

III. Devising a Strategy for Success

In voluntary and non-profit management, the term 'strategy' is increasingly being bandied about. Animal protection organisations devote considerable time and energy to drawing up 'Strategy Documents', and meetings on strategy abound at both board and staff levels. Yet most of the people involved would be unable to provide a concise and accurate definition of what they actually mean by 'strategy'! 'Strategy' is one of those 'important and meaningful' sounding words that can signify everything or nothing. This chapter defines strategy, examines some important elements of the strategy process and stresses the importance of a focussed and clear strategy.

Definitions

Strategy can be defined in many ways, including the following useful examples: -

'Strategy is the pattern of activities to be followed by an organisation in pursuit of its long-term purpose', including its 'placing' within the movement. In simple terms: 'Where we are now, where we want to go and how we intend to get there.'

'An agreed-upon course of action and direction that helps manage the relationship between an organization and its environment. The goal is to achieve alignment or synergy so that an optimal flow of resources to the institution is achieved.'

'Strategy can be defined as the process of identifying, protecting, leveraging and renewing the strategic capabilities of an organisation through its definition of purpose its organisation and processes, and its choice and support of people.'

What most definitions have in common is: -

- An understanding/assessment of the organisation's resources and capabilities
- An understanding/assessment of the external environment
- From these, a decision on the best way to use and apply the former to achieve an agreed aim in the latter.

The Importance of Strategy

Strategy formulation is a vital function of NGO management. A well-focussed and defined strategy is necessary to ensure optimal progress towards mission and vision is achieved - in the same way as a route map (or sea chart) is needed, to ensure the most direct route is taken between home and destination. Also vital are effective ways to monitor, review and realign strategy in the fast-changing animal protection environment.

Social goals make it more difficult to determine priorities, set measurable targets and evaluate performance. This does not mean it is impossible, just that it is not easy (or often natural) to do this. Also, as the chapter on 'Managing the Mission Driven' relates, there is a marked tendency for the mission driven to consistently broaden their

focus and workloads. These factors make it even more important to have a well-defined strategy. Those who try to save the world, without breaking it down into ‘bite size pieces’ simply waste their resources and energy. Also, the powerful vested interests the movement is fighting are infinitely better resourced, making the effective focus and leverage of animal protection organisation’ resources vital to success.

What Constitutes a Strategy?

Strategy is concerned with the determination of the nature, domain and scope of an organisation’s activities, and the evaluation of their success. The pattern of activities in strategy arises from the acquisition, allocation and commitment of a distinct set of resources and capabilities by the organisation, in an effective match with the challenges of its environment, and from the management of the network of relationships with and between stakeholders.

Strategy can combine some or all of the below factors: -

- **Mission Statement** (see below)
- **Vision** (see below)
- **Strategy** (including goals and objectives)
- **Core Values** (see below)
- **Critical Success Factors** – what the organisation must get right to succeed in its mission
- **Positioning** – Similar to brand. Building a valued and preferred position in the minds of your target audience (how you would like them to describe you)
- **Brand/Reputation** – Developing and communicating powerful and meaningful differences between your offerings and those of your competition

In a middle to large-sized organisation the strategy section would, in reality, probably incorporate several sub-strategies covering key departments e.g. campaign strategy, educational strategy, fundraising strategy, financial strategy and IT strategy.

Operational planning is the practical plans to implement strategy. This is dealt with in a separate chapter.

Strategic Planning Terminology and Hierarchy

There is a great deal of inconsistency in how the following terms: strategic issue, goal, and objective, are used. The following is a useful reference/guide that can be applied in the interests of establishing a common vocabulary:

Strategic issue – A problem or opportunity that the organisation wishes to address or take advantage of.

Goal – Specific, measurable statements of what will be done to address strategic issues.

Objective – An activity that will help you accomplish a goal. Objectives, sometimes called tactics, are framed in action plans that detail:

- Responsibility
- Timeline
- Resources
- Assessment/evaluation

The most important thing about motivation is goal setting. You should always have a goal.

