

Developing strategy for your organisation

a workbook



Introduction

Welcome to our *Developing strategy for your organisation* workbook. Te Taumata Toi-a-Iwi developed this resource as part of a workshop series for arts organisations, commissioned by Auckland Council. We are now sharing the workshop resources more widely. You can find other workbooks from the series, *Demonstrating impact* and *Sharing your story*, on our [website](#).

The COVID-19 pandemic has presented arts organisations with a variety of challenges. Lockdowns and other restrictions have meant fewer opportunities to get together, with each other, within our organisations, with our audiences, and with our communities. This has heightened the impact of long-standing pressures in the arts sector around issues such as wellbeing and financial sustainability. Now in the third year of the pandemic, arts organisations are looking at long-term adaptation to a world that is different to the world we knew in 2019.

The strategy workshop series aimed to help arts organisations think through how to build organisational resilience and sustainability. The series was funded by Creative New Zealand and was delivered in mid-2022 for Auckland Council Arts Partners.

Each workshop was accompanied with one of these workbooks – now more widely available for sector organisations.

This workbook will introduce some key concepts to help you understand the role of strategy in your organisational planning, and how to develop your strategy. It will cover:

Where strategy fits in your business planning process	4
Characteristics of good strategy	5
How to create an actionable strategy	6
Communicating your strategy	10
Links to further resources	12

Where strategy fits in your business planning process



Strategy is the act of focussing on what's important and doable.

Strategy is just one component of your business plan.

What we aspire to be

Mission

Our reason for being. Typically, a statement describing a problem or unfulfilled need and who we are solving it for.

Vision

The idealised solution that fulfils the mission. It's how we create impact and acts as the goal posts for our strategy.

Our focus

Strategy

This is a set of guiding principles and decisions (informed by reality and caveated with assumptions) that we believe will help us achieve our vision.

What we are doing

Road Map

The plan. The concrete steps towards achieving our vision, including the necessary resources, rough milestones and timelines.

Execution

The day-to-day doing of everything detailed in the roadmap. Done while collecting any and all data needed to inform any changes to our roadmap and strategy.

Senior Leadership Team

CEO

Board

Senior Leadership Team

Project Leads

Characteristics of good strategy

Good strategy

- ✓ Short
- ✓ Simple and concrete
- ✓ Focused and directional
- ✓ Action-oriented
- ✓ Coordinates resource and competencies
- ✓ Takes culture into consideration
- ✓ Flexible
- ✓ Clearly managed and reported on
- ✓ Broad involvement

Bad strategy

- × Long
- × Complex and abstract
- × Aims to do too much
- × Focuses on ambitions and visions
- × Long checklists
- × Expects a rational or idealistic world
- × Static
- × Unclear management and ownership
- × Delegated to “experts”



There is no right or wrong strategy, only good and bad strategy.

How to create an actionable strategy



How might I get the board and wider team excited to take part in a strategy setting process?

Team engagement in strategy



Diagnosis

- Discover this as a team. Get as many inputs as you can from both inside and outside your organisation.
- Distill and rank your findings.
- Based on what's important and doable.

Guiding policies

- It's not a business plan — Keep it high level and only focus on the areas that require focus.
- Assign working groups to draft the coherent actions. Include board members in the working groups.

Coherent actions

- Ensure these are written with the people expected to action the plans.
- Always start with a draft. It's never right first time.
- Agree ballpark resources.
- Agree three and five year outcomes.

A road map for action

Mission

Vision

Strategy

Road Map

Execution

With the strategy in place, we can now:

- Write the step by step plans that will help us achieve it
- Name names
- Draft timelines
- Allocate resources
- Create a master plan and book in regular check-ins

A strategy template

Obstacles and challenges What problems are we trying to solve? What obstacles must we overcome?		Guiding principles How will we overcome the challenges? What specific values or you will guide the team?	Activities What types of activities solve the problem? What capabilities achieve our aspirations?
Aspirations What are the ideal desired outcomes? What do we want to achieve?	Focus areas What will we focus on for the most impact?		
		Outcomes What metrics will be used to gauge success? What types of measurements will we employ?	

Communicating your strategy

Identify the key messages about your strategy you want to share and to whom

- Who will be interested in your strategy?
- What they will be looking for?
- How will you engage with them?

Think about specific audiences

- What would a funder be particularly interested in when they receive your strategy? Where is the fit with their own strategic objectives? What outcomes do they have a particular interest in? (you could reference <https://www.tetaumatatoiaiwaiwi.org.nz/nga-toi-investment-outcomes/>)
- If you're running a programme for tamariki, what would a parent be particularly interested in?

Planning communication about your strategy to key stakeholders

Audience

Who are your key stakeholders?

Performer / participant

Volunteer

Parent

Corporate donor

Grantmaker

Government or local government funder

Sponsor

Patron

Government or local body politician / policy maker with sector interest

Other

Information interest

What will they be looking for in your strategy?

Key messages

What in your strategy meets their particular information interest/s?

Communications

How will you communicate with them?

Links to further resources

Strategyzer

— A series of books that lays out the fundamentals and how to bring them all together. The website also includes useful tools and templates.

Good Strategy Bad Strategy

— An intro to the book *Good Strategy Bad Strategy* by Richard Rumelt.

Mural

— This is an online whiteboard tool. But its template gallery houses fantastic templates and frameworks from a wide range of sources. (Some of this is subscriber only content).

www.answerthepublic.com

— A powerful tool to better understand what your audiences are looking for. (This is a subscription service but you can use 2 free searches a day).

Medium

A publishing platform with which has lots of great articles on the Arts sector, including on audience and donor strategies.

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