

**YOUTH  
INVESTMENT  
FUND**

**Planning to Win:  
*realistic strategies that  
resource your mission and  
sustain your team's energy***

*Sinem Çakır*

**PG COLLECTIVE**

## Check In

Answers in the chat.

**Who sets the strategy at your organisation?**

# About PG Collective



## Who we are

PG Collective is growing team of strategists, troubleshooters and problem solvers.

We see ourselves as quiet radicals on a mission to create a more equitable and sustainable society, fighting systems and strategies which all too often undermine positive change.



## What we do

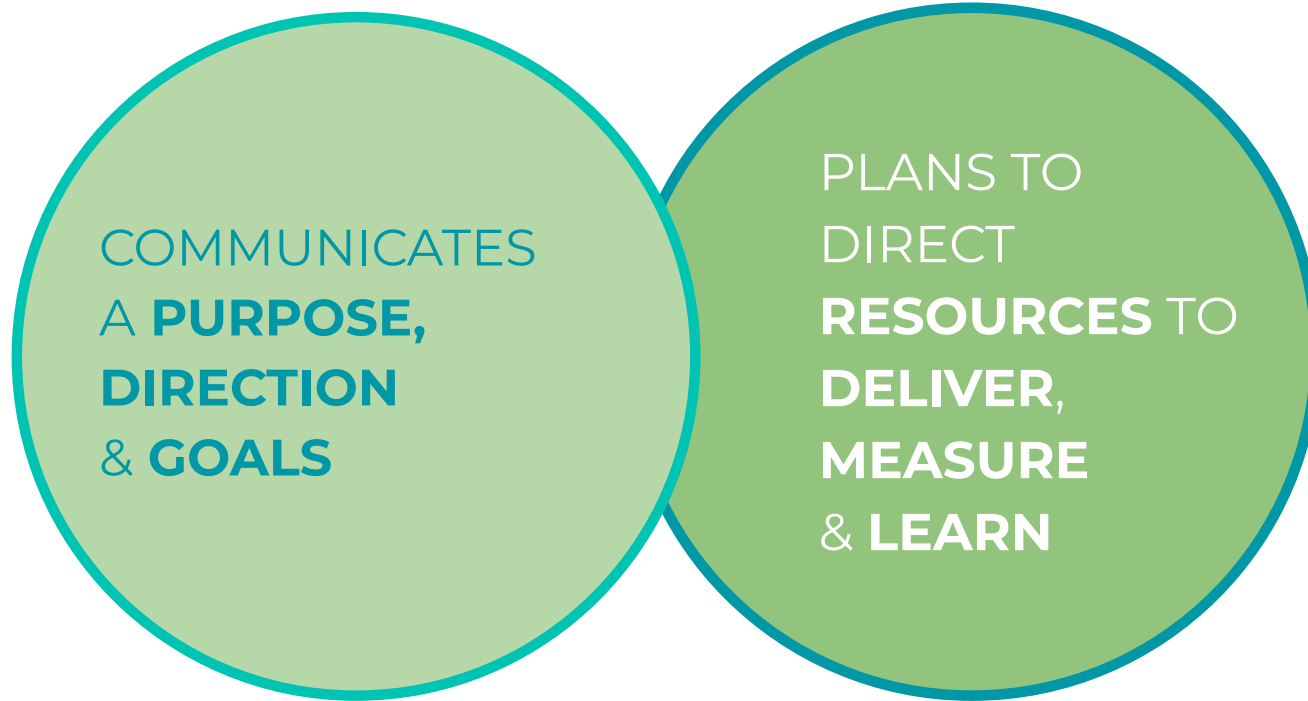
We provide practical advice and support to communities, networks, movements, social purpose businesses and non-profits going through major transition.

We're not afraid to challenge the status quo and break down barriers, working with brilliant, passionate and entrepreneurial people to do things differently.

# Agenda

1. Break down what strategy is.
2. Introduce tools for strategic planning.
3. Set strategies against real world context and capacity.
4. Listen to stakeholders, including funders.

