

# **The four perspectives we adopt when assessing or designing a strategy for a non-profit organization**

Marcus Coetzee & Andy Simpson | May 2020

# A Framework for Developing a Strategic Plan

1

The scope of a strategic plan will vary depending on the **size, complexity, and maturity of the organization**.

2

An effective strategy will **identify where an organization should focus its resources and efforts** to achieve the greatest impact.

3

The strategy should identify **where changes are required** in how the organization thinks and operates.

4

A strategy will identify the **guiding principles and philosophy** that underpins the organization.

5

The process to develop a strategy should be **inclusive of directors, staff, and key stakeholders**.

6

A strategy must be **adaptable, dynamic, even organic** – it must accommodate an unpredictable future.

7

A strategy must be **high-level** – envisioning and directional.

8

The strategy's purpose is to **cultivate clarity amongst the leadership team**, which manifests as decisions, action, and impact.

# Perspectives for Non-profits and Social Enterprises

Strategic plans should include **four interrelated perspectives**:

## IMPACT PERSPECTIVE

This describes how an organization can achieve a meaningful impact on the world.

This is ultimately the purpose of all non-profits and social enterprises.

It requires organizations to clearly define their objectives, and figure out how to achieve this and provide convincing evidence thereof.

[www.marcuscoetzee.co.za](http://www.marcuscoetzee.co.za)

## MARKET PERSPECTIVE

This describes how an organization can build its brand and secure the opportunities it needs.

Clear positioning, good branding, and a supporting PR strategy create a platform for selling goods/services, fundraising, and finding good investment opportunities.

The market – customers, competitors, and trends – must also be incorporated.

## FINANCIAL PERSPECTIVE

This describes how an organization can achieve financial sustainability. It requires organizations to make sensible financial decisions and manage risks.

This will mean building reserves, diversifying income streams, maintaining the right relationship between overheads and projects, and costing projects effectively.

## CAPABILITY PERSPECTIVE

This describes how an organization can become more capable (as opposed to just “having capacity”).

It requires the right organization design, capabilities, systems, and culture.

It must also have the right legal form(s) and transactions between them.

## FINANCIAL PERSPECTIVE

Pursue financial sustainability

Financial Reserves

Costing Methods

Financial Projections

Incomes Sources & Types

Investments & Assets

Overhead Allocation

Risk Assessment

Organizational Design

Legal Structures

Capabilities

Systems

Culture

## CAPABILITY PERSPECTIVE

Build a capable organization

# SUSTAINABLE IMPACT

**Philosophy:** Vision, Mission, Paradigm, Values

Theory of Change

Impact Models

Delivery Partnerships

Programmes

Monitoring & Evaluation

## IMPACT PERSPECTIVE

Achieve a meaningful and ongoing impact

## MARKET PERSPECTIVE

Build a brand and pursue opportunities

**Market Assessment:** Customers, competitors, trends

Brand & Positioning

**Income Strategies:** Securing revenue, funding, and investment

**PR & Marketing:** Strategy and platforms

## Thanks

Andy Simpson | [Collaboration](#)

[www.imanidevelopment.com](http://www.imanidevelopment.com)

Brendan Quinlivan | [Layout](#)

[bpquinlivan@outlook.com](mailto:bpquinlivan@outlook.com)

## Follow Me

[www.marcuscoetzee.co.za](http://www.marcuscoetzee.co.za)



[linkedin.com/in/coetzeemarcus](https://linkedin.com/in/coetzeemarcus)



[@marcuscoetzee](https://twitter.com/marcuscoetzee)

