



Strategic Planning Workshop for Community and Voluntary Organisations

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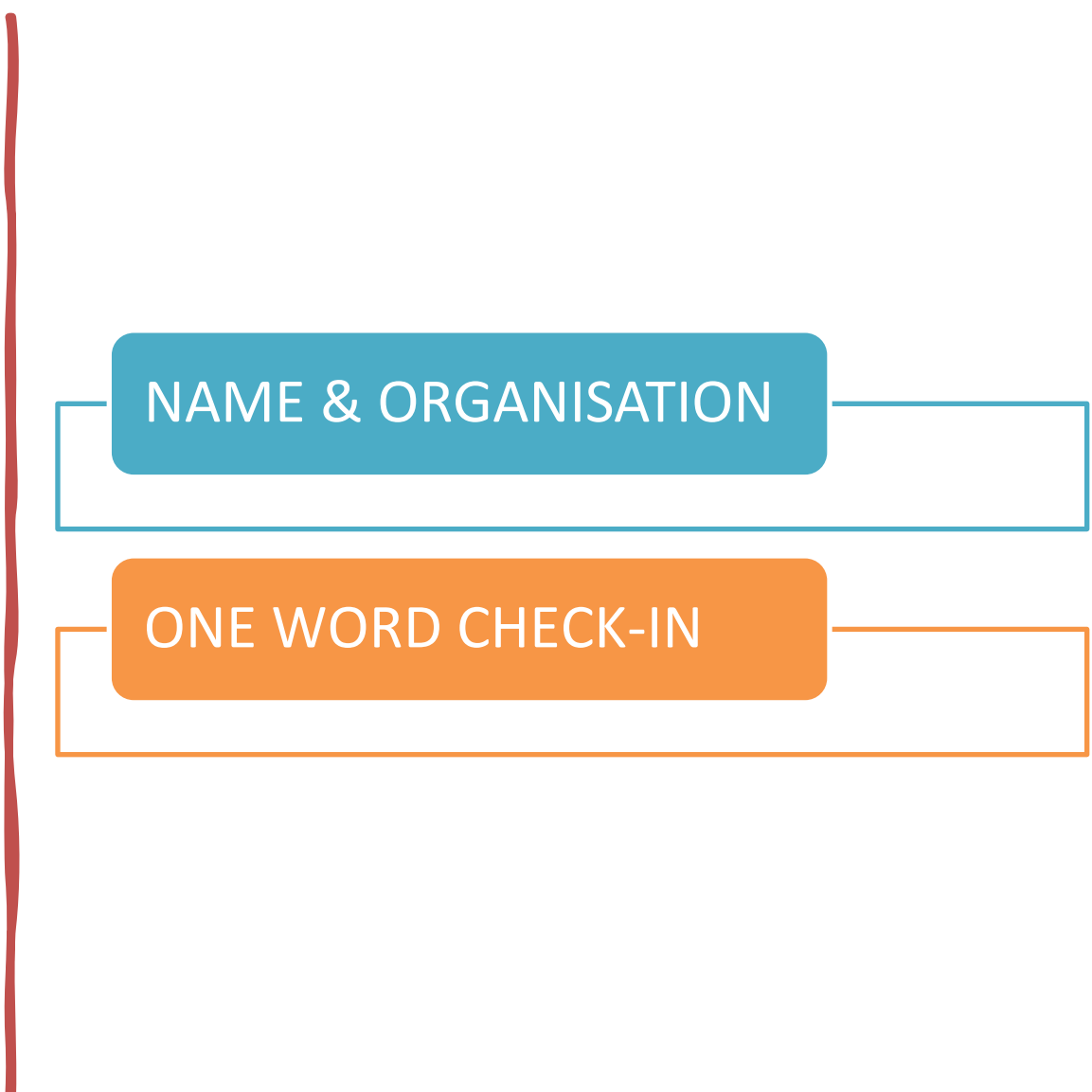


Workshop Aim & Learning Outcomes

Learning Outcomes:

- Understand shared purpose and vision
 - Conduct a strategic gap analysis
 - Recognise external influences using PESTLE and SWOT
 - Set goals and measure impact
 - Appreciate the importance of evaluation
- 

Introductions and Welcome



NAME & ORGANISATION

ONE WORD CHECK-IN



Audience Poll

- Does your organisation have a current strategic plan?



"The essence of strategy is choosing what not to do"

Michael Porter.

Understanding Theory of Change



What Is a Theory of Change?



Describes *how and why* change happens — not just *what* we do



Maps the pathway from **activities** → **outcomes** → **impact**



Makes our **assumptions** visible (why we think an action will work)



