain effective and focused. Effective strategic planning is vital to maintain healthy organisations and to support effective impact in their communities.

### When do we offer strategic planning?

The Capacity Building team provides a 'strategy before structure' approach when responding to support requests and within other areas of our organisational development work supporting voluntary, community and social enterprise (VCSE) groups. We tailor this strategic planning support approach to the size and needs of each organisation. This support is offered to:

- Emerging groups to ensure that they have a clear strategy guiding their work
- Groups who need help to choose and understand an appropriate governance structure (such as an unincorporated charity/charitable association), or a legal governance structure (such as CIO or CIC)
- Support older/more established Charities and CICs who have no clear or current strategy, or who have a strategy that needs refreshing and updating



- Support further organisational development support that groups ask us for and need, such as funding strategies, funding applications, or exploring other income opportunities

### **How do we do this?**

In practice this means that when groups approach us for support with incorporation, funding, business planning, governance, or groups who are in a period of change or crisis and are lacking strategic direction, it is often helpful to first offer them a facilitated strategy session for their board/committee. This session, usually in-person, is 2-3 hours long and all group decision-making leaders, (potential/actual) trustees and directors are invited to join. We ask for a minimum of three people to attend and this is for the group's benefit as it supports capacity and good governance practice. We'll talk to you about how the session will run and what it will cover.

Each session follows a similar agenda however, we adapt this specifically for the needs of each group. In the strategic planning session, facilitated by a Capacity Building Team development worker, the group is guided through several questions and discussion points. By the end of the session, groups will usually have a much clearer idea of their strategic aims, shorter term goals and, if needed, which legal/governance structure is most appropriate for their work and aims.

### **What are the outcomes?**

New/emerging groups:

- Develop a clear, agreed vision; mission; objects; medium and long-term goals
- Identify and analyse group strengths, weaknesses, opportunities and threats (analysis)
- Identify a suitable governance structure that is fit for purpose
- Able to move forward clearly having identified an appropriate governance structure

Established groups:

- Refreshed, clear, agreed vision; mission; values; medium and long-term goals
- Realigned as a leadership team
- Identify any challenges in the organisation and problem solve these together
- Agree on strategic, short and medium-term goals to prioritise
- Identify priorities for work streams and funding streams



- Clarify and work on organisational strengths, weaknesses, opportunities and threats (a new analysis)

In our experience, groups have really appreciated coming together and making the space and time to think about their organisation on a strategic level. Groups often really enjoy the session and leave feeling motivated and ready to take actions forwards. All groups receive a draft written strategy document/ strategic plan from the Capacity Building Team.

### **Examples of strategic planning support and benefit to groups**

**A new group:** A group which had not started delivering services or events but had a group of leaders who are very experienced delivering community activities. The group leaders are well connected to a specific diaspora community in which they have identified a gap and understand the needs of that community. The leaders wanted to approach the new group with a united and strategic approach.

**“Thank you so much for the detailed follow-up and for taking the time to guide us through the strategic planning process. It was a pleasure meeting you and the team. We truly appreciated the opportunity to reflect on our vision, and we found the session both insightful and motivating.”**

**“We’re very grateful for the resources you’ve shared with the draft strategic plan. These will be immensely helpful as we take our next steps. We also welcome the example charitable objects you included, which offer a clear and useful model to reference”.**

**An emerging group:** Already delivering services under an existing organisation and which broadly fits under the aims of that organisation. However, the services are aimed at a specific demographic which is quite niche and nuanced. The organisation thought the services might need to be delivered under a separate organisation and wanted to explore this option and the idea of creating more distinct identities for its existing work and the new work. The same leaders intended to be involved in both the existing and the new organisations.

**“We deeply appreciate the work you've put into this already and for all your support in getting off the ground, but with the resources we have at the moment we've decided to put starting the charity on hold.”**



**“Everything you've shared with us has been useful and will be made use of with gratitude. . . Thank you for your encouragement and support with this.”**

**A group in a period of change:** a well-established, long-standing community and CIO with low income which supports people from a specific diaspora community. They asked the Capacity Building Team for help after long-serving trustees stepped down and they found themselves with an entirely new board.

**“Thank you for your time and invaluable contribution and support on paving the road map of our strategic direction and plan approach.”**

**“On behalf of the trustee, I want to reflect on the session provided by Macc, it was a very valuable session for us. It gave us the chance to reflect on the current state of the group, discuss our challenges, and plan more clearly for the future (set strategic plan and operational plan).”**

**“We found it particularly useful to map out priorities such as volunteer recruitment and training, fundraising development, monitoring and evaluation, and long-term goals.”**

**“We especially appreciated being introduced to the Sanctuary Seekers’ Network as a valuable source of information and support. Overall, the day was insightful and motivating, and it has provided us with a clearer strategic vision for moving forward.”**

**A well-established group:** An organisation running a range of services, with a great reputation in the community, relying on multiple small grants. This group asked the Capacity Building Team for support to stabilise their income through larger grant funding opportunities. As the organisation already runs many services, we offered a strategy session because it was important for them to have a clear and current strategic plan in place which would not only provide direction and clarity to staff and trustees but would also strengthen future funding applications.

**“Thank you very much for this. I am so happy to see our first-ever strategy document. The trustees and I will work on this to have a finalised version. And create clear next steps.”**

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