Francie Larrieu Smith

Establishing Boundaries

In an animal protection organisation context, it is vital that strategy includes boundaries and limits, and aims for focus and prioritisation. The temptation is to include every issue and problem (that might potentially be addressed). However, this is likely to be counterproductive in practice. The underlying objective should be to maximise mission fulfilment, given available resources – and this does not mean tackling everything. It means harnessing resources and leveraging these to best effect.

In this context, restricting the number of issues covered, the number of campaigns or projects and the possibility of ‘niche marketing’ should all be considered. With regard to the latter, a good example of ‘niche marketing’ is the work of the USA office of VIVA (Vegetarians International Voice for Animals). When VIVA entered the USA market, it was a small office amongst a large and well-resourced national animal protection movement. It took up the largely neglected issue of the factory farming of ducks, and made a considerable impact through its relentless pursuit of this campaign issue.

Building a Strategy

Strategic management should not be mystified. It is simply developing and advancing the work and concerns of the organisation as a whole, within the constraints and demands of its wider environment. It is often little more than ‘enlightened common sense’.

Research and analysis are the building blocks of strategy formulation. The key elements needed are an analysis of the organisation’s resources and its own particular strengths and an analysis of its operating environment. Thus, you are carrying out both an ‘internal’ (within the organisation) and ‘external’ (outside the organisation) analysis. This is necessary to determine the organisation’s ‘best fit’ within its ‘industry’ (i.e. the role that will help it to achieve most for animals). This is known as ‘effective strategic fit’ in management terminology – meaning a good match between the organisation and its environment.

Internal Analysis

The internal analysis considers the organisation’s resources (both financial and human) and its ‘distinct (or core) competencies’. A common and simple tool for this is the **SWOT** analysis that examines: -

Strengths – key strengths, core competencies/capabilities or (especially) unique advantages (‘Unique Selling Points’)

Weaknesses – weaknesses in the organisation – things it does less well and/or cannot cope with

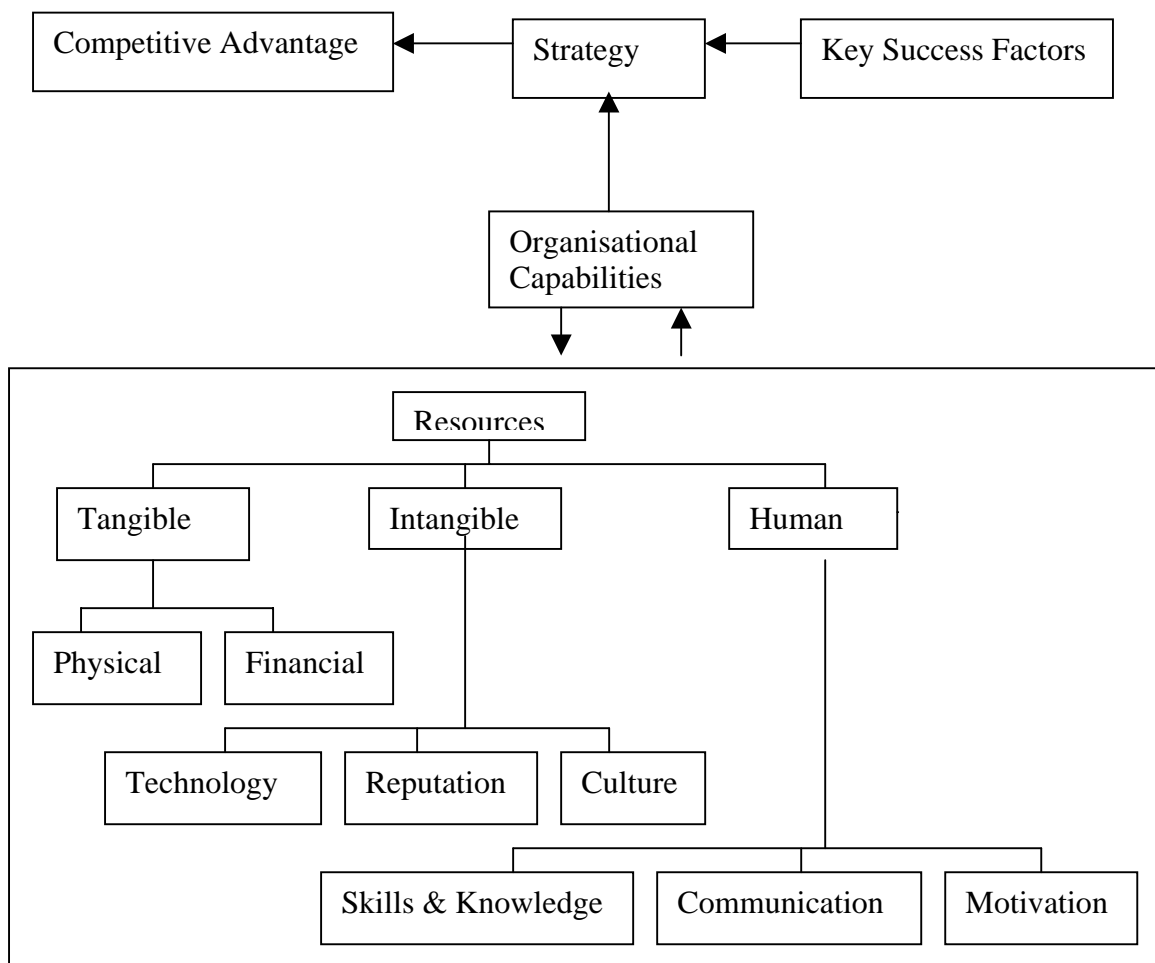
Opportunities – opportunities that may arise for the organisation