Links day-to-day work to the **bigger community difference** we aim for

Why It Matters

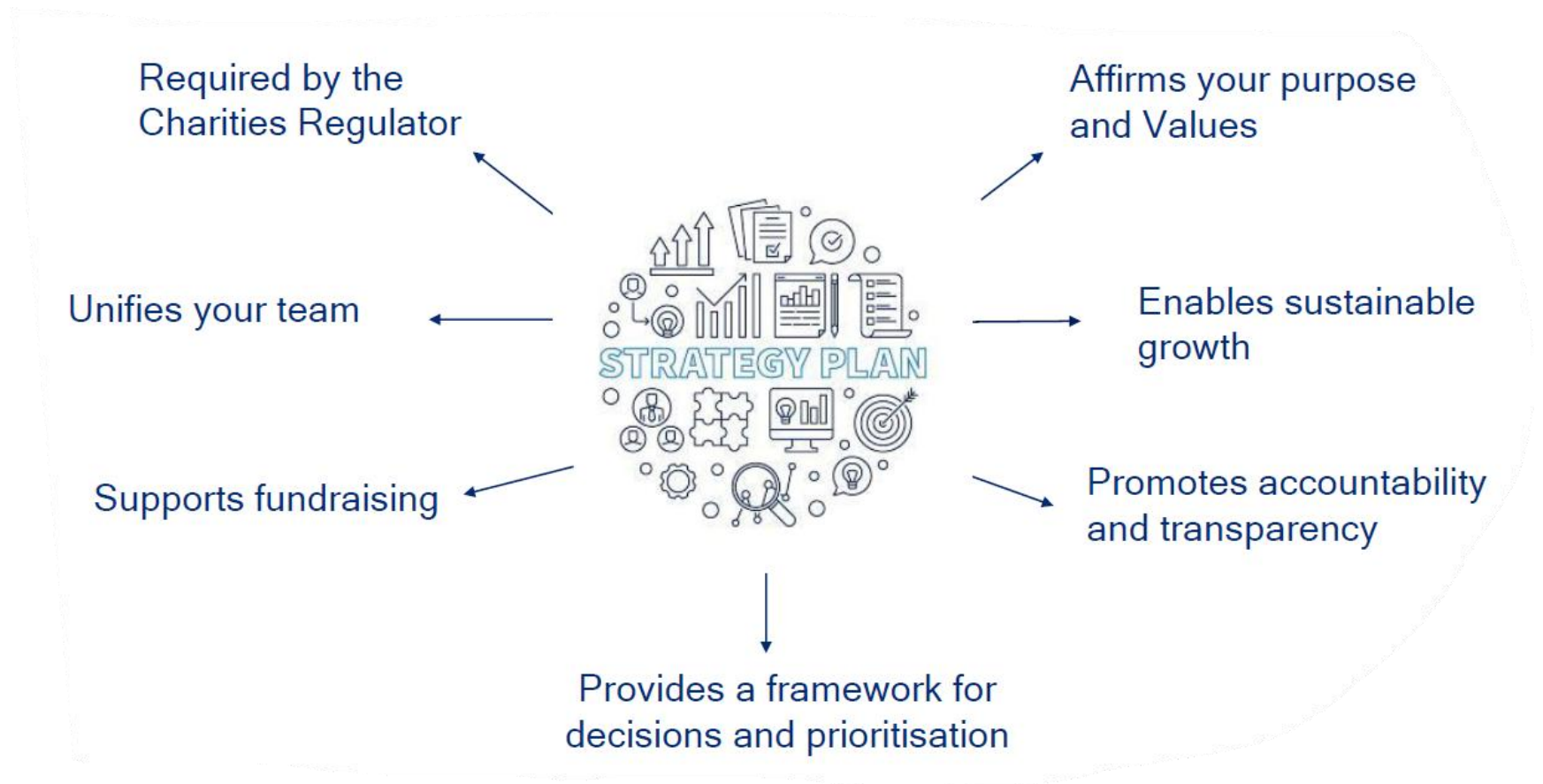
Bringing It to Life in
Our Strategy

Clarifies **why** our
priorities matter —
not just what they are

Helps **align board,
staff, and volunteers**
around a shared
vision of change

Guides **decision-
making and resource
allocation** — what to
focus on first

Forms the foundation
for **measuring and
communicating
impact**



Why Strategy Matters

How will
we use
the
Strategic
Plan?

Planning

Reporting

Prioritising

Communicating

Funding



1. Area of Work: Provision of Specialist Services

AMBER WOMEN'S REFUGE STRATEGIC PLAN 2025-2029

STRATEGY	1.1	To provide Refuge Accommodation, Helpline, Information and Support Services to women and children.
ACTION	1.1.1.	To deliver and develop the Refuge based services
ACTIVITIES	1.1.1.1.	To continue to operate the refuge in line with existing policies and procedures
	1.1.1.2.	To ensure Individual Support Plan procedures guide client support work and encompass an empowerment process
	1.1.1.3	To integrate, develop and maintain group work for refuge clients
	1.1.1.4.	To seek and allocate resources, including staff, to drop-in service
	1.1.1.5	To inform relevant services, including Helpline callers, about the drop-in service
	1.1.1.6.	To seek and allocate resources, including staff, to the Helpline
	1.1.1.7.	To consider designating a defined space to the Helpline
	1.1.1.8.	To develop and promote the identity of the Helpline as part of refuge services in Kilkenny and Carlow
	1.1.1.9.	To continue to link Helpline calls to other services (internally and externally)
ACTION	1.1.2.	To deliver Counselling Support
ACTIVITIES	1.1.2.1	To continue to seek funding opportunities as they arise
	1.1.2.2.	To continue to offer sessions to women
OUTCOMES	That women and children who contact Amber seeking emergency accommodation, information and support receive a service (2025-2029).	

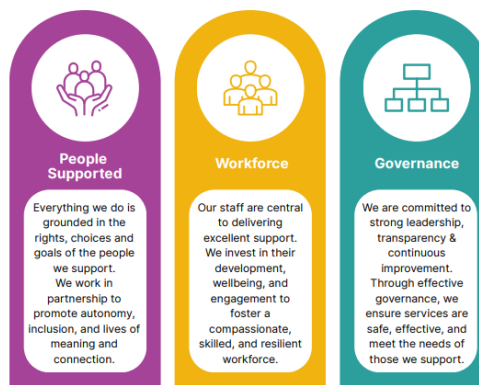


MUIRÍOSA FOUNDATION STRATEGIC PLAN 2025 - 2029

Strategic Pillars

Muiríosa Foundation's strategy is built on **three core pillars** that reflect our commitment to quality, person-centred support, and sustainable growth. These pillars guide our actions and help us stay focused on what matters most.

These pillars form the foundation of our strategic vision and drive our mission to enable people supported to live self-directed, connected lives in their communities.



1. Amplifying the Voices of the People We Support.

Objectives:

- 1.1:** Develop a Total Communication strategy.
- 1.2:** Further develop and support peer-led advocacy networks and create formal structures to influence decision making.
- 1.3:** Facilitate and enable people supported to participate in public forums and policy consultation.
- 1.4:** Enhance person-centred supports that empower individual choice, involving families in line with the person's will and preference.
- 1.5:** Enable meaningful involvement of people supported in staff recruitment processes.
- 1.6:** Promote planning processes that reflect each person's will and preference.