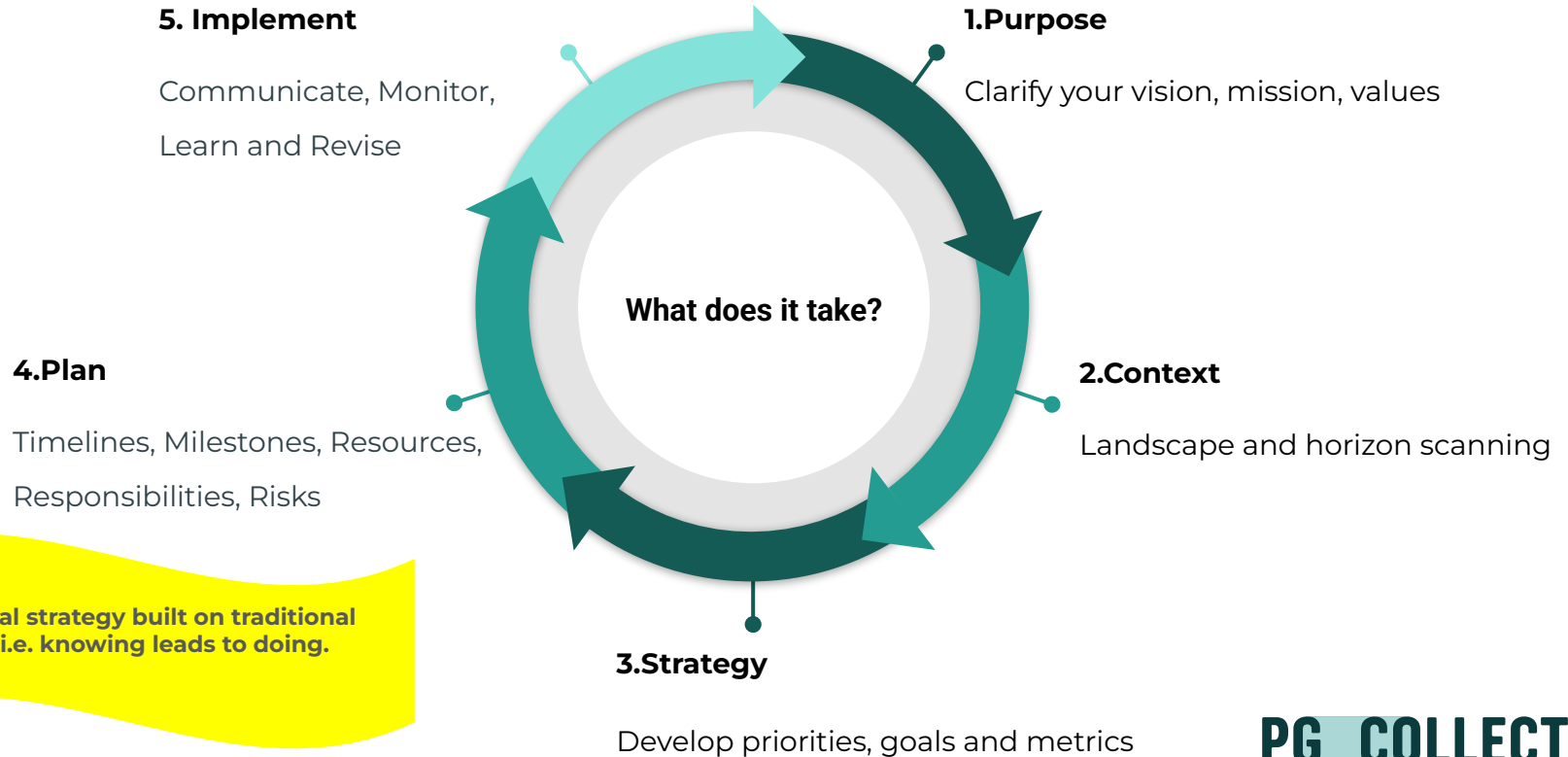
# What is Strategy?



