

Planning 1: Strategy & Vision

Sported Sprints



Introductions

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Planning 1



The “Planning” Series

1: Strategy & Vision

5 September

2: Making a Business Plan

12 September

3: Practical Project Planning

19 September

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Today's Content

- 1. What is a Strategy and how is this different from a Business Plan?**
- 2. How do I develop my Strategy?**
- 3. How do I articulate my Strategy?**

What is a Strategy?

Your Strategy defines a “map”, specifically:

1. where you want to get to, and
2. the route you will take to get there

A **Strategy** should:

- Define the **realistic medium to long-term outcomes** that you would like to achieve
- Define the **customers** that you would like to support
- Define the **services** that you would like to provide to your customers
- Ideally be **driven by data** or other insight about the environment you operate in
- Provide everyone connected to your organisation with a **common purpose and clarity** around how what they do is aligned to the strategy

**YOUR
STRATEGY
MUST ADAPT
TO CHANGE**

Strategy Components

Your Strategy details what your purpose is, what is important to you and what you want to achieve

A Strategy should contain:

- **WHY** you exist – your **Mission** statement
- **WHAT** the future is that you aim to deliver – your **Vision** or **Purpose**
- **WHAT** you believe to be important – your **Values** and **Principles**
- **WHAT** outcomes you aim to achieve – your strategic **Goals** and **Objectives** and how you will measure these outcomes
- **WHAT** you need to be to progress the strategy – your strategic **Action Plan**

Mission, Vision and Values define your culture or DNA

Mission, Vision and Values examples

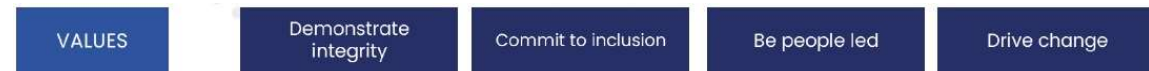
Your Mission and Vision should be relevant to every customer group that you engage with and deliver services to

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SPORTED

Mission: “We want every young person to have the same opportunity to fulfil their potential”

Vision: “Helping community groups survive, to help young people thrive”



MY NAME IS DODDIE FOUNDATION

Mission: “Fund, guide and enable the smartest, most efficient research to expedite the development of new treatments”

Vision: “A world free of MND”

ACE IT

Mission: “We advance the knowledge and connectivity of older people in Edinburgh, through digital coaching and empowerment, to improve wellbeing, independence and promote active involvement in our community”

Vision: “To contribute to a society where everyone enjoys the benefits of digital empowerment and the inequality created by a technological generation gap is minimised”



How Strategy differs from a Business Plan

Strategy setting is painting a picture of the future you would like to achieve

Strategy

- **Qualitative**
- Driven by **external** considerations
- Based on high level, **informed assumptions** around customer needs
- Provides a “**framework**” for business planning

Business Plan

- **Quantitative**
- Driven by **internal** considerations
- **Detailed** plans and financial forecasts

If you don't have a Strategy and only focus on business plans, you will **only deliver incremental change** as you will be primarily driven by internal considerations

Questions re what Strategy is

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Development Stages

It takes time to develop a strategy (at minimum 3 months).

Strategy typically considers a time horizon of 3 – 5 years, but it depends on the stability of your environment

Developing a **Strategy** involves a number of stages:

Engagement

You need to involve people from across your organisation including trustees, staff, volunteers and potentially customers.

They all have different perspectives and value to add

Set/Review your Mission, Vision and Values

Evaluate where you are now and what could happen in your environment

Identify your future goals and objectives

Develop an action plan and communicate the strategy

Where are you now and what could change

During this stage you have to be forward looking and make informed assumptions based on evidence and trends

This is the stage where the real work is done.

Understanding your Customers

Who are your customers, what are the needs of your customers and how are these changing (as discussed on next slide)

Analysing your “competitive” position

Undertake a SWOT analysis (to be discussed on later slide)

Understanding your customers

Understanding your customers and their needs is the most important aspect of developing your strategy.

You can have different strategic objectives for different customer groups

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Customer Group Profiling

- What are the **characteristics** of the customers in that group (e.g. age, location, income)?
- What is the **size** of the group and is that changing (up or down)? What's driving that change?
- What are the **needs** of the customers in that group? Are these needs changing and, if they are, why?
- What **barriers** exist that might prevent them from accessing your services (e.g. language, mobility)?
- If you support this customer group already, **how do these customers find** your services?

