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## Tackling Child Exploitation Support Programme

# Approaches to Strategy – Resources



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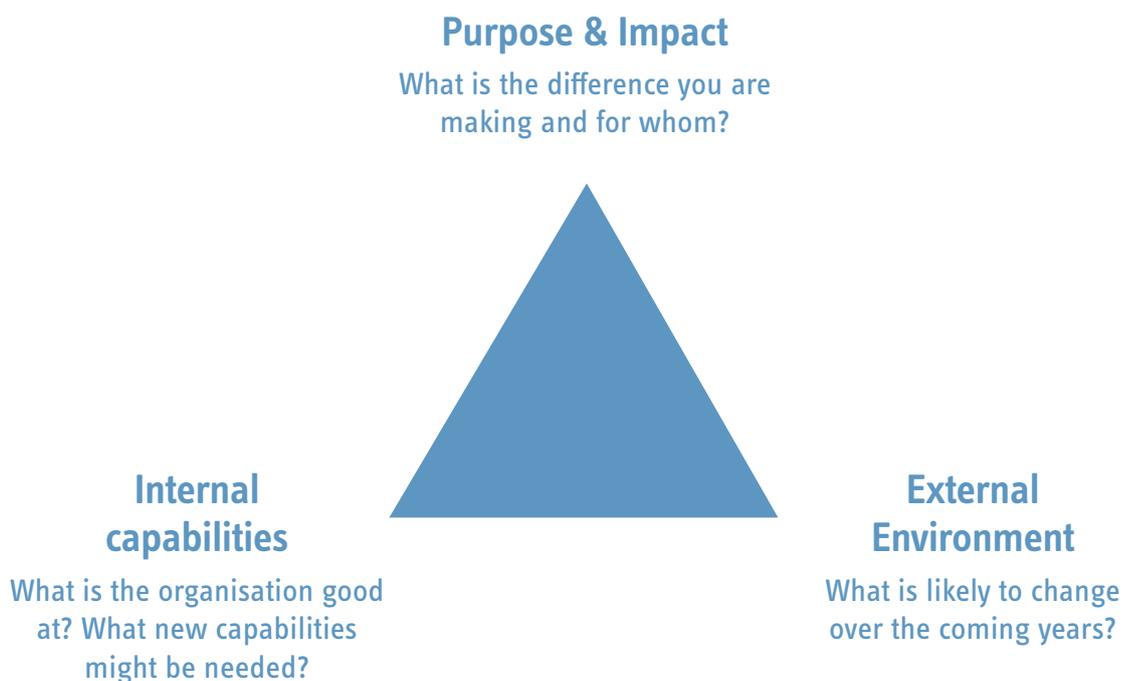
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## Effective strategy: sing Mark Moore's strategic triangle

The triangle is a simple way to separate out three key questions to be considered in a strategy process. An organisation looking to use this approach might seek to:

- a) Start with an analysis of the external environment. This might include a PESTLE analysis – thinking about the political, economic, social, technical, legal and environmental changes that are likely to happen over the coming years. It might also include a survey or phone calls with key stakeholders to get their perspective on the likely changes in the external landscape, and their views about what the organisation is good at (internal capabilities).
- b) Use a SOAR approach or strengths-based conversation to review the organisation's capability.
- c) Review the purpose and impact of the organisation – perhaps looking into who the current service recipients are, and who is being missed. Voluntary organisations might review their 'vision and mission' statements under this heading.



## Case study: using the 'strategic triangle' with a small umbrella organisation

### The issue

A new director of a small umbrella organisation wanted to review how it was working – whether or not it was making an impact and providing a good service to its member organisations. A recent review of the vision and mission had been completed and so the 'purpose' question was not in scope.

### The approach

Over a period of nine months, staff members led on understanding the external environment, with one completing a PESTLE exercise, and another led on interviewing members about what they wanted from the organisation. The new director used introductory interviews with key stakeholders to gain their understanding of the external environment, and their view of the strengths and weaknesses of the organisation's capabilities. An all-staff workshop reviewed the output of these exercises.