# What's in a Strategy Document?

	<b>Section</b>	<b>Containing</b>
1	Executive Summary	Intro & Overview
2	Organisational Purpose	Vision, Mission, Values
3	Landscape & Context	SWOT, PESTLE, other
4	Strategic Priorities	Aims & SMART Goals
5	Resourcing	Finances, People, Assets
6	Implementation	Deployment of Resources
7	Risks	Challenges to Mitigate
8	Impact	Monitoring & Evaluation

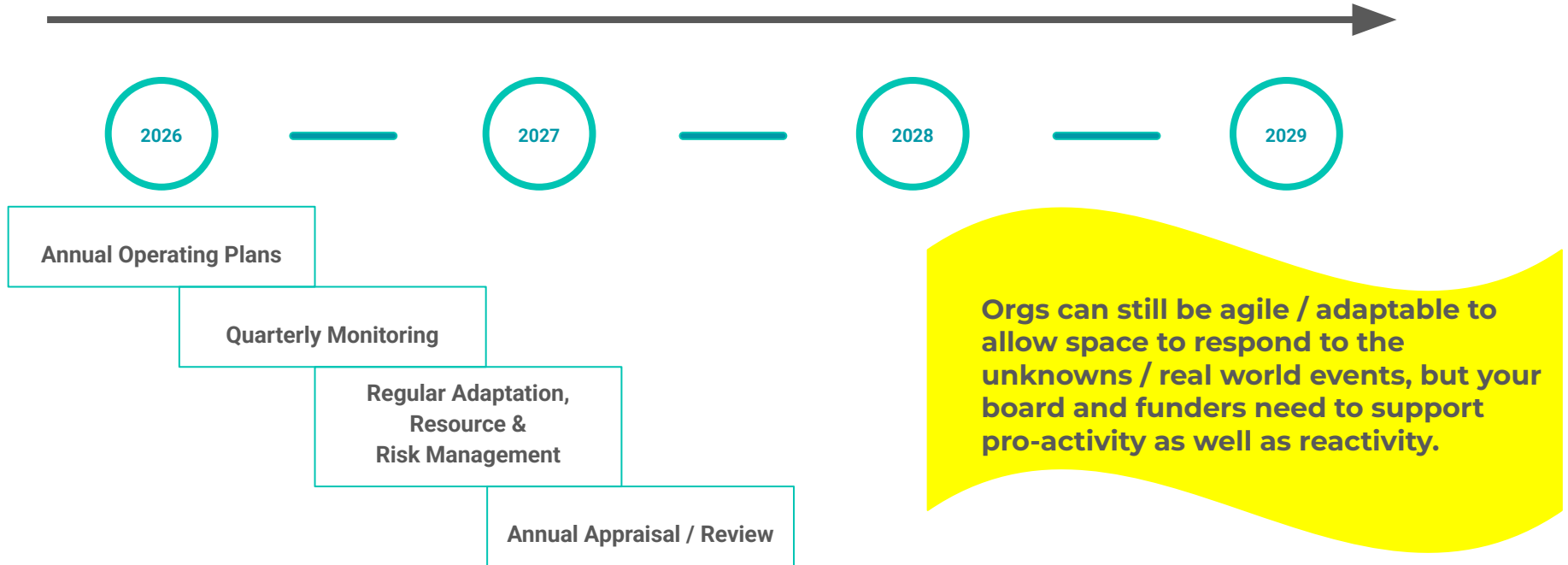
# What is the (traditional) Strategic Planning Process?



Traditional strategy built on traditional thinking i.e. knowing leads to doing.

