



**IN SITU**

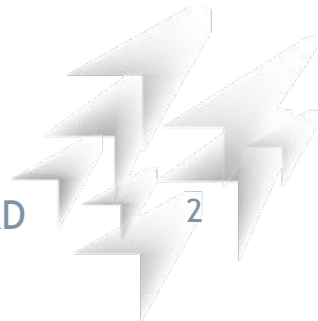
TAKING  
**COOPERATION**  
FORWARD

 D.T2.3.2 Joint Socio Cultural Education Training (Train the Trainers)

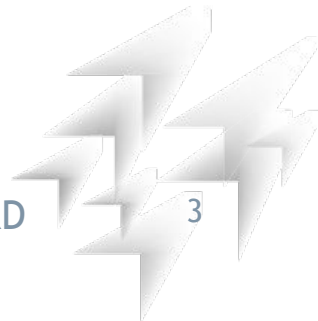
 **With or Without a Compass: Strategic Planning of Social Initiatives**

 IN SITU, Brodoto, Damir Soh

1. What is strategic planning?
2. Importance of strategic planning
3. Stages
4. Models and tools
5. Who can do strategic planning?
6. Elements of a strategic plan
7. Q&A
8. Further reading list



# What is strategic planning?



# WHAT IS STRATEGIC PLANNING?

- set of activities, systematic process of...
- ...setting priorities, focusing energy and resources
- ...identifying elements of a blueprint that will help organizations accomplish their goals
- ideally, it is done for a 3-5 year time span



# WHAT IS STRATEGIC PLANNING?

organization management

**setting priorities**

focusing energy and resources

**strengthening operations**

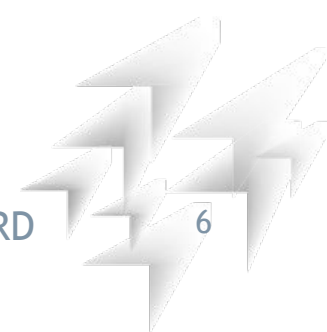
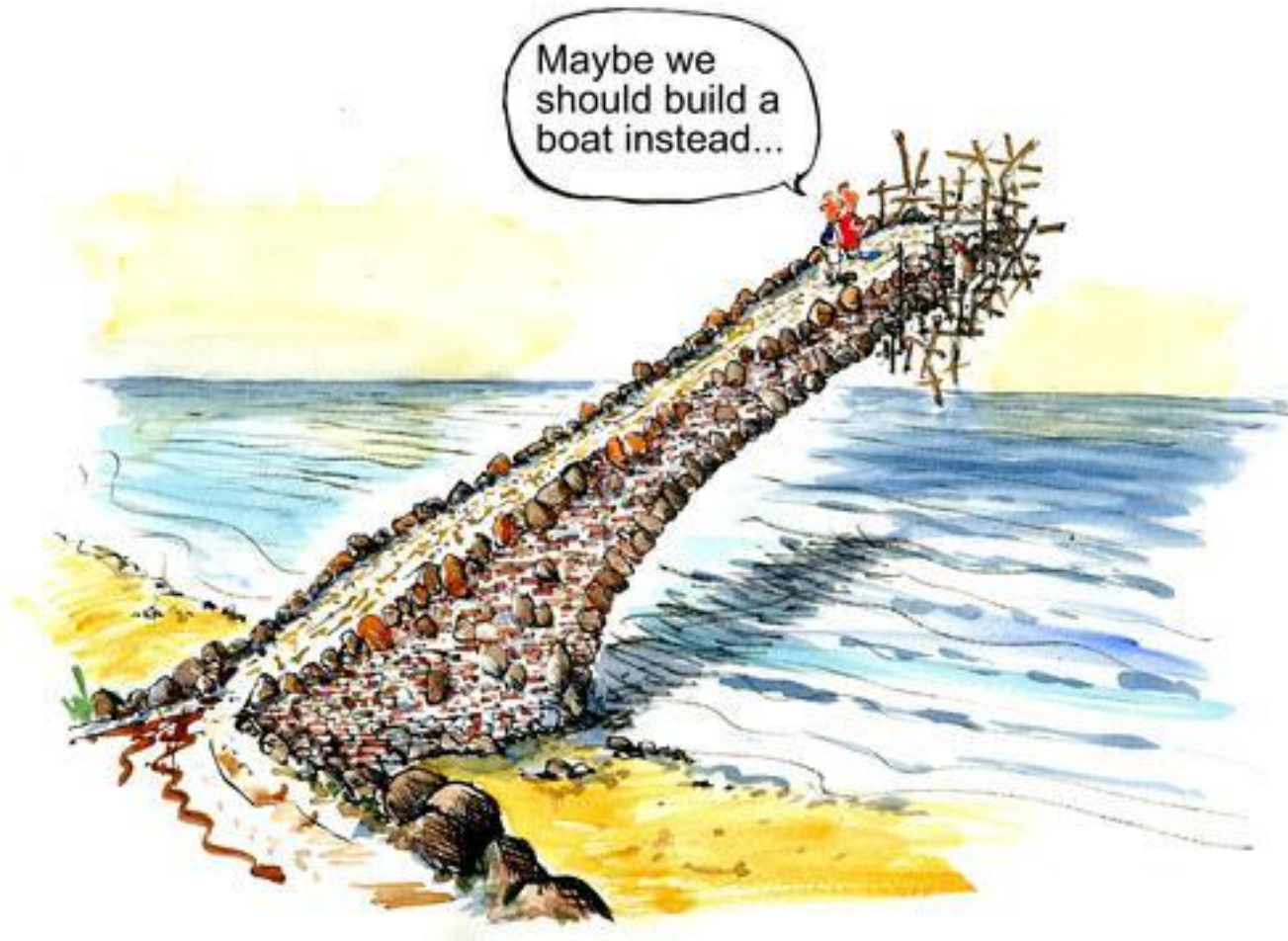
ensuring common goals for employees and  
stakeholders