What success looks like:

- Peer-led advocacy, involvement in recruitment decision making, and formal input structures ensure people supported shape the organisation.
- A Total Communication strategy that focuses on all available methods of communication to enable people supported to express their will and preference.
- Embed individual choice and autonomy in all planning activities.

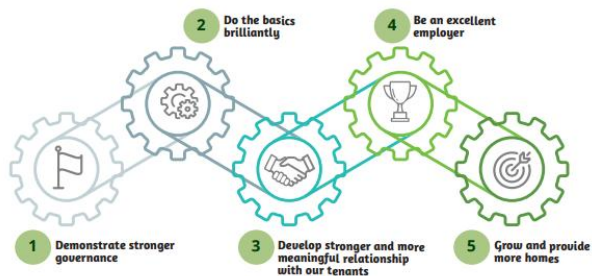
“ I want to learn more and get a new job.

- Feedback from a Person Supported through focus groups



Strategic Plan

2025-2029



Demonstrate good governance and leadership



OUR VISION

Demonstrating strong governance is vital and pivotal for successful organisations. We will ensure that our board and sub-committees demonstrate good governance and provide strong strategic direction and leadership to help deliver our mission and vision. Our vision for good governance is underpinned by the Standards for Governance and Finance set by the Approved Housing Bodies Regulator, and the requirements of the Charities Regulator.

OUR COMMITMENT

- ✓ Reflect good governance and strong board leadership through effective frameworks for governance, business, financial and performance management.
- ✓ Ensure that CDHA has a board that is skilled and governance structures that enable effective oversight and assurance and create value in setting long-term strategic priorities.
- ✓ Demonstrate a culture of decision-making that considers effective resource management to meet our long term vision, drives efficiencies and demonstrates value for money.
- ✓ Have effective arrangements for reviewing governance arrangements to reflect best practice on board size, member recruitment and renewal, and ensure compliance with the Approved Housing Bodies Regulatory Authority's Regulatory Standard for Governance and Finance.



Where to Begin



Set time aside for
strategic conversations



Allocate capacity to
coordinate the process



Get commitment
from your Board

Vision, Mission & Values

- Vision – The What
- Mission – The How
- Values – The Who

Activity: In pairs, draft or refine one sentence for each.



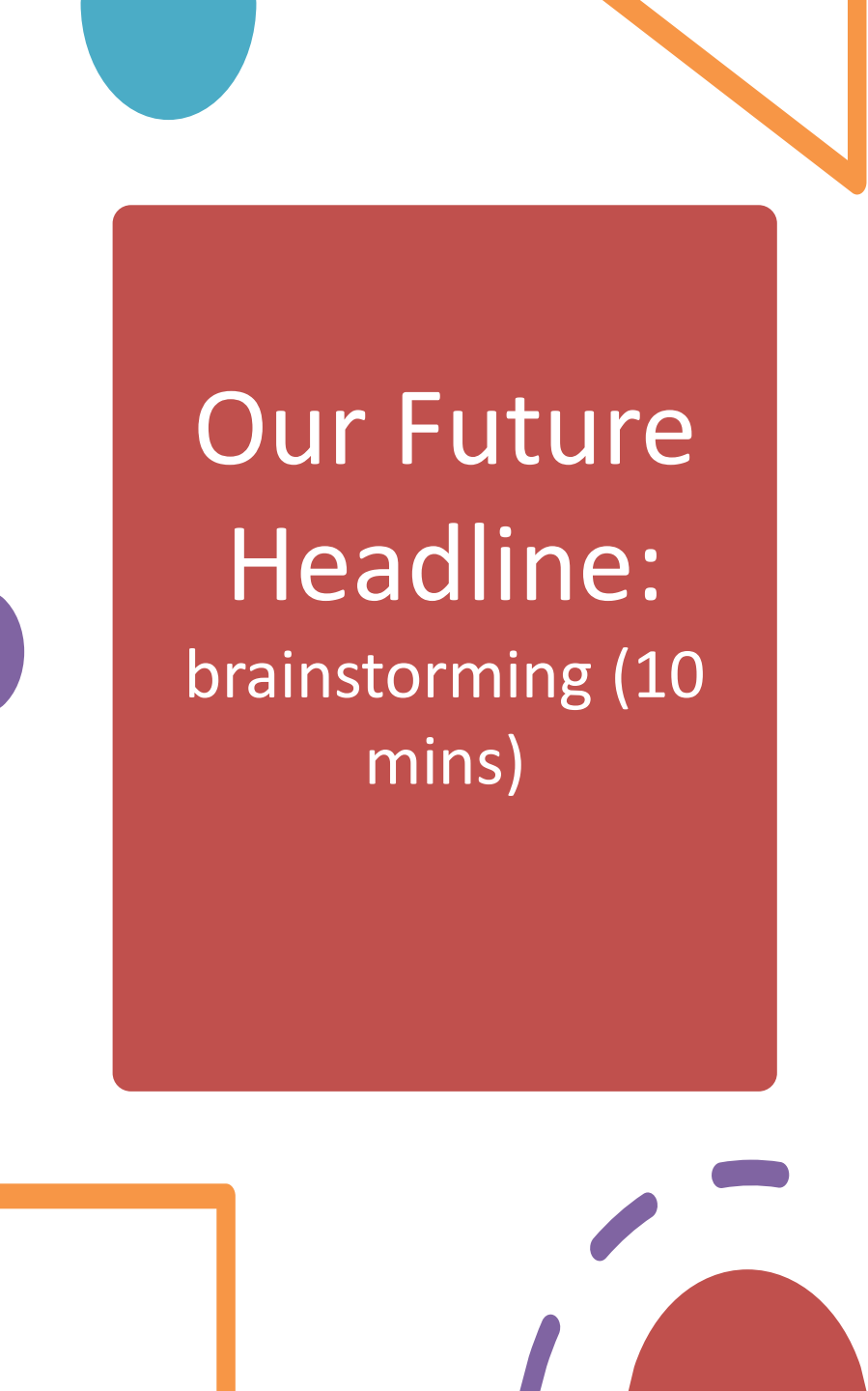
MISSION



VISION



VALUES



Our Future Headline: brainstorming (10 mins)

In groups, or individually...