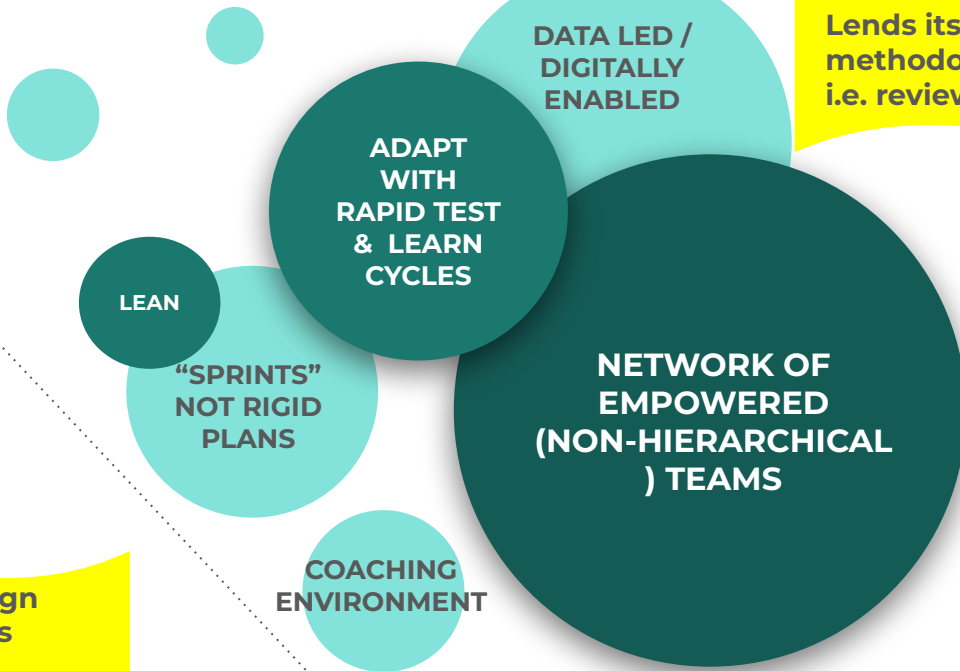
# Traditional Strategic Timelines

Typical 3 -5 year strategic plan (medium to long term)



# Agile Strategic Methodology

North Star  
= Purpose / Vision



Lends itself well to 'lean startup' methodology  
i.e. review & reinvent/ pivot.

Agile strategy built on design thinking i.e. knowing needs testing, before doing.

# When to re-strategize

1. Does existing strategy still describe your purpose well?
2. Can you use current strategy to make good decisions?
3. Does the direction described still feel right for the world around you, especially if there has been a lot of change?
4. Have you grown or become smaller?
5. Are your relationships with other organisations changing?
6. How much have your sources of income changed?

Source NCVO

<https://www.ncvo.org.uk/help-and-guidance/strategy-and-impact/strategy-and-business-planning/getting-started-with-strategy-and-business-planning/do-you-need-a-new-strategy/>

# Rapid Review

## Strengths

- What's working?
- What's unique to you?

## Weaknesses

- What's not working?
- Where are others doing better?

# SWOT Analysis

## Opportunities

- Where is there potential?
- What gaps might you fill?

## Threats

- What risks do you face?
- What's outside of your control?

# Process of Organisational Reflection & Assessment

1. Where are we now?
2. Where do we want to get to?
3. How are we going to get there?
4. How will we know when we have got there?

# Process of Organisational Reflection & Assessment

## INTERNAL LENS

1. Organisational history and purpose
2. Profile and reputation
3. Previous and current strategies
4. Financial and operational resources
5. Governance structure and risks

## EXTERNAL LENS

A PESTEL Analysis examines external market factors - including Political, Economic, Social, Technological, Environmental and Legal - that might impact your organisation's direction, performance or overall position.



## PESTEL ANALYSIS TEMPLATE

For companies, industries or countries.

[pestleanalysis.com](https://pestleanalysis.com)

**P**

**Political**

Political factors are government, trade and tax policies, general political issues, changes in leadership, regulation, and political trends.



**E**

**Economic**

Economic factors may include inflation, interest rates, exchange rates, economic growth and unemployment levels.



**S**

**Social**

Social factors are cultural trends and patterns in society. They may include lifestyle trends, age distribution, and consumer behavior.



**T**

**Technological**

Technological factors may include technological advancements and developments, innovation and scientific breakthroughs.



**E**

**Environmental**

Environmental factors may include climate change, environmental regulations, waste management policies and consumer environmental awareness.



**L**

**Legal**

Legal factors may include labor and consumer laws, market and import/export regulations, health and safety policies and guidelines



Source *PestleAnalysis.com*

<https://pestleanalysis.com/what-is-pestle-analysis/>

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# Aligning your plans with real world capacity

Dependencies:

1. Current and forecasted finances
  - ability to recruit, train, retain and offer competitive salary & benefits
2. Skills mix / skills assessments and gaps
3. Workforce development, learning, training and investment needs
4. Current workforce capacity (FTE - full time equivalents)
5. Existing contracts, working schedules and timetabling/seasonality

## What's the trap?

Typical problems with our revenue funding landscape - it forces us to:

- ✘ Chase programmatic funding to the extent that we overpromise
- ✘ Add new activities / initiatives without cutting any programmes
- ✘ Widen and diversify our offering without upskilling workforces
- ✘ Build / launch large programmes, without testing, piloting and adapting

# Capacity & Resource Planning

Ideally from the organisation's strategic perspective, we want to:



Mitigate the risk of the burden of overworking and burnt out teams



Build capacity ahead of demand - can be difficult to do in our sector



Build some flexibility into workforce capacity according to need  
e.g. sessional / freelance capacity that can be dialled up and down



Build in agility to adapt to conditions through skills sharing, reskilling,  
secondments, redeployment and more - reducing staff turnover/churn

# What do funders need to see?

Ideally from the funders perspective, strategy needs to:



Mitigate wasted effort or resource - build in test and learn cycles through monitoring and reflection to demonstrate responsiveness to evidence.



