

How we developed our Strategic Plan as a collaborative Partnership

Background

In October 2020 the Black Country Futures partnership recruited a Partnership Strategic Lead, employed by Steps to Work (as agreed by all partners). After meeting with all the partners, the Partnership Strategic Lead proposed that the partnership develop a Partnership Strategic Plan. They developed a proposal for how this would be developed which was put forward to the Black Country Futures working group and formally agreed on 26th November 2020.

The Black Country Futures partnership already has partnership agreements which outline each partners contribution towards delivery of the overall project and clear messaging for the project itself.

The purpose of having a partnership strategy is to:

- Set the direction of the partnership
 - By clarifying the purpose and benefits of working in partnership we can establish how we want to use the partnership model going forward
- Increase our commercial awareness
 - By going through the strategic planning process, we will be more aware of the environment and market we are working within, our competitors and what we need to do to increase our competitive advantage
- Help us to focus
 - Strategic planning can help us develop the right goals and targets and help us to monitor and measure progress against these, and define responsibilities
- Enable clear messaging
 - Through the process we will create a shared understanding, and clear and consistent messaging about the partnership, to use with influencers, funders, stakeholders, media, and others.

It is a distinct from the Black Country Futures project, which has already gone through this process prior to submitting a funding bid to the National Lottery and focuses on the partnership itself rather than the delivery of support to beneficiaries (although the two are clearly interlinked).

The principles outlined and agreed were:

- ✓ This is a plan developed by the partnership, for the partnership and will shape the future work of the Partners and Partnership Strategic Lead
- ✓ All partners should have the opportunity to be involved in the consultation and be encouraged to participate
- ✓ The existing working group can be utilised to take lead on strategic development – but all partners should be given the opportunity to join the working group either long-term or temporarily to support this process
- ✓ All partners should have the opportunity to review the PSP draft and be encouraged to provide feedback
- ✓ The majority of partners need to agree the plan before it can be finalised

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Consultation

For the partnership strategic plan to have any value, for it to be suitable, widely accepted and delivered against, the Partnership Strategic Lead consulted with all partners. Three consultation sessions were run throughout December via Zoom. As these sessions were delivered via zoom it was decided to ask each partner to identify a 'strategic lead' who would attend these sessions on behalf of their organisations. Prior to each session details were provided to the lead to enable them to facilitate in-house discussions on the themes being covered, so they could reflect their teams input at the meetings. Each partner was also given the opportunity to send feedback from their team via email prior to each session.

In each zoom meeting there were three groups split into breakout rooms so that partners were able to have detailed discussions, which were led by a member of the Black Country Futures working group. Members of the breakout groups alternated over the course of the three sessions to encourage relationship building between the partners. The Partnership Strategic Lead collated all responses and refined these into summaries to be used for the development sessions.



Figure 1 - Consultation session themes

In session 1 we discussed our strengths, weaknesses, opportunities, and threats considering both internal factors (what we do well/ what we need to improve, partnership vs multi-agency approach, the benefits and reach of partnership working and our Unique Selling Point), and external factors (Political, Economic, Social, Technological, Environmental, Legal). We also discussed key messages - who we are, why we exist, what we do, where we do it, when we do it and how we do it.

In session 2 we discussed our goals. We discussed our priorities as a partnership, and had further conversations to begin to identify:

- People related goals (e.g. Beneficiaries, Community, Environment, Social, Stakeholders, Influencers, Workforce)
- Finance related goals (e.g. Sustainability, Transparency, Social Return on Investment, Funding, Income generation)
- Profile related goals (e.g. Our audience, Targeted messaging, Capacity / Capability, Brand Awareness)
- Efficacy related goals (e.g. Systems and processes, Quality standards, Resources and Service Delivery, Continuous Improvement)

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In session 3 we had focused discussions on identifying the roles and responsibilities of the Partnership Strategic Lead and each of the partners in delivering this strategy. We discussed methods of communication, how we would manage and measure activity, how we would behave towards one another and the tools and resources we needed to work together.

The consultation sessions were well attended with full representation at both session 1 and session 2. One partner was unrepresented at session 3 due to a scheduling conflict. There were many comments captured at each session with 462 responses formally captured in total (Session 1 – 181 comments, Session 2 – 108 comments, Session 3 – 173 comments). Feedback from the sessions was positive with no requests for changes to structure or style between sessions. The Partnership Strategic Lead would have led these sessions differently if it had been possible to deliver them face-to-face but was satisfied that the outputs of the sessions enabled the plan to move into the next stage of development.

Development

The nominated Strategic Leads from all partner organisations were invited to join an expanded Black Country Futures working group for a temporary period to develop the Partnership Strategic Plan using the consultation responses. This group met twice (21st January and 27th January) to further develop the strategic plan in development sessions led by the Partnership Strategic Lead.

In these sessions we covered 5 main areas:

- We reviewed the consultation responses regarding our purpose and key messages. We refined these to create both an 'elevator pitch' and a more detailed summary of our partnership (who we are, what we do, why, how and where we do it). This was supported by the marketing manager at Steps to Work.
- We continued the SWOT analysis, discussing how we will play to our strengths / capitalise on them, how we will address our weaknesses, how we will manage threats, and how we will manage and respond to opportunities. This fed into the next stage of defining our priorities, goals and activities.
- We reviewed the consultation responses on priorities and goals and refined these to create a clear list of priorities and aims. More detail was added to show the activities that will support us in reaching these aims and we created a timeline for key activities.
- We reviewed the consultation feedback on our shared ethos and behaviours and created a clear definition of the shared values of everyone involved in the partnership. This fed into the values expressed in the Partnership Strategic Plan and will feed into the partnership agreement (alongside the feedback on the roles of the Partnership Strategic Lead and the role of partners).
- We considered how we would measure and track progress of the partnership strategic plan and define any relevant measurement criteria/KPI's against the aims. This will form part of the governance structures for the partnership.

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Review, feedback and sign-off

On 28th January 2020, a draft of the Partnership Strategic Plan was shared with all partners for review and feedback. Final approval for the content of the plan was received on 9th February 2021 and the Partnership Strategic Lead worked with the Marketing Manager at one of the partners (Steps to Work), to create an external version of the plan which could be shared externally. The internal version of the plan includes activity timelines and greater detail, but the external version has been trimmed so that it communicates the key messages and aims relevant to an external audience. This video can be viewed online at <https://www.youtube.com/watch?v=eAR6zw57oK0>

Outputs and timeline

This strategic planning process consisted of several key activities and dates, summarised below.

NOV 2020	DEC 2020	JAN 2021	FEB 2021
<ul style="list-style-type: none"> Strategic planning process designed Approach agreed with working group 	<ul style="list-style-type: none"> Consultation meeting 1 Consultation meeting 2 Consultation meeting 3 	<ul style="list-style-type: none"> Refinement of consultation responses Development group meeting 1 Development group meeting 2 	<ul style="list-style-type: none"> Partnership Strategic Plan drafted PSP shared for review and feedback Revisions made and final version produced and signed off

Through this strategic planning process, we created several key outputs:

1. A SWOT analysis
2. A Partnership Strategic Plan which includes;
 - a. A definitive statement of who and what the partnership is, and what it does
 - b. The shared values of the partnership
 - c. The priorities and aims of the partnership
 - d. A high-level summary of the partnership's planned activities
 - e. A timeline for these activities

It has also fed into other outputs including;

- Our Memorandum of Understanding
- Our marketing and communications plan
- Our action plans
- Our governance strategy
- Our working groups
- Our sustainability plan
- Funding bids