

Strategy & Business Plan 2019-21



BISHOP
SIMEON
TRUST



Vision

A South Africa where young people are educated and able to lead.

Mission

To enable young people in South Africa to challenge and conquer those obstacles that prevent them from making the most of their potential to lead, build a positive future and thrive.

Our Values

The following values are central to the way in which the Bishop Simeon Trust works.

- **Respect:** we believe in compassion, recognising the value and rights of all those we work with.
- **Integrity:** we are transparent and accountable to ensure that we have the trust of those we serve and those who support us.
- **Sustainability:** we work in a way that promotes independence and continuance of support beyond our interventions.
- **Collaboration:** we believe that working in partnership with those who share our vision and values builds on existing knowledge and achieves greater impact.
- **Learning:** we believe that it is through the power of learning that we will improve the lives of those we serve and assure the efficacy and impact of our work.
- **Equality:** We believe that all children deserve a fair chance at life, regardless of gender, race, sexuality or religion. We are committed to supporting those who are unfairly targeted by systemic forms of oppression to help to build a more equal society.

- **Strategic Objectives**

1. To build the capacity of our South African community partners to deliver sustainable services, support education and promote the rights of young people.
2. To build and maintain sustainable strategic partnerships with other organisations with whom we may better deliver our mission
3. To generate a diversified income by increasing awareness in the UK of our work and the need in South Africa.
4. To generate a diversified income stream in South Africa.
5. To build and maintain a strong and effective organisation in the UK and South Africa.

Key Performance Indicators

By April 2021:

1. We will have operational partnerships with 10 community-based organisations in Ekurhuleni, reaching a minimum of 5,000 vulnerable children each year.
2. We will have a well-established Safe Park Programme that provides demonstrably effective organisational and service development support to 10 community-based partners.
3. We will have a well-established Youth Leadership Programme that provides demonstrably effective behaviour change and advocacy support to Youth Committees within 10 community-based partners.
4. We will have secured a projected minimum operational income of £200,000 for the year 2021-22.
5. We will have clearly structured, well-established and equitable operational partnerships in South Africa with at least two local organisations.
6. We will be active within strategic networks and partnerships through which we are able to inform provincial and national policy that improves the lives of children across South Africa

Strategic Objectives and Key Activities 2019-21

1. To build the capacity of our South African community partners to deliver sustainable services, support education and promote the rights of young people.

- 1.1 **Safe Parks:** continue to develop and implement the Early Childhood Development Centre and Safe Park support models and their core programmes as our central mode of delivery for our target communities with our local partners.
- a. Annual implementation of Safe Park Self Assessments with all Community Based Organisations (CBOs) in order to identify annual Safe Park Development Plans
 - b. Identification of annual Safe Park Development support schedule and associated resource needs.
 - c. Support the identification of training provision and the delivery of Safe Park Development training with CBO partners against the identified schedule, documenting training and building a library of training standards against specific needs for future reference.

- d. Safe Park programme monitoring and reporting, via quarterly collection and collation of CBO Output Indicators using Salesforce, along with records of meetings, correspondence.
- e. Safe Park annual evaluation via the implementation of the Safe Park Self-Assessment to help identify change and impact within the CBOs.

1.2 **Organisational Development:** continue to develop and implement the Organisational Development model as our central mode of organisational strengthening for our local partners.

- a. Annual implementation of Organisational Self Assessments with all Community Based Organisations (CBOs) in order to identify annual Organisational Development Plans
- b. Identification of annual Organisational Development support schedule and associated resource needs.
- c. Support the identification of training provision and the delivery of training with CBO partners against the identified schedule, documenting training and building a library of training standards against specific needs for future reference.
- d. Organisational Development programme monitoring and reporting, via records of meetings, correspondence, etc. with CBOs using Salesforce.

- e. Organisational Development annual evaluation via the implementation of the Organisational Self-Assessment to help identify change and impact within the CBOs.