**establishing agreement on outcomes/results**

setting response to changing environment



# WHAT IS STRATEGIC PLANNING?





# WHAT IS STRATEGIC PLANNING?



# Importance of strategic planning

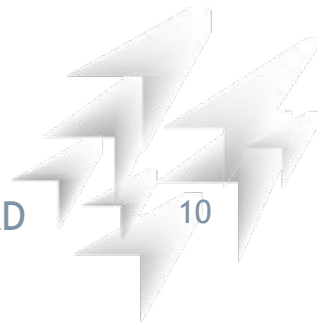




- utilizing most appropriate strategic tools = ideal strategy plan
- creating a strategic plan is not a linear process
- it is time-consuming
- it happens with years of experience!



- Key reasons for strategic planning:
  - building the main initiative behind a CSO (mission & vision)
  - short-term and long-term objectives
  - efficient decision-making
  - better understanding of strengths & weaknesses
  - more organized and well planned activities
  - better management of time, money and human resources
  - better response to changes in environment
  - removing conflicts and disorders
  - helping members to focus more on the important affairs and matters
  - gaining competitive advantage
  - producing measurable impact



# Stages of strategic planning

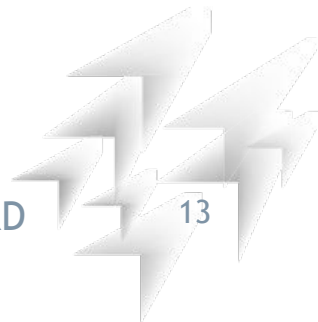


## Strategic Planning Simplified



## Five stages:

1. analysis of the current state (e.g. SWOT)
2. defining the future state of an organization (e.g. mission & vision)
3. determining goals and objectives (S.M.A.R.T.)
4. implementation (execution)
5. monitoring & evaluation (review)



## WHY SHELTER?

---

**Recovery starts with shelter. Having somewhere dry and warm to sleep, to prepare meals and be with your family is vital for starting the long process of rebuilding your life.**

Emergency shelter offers privacy and helps to preserve your dignity. It offers protection from the elements, animals and disease. It helps keep communities together. It can help to bring back a sense of normality, allowing children to go back to school.