Ideally, external data will exist about these customer groups that will help to assess some of these questions

Give each group a name that is descriptive of that group

Test your strategy ideas against each group

SWOT Analysis

For EACH customer group, a SWOT analysis should be produced considering relevant internal and external factors that impact on your “competitive” position:

- **Internal: Strengths and Weaknesses**
- **External: Opportunities and Threats**

	Helpful	Harmful
Internal Source	STRENGTHS Things about your organisation that give you an advantage over others	WEAKNESSES Things about your organisation that disadvantage you compared to others
External Source	OPPORTUNITIES Things within your environment that you could take advantage of	THREATS Things within your environment that could create difficulties for you

Undertaking a SWOT requires you to have views about “competitors” (alternatives that your customers might choose) both now and in the future

Goal and Objective Setting

Example below taken from Sported strategy

- Think about what you want to achieve in the period – e.g. stability, growth.
- Different strategies and goals can be defined for different customer groups
- Objectives should ideally be time-bound and specific e.g. have established a girls' football group by 2025
- Consider how you will monitor/measure progress toward each goal e.g. outcome measures, performance indicators



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Your Action Plan

The Action Plan explains how you are going to make your strategy a reality. This is in effect a roadmap of the journey you are embarking on

The Plan must be REALISTIC!

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Prioritisation

The initial step is to prioritise the various objectives you have set

Each Action should:

- Be linked to one of your strategic objectives
- Have a clear description of what needs to be done and the outcomes/outputs to be delivered
- Have a defined owner
- Have a timeline for when this action should be completed
- Detail any resources required to undertake the action

Example actions include undertaking research into demand for a new idea, identifying delivery partners, and identifying relevant funding options

Each action should be linked to one of the strategic objectives

Questions re Strategy Development

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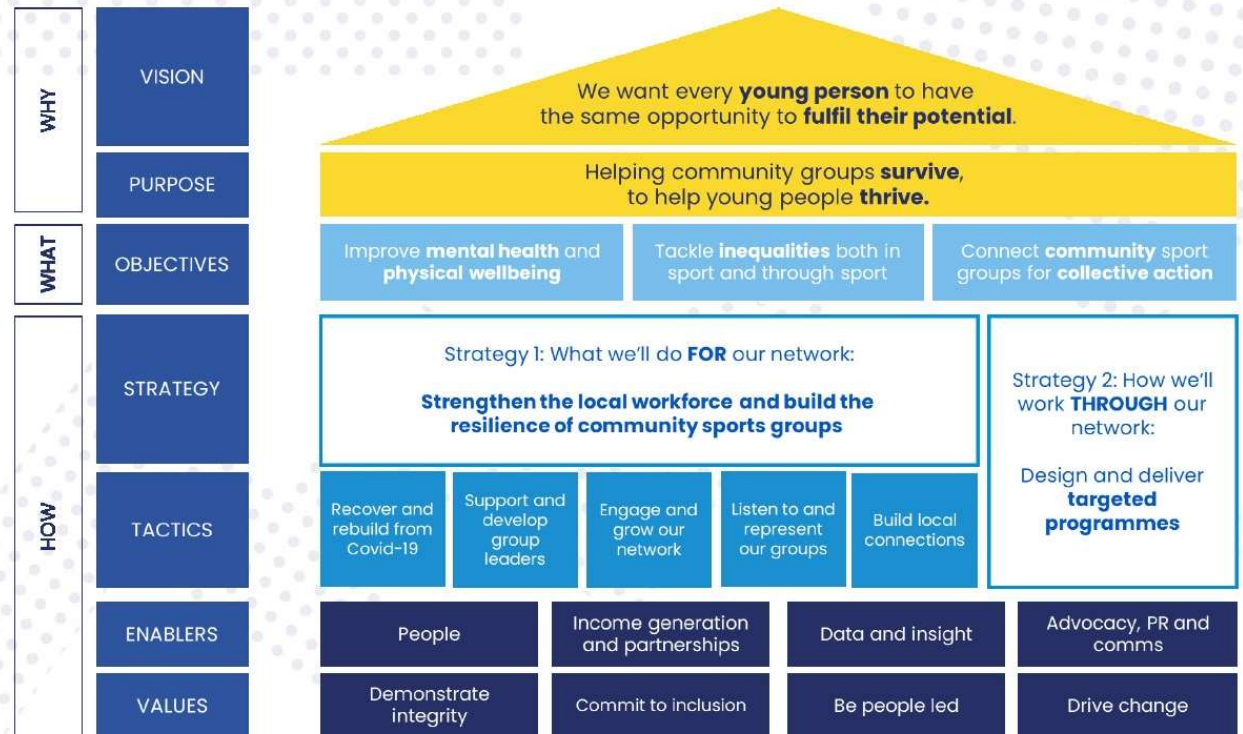
Spoted

The Spoted strategy is presented via the “clubhouse” concept

[Reach. Include. Empower 2021-25 Strategy \(spoted.org.uk\)](https://spoted.org.uk)

