

Forward Planning



4ST PLAYBOOK

A self-help guide with concrete steps, examples and ideas to explore and achieve desired 4ST outcomes

Updated 10/11/2022



OUTCOMES:

Thrust 2



SPEs are forward thinking and practise sustainable resourcing

Thrust 4



The social service sector is well-positioned for the future

FORWARD PLANNING

Thrust 2 Outcome:



SPEs are forward thinking and practise sustainable resourcing

Thrust 4 Outcome:



The social service sector is well-positioned for the future

Guiding questions

- To what extent are you prepared for the future? To what extent are you prepared for changes in the short, medium, and long term?
- To what extent do you have the capabilities, resources, and infrastructure to facilitate strategy planning in your organisation?
- How might megatrends such as technological advances, demographic shifts and economic factors affect the social service sector and your organisation?
- What actions do you need to take to minimise the threats/risks? What are some arising opportunities that you can leverage? To what extent would your existing “competitive advantage” remain strong?
- What organisational and sector-wide contingencies are in place in the event of any large-scale disruptions?

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Rethinking is a skill set, but it's also a mindset. We already have many of the mental tools we need. We just have to remember to get them out of the shed and remove the rust.

- Adam Grant (Author of *Think Again*)

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What does it mean to be well-positioned for the future?

To be well-positioned for the future, we need to continuously learn and adapt to foreseen and unforeseen developments. Beyond meeting present needs, we plan and act for the future, so that we remain relevant and bring value to the sector. The steps to be taken under this outcome are not only at the SPE level, but also at the sector wide level. This outcome is closely linked to the Thrust 2 outcome: **SPEs are forward thinking and practise sustainable resourcing.**

The outcomes in this thrust reflect a system-centred view, where we appreciate that actions in the social service sector are carried out as a whole system, as well as in its constituent parts. This view also recognises interdependence between players, and the need for trusting relationships, enabling structures and processes to generate change across different levels. The systems thinking lens must be taken into consideration across the work we carry out in this thrust.

The main recommendation under this outcome is to enhance strategic planning in the sector to better manage future challenges.

What is strategic planning? Why is this important?

Strategic planning is the “process of determining and articulating what goals are to be achieved in the medium to long term, where the nature of the operating environment is subject to change, as well as how to reach these goals”¹.

Strategy is critical and can be a means to mobilise an organisation to move towards a desired future, as well as in guiding an organisation through challenging times.

To achieve this, organisations can:

Align different parts of an organisation to generate a sense of purpose and direction for the employees.

Make clear the priorities of an organisation and inform the organisation's resource allocation.

Determine how it relates to the external environment - guide an organisation to make the most of opportunities, manage and respond to changes and threats.

Foster a sense of identity amongst the employees when the organisation involves the staff to contribute to the process from the early phase, and actively attempts to integrate “top down” direction and “bottom up” views.

Organisation strategy planning

Steps that SPEs can take to formulate and implement the strategic plan for their organisation are as follows:

1. Build capability and initiate the process

- Dedicate time and resources to strengthen SPEs' capabilities to plan for the future, and implement the action plans.
- Ensure full commitment from Board and Management.
- Identify a team of experienced staff to drive and facilitate the entire process.
- Review existing information and past efforts to understand current reality.
- Set desired goals and outcomes, and scope key strategic questions to be uncovered through the process.
- Where relevant, consider getting external advisory support to facilitate or execute the whole process.

2. Examine both internal and external operating environment

- Engage internal stakeholders (across all levels in an organisation) to obtain their views.
- Scan the external environment for opportunities and risks.
 - Identify key trends and driving forces in the environment and assess their implications (e.g., conduct a STEEP analysis to uncover the **S**ocial, **T**echnological, **E**conomic, **E**nvironmental, **P**olitical factors).
 - Engage external stakeholders (across various stakeholder groups and across different levels in an organisation) to gather varied insights and perspectives.
- Distil and sense-make the data to assess the implications to the organisation.
 - Organise the information into a SWOT to assess the **S**trengths, **W**eaknesses, **O**pportunities and **T**hreats that the organisation faces.
- Review/validate the organisation's mission, value proposition and roles.

3. Formulate a strategy and define the pathways to success

- Identify the strategic priorities using tools such as the Organisational Health Framework of Social Services (OHFSS).
- Develop a detailed strategy plan (objectives, key strategies, long and short-term goals), using the Theory of Change to guide the process.

4. Translate the strategy into priority actions

- Develop an implementation plan.
 - Identify parties responsible for implementation, establish timeline for implementation, and resources needed – time, money, manpower, space, etc.
 - Conduct risk assessment.
- Invest in time and resources to ensure execution takes place.
- Communicate the strategy and cascade the goals to all staff within an organisation.
- Launch the strategic initiatives required to actualise the objectives.
- Define measurement metrics to track progress.
- Provide incentives to drive implementation.