Most importantly, it empowers families to start the process of getting back on their feet.

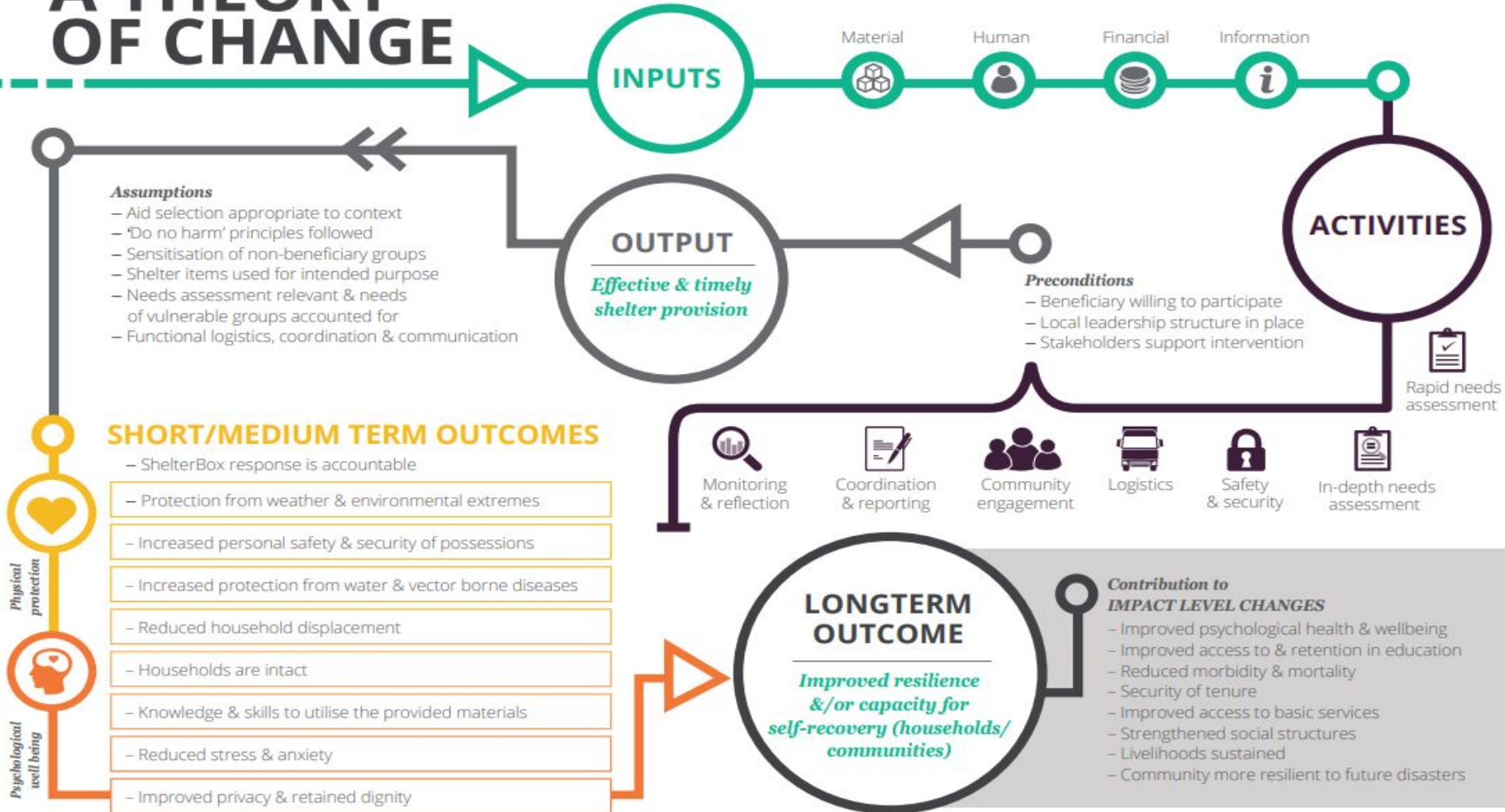




# STAGES OF STRATEGIC PLANNING



## A THEORY OF CHANGE



# Models and tools for strategic planning



# MODELS AND TOOLS FOR STRATEGIC PLANNING

MODEL TYPE	Standard Strategic Planning Model	Issue-Based Strategic Model	Organic Strategic Planning Model	Real-Time Strategic Planning Model	Alignment Strategic Planning Model
BEST USED WHEN...	Your internal and external conditions are relatively calm	You're facing turbulent internal or management conditions at your nonprofit	There is an unpredictable or troublesome external climate in which your nonprofit operates.	Your nonprofit is undergoing a crisis of internal or external conditions	You have great individual departments but a lack of effective communication





# MODELS AND TOOLS FOR STRATEGIC PLANNING

**IN SITU**

## Standard strategic planning model

- start with future in mind
- develop the plan to achieve it
- extrovert approach


## Environs Kimberley's Strategic Plan 2017-20



- WE VALUE**
- Informed decision-making
  - Community-based conservation
  - Best-practice scientific research
  - The power of people to effect change
  - Recognition of the rights & interests of Traditional Owners
  - Indigenous ecological knowledge
  - Collaborations & partnerships
  - Organisational independence & integrity

**OUR GOALS**

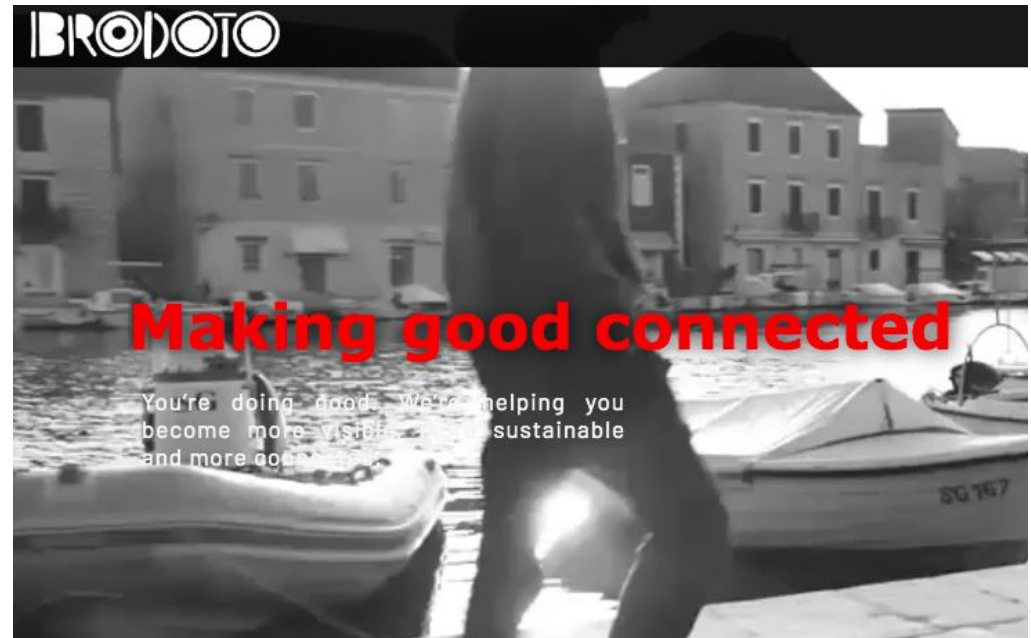
Kimberley lands & waters are protected & sustainably managed	A conservation economy in the Kimberley	Strong collaborations at regional, national and international levels	Organisational sustainability