### The outcome

The workshop identified that the external landscape was positive – there were opportunities to influence policy change. But it was also competitive – there were lots of organisations doing similar work. It identified that there was a lack of experience in working together with other organisations in the same field, and this was reducing the organisation's impact. This was agreed to be a key strategic priority for the coming year.

## Option assessment exercise

The following exercise is drawn from ‘Tools for Tomorrow’, a useful and practical guide to strategic planning, published by the National Council for Voluntary Organisations. It’s a two-part approach for assessing options in a group. The first is about criteria, the second is about options.

Where a group disagrees about strategic options, it is often because people are assessing the criteria differently. Some will value making noticeable changes to people’s lives; others will value reaching a lot of people. Some will value activities that could change national policy; others will value activities that change practice on the ground. By separating out the criteria, it allows the discussion about what is being valued to be explicit, rather than hidden.

### Part one

As a group, brainstorm what matters to you. What are your decision-making criteria? This could be done by individuals sticking post-it notes on a flip chart (real or virtual) and then clustering them to produce an agreed list (it’s best to aim for no more than eight criteria).

### Part two

Identify the strategic options facing the organisation. These will probably have emerged during earlier phases of the strategy process (it’s best to aim for no more than six or so). Then split into pairs or groups and have each group review each option against the agreed list of criteria (score 1 for weak, 2 for medium and 3 for strong).

The first table below is an example format for part one (expand to an A4 sheet for a face-to-face session). The second table is an example format for part two (best done on a flip chart so everyone can see the results). Now discuss (often this is where the real conversation begins, e.g., option A is stronger on criteria 1 than option B, but option B is much stronger on criteria 2, and so on).



## Case study (1): using the option assessment exercise with a local education charity

### The issue

A small education charity that provided additional teaching at weekends had been funded by the local authority. When LAs lost much of their education funding in 2010, the charity was facing financial losses and had to consider alternative options. The best way forward wasn't clear.

### The approach

The trustees and staff were asked to consider options before an 'away day'. On the day they brainstormed and agreed on a list of key criteria, and assessed their options against that criteria.

### The outcome

The group knew they needed additional funding, but splitting the criteria into 'brings funding in quickly' and 'prospect of a long-term solution' enabled them to assess the options more strategically. They narrowed their options to two, which were then explored for feasibility.

Option / criteria	Option A – Seek funding from grants	Option B – Seek funding from corporates	Option C – Partner with other charities	Option D – Approach teaching school alliances	Option E – Approach academy chains
Brings in new funding quickly	1.5	1	2	2	1
Prospect of a long-term solution	1.5	1	3	3	2
Consistency with values	3	3	3	3	3
Contribution to mission	3	3	3	3	3
Builds future capacity	2	3	3	2	1
<b>Summary</b>	<b>11</b>	<b>11</b>	<b>13</b>	<b>13</b>	<b>10</b>

## Case study (2)

In another organisation, this approach didn't work so well. The discussion was framed as, 'Where do you want to be in 10 years time?' The initial brainstorm identified nearly 30 criteria that were considered important, and it took a lot of effort to narrow them down to 11. Learning: this approach is best when the options are relatively concrete, rather than open-ended.

## Getting to action

This is a simple framework for turning strategic objectives into more detailed plans. It can be done in groups on an away days (either splitting people up into groups according to their job function or having mixed groups all work on the same topic and pooling their work). Or it can be done by teams as part of business planning.

Area for improvement / what needs to change	What could we do to improve things? (actions)	How would we know if things had improved? (progress indicators)	What could get in the way of making progress? (risks)

## Appreciative inquiry: delivering a 4-D strategy process

There are many websites, books and consultancies which provide guides to ‘appreciative inquiry’ (AI). All include 1-1- interviews, small group work and large group sessions. Some suggest an away day format with the four steps taking place in four all-staff away days (could be in a week, or over a short period of time). Others suggest a more extended process, perhaps including staff surveys to reach more people, coupled with large group sessions to go into issues in more depth.