5. Monitor and review to ensure progress

- Set up the relevant governance structure and reporting mechanism (e.g., set up formal reporting channels to Board and Management to update).
- Track and monitor the outcomes and activities (e.g., using relevant dashboards to analyse the data collected).

It takes time to go through the whole strategic planning exercise and for changes to take effect. There is no fixed timeframe for organisations to go through the entire strategic planning exercise, but organisations should have annual reviews where they systematically scan the environment and monitor the progress to examine if their initiatives are leading to the desired outcomes. The process should be iterative and implementation plans can be re-scoped to respond to emerging trends.

In the whole strategic planning exercise, data plays an important role in the process to direct efforts to what might be impactful, spot gaps and anticipate future needs. It is important for organisations to strengthen the capability to capture, share, fuse, and exploit data.

The Organisational Health Guidebook for Social Services² developed by NCSS outlines the key considerations and steps that SPEs can take to strengthen their organisations' performance in Strategy & Leadership – from developing and implementing a strategy plan, to having effective and capable leadership, and forging a unified organisation culture.

Strategic foresight

“ Strategic foresight doesn't help us figure out what to think about the future. It helps us figure out how to think about it.

-J. Peter Scoblic (HBR: *Learning from the Future*)

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One component of longer-term strategic planning involves foresight, which involves looking out at the external operating environment for potential opportunities and risks and thinking about the implications on the organisation and the sector. There are a range of tools and techniques to help organisations carry out foresight work. Some examples are horizon scanning, scenario planning, and analysis of trends and macro factors, e.g., using STEEP (Social, Technological, Economic, Environmental, Political). An example is shown below. Technology, data, and analytics are also key enablers that facilitate this area of work.

² Find out more about Organisational Health Guidebook for Social Services: <https://www.ncss.gov.sg/social-service-agencies/capability-building>

Looking Out: Some key trends/drivers that can affect the sector in the future

	Trends/Drivers	Implications on the sector	How might we best prepare ourselves?
Social			
1	Ageing population, coupled with declining birth rates, fewer marriages and smaller family units	<ul style="list-style-type: none"> • Ageing = issue of healthcare needs, which are often intertwined with social needs (e.g., financial, social isolation). • Reduction in working population and shrinking talent pool. • Lesser support within families, and this may result in great reliance on external caregiving arrangements. 	<ul style="list-style-type: none"> • Engage the silver generation in flexible work arrangements to support the sector's needs or involve them as volunteers to augment manpower needs. • Leverage community and grassroots support for service users. • Explore remote services from other countries for specialised and niched areas. • Centralise temporary manpower support in an organisation and deploy to other organisations accordingly, when needed.
2	Young generation has different expectations and preferences	<ul style="list-style-type: none"> • More interested in contributing to the sector beyond giving monetary donations; they are looking at contributions that would have a sustainable impact. • More likely to give both their time and money if they are inspired by the mission and feel engaged (relationships matter). • More likely to support business causes that give back to the community when shopping online. 	<ul style="list-style-type: none"> • Leverage the skillsets that the young generation may have, instead of sticking to traditional ways (e.g., have them support in social media or coding work of the organisation). • Engage the future generation differently in giving (e.g., articulating the impact clearly, taking time to foster strong relationships and actively involving them in the giving process).

		<ul style="list-style-type: none"> • Expect greater career mobility, promotions and learning opportunities; have fundamentally different career aspirations. 	<ul style="list-style-type: none"> • Find alternative and new ways to connect with future workers.
Technological			
3	Greater use of digital technology which allows for higher connectivity and automation	<ul style="list-style-type: none"> • With the advancements in technology, individuals are finding new ways to advocate for causes close to their heart. Younger generations are using means such as livestreaming to advocate for causes, collect donations and spread awareness about certain issues. 	<ul style="list-style-type: none"> • Explore in-trend digital mediums and channels (e.g., social media, livestreaming websites) to reach a larger audience in the giving space.
		<ul style="list-style-type: none"> • Donors and individuals are increasingly looking for information online regarding causes to give. • Some services may need to be provided in multiple modalities, to cater to the varied needs of individuals. 	<ul style="list-style-type: none"> • Create an online platform that facilitates interactions (enquiries, donations, volunteer applications) with the existing and potential donors and volunteers. • Enhance online services to better serve the virtual audience; services no longer need to be provided only from Singapore and can be from other parts of the world.
		<ul style="list-style-type: none"> • Technology drives major changes to the worker's skills. 	<ul style="list-style-type: none"> • Outsource to the private sector if the skills needed are not present in the organisation. • Equip staff in organisation with the relevant skills (skilling, reskilling, and upskilling).