Include a sub-headline and a few bullet points describing what's changed — what's different for your clients, your staff, your community, and your organisation's reputation.

- What are people saying about you?
- What outcomes are you celebrating?
- What made it possible?

Understanding the External Environment (PESTLE)

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	

Strategic Gap Analysis (SWOT)

What's in a SWOT analysis?

The good

The not-so-good

What we've got

Strengths

What resources can we deploy?
What are our advantages?
What's working well?



Weaknesses

What abilities are we lacking?
Where are we starting to struggle?
How can we overcome these?



What's out there

Opportunities

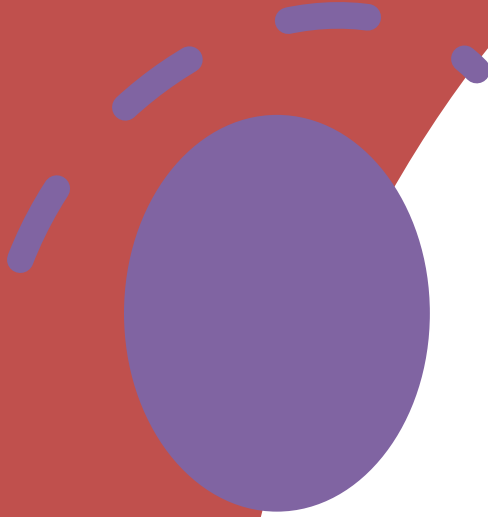
Who might most value our strengths?
What trends work in our favour?
What prizes are within reach?



Threats

What headwinds do we face?
Who might challenge us?
What could go wrong?

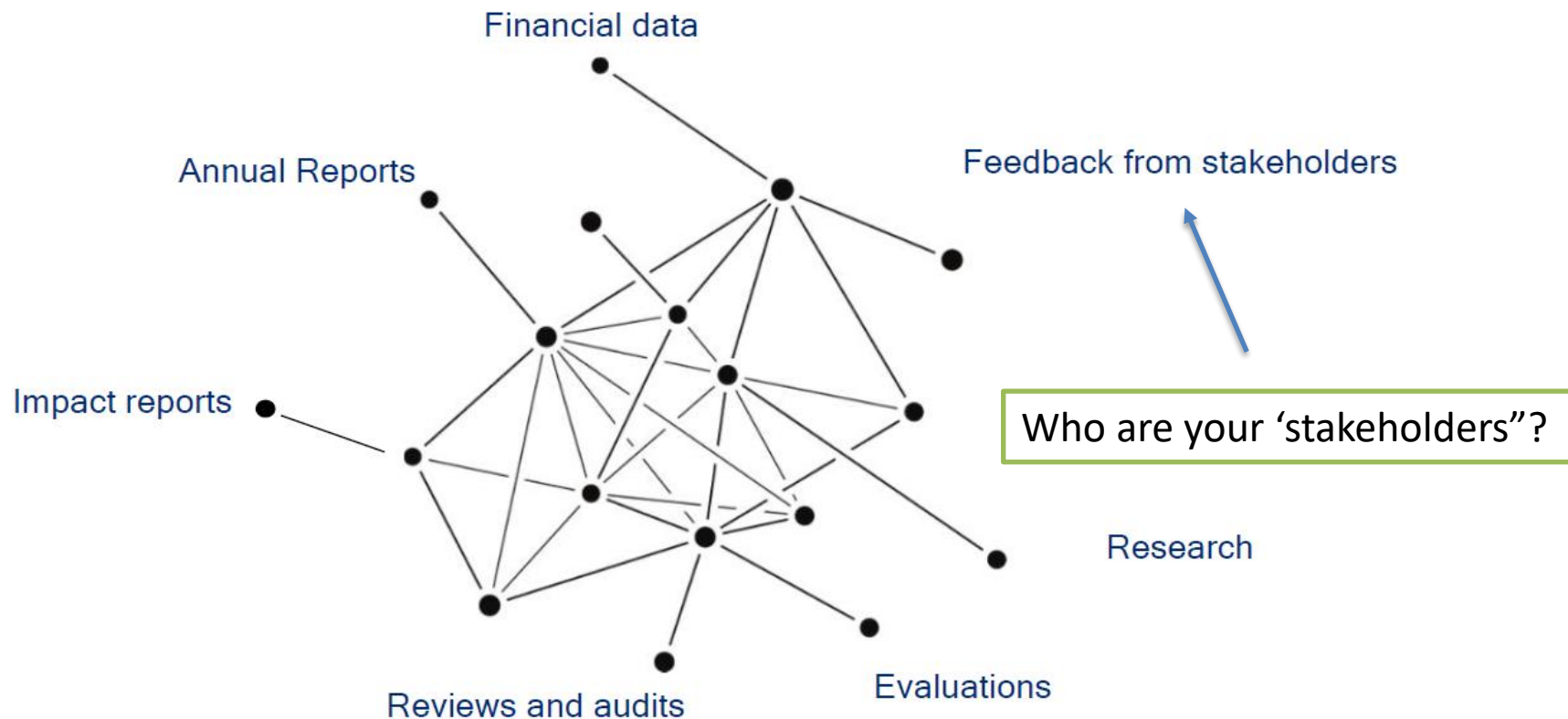


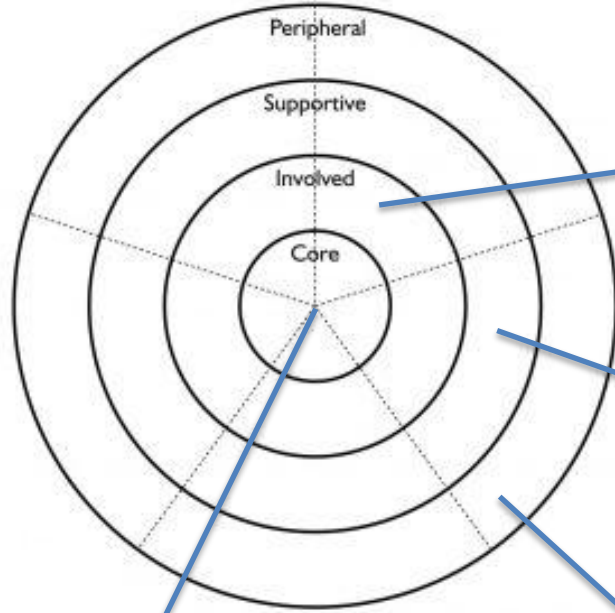


Quick Activity

Identify **2/3 internal** strengths and **2/3 external** challenges your organisation faces right now.