Threats – potential threats to the organisation and its work

A SWOT analysis can be charted on paper or simply prepared from a brainstorming session (popular as it throws up many and varied ideas).

Resources and Capabilities

The diagram below helps to identify likely areas for core competencies.



Resources, Capabilities and Competitive Advantage
(After Grant 1995)

External Analysis

The second part of this analysis is of the external situation affecting the organisation. This involves an analysis of an organisation's position in the movement, competition or collaboration decisions, relevant external environmental factors (political, economic, social, cultural, geographical, legislative etc.), educational, service provision and/or campaign environments and objectives.

A common and simple tool for this external analysis is the **STEEP** analysis that examines the following factors, as relevant: -

- **S**ocial
- **T**echnological
- **E**conomic
- **E**nvironmental
- **P**olitical
- **(P**ersonal) **V**alues

An example of the type of things to consider is: -

Social	Technological	Economic	Environmental/ Animal	Political	Values
Changing attitudes	Available technology	Available funding	Opportunity to improve conditions/ status	International and regional position	Opportunity to change
Changing treatment of animals	Technology used by competitors	Cost and prices	Feasibility of ban(s)	Country position	Corporate social responsibility
Changes in responsible ownership	Technology potential in work	Impact of Euro	Current policies and situation	Existing laws and standards	Organisational culture
Changing donor/supporter habits	Industry advances due to technology	Exchange rates	Funders policies	Enforcement	Growth of concern
Changing expectations of stakeholders		Future trends and impact	Competitors work and plans	Political acceptability/ possibilities	Ethical investment
		Competitors funding		Government funding opportunities	Ethical investment funders?
				Industry lobbying	

What and how much you need to do depends on an initial ‘quick and dirty’ analysis – for example, if your talents lie in neutering, then you have no need to carry out an international political analysis!! Similarly, if your talents and capacity point to international campaigning, then you should not waste time on identifying local groups and laws...

In considering political factors, you should also include an examination of legislation affecting the work of your organisation i.e. constraints as well as animal protection legislation that could assist your work. Also, you should include any agreed standards, notions of ‘good practice’ and operating imperatives – the rules and norms in the society/environmental in which you will operate.