The essence of the approach is a four step cycle:

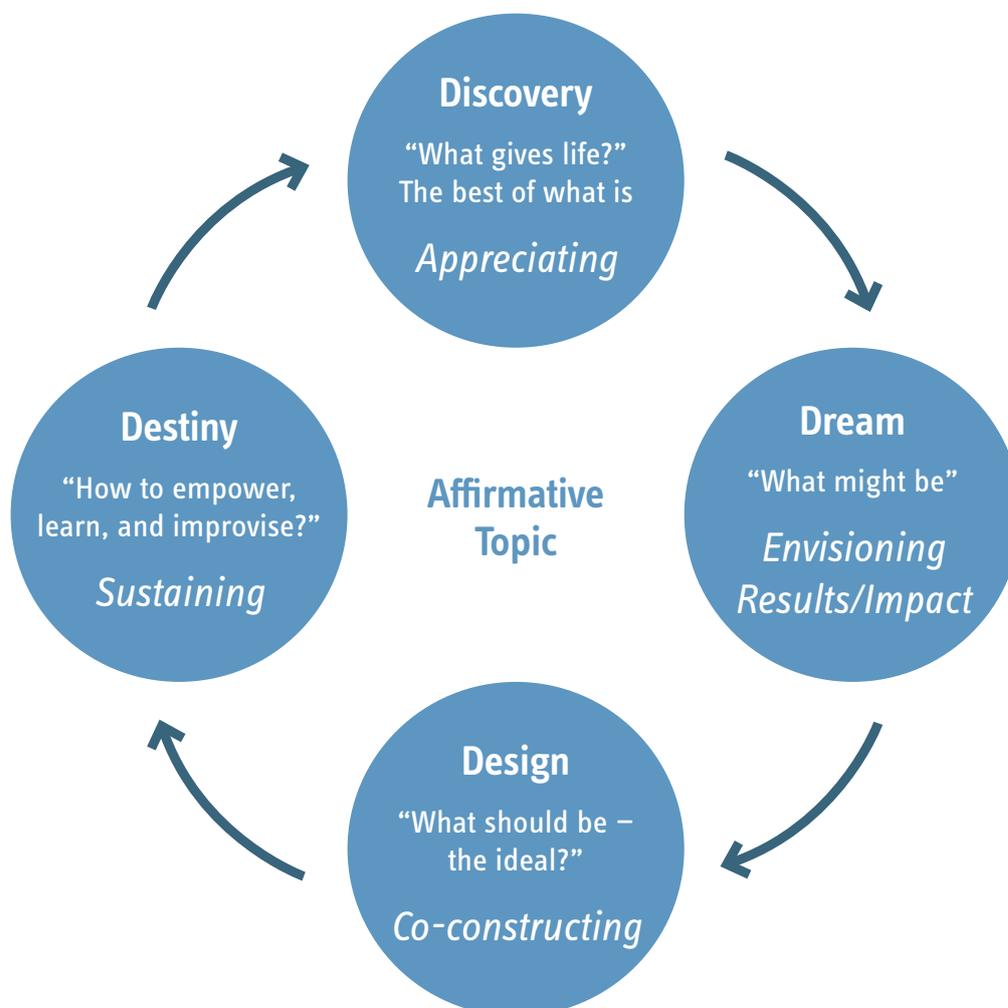


Figure 1: The AI 4-D Cycle (Cooperrider & Godwin 2011)

- 1) **Discovery** – of what the organisation is like when it is at its best. This could include interviews with people asking ‘What’s the best part of your role?’ and ‘Tell me about a time when you found working here exciting and uplifting’, followed by, ‘What was it that made a difference?’ The individual stories are reviewed in groups to pull out themes, and then again to draw out ‘enduring themes’ – statements that are true of the organisation throughout.
- 2) **Dream** – building on the first step, interviewees are asked open, positive questions such as ‘What most excites you about the enduring themes?’ and ‘What three wishes do you have for the future?’ These are drawn together to develop dreams for the future organisation. A further step would go into the dreams in more detail: ‘What would it really look like?’
- 3) **Design** – this stage asks the question ‘What does the organisation need to do to deliver the dream?’ This might cover ways of working, structure, communication style, etc. Again, it could bring together interviews from across the organisation into group discussion. The key messages are summarised in statements about the future state. For example ‘We are honest when we don’t know what to do next.’
- 4) **Destiny** – the final stage focuses on action planning – ‘What actions will make the dreams a reality and bring the design to life?’ The format of this will depend on the size of the organisation, but many AI processes will set up small, cross-organisational groups to take parts forward.