Where Do I Get This Information?





Core to Success: This initiative won't happen without them. Core beneficiaries, service users, clients, tenants etc.,

Involved: They have a direct stake in the outcome and should be linked to and contributing to what's happening. Staff, volunteers, board etc(*Collaboration*)

Supportive: They care about the vision and need to stay lightly engaged, receive updates, etc. They can help if called on. (*Co-operation*)

Peripheral: They receive information and know what's happening, but don't need to be directly involved. (*Communication*)



Stakeholder Mapping

Who are your stakeholders?

- Board • Staff • Volunteers
- Funders • Service Users
- Community Members
- Partners • Peers • Media
- Policy Makers

Activity: Stakeholder Mapping Circles



How to: Stakeholder Consultations

Focus Groups

- Smaller group

- Targeted

- Discussion-based

- Engaging

- Qualitative feedback

Survey

- Unlimited numbers!

- Broad group

- Understand trends

- Qualitative & quantitative feedback

Interviews

- 1:1 or small group

- Experts or specialists

- Good for sensitive conversations or feedback

Workshop

- Larger group

- Broader

- Exercise-based

- Interactive with Diverse Inputs

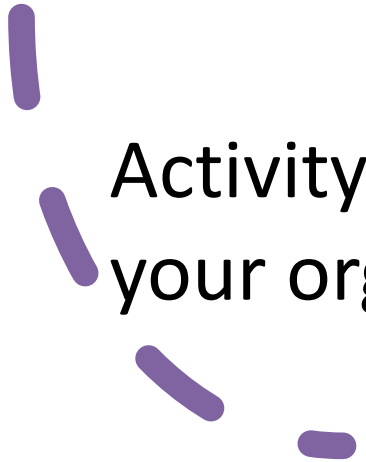


How to: Stakeholder Consultations



Building Your Strategic Framework

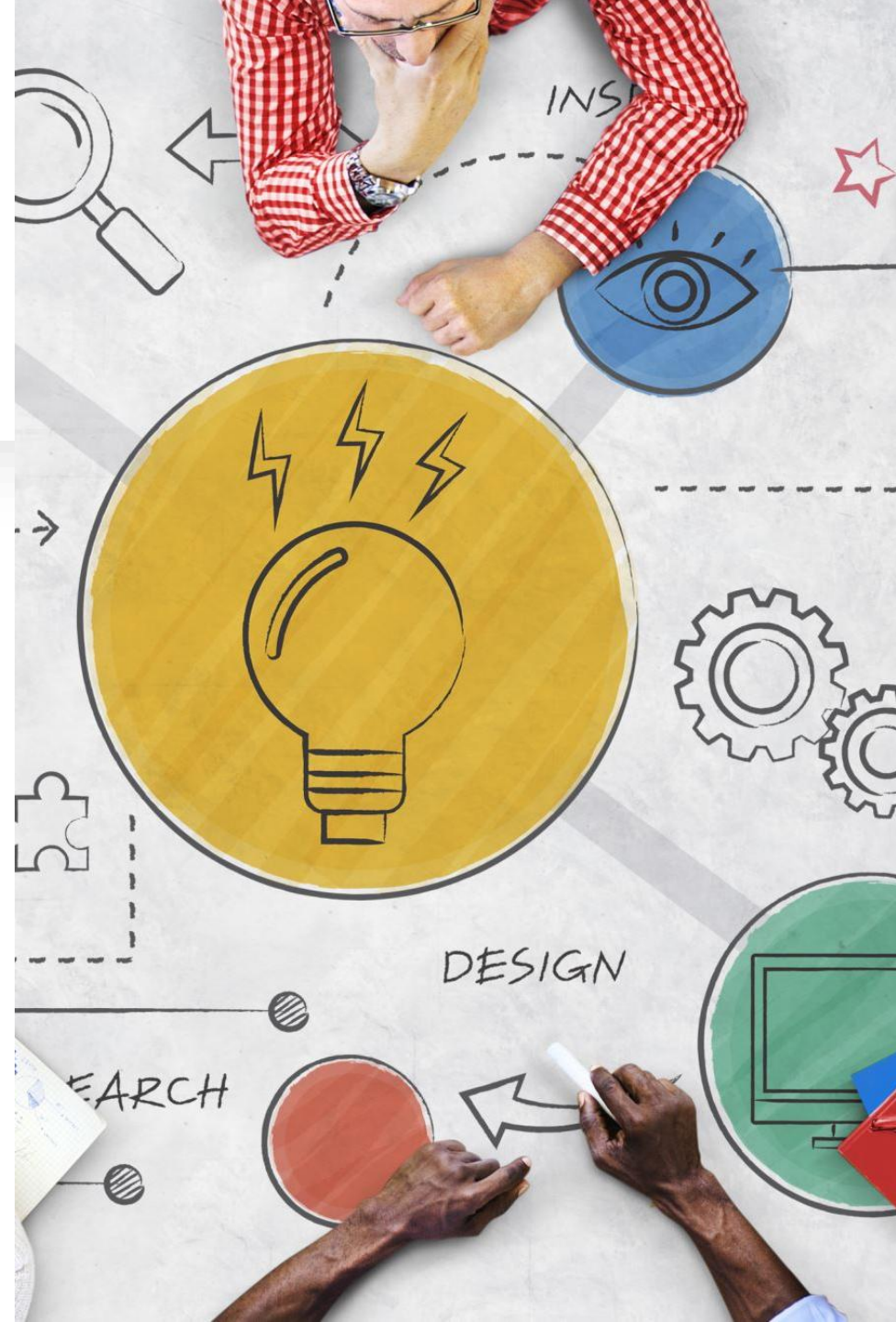
Vision → Mission → Values → Pillars → Goals
→ Actions → Impact