Economic

4	<p>Slowing global economic growth, changing demand for new skills, unexpected economic crisis (e.g. impact due to pandemics such as COVID-19, economic downturn)</p>	<ul style="list-style-type: none"> • SPEs could potentially face funding constraints in times of economic crises as donors may reduce or cut their funding contributions. • Funders will demand more transparency and accountability for their donations. 	<ul style="list-style-type: none"> • Diversify and find stable sources of fund to ensure financial security. • Set aside sufficient reserves in anticipation of future needs • Invest in proper evaluation to articulate effectiveness of programmes and their impact.
		<ul style="list-style-type: none"> • Widening income gap due to globalisation. • Potential increase in number of service users in times of an economic downturn because of job displacement or retrenchment, leading to other social issues. 	<ul style="list-style-type: none"> • Anticipate that there may be more service users, and explore ways to best address this scale of need.
5	<p>Reduced availability of specialised manpower to keep up with growth in demand for services</p>	<ul style="list-style-type: none"> • Population and growth of workforce to remain low/flat in the foreseeable future, creating a decrease in the growth of available sector professionals. 	<ul style="list-style-type: none"> • Anticipate that the growth rate in service users will exceed the growth rate in specialised manpower, thus necessitating an increase in productivity to address this imbalance. Options to explore may include the use of technology and volunteers.

Environmental

6	Climate change has made environmental sustainability a priority in many countries	<ul style="list-style-type: none">• Greater emphasis and interest in climate change, and its long-term effects in Singapore.	<ul style="list-style-type: none">• Retro-fit programmes to ensure that they are environmentally friendly.• Buy equipment that are energy saving and part of the green procurement.
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Political

7	Impact from geopolitical crises (e.g., Ukraine War)	<ul style="list-style-type: none">• During a crisis, certain goods and services may become scarce which could inflate the prices of such goods (e.g., increase in oil prices during the Ukraine War).	<ul style="list-style-type: none">• Find alternative sources of resources to manage increase in prices.• Optimise or reduce existing spending.
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Risk management (including crisis preparedness)

Closely linked to strategic planning is risk management. To effectively engage in strategic planning, one needs to understand the risks they face. COVID-19 has also emphasised the importance for us to plan and be prepared for crises. The Non-profit Risk Management Centre defines risk management as “...a discipline for dealing with the possibility that some future event will cause harm. It provides strategies, techniques, and an approach to recognising and confronting any threat faced by an organisation in fulfilling its mission.” Risks can be at varying levels, internal or external of the organisation, and scale as the size of organisation or sector.

Examples of risks are:

- Finance (e.g., financial crisis, investment risk)
- Personnel and administration (e.g., inadequate screening for staff and volunteers, resulting in undesirable situations such as theft)
- Information technology (e.g., improper use of data, donor data breach)
- Legal (e.g., fraud, intellectual property rights issues)
- Service delivery (e.g., inadequate quality assurance and programme monitoring)
- Uncontrolled risks (e.g., natural disasters and global pandemics)

Besides having a risk management plan in place within an organisation and having the Board and Management to oversee it, it is also important to communicate within the organisation so that all levels of staff understand the risks involved. Where relevant, staff can be sent for training to better understand and manage the risk.

Beyond having a risk management plan at an entity level, it is also critical to have a plan at the sectoral level, as some risks at an entity level may impact the sector or some risks impact the whole sector, beyond just an entity.

Call for Non-profit Risk Management (Stanford Social Innovation Review)

lists the steps that organisations can take to make risk management a standard operating procedure:

Steps you can take		
Identify	Understand the context	Assess the organisation's mission, vision, and goals to fully understand and frame priorities
	Develop a timeline and set goals	Adopt a phased plan, with metrics put in place to measure success
	Perform a risk inventory	Identify risks and opportunities across all functions of the organisation
Assess & Prioritise	Create and use a risk register	Prioritise risks, assign owners, formulate responses, and set timelines for follow ups
Respond	React to Risks	React to risks proactively by researching emerging issues, mitigating threats, and piloting new initiatives to assess if they work
Monitor, Review & Improve	Evaluate the responses	Assess periodically what responses work, what can be done, and what improvements can be made
	Seek funder support	Garner funders' support to build capabilities to manage risk
	Improve the way one manages risk incrementally	<p>After the foundation is in place, organisations can go beyond to improve effectiveness such as</p> <ul style="list-style-type: none"> • having dedicated manpower to look at risk management and process improvement within an organisation, • improving data gathering and exchange processes to make better decisions, • improving financial impact modelling for the various risk scenarios

Organisations can also adopt **scenario planning**, an iterative process involving the four key steps below that can help navigate uncertainty:

- Identify key drivers
- Develop and model scenarios
- Create a portfolio of actions
- Determine key trigger points

Resources available

Guides/Tools

Organisational strategy planning:

Four Best Practices for Strategic Planning (Boston Consulting Group)

This article guides organisations to improve their existing practices in setting strategy.