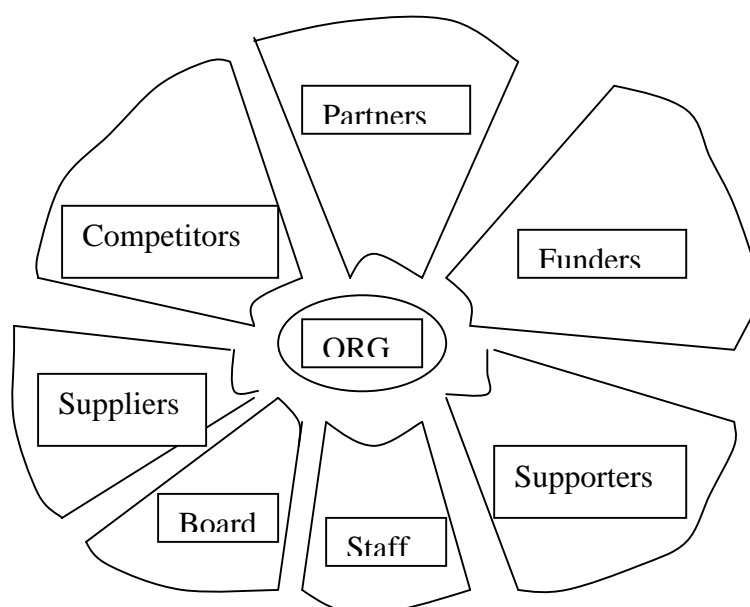
When considering the animal protection operating environment, the following should be included: -

- Competitive or collaboration strategy?
- Different forms of cooperation.
- Joint projects.
- Coalitions and affiliations (see separate chapter on Forging a Movement – Collaboration or Competition).
- Position between organisation and wider social movement.
- Is the cause more important than the organisation?
- How full is the ‘market’ (will you be duplicating the work of others, or is there a real need)?
- What are the industry’s major problems?

Stakeholder Analysis

An important part of strategy analysis is a stakeholder analysis. This examines all major parties with an interest in the organisation, and looks at their perspective. If you are not sure of the views of major stakeholders, a consultation exercise is recommended. This can be either in writing (e.g. by questionnaire) or through personal contact (e.g. using ‘focus’ groups).

The following is a diagram showing likely major stakeholders of an animal protection society.



In animal protection organisations, the largest stakeholder groups is not even represented here – probably because it cannot be consulted. It is, of course, the animals – and just because they cannot be consulted does not mean they should not be considered. In fact, they should be given priority over all stakeholders, as they are the reason for the organisation’s existence. Animals can be considered by an assessment of the numbers of animals involved, the degree of suffering and the potential for

reform (and thus alleviation of this suffering). However, the value of a ‘flagship’ campaign or species as part of the overall fight (the step along the way) should not be overlooked. For example, the use of the Panda as a flagship species for animals in danger of extinction has worked very well for the World Wide Fund for Nature (WWF).

The animal protection analysis (Status of Animal Protection Report) suggested in the chapter: ‘Is it Working Internationally?’ is an excellent tool to use in strategic analysis – and will ensure that this important stakeholder group is not overlooked.

The Movement and its Stages of Development

When considering the position of the animal protection movement in your country, it may be helpful to bear in mind the following model that sets out the five major stages in the growth of the movement: -

