

# How to write a robust strategic plan for your charity.



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Strategic planning: it's the most effective way for your charity to realise its mission and have a lasting impact on your beneficiaries. Unfortunately for charity leaders, balancing the endless to-do list with a shortage of time often means strategic planning slips down the order of priorities.

However, it's critical that you spend the time developing a robust strategic plan for your charity. Your strategy defines where you want to go and how you're going to get there. Without one, how will you know that your team is pulling in the same direction?

A strategic plan can be as simple or as complex as you choose to make it. Large charity, or small charity, the process is broadly similar, and we've outlined a useful step-by-step guide to writing a great strategic plan for your charity, along with a few tips to get you started.

## Step 1. Stakeholder consultation

The first step is to undertake stakeholder consultation. This may seem a bit overwhelming at first, so let's break it down!

Start by identifying who your key stakeholders are and how you plan to speak to them.

Examples of the 'who' could be your team and wider staff, trustees, funders and the general public, but most importantly, talk to your beneficiaries! Prioritise diversity of input right from the get-go to understand the totality of challenges, needs and aspirations. Think about 'how' you plan to gather and record the information: this could be through interviews, surveys or focus groups, or a mixture of them all!

The data from consultation sets the foundation for your strategic plan, so it's a vitally important first step to take.

## Step 2. Perform a SWOT analysis

Now you've gathered information from different stakeholders, it's time to identify your organisation's strengths, weaknesses, opportunities and threats. By performing a simple SWOT analysis, you can begin to build a clear picture of what's working, potential areas for development, and what risks you may need to mitigate.

This is a great opportunity to ask yourselves some important questions: what do you know your charity does really well? What's holding you back from achieving your vision? Where do you think you could add more value to your beneficiaries?

This is a helpful [article](#) geared towards charities, explaining the benefits of performing a SWOT analysis and guiding you through the process.



### Step 3. Identify your aspirations, define your vision and mission

Having established a good understanding of your external environment, it's time to set out your organisational aspirations and define your vision and mission.

Your aspirations should be long-term in nature: what goals would you like your charity to achieve over the next 3/5/10 years? Once these have been determined, use them to inform your vision and mission, which together articulate the difference your charity is trying to make in the world.

Your vision statement should clearly set out the future you are aspiring to create. It will drive your charity towards achieving your long-term goals, defining what will be pursued and how you will get there. Your vision should be clear and inspiring to motivate everyone to commit to your journey.

Your mission statement is what will be accomplished in pursuit of your vision. It should communicate your charity's purpose, identify your stakeholders, and set out your primary objectives.

Some useful things to consider when developing your vision and mission:

- Is it unique?
- Have we kept it simple and short?
- Is it memorable?
- Have we been ambitious yet kept this achievable?
- Is it inspirational?
- Is it rational, whilst still emotional?

If you have a vision and mission from a previous strategy, this is the point where you should sense-check that they are still fit for purpose and representative of your current stakeholders.



**Vision**



**Mission**



**Values**

#### Step 4. Set out your core values

Your values are the guiding principles that defines your charity's culture and ways of working.

Values are the core beliefs that everyone in the organisation must adopt, from the leadership team right down through the wider staff team. It is important that you engage the full team in developing these - consultation with your team will give you an understanding of whether existing values still apply, and what new values might be needed to guide future behaviour. Whilst it may be the leadership team who ultimately define these values, gaining input from the team will help to ensure a higher level of buy in and diversity of perspective.

Communication is also key. Once you've defined your charity's core values, make sure to communicate them clearly back to your staff team - every person must understand the standards by which they are expected to live and work!

#### Step 5. Define your strategic focus areas

Strategic focus areas are the building blocks of your strategy, they bridge the gap between your vision statement and the individual actions needed to achieve it. Focus areas help to give your strategy structure by breaking it down into distinct sections, with each section underpinned by its own strategic goal.

Cascade recommends the following for developing great strategic focus areas:

- Aim to keep your focus areas short and memorable. You should be able to distil your focus into 6 words or less.
- Don't go too broad. Make sure your focus areas are... focused!
- Don't use metrics at this stage. Keep your focus areas outcome-oriented but high level.
- Every strategic plan is unique, but 3-6 focus areas is probably a reasonable range.

#### Step 6. Set your goals

Strategic goals underpin your focus areas: they are high-level, purpose-driven statements that set out exactly what it is you want to achieve.

Characteristics of strong strategic goals:

- Motivating - have strategic goals that are ambitious enough to inspire your team into action.
- Realistic - although they should be challenging, ensure that your goals are attainable within the constraints of your resources, capabilities, and budget.
- Measurable - while strategic goals don't need to be as accurately monitored as key performance indicators (KPIs), it's worth developing some high-level success measures to track your progress.

We'd recommend having no more than 1-2 strategic goals per focus area, as this should give your team a clear purpose to rally behind.

## Step 7. Draw up your action plan

Having determined your high-level strategic direction, it's time to get down to business! This means developing a detailed action plan in order to implement your strategy and transform your vision into reality.

To begin this process, you should start by setting your strategic objectives. These are the definitive, quantifiable targets that organise your high-level goals into explicit actions which are driven by a deadline.

There are lots of resources out there to help you craft great strategic objectives, but a commonly adopted framework is SMART. Take a look at our previous blog, strategic objective setting for national associations and federations, which explains in detail the objective-setting process and includes plenty of tips that can be applied to charities.

You'll also need to develop related KPIs, the metrics that will be measured to monitor the progress of your strategic objectives.

Examples include:

- Fundraising income generated
- Beneficiaries supported
- Social return on investment
- Social media engagement
- NPS

However, these are just suggestions – your KPIs are personal to your charity's vision, mission, and purpose – success will look different to everyone

## Final checks and implementation

Now that you've finished developing your strategic plan, it's ready to review and begin implementation. The next step is to create a polished, public facing document that can be shared with your stakeholders and the community. By approaching it systematically and paying attention to the details, your charity will be in the best position to achieve its goals – time to get planning!

Find out more about how we can support you by visiting our [strategy](#) or [fundraising](#) pages.

## [Contact Us](#)

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