## Useful Reading

- > Lewis, S., Passmore, J., & Cantore, S. (2016). *Appreciative Inquiry for Change Management (2nd Edition)*. Kogan Page.

## SOAR: strengths, opportunities, aspirations, results

The SOAR approach can be used instead of a SWOT analysis, or as an alternative to an AI process. The following are examples of good questions to consider under each heading.

### Strengths: What can we build on?

- > What are we most proud of as an organization? How does that reflect our greatest strength?
- > What makes us unique? What can we be best at in our world?
- > What is our proudest achievement in the last year or two?
- > How do we use our strengths to get results?
- > How do our strengths fit with the realities of the marketplace?
- > What do we do or provide that is world class for our customers, our industry, and other potential stakeholders?

### Opportunities: What are our stakeholders asking for?

- > How do we make sense of opportunities provided by the external forces and trends?
- > What are the top three opportunities on which we should focus our efforts?
- > How can we best meet the needs of our stakeholders, including customers, employees, shareholders, and community?
- > How can we reframe challenges to be seen as existing opportunities?
- > What new skills do we need to move forward?

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## Aspirations: What do we care deeply about?

- > When we explore our values and aspirations, 'What are we deeply passionate about?'
- > Reflecting on 'strengths and opportunities' conversations: who are we, who should we become and where do we go in the future?
- > What are our most compelling aspirations?
- > What strategic initiatives (e.g. projects, programs, processes) would support our aspirations?

## Results: How do we know we are succeeding?

- > Considering our strengths, opportunities and aspirations, what meaningful measures would indicate that we are on track to achieving our goals?
- > What are 3-5 indicators that would create a scorecard that addresses a triple bottom line of profit, people and planet?
- > What resources are needed to implement vital projects?
- > What are the best rewards to support those who achieve our goals?

### SOAR case study: asking, 'What do we care deeply about?' in a Safeguarding Partnership meeting

The TCE programme worked with a unitary authority looking to improve joint working across the local Safeguarding Partnership. It identified a shared understanding of data across the partnership as a priority, and the programme team facilitated a workshop to review the availability of data, focusing on the issue of school exclusions as a pilot study.

#### The approach

The first part of the workshop asked, 'What do we **know** about school exclusions in our area?' The second part asked, 'What do we **feel** about school exclusions in our area?'

#### The outcome

The second question revealed that many more agencies were worried about school exclusions, and motivated to act on this issue, than had data. A wider range of partners committed to actions to address young people being excluded, and potentially at greater risk of exploitation, than had engaged in the conversations about data.

## Case study: using SOAR to inform the strategy of a prison education charity

This small charity delivers arts education programmes in prisons and was working on a new strategic plan.

### The approach

Whole staff team discussion:

- (1) What are you most proud of over the past year?
- (2) Why do you care about those activities / outcomes?
- (3) How do they fit with what you say you do?

### The outcome

They described their excitement at a ‘symposium’ where former prisoners engaged via the arts with senior officers and policymakers.

This led them to be more explicit in their strategy about their role in connecting prisoners and policymakers in order to advocate for prison reform.

## A simple strengths-based Approach: what happened, what was the impact, what made it work?

The exercise below can be useful to get people thinking quickly and positively about the change they want to see. It is best done in small groups gathered around a flip chart (or a breakout room with a Jamboard or Google doc), and then have each group feedback to the main group to pull out key themes.

### Exercise

Thinking about the change you'd like to see, identify occasions in your organisation where this (or something like this) has happened before.

Think through:

- > What happened?
- > What was the impact?
- > What made it work?

What happened?	What was the impact?	What made it work?

## Case study: using strengths-based approaches in a large national charity

### The question

How to improve working between the policy team in head office and the area / service managers working in services across the country?

### The approach

Whole staff team discussion:

- (1) Using postcards to ask the question, 'What would it look like if the organisation was working really well together?' generated some helpful positive images and metaphors
- (2) Asking people to think about good examples they had been part of and identify what happened / what was the impact / what made it work.

### The outcome

They came up with loads of examples; it changed the conversation from, 'Why doesn't it happen?' to, 'We can do this - how can we do more of it?'