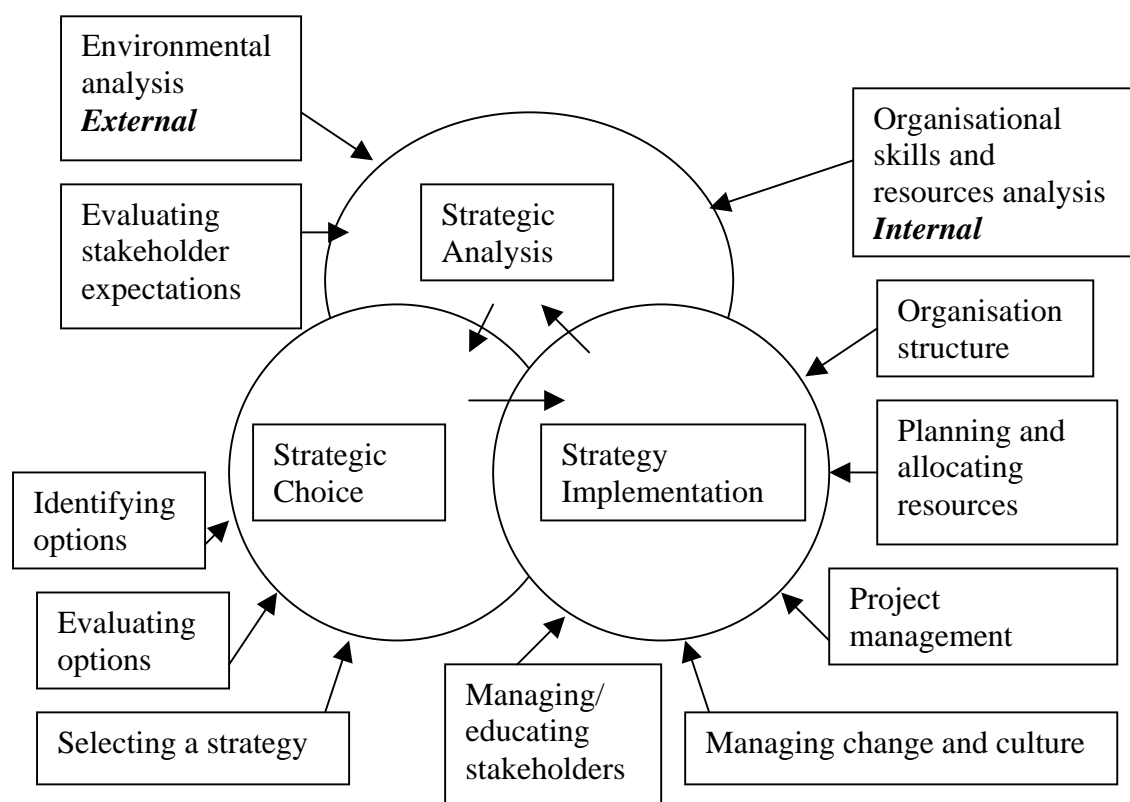
- Acceptance building (broad/softer education)
- Awareness/consensus building (campaigning – harder, more focussed/issue-related education and consumer awareness, and lobbying).
- Legislation
- Action to embed legislation (investigations and exposés, enforcement, legal action/test cases etc.)
- Functioning system of protection

Adapted from comments by: Kim Stallwood

This analysis may be useful in an assessment of the most appropriate type of approach given the current state of the movement in your own country (and/or the country in which you plan to work).

The Strategy Process

The following is a model of the strategic process: -



An important aspect highlighted by the above diagram is that strategy is formulated after consideration of a broad range of factors, including stakeholders' views. Once a strategy has been formulated, it may be necessary to manage stakeholder expectations and educate stakeholders about the adopted strategy. When mission fulfilment is the over-riding concern, it is clearly not possible to satisfy all stakeholders' expectations. However, where possible, stakeholders need to be brought along, and given the opportunity to appreciate the reason for the chosen strategy and the opportunity it provides to maximise gains for the animals. This is particularly important for major donors and funders.

Many animal protection organisations find it an occupational hazard of strategic planning to become sucked into a 'time warp' whereby they do not get past the strategic analysis point. This is probably because the search for the optimum solution is always evasive! The important thing is to make an appropriate strategic choice and to push this on to the implementation stage. There is no perfect answer. The trick is to make a choice and then implement this with flair, vigour and resolve. Unless a strategy is subsequently proved to be wrong or inappropriate, a sustained effort is needed to win the day. The organisations that flit from project to project, from groundbreaking plan to revolutionary campaign seldom wait long enough to see the fruits of their labour. It is telling that some of the major animal protection successes (at EU level) have taken a decade or more of sustained campaigning.

Most of the important things in the world have been accomplished by people who have kept on trying when there seemed to be no hope at all.