<p>Work closely with others to:</p> <ul style="list-style-type: none"><li>Manage &amp; protect the biodiversity of the region &amp; areas of high conservation value</li><li>Promote the recovery of threatened species &amp; ecosystems in the region</li><li>Restore degraded &amp; weed-infested habitats</li><li>Keep the Fitzroy &amp; other Kimberley rivers wild and flowing free</li><li>Promote management practices that minimise greenhouse gas emissions</li></ul>	<p>Advocate for economic opportunities that improve the social &amp; environmental conditions of the region by:</p> <ul style="list-style-type: none"><li>Supporting economic activities that are ecologically sustainable (e.g. Aboriginal ranger programs)</li><li>Promoting the economic value of protecting the region's ecosystems (e.g. cultural &amp; eco-tourism)</li><li>Advocating for small-scale horticulture/agriculture</li><li>Ensuring that cost-benefit analyses of development proposals consider environmental sustainability</li><li>Offering alternative economic perspectives on development in the region</li></ul>	<p>Continue to build and extend our relationships through:</p> <ul style="list-style-type: none"><li>Partnering with Kimberley Aboriginal people &amp; local communities in biodiversity, conservation &amp; natural resource management activities</li><li>Engaging &amp; collaborating with government &amp; industry bodies</li><li>Alliances with other conservation NGOs</li><li>Working closely with scientific groups &amp; tertiary institutions</li></ul>	<p>Give the Kimberley environment a strong voice into the future through:</p> <ul style="list-style-type: none"><li>Ensuring that EK achieves long-term financial viability</li><li>Providing a supportive &amp; responsive working environment for our staff</li><li>Extending EK's membership base to be more diverse</li><li>Establishing &amp; maintaining efficient organisational systems &amp; processes</li><li>Employing rigorous, professional &amp; accountable standards in everything we do</li><li>Continuing to raise the profile of the organisation</li></ul>