1.3 **Youth Leadership:** work with our CBO partners to help them to develop Youth Committees within their Safe Parks to support, develop and lead campaigns designed to equip young people with better coping strategies and to influence positive behaviour change.

- a. Work with CBO partners to help identify and recruit Youth Committees to lead and support these.
- b. Implementation of the Grassroots Comics model with the Peer Group to identify and communicate priority issues within their lives and communities.
- c. Support Youth Committees in the identification of their Campaign Plan emerging from the priority issues identified, exploring creative means to do so via forum theatre, film making, creative writing, etc.
- d. Identification of resources required and potential sources to enable Youth Committees to implement their Campaign Plans.

- e. Support for the development of skills and implementation of the Campaign Plans, along with local campaigning to disseminate and influence further.
- f. Identification of common priority issues across Youth Committees and support for the development of collective campaigns which bring them together to influence policy at national and regional level.
- g. Networking and communications support with strategic stakeholders in South Africa, UK, etc., which will help Youth Committees achieve the greatest influence through their campaigning.

2 To build and maintain sustainable strategic partnerships with other organisations with whom we may better deliver our mission

- 2.1 **Partnership Support and Management:** we will maintain and develop our delivery partnerships such that they are clearly bound by Memorandums of Understanding, delivery contracts, budgets and processes of monitoring and review.

- a. Development and review of Memorandums of Understanding with delivery partners to assure that they remain valid and relevant to operational arrangements
- b. Assurance that valid delivery contracts and budgets are always in place, providing clarity regarding operations and finances and are subject to monthly reporting and review.
- c. Assurance that operational partners have transparent financial management and reporting processes, via annual budget plans aligned with operational plans, monthly financial reporting and quarterly review of the financial position.
- d. UK representatives from the Trust will undertake two South Africa monitoring visits each year to develop relationships, validate reporting and review performance against contracts, budgets and partnerships.

2.2 **Networking:** we will identify and develop partnerships with key strategic stakeholders in South Africa, UK and globally, who share our vision and are able to contribute to the achievement of our mission and strategic objectives with our operational partners.

- a. Analysis, review and identification of key strategic stakeholders with an active interest in supporting the rights and education of children and adolescents in South Africa.
- b. Identification of potential strategic partners where there is significant strategic overlap in terms of vision, mission and objectives, with specific identification of potential areas for cooperation.
- c. Establish strategic partnerships through Memorandum of Understanding with identified strategic partners.
- d. Establish active strategic partnership working plans and agreements with identified strategic partners which further the Trust's Strategic Objectives.
- e. Identify contingency operational plans in the event of existing operational partnerships failing.

3 To generate a diversified income by increasing awareness in the UK of our work and the need in South Africa.

- 3.1 **Communications and Marketing:** continue to develop and implement an external communications and marketing strategy which raises awareness of the contemporary issues relating to education, children's rights, HIV/AIDS and socio-economic development in South Africa, whilst raising our profile, highlighting our achievements and promoting the efficacy of our work.
- a. Work with South African partners and stakeholders to identify an annual plan of communication themes each year.
 - b. Work with South African partners to collect 24 social media updates and associated photographs each month that will be shared through social media.
 - c. Work with South African partners to collect 4 case studies of individuals or CBOs each month, supported by photographs and consent, which will be shared through social media and on the Trust website.
 - d. Work with South African partners to collect 20 films produced by Youth Committees each year that may be can used to support communications.
 - e. Production and distribution of 2 Newsletters each year aligned with case studies and communications themes in collaboration with South African stakeholders.

- f. Production and distribution of a monthly eNewsletter which draws together new case studies and communications themes in collaboration with South African stakeholders.

3.2 **Fundraising Strategy:** develop and implement a diversified fundraising strategy which secures support for the Bishop Simeon Trust to deliver our strategic objectives and ensure sustainability beyond 2021.

- a. Identify fundraising budgets comprising core and