<https://www.bcg.com/publications/2016/growth-four-best-practices-strategic-planning>

Always-On Strategy (Boston Consulting Group)

This article guides organisations to make strategic planning less rigid and sequential, and more agile so as to respond to the changing conditions in the environment.

<https://www.bcg.com/publications/2017/growth-always-on-strategy>

Learning from the Future (Harvard Business Review)

The article shares how leaders can go about formulating strategy in the face of uncertainty and prepare for future demands. It talks about how exploring the imagined futures helps in facilitating decision making, and the need to ingrain this process within the organisation and revisit from time to time, in view of the constantly changing world.

<https://hbr.org/2020/07/learning-from-the-future>

Organising for the future: Nine keys to becoming a future-ready company (McKinsey & Company)

An article that sums up nine imperatives that will differentiate future-ready organisations from the others, specifically focusing on “who we are” as an organisation, “how we operate”, and “how we grow”.

<https://www.mckinsey.com/business-functions/people-and-organizational-performance/our-insights/organizing-for-the-future-nine-keys-to-becoming-a-future-ready-company>

Foresight planning:

Foresight (A Glossary)

The Centre for Strategic Futures publication outlines and explains terms and concepts used by foresight practitioners.

https://www.csf.gov.sg/files/media-centre/publications/csf-csc_foresight--a-glossary.pdf

Foresight (Series)

Foresight by the Centre for Strategic Futures covers research into international megatrends and emerging issues, and the implications of these trends and issues.

<https://www.csf.gov.sg/media-centre/publications/foresight-series>

Tools:

External Environment Analysis (The National Council for Voluntary Organisations)

This site guides organisations to conduct external environment analysis which may have potential impact on the organisation.

<https://knowhow.ncvo.org.uk/organisation/strategy/externalanalysis>

Why the Social Sector Needs Scenario Planning Now (Boston Consulting Group)

An article which highlights the importance of scenario-planning exercises to identify driving forces and trends that can guide actions to prepare for the future.

<https://www.bcg.com/publications/2020/why-social-sector-needs-scenario-planning>

Training to explore

Management and Organisation Development Courses

Visit SSI for more info at <https://www.ssi.gov.sg/training/management-and-organisation-development/>

Innovation and Change Management

Visit Capelle Consulting for more info at <https://www.capelleconsulting.com>

Annex - References:

Systems-perspective

- <https://medium.com/disruptive-design/tools-for-systems-thinkers-the-6-fundamental-concepts-of-systems-thinking-379cdac3dc6a>,
- https://ssir.org/articles/entry/systems_thinking_a_view_from_the_trenches
- <https://necsi.edu/system-perspective>

Strategy Planning

- <https://www.ncvo.org.uk/help-and-guidance/strategy-and-impact/strategy-and-business-planning/getting-started-with-strategy-and-business-planning/what-is-strategy/#/>
- <https://www.bcg.com/capabilities/corporate-finance-strategy/strategic-planning>
- <https://www.bcg.com/publications/2016/growth-four-best-practices-strategic-planning>
- <https://onstrategyhq.com/resources/strategic-planning-process-basics/>

Theory of Change

- <https://www.thinknpc.org/resource-hub/ten-steps/>

Strategic Foresight

- https://www.csf.gov.sg/files/media-centre/publications/csf-csc_foresight--a-glossary.pdf

Trends/Drivers

- <https://www.todayonline.com/singapore/singapore-feeling-impact-rapidly-ageing-population>
- <https://www.channelnewsasia.com/singapore/ageing-society-caregiving-parents-dementia-elderly-health-310611>
- <https://www.forbes.com/sites/forbesnonprofitcouncil/2021/12/27/the-future-of-giving-trends-shaping-next-gen-philanthropy/?sh=2152de311b88>
- <https://www.aboutamazon.sg/news/company-news/new-study-shows-shoppers-in-singapore-are-keen-to-support-local-businesses>
- <https://www.todayonline.com/singapore/millennials-using-livestreaming-advance-causes-close-their-hearts>
- <https://www.forbes.com/sites/forbestechcouncil/2021/08/20/how-millennials-and-gen-z-are-revolutionizing-the-philanthropic-world/?sh=6fc598f1562d>
- <https://www.todayonline.com/singapore/covid-19-some-charities-struggling-raise-funds-even-economy-gradually-reopens-others>

Annex - References:

Risk Management

- <https://www.handsonnwno.org/wp-content/uploads/2016/08/A-Primer-on-Risk-Management.pdf>
- https://ssir.org/articles/entry/a_call_for_nonprofit_risk_management#
- <https://www.bridgespan.org/insights/library/strategy-development/nonprofit-scenario-planning-during-a-crisis>