

# Staff Strategy and Planning Away Days / Workshop

## Background and introduction

We're looking to bring in an external organisational strategy consultant / facilitator to design, deliver and facilitate ORG's first 'in-person' two-day workshop for a newly expanded staff team to ensure our 'Strategic Priority Areas' as defined by 'The Strategy (2022-2025)' are fully aligned with our 'Strategic Objectives' (goals) and a range of 'outcomes', 'outputs', 'activities', and 'tasks' across a range of our 'programmes', 'projects', and 'campaigns'.

## Context

Below information will provide further context.

- We have a robust high-level Organisational Strategy known as 'The Strategy (2022-2025)', approved by the Board. Our 'Strategic Priority Areas' stem from 'The Strategy (2022-2025)'.
- We have a number of new staff members who have joined our organisation recently. Some of their time (alongside existing staff members) are funded by the grants (project-based/restricted funding).
- We have a number of new grant projects which means staff will have to deliver 'outcomes', produce 'outputs', and conduct 'activities' to fulfill grant project objectives over the next few months and years. These are theoretically in line with 'Strategic Priority Areas' due to the nature of the grant projects, but should also in practice be seen to be in line with our 'Strategic Priority Areas' (as defined by 'The Strategy (2022-2025)').
- New staff members who are funded by new grant projects are now more or less familiar with 'outcomes', 'outputs', 'activities', and 'tasks' which they're individually or collectively responsible for as part of grant projects. They are currently in the process of fleshing out all of these responsibilities as part of an exercise covering 'annual plan', 'workplan', and 'roadmap'.
- We also have other 'Strategic Priority Areas' which are funded by core. These responsibilities should also be planned out. Although this partly depends on the completion of 'annual plan', 'workplan', and 'roadmap', and partly on onboarding new Comms and Campaign staff.
- Overall, we want to ensure that all our staff across different teams have (or are in the process of completing) workplans which reflects 'grant project-funded' and/or 'core-funded' 'Strategic Priority Areas' and understand the interdependencies.

## Workshop format/methodology

We'd like to hear your proposal including clear ideas on the format/methodology and reasons behind it. We have three **key criteria** on format:

1. All staff should feel comfortable and supported to provide strategic input and critical reflection either in all-team or small-group settings;
2. An informal space for half-formed ideas, brainstorming, collective conversation etc.
3. Input from staff on the sessions

We'd like to ensure that all our staff members are included and seen to be participating in different elements of the workshop as much as possible. We don't want to compromise efficiency, but would like to create an environment which would allow the team to 'feel' their partaking in the workshop beyond simply just participating. So, would like to hear your ideas on how your proposed format/methodology incorporates this request.

## Key Session

As a growing and ambitious Human Rights/Civil Liberties organisation, we're aware of our role within our sector or also broadly within the society, in ensuring that we pro-actively practice the principles that we advocate and campaign for. 'Diversity and Inclusion' is one key area for us. Therefore, we'd like to have a session on this. This doesn't have to be delivered by you, but if you do have expertise on this or know someone who has, we'd like to have this conversation with you/them.

## Objectives

Below are what we'd like to achieve as a result of this workshop.

1. **A shared understanding of ORG's 'Mission', 'Vision'. 'Purpose', 'Theory of Change', 'The Strategy (2022-2025)', and 'Strategic priority Areas'.**
2. **A shared 'big picture' (not operational or tactical) understanding of where ORG is in its current journey in relation to 'The Strategy (2022-2025)', but also as a growing and ambitious organisation.**
3. **A shared understanding of the key (policy, external and organisational) challenges ahead (2022 and 2023) including our strengths and weaknesses, and risk areas in addition to suggestions for improvement and meeting these challenges.**
4. **A collective organisational plan (covering the remainder of 2022 and lifetime of grant projects) which includes policy, comms, campaigns, and funding (renewal) aspects/elements. [Individual 'annual plan', 'workplan', and 'roadmap' should contribute to this 'organisational plan'].**

## Appendix

Terms	Definitions
Vision	A simple analogy. Think of a skyscraper. Vision is the initial thought about what kind of place it will be and why it will matter. Strategy is the blueprint for the foundation and framing - vision is your view of the future. Strategy explains the approach you will take to realize that future state
Mission	Captures at a high level what you will do to realize your vision.
Purpose	motivating force moving, guiding, and delivering the organisation to a perceived goal. It is the driving force, the fuel, the bond, the intangible link that pulls the organisation together to achieve success.
Theory of Change	How our vision can be achieved
Strategic Priority Areas	Strategic priorities, OUR priorities
The Strategy (2022-2025)	The approach you will take to realize the future state described in your vision
Strategic Objectives	Goals
Outcomes	Result or consequence of our work (activities and outputs)
Outputs	Produced as a result of our activities
Activities	Milestones or tasks carried out by ORG
Tasks	Discreet pieces of work that need to be achieved in order to realise project deliverables
Programmes	Set of related projects and campaigns with a long-term goal
Projects	Unique, time-specific set of activities that contribute to the goal(s) of a programme
Campaigns	Set of short or long term activities (usually) targeted at a specific piece of policy/legislation
Grant plan	Plan to document how we achieve the deliverables in a grant agreement
Annual Plan	Document that sets goals and expectations for the coming year and can be related to our strategic plan
Workplan	Developed by each staff member to guide their work across the year; relates directly to strategic plan and grant plans
Roadmap	granular system of line management supervision in the policy and lit team – breaking down workplans into the steps that need to be taken to deliver them
Project Plan	Overview of work that needs to be achieved to realise project deliverables on a team basis, used for sprint planning.
Grant plan	Plan to document how we achieve the deliverables in a grant agreement