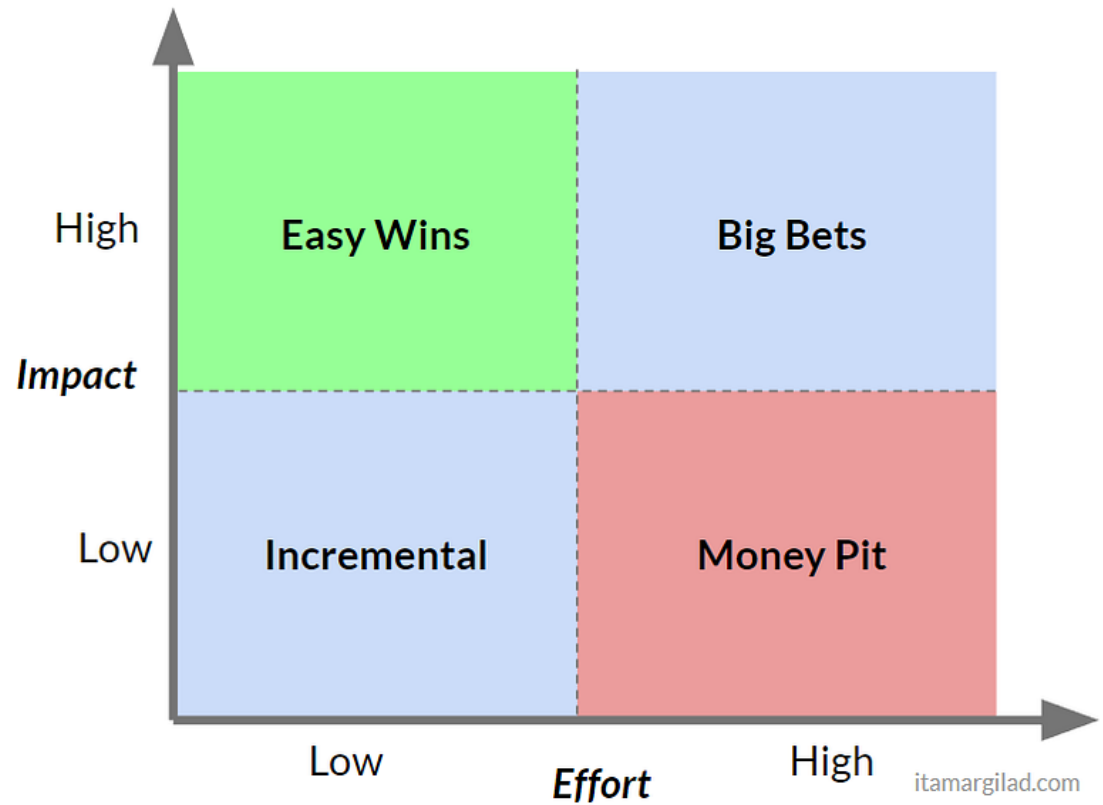
Activity: Draft 3–5 pillars or themes to guide your organisation's next 3 years.

Why the Prioritisation Matrix Matters

- Brings objectivity to decision-making
- Focuses energy and resources on what matters most
- Builds shared understanding and buy-in
- Links strategy to practical action
- Supports agile, evidence-based decisions