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The Clubhouse

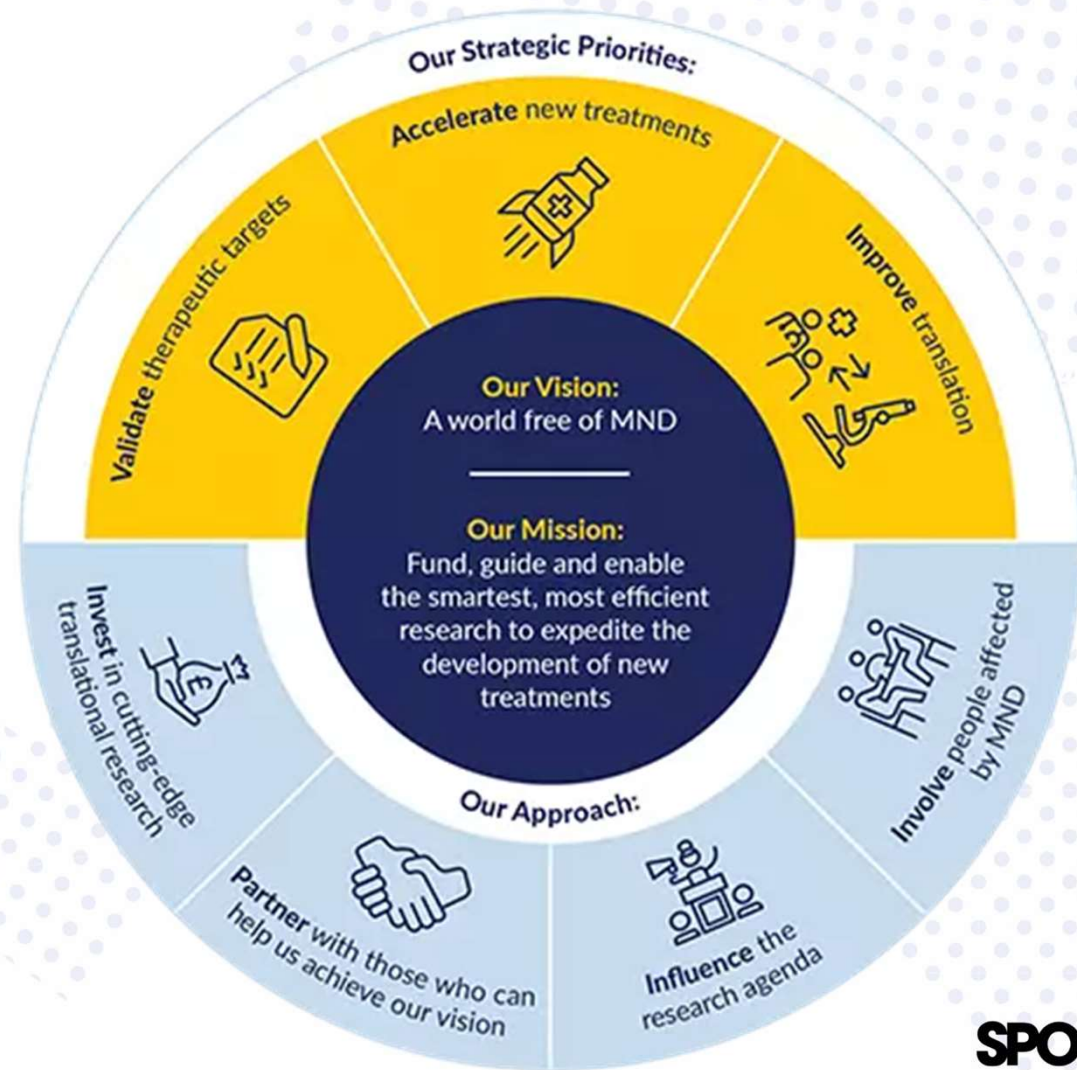


My Name is Doddie

The “My Name is Doddie”
Foundation was setup
when Scotland rugby
player Doddie Weir was
diagnosed with MND

[Research Strategy: Advancing MND
Knowledge | MN5D Foundation
\(myname5doddie.co.uk\)](#)

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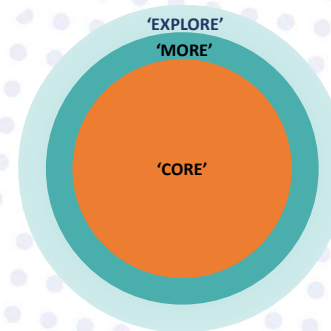


ACE IT

ACE IT is a small Edinburgh based charity that helps older people learn digital skills.

[About ACE IT Scotland – ACE IT Scotland](#)

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Mission

We exist to advance the knowledge and connectivity of older people in Edinburgh, through digital coaching and empowerment, to improve wellbeing, independence and promote active involvement in our community.

Vision

ACE IT will be contributing to a society where everyone enjoys the benefits of digital empowerment and the inequality created by a technological generation gap is minimised.

Values

- Open culture
- Person-centred
- Partnership-working
- Knowledgeable:

Strategic Priorities

Our ambitions for 2026 mean significant development: delivering our core services, expanding to do even more, and exploring new transformational opportunities. To do this we will focus strategically on five key areas:

1. Knowing our Learners
2. Service Development
3. Fundraising
4. People Management
5. PR & Communication

Measures of Strategic Success

- *Breadth of reach*
- *Diversity of our learner base*
- *Stability of funding*
- *Size*

Questions re Strategy Articulation

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Review

- 1. What a Strategy is and how this is different from a Business Plan**
- 2. How to develop my Strategy**
- 3. How to articulate my Strategy**

Final Questions

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