Deliver according to current need - i.e. solve a current and real world problem that is well understood and well defined - not wedded to a specific service.



Situate itself alongside those the service / building is for ('do with not to') demonstrating representation, genuine listening and influence / power sharing.



Legacy and/or sustainability built in by design - to the business model, to the upskilling of communities, to the impact on other systems or services.

**Comfort Break**

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# Exercise 1: Who is on your Stakeholder Map?

## **Contextual**

those in the broader environment shaping everything (electorate, politicians, academics, society...)

## **Peripheral stakeholders**

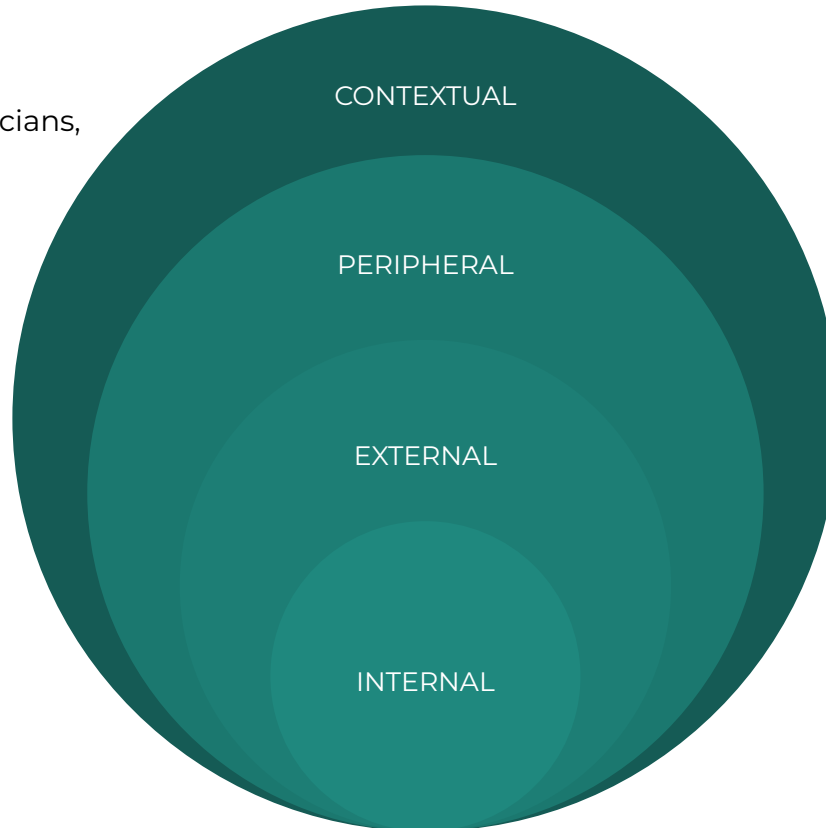
indirectly influencing with weaker ties, low influence/interest (other services, providers, landlords...)

## **External stakeholders**

directly interacting but outside the organisation (parents, guardians, teachers, funders, partners...)

## **Internal stakeholders**

within the organisation (board, staff, volunteers, young people...)



## Question

Who else's insight does  
your organisation need to seek?

&

How do you have  
stakeholder conversations?

## Exercise 2: Strategic Planning Cycle - the timing Q

Has technology taken over your provision?

Has the context around you changed?

Has technology taken over your skills base?

Has existing strategy run its course?

Has the money began to dwindle?

Have you been hit hard by covid / climate / energy / [insert crisis here] ?

Have you had a change in leadership, vision or direction?

How do you know?

Has technology taken over your provision?

Has societal risk /tolerance shifted?

Have young people's needs evolved since your strategy was set?

Has the appetite on the Board changed?

Has your business model failed?

## Question

What's the narrative / framing for the timing of your next strategic review?

## Exercise 3: Situating your review in real world context



## Check In

What's your next strategic planning move?

*Thank you*

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