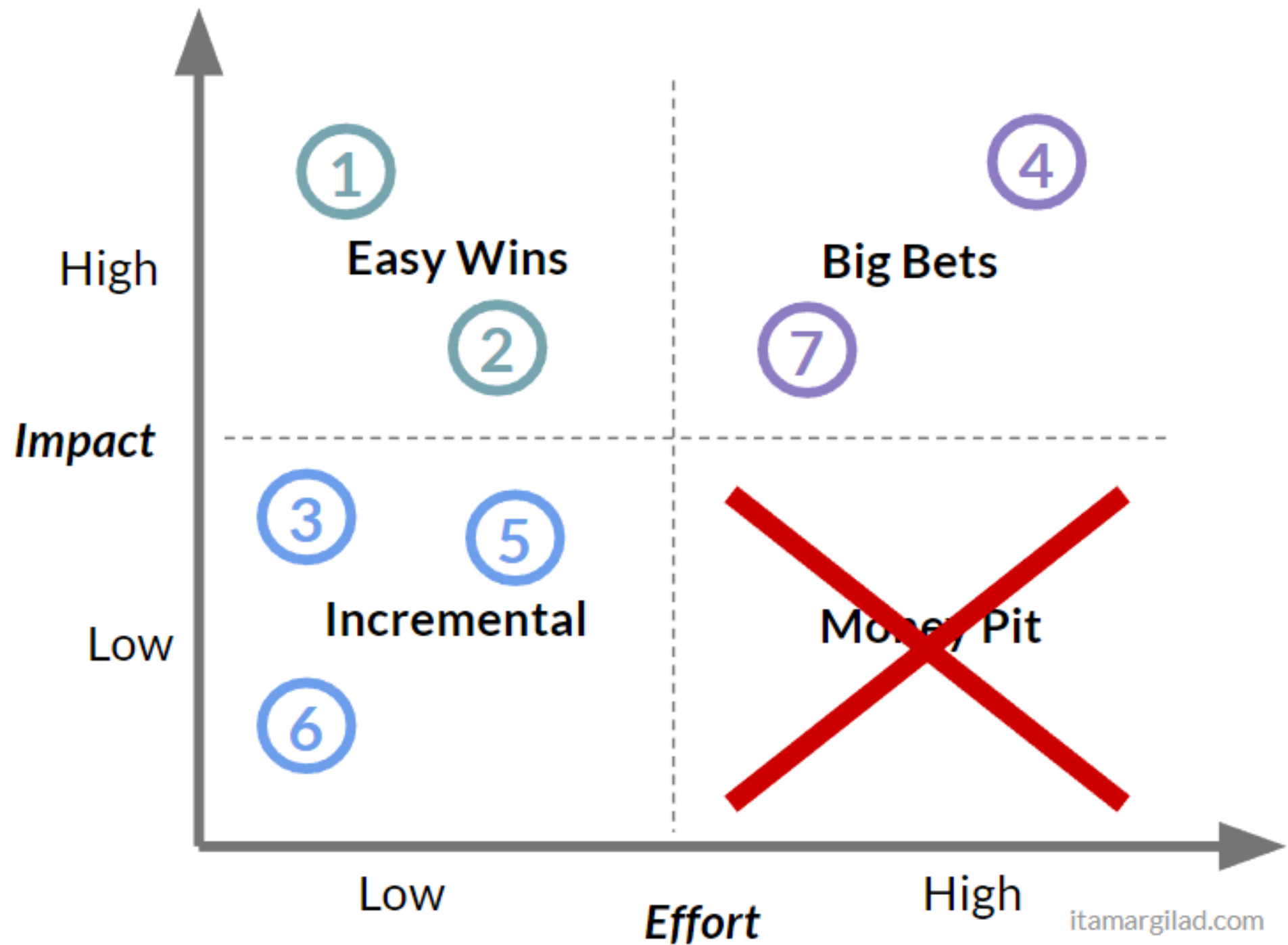
Prioritisation Matrix



Impact vs. Effort Matrix



Quadrant	Description	Example
High Impact / Low Effort	Quick wins – do these first	e.g. Improve internal communication
High Impact / High Effort	Strategic investments – plan and resource carefully	e.g. Develop a new service model
Low Impact / Low Effort	Nice-to-haves – fit in if time allows	e.g. Update social media policy
Low Impact / High Effort	Time wasters – avoid or defer	e.g. Large project with limited benefit



Group Activity: “Focus for the Future”

Scenario:

You are the board of “**Silver Threads**”, a community organisation based in rural Ireland.

Silver Threads supports older people to stay connected, healthy, and active through social clubs, home visits, volunteer drivers, and digital inclusion classes.

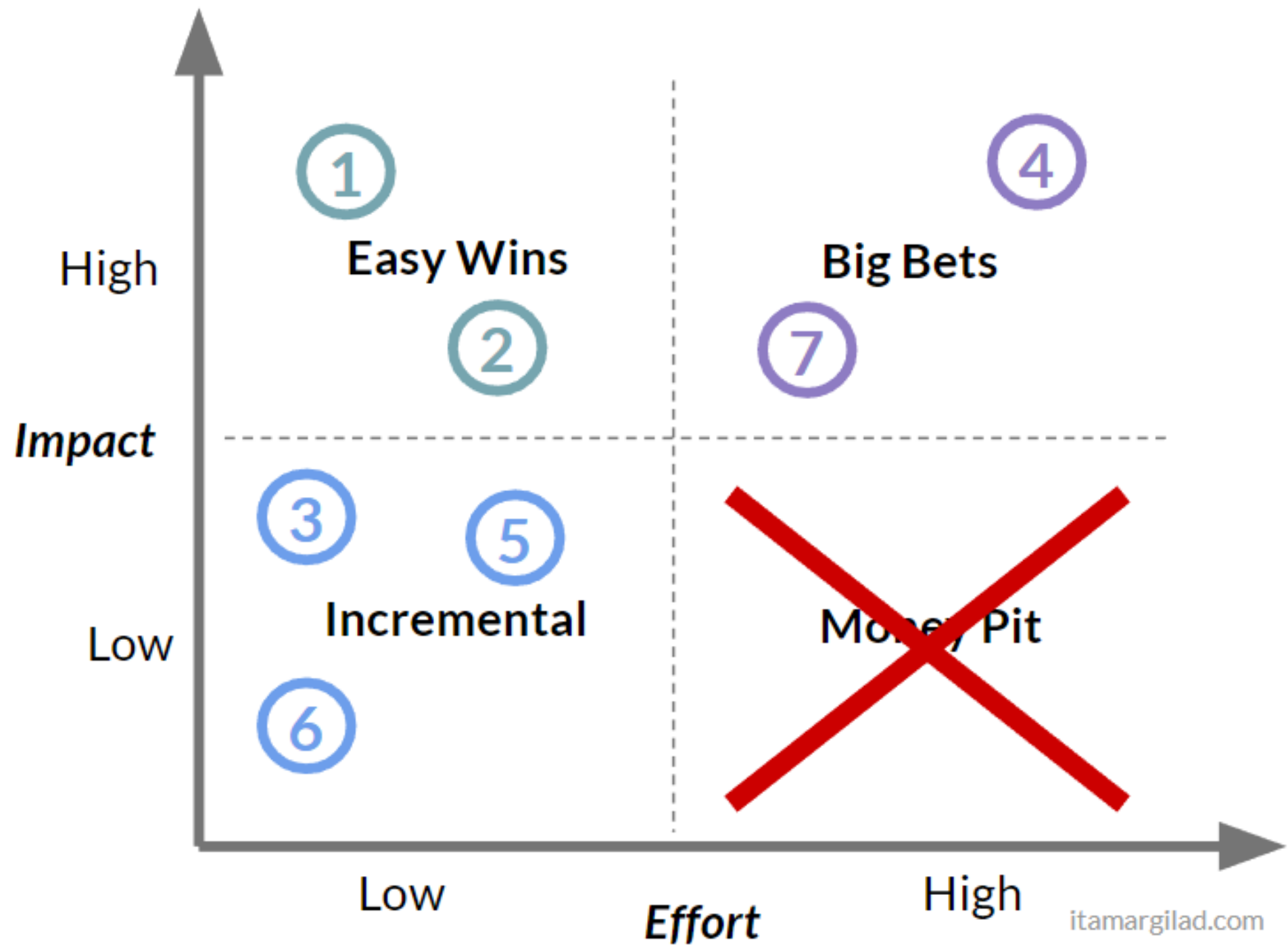
The organisation relies heavily on volunteers and local fundraising and wants to plan its next three years strategically.