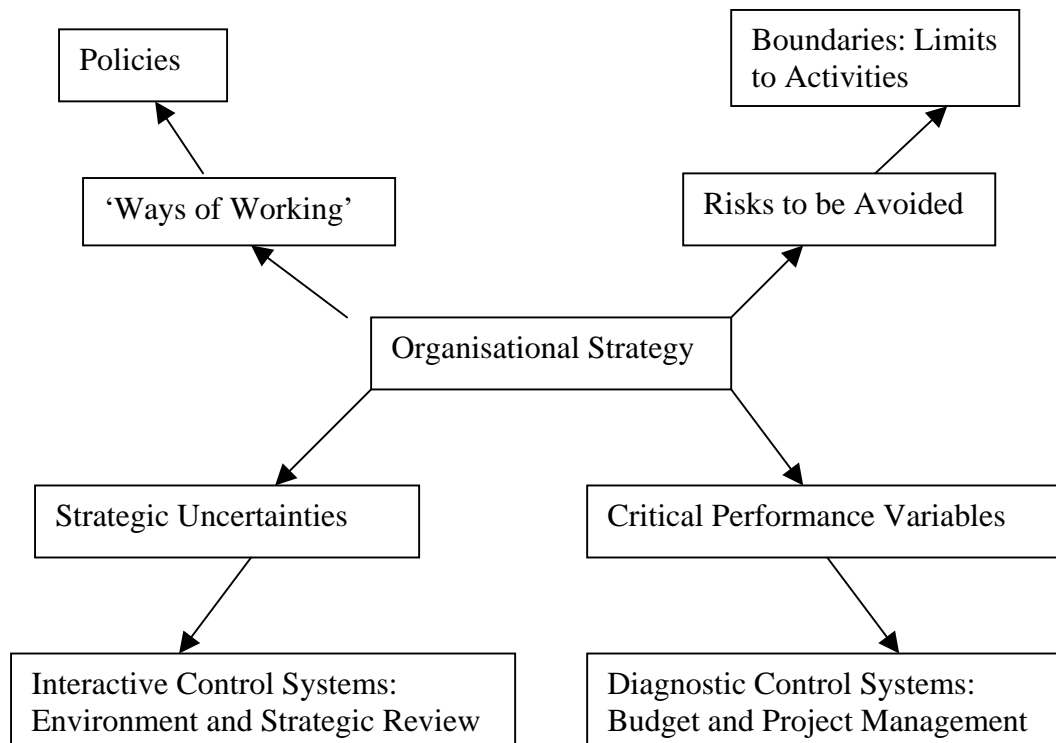
Dale Carnegie

Organisational Values

Organisation (Core) Values are enduring beliefs that your organisation, and the people who inhabit it, hold in common and endeavour to put into action. Core values guide your organisation's board, staff and volunteers in performing their work. Core values can be relatively informal yet still enduring. Values lead individuals within organisations to believe that some goals or ends are legitimate or correct and other goals are illegitimate or wrong. Core values are often expressed in a statement of values. In the animal protection movement, there may be a number of separate Core Values, for example: -

- Animal protection policies
- 'Ways of working' (the 'way we do things around here')
- Ethical investment policies
- Ethical fundraising policies

Core values are a distinct belief system, with explicit values. The major values may even be encapsulated in the organisation's mission statement. They are a framework/boundaries against which to take decisions. Their role in the strategic process is demonstrated below: -



Basic Control Levers
Adapted from Simons 1995

Many animal protection organisations have already formulated core values in these areas, and may be willing to share these (to help other organisations wishing to formulate their own). Indeed, the larger organisations have booklets setting out their animal protection policies, and some are even included on the organisation's Web Site.

Mission and Vision

Man's reach should exceed his grasp, or what's a Heaven for?
Robert Browning

Some animal protection societies have both a mission and a vision, although many have only a mission statement. Briefly, the difference is as follows: -

- **Mission Statement** – A declaration of an organization's purpose; its raison d'être.
- **Vision** – A realistic, credible, attractive future for your organization.

The mission is important because it can engage both the hearts (culture) and minds (strategy) of the organisation's staff and the board. A good mission that is used well can be inspirational and develop a strong, shared organisational culture. It helps to ensure that employees' are emotionally tied to the organisation, and that their goals are synchronised with those of the organisation.