## Issue-based strategic planning model

- start with current status in mind
- identify gaps and issues
- develop the plan to overcome them



## Organic nonprofit strategic planning model

- start with unified understanding of goals
- examine each members' strengths
- check progress quarterly

CO-IMPACT  
FOUNDATION

PARTNERS

PROGRAMS

POSTS

ABOUT

CONTACT

compassion

collaboration

co-investment

CONNECTED TO POSITIVELY IMPACT SOCIETY AND ENVIRONMENT

Partnering with Co-Impact Foundation increases impact of the key stakeholders in the **impact investment ecosystem**:

TAKING COOPERATION FORWARD

20





## Real-time nonprofit strategic planning model

- in the midst of a crisis
- frequent meetings
- checking day-to-day progress



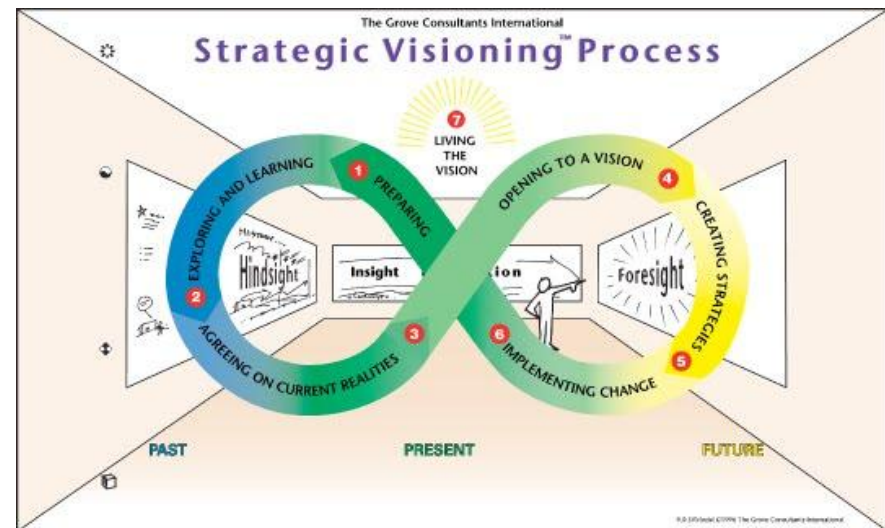
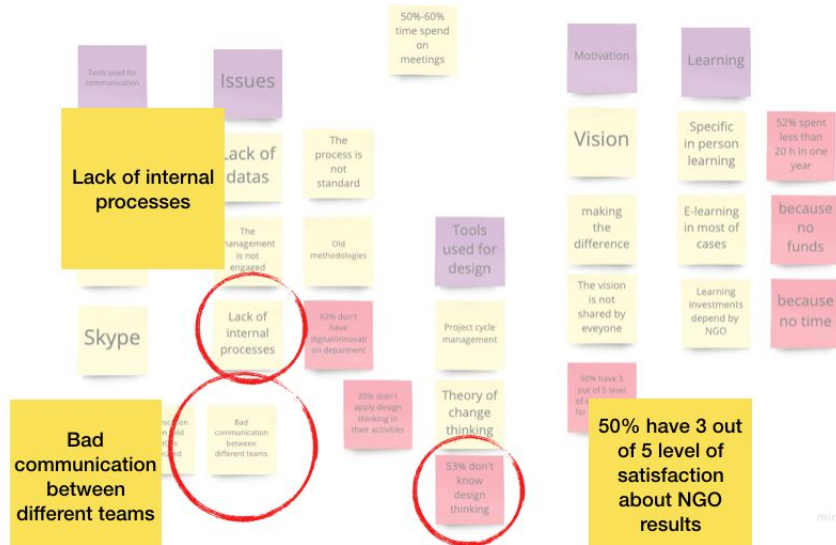
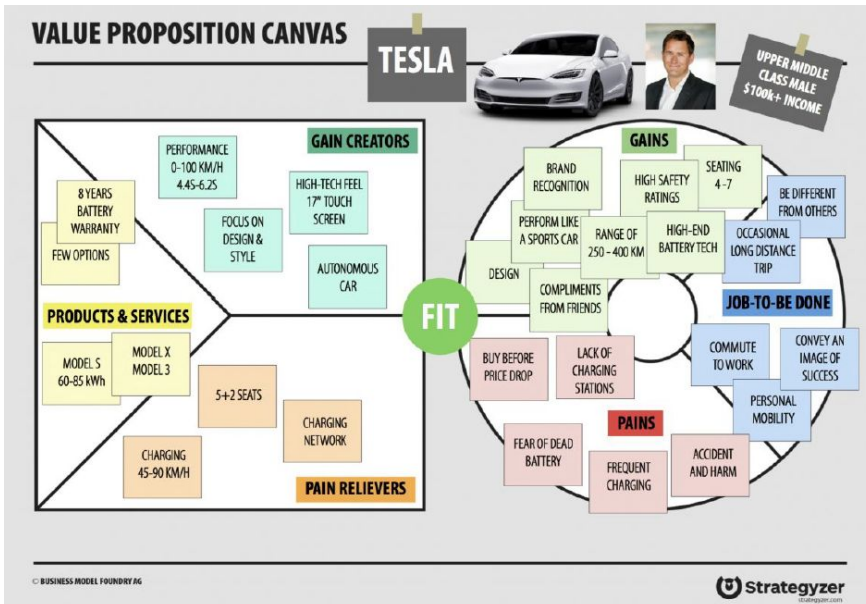
## Alignment nonprofit strategic planning model

- trouble in communication between departments
- re-establishing the common mission
- setting new communication standards



# MODELS AND TOOLS FOR STRATEGIC PLANNING

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# Who can do strategic planning?



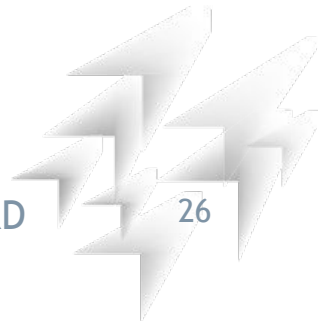
# WHO CAN DO STRATEGIC PLANNING?