You’ve identified several possible **strategic priorities** — but not all can be delivered at once.

Your challenge: decide where to focus first.

“Focus for
the Future”
–
Instructions

- Review the list of objectives
 - Discuss each one and plot it on an **Impact vs Effort** matrix
 - Agree your group’s **top 3 priorities** and note *why* you chose them.
 - Be ready to share your reasoning with the wider group.
- 



Strategising

Strategic Planning Template				
Vision	The future you are aspiring to	Our Vision is...		
Mission	Your purpose and/or role in advancing your vision	Our Mission is...		
Values	Your guiding principles	Our Values are....		
Pillars	The headlines of your strategy - memorable, understandable.	Pillar 1	Pillar 2	Pillar 3
Strategic Goals/ Ambitions	What is that you want to achieve/advance in the next X years?	Goals	Goals	Goals
Actions	What needs to happen in order to deliver on your goals.	Actions	Actions	Actions
Impact	How will your when you have delivered, how will you measure the impact and success.	Outcome	Outcome	Outcome

Sense Check & Peer Reflection



Setting Goals & Measuring Impact



WHY IT MATTERS:



GOALS TURN VISION
INTO ACTION



FOCUS EFFORT AND
RESOURCES



MAKE PROGRESS
MEASURABLE AND
VISIBLE

Two simple goal-setting tools:

SMART Goals:

Specific • Measurable • Achievable •
Relevant • Time-bound

OKRs (Objectives & Key Results):

Objective → What we want to achieve

Key Results → How we'll measure success

Example – SMART Goal

Goal: Increase volunteer retention by 10% by June 2026 through quarterly recognition events.

- **Specific:** Volunteer retention
- **Measurable:** 10% increase
- **Achievable:** Based on current volunteer numbers
- **Relevant:** Supports sustainability and service delivery
- **Time-bound:** June 2026

Reflection:

How will we know this goal is working?

→ Track numbers, collect stories, seek feedback, monitor outcomes.

OKR Example – Volunteer Engagement

Objective:

Strengthen volunteer engagement and satisfaction across all programmes.

Key Results:

- 1 Achieve **90% volunteer satisfaction** in annual feedback survey by June 2026.
- 2 Increase **average volunteer retention** from 65% to **75%** year-on-year.
- 3 Ensure **100% of volunteers complete induction and safeguarding training** within 4 weeks of joining.

Why it matters:

Engaged, supported volunteers stay longer, deliver better services, and enhance community impact.

Link every goal to your mission and outcomes.

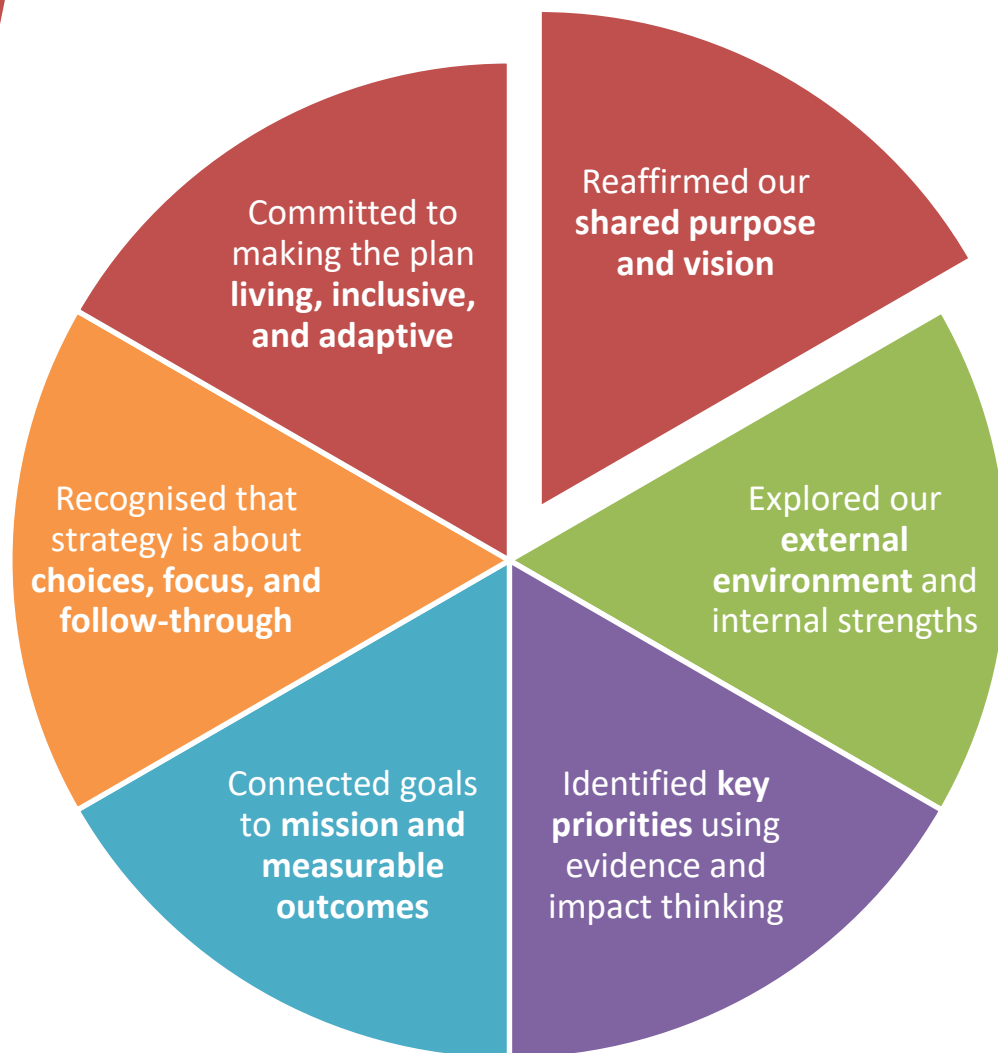


SMART



OKR

Bringing It All Together – Your Strategic Journey



Thank You

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