## The river exercise: using metaphor to develop a shared understanding of the past and the future

The 'river exercise' is an example of using metaphor to create a shared understanding. Best done in small, mixed groups, it requires flip chart paper and coloured pens. The task is to draw a picture of a river which illustrates the course of the organisation so far, and into the future:

- > Where has the organisation come from? What is the source / are the sources?
- > What's the path to, 'Where are you now?'
- > What's likely to be the course from now on?
- > What's the dream destination? The sea? A beautiful lake? What is it like there?

### Case study: the river exercise in a new team in a children's home

#### The issue

A group of staff had been brought from across the organisation to form a new staff team for a newly opened children's home. Three months in, it wasn't going well.

#### The approach

The staff worked in small groups to draw on a flipchart how they had joined the new team, and how they had felt about the experience so far. Using the river as a metaphor, they identified that some had come from 'stormy' backgrounds, and some had been flowing steadily for quite a while. It had been most difficult in the home when new children had joined – they coined the term 'the whirlpool of referrals'. Their shared aim was to reach 'the sea of tranquillity'.

#### The outcome

The river metaphor gave the group a way of talking openly about their different perspectives, and identifying what was causing problems for the team. They went on to consider actions they could take to mitigate these issues and had a shared language to use when future problems occurred.

## Simple metaphor exercises

The following exercises are useful to prompt thinking about metaphor, ‘generative images’ and strategy.

### Exercise 1: What is your organisation like?

- > If my organisation was an animal, what sort of animal would it be?
- > Discuss in pairs – why have you chosen that animal?
- > What type of animal would your boss or your CEO say they wanted the organisation to be?
- > What type of animal would you like your organisation to be?

### Exercise 2a: Metaphors of strategic change

Look at your organisation’s strategic documents. What metaphors does it use? (See example below.)

#### NHS England’s 2019-2020 objectives

Objective 1: ensure the effective **delivery** of the Long Term Plan:

- Laying the foundations** for successful implementation of the Long Term Plan.
- Achieving financial balance.
- Maintaining and improving performance**, and improving the quality and safety of services.
- Establishing a joint NHS England and NHS Improvement operating model to deliver integrated system leadership of the NHS.

## Exercise 2b: Metaphors of strategic change

- > Think about a change you'd like to see in your organisation, or your team. Write it down.
- > Talk in your groups / pairs about the metaphor of change you are using and why.
- > Does it relate to how you described your organisation?
- > Is it the language you would expect to see in your organisation or is it your own language?
- > Would one of the other metaphors communicate something different?

### Case study: the snail metaphor

In working with a leader in a large organisation, she was frustrated that she wasn't able to change the policies and procedures that affected her work.

We used the metaphor of a snail, where the actual snail is soft and pliable but the outside shell is rigid, to help her see that there was an opportunity to focus on changing the behaviour of the people in the organisation (the actual snail) rather than worrying about the shell.

Thinking of the organisation as the snail (the people) rather than the shell (the policies) gave her a way forward in a stressful situation.

## Discourse (or conversational) approaches

### Exercise: Using conversations as indicators of change

- > How would I like the conversation to change?
- > What do people say now about the issue?
- > What would I like to hear people say instead?
- > How could I hear them?

### Case study: using discourse-centred approaches to organisational change in a large children's charity

The consultancy brief was to help write an implementation plan for a change project.

The first question: **What is the change project?** Different people had different answers. Alternative discourses were at play, reflecting the different power positions of the groups within the organisation. So the first task was to negotiate a sufficiently shared description, a process of meaning-making or social construction of the change project. I used the 'elevator pitch' approach.

#### Elevator Pitch

What we are doing  
(15 words)

Why we are doing  
(shared need)

What success looks like

What is in it for me?  
(Tailored to Stakeholder)

The second question: **Who thinks what about the change?** It might involve the charity changing (over time) the services it ran, i.e. more of some and less of another.

Advice given was to start communicating early and use reflexivity, so that responses could be built into the plan.

The third question: **How can we tell when the project is a success?** What are the performance indicators?

The advice given was to use conversation change as an indicator, within the project group and beyond. If you change the conversation, you've made the change.



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