Senior team members and the board, but...always include:

1. office staff
2. CSO key partners
3. donors
4. strategic thinkers / consultants



# Elements of a strategic plan





# ELEMENTS OF A STRATEGIC PLAN

**STRATEGIC PLAN  
EXECUTIVE SUMMARY  
2015-2017**

November 2014

**TABLE OF CONTENTS**

- LETTER FROM THE PRESIDENT AND CEO
- WHO WE ARE
- OUR VALUES
- OUR HISTORY
- SOLUTIONS AND IMPACT TO DATE
- MARKET SITUATION AND NEED
- THE NEXT 3 YEARS**
  - Our Priorities
  - Programs and Services
  - Goals to Meet the Plan
  - Financials

**taproot**  
FOUNDATION

## THE NEXT THREE YEARS

### OUR PRIORITIES

#### 1 FOCUS ON OUR CORE CLIENT: NONPROFITS AND OTHER SOCIAL CHANGE ORGANIZATIONS

- Affirm our focus on our core client.
- Match spectrum of high-impact pro bono services to client need.
- Continue to build our capabilities to reach more nonprofits where and when they need help.
- Expand and enhance nonprofit use of pro bono around the country.

#### WHAT WILL SUCCESS LOOK LIKE

- Number of organizations served increases significantly.
- Our program teams are structured to make sure that nonprofit needs are being met.
- Our program mix shifts from over 50% Service Grants to a greater balance between Done in a Days, Taproot+, and the Service Grant program.
- Our programs are achieving our impact goals efficiently. Low-impact and inefficient programs will be de-emphasized.
- 15% of nonprofits served will be outside of our five cities.
- We have established strong partnerships with pro bono providers in at least three other core markets across the globe.



OUTCOMES

Longest term  
Nearest term

**SOCIAL CHANGE ORGANIZATIONS SOLVE CRITICAL SOCIETAL PROBLEMS.**

Rationale: To solve critical societal problems, organizations need to be effective in pursuing their missions.

Accountability ceiling

**SOCIAL CHANGE ORGANIZATIONS ARE INCREASINGLY EFFECTIVE in serving their communities and pursuing their missions.**

Rationale: To be effective, organizations need to access high-quality and high-impact resources, which can often include pro bono services.

Assumption: Pro bono service can contribute to increased organizational effectiveness.

**PRO BONO SERVICE IS COMMONLY USED.** Social change organizations consistently integrate pro bono service into their resource strategies.

Rationale: To use pro bono services regularly, organizations need to trust that the time investment will be worth it because the resource will deliver on their needs.

Assumption: Trust in pro bono service correlates with pro bono use.

**PRO BONO SERVICE IS TRUSTED.** Social change organizations trust that pro bono service is a readily available and effective resource for meeting their needs.

Rationale: To trust pro bono services, organizations must feel pro bono reliably and effectively delivers on their needs.

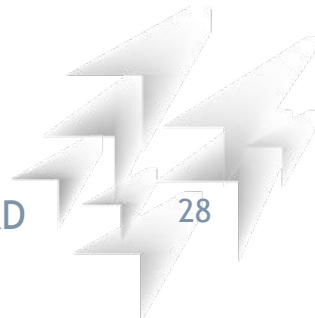
Assumption: Perception of availability and effectiveness of pro bono service correlates with trust in pro bono service.

**PRO BONO SERVICE IS READILY AVAILABLE.** Social change organizations have access to the pro bono service they need when and where they need it.

**PRO BONO SERVICE IS EFFECTIVE.** Social change organizations receive and successfully implement high quality and high impact services that meet their needs and help to overcome resource constraints that are keeping them from achieving their missions.



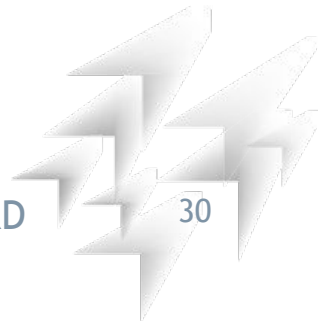
# Theory of change (2016) Taproot Foundation



# Q&A



# Further reading list

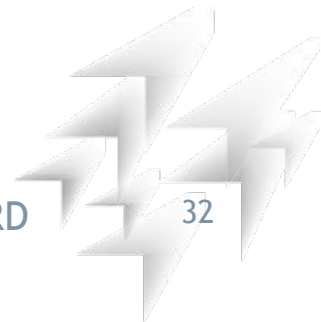


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# THANK YOU FOR YOUR ATTENTION!



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