The vision is a longer-range vision of success and, as such, can be a powerful engine driving an organisation towards excellence. However, it is debatable whether having both a vision and a mission dilutes and confuses what should be a powerful message of intent (particularly for external audiences). In reality, a powerfully worded mission statement will provide a clear indication of the organisation's ultimate goal and vision (by virtue of the fact that this is what will result if it achieves its organisational purpose as set out in the mission).

The following guidance on developing a mission statement has been adapted from HSUS guidance given on its Web Site. A more complete version can be found on:

http://files.hsus.org/web-files/HSI/E_Library_PDFs/eng_ht_form_org.pdf

Developing a Mission Statement

A mission statement sets forth the fundamental purposes for which your organisation has been formed. It should cover: -

- Purpose – why the organisation exists – goals and objectives.
- Programme – how you will achieve your purpose
- Principle – what your values are

The mission statement should be: -

- **Understandable** – to the general public
- **Brief** – short paragraph

- **Realistic** – in terms of your financial and human resources
- **Specific** to provide a framework for your developing objectives and programmes
- **Broad** enough to stand the test of time, so it does not need to be reworked frequently
- **Accurate** reflection of the boards intent and understanding
- **Operational** (state the expected outcome)

Brand

An animal protection organisation needs to build a strong brand, in the same way as does a commercial organisation. Both the society's name and logo are tied to brand. A successful brand in animal protection terms is one that is always brought to mind when an animal protection problem is presented – for example, donors wishing to help, or people making legacies to the cause, will think of the brand as the one to fulfil their needs (and deliver for animals). To build and communicate a strong brand an organisation needs to: -

- Communicate a strong, coherent brand promise to all audiences
- Follow and deliver the brand promise
- Make regular – and well publicised – animal protection advances and achievements

Commercial companies often use five key brand components to help them explain, communicate and live by their brand: -

- Brand promise
- Brand rationale – an explanation of the brand promise
- Brand attributes – a series of words or phrases that you want to be associated with your organisation (as inspired and implied by your brand)
- Tagline or strap-line – memorable shorthand for the brand promise
- Graphic element – the visual element of the brand

These can be equally helpful to animal protection societies, with the latter usually being a memorable and eye-catching logo.

Strategic Review

Strategy is not a work that is 'set in stone' as soon as it has been formulated. If an organisation wishes to retain strategic advantage, it needs to keep abreast of changes to its internal capabilities and its external environment that may necessitate a change to strategy or other corrective action.

An organisation needs to keep monitoring emerging events and its environment. For many animal protection organisations, this will mean the need to develop: -

- General awareness of the broader strategic options and orientations of the sector.
- Greater awareness of the plans and actions of its competitors and collaborators.
- Greater awareness of the political environment in which it operates.

- Ability to ‘think strategically’ about aspects of its day-to-day responsibility.

However, for some, the scope for strategic review may be quite limited – especially more focussed and practically-orientated work (e.g. sheltering)

The below are important aspects of strategic review: -

- **Driving forces** – Factors that impact your organisation and initiate change. Driving forces can be anticipated and unanticipated, controllable and uncontrollable. They can include a major threat or pressure from the external environment, an emerging opportunity, an internal crisis or setback, or new leadership
- **Environmental scan** – A process for discovering and documenting facts and trends in the external environment that might impact the institution’s future

Environmental scanning should include (but not exclusively): -

- Newspaper and news scanning for animal protection issues.
- Trade journals.
- Scientific press.
- Trade conferences and shows.
- Animal protection conferences.
- Web Sites of key competitors.
- Key animal protection meetings.
- Relevant political and governmental conferences and meetings.
- Funders’ conferences and meetings with funders.
- Supporters and donors meetings.

‘Strategy is the Great Work of the organisation.
In situations of life or death, it is the Tao of survival or extinction.
Its study cannot be neglected.’

*Sun Tzu’s Classic ‘The Art of War’. Written in China more than 23 centuries ago
(estimated 480-221 BC) – one of the world’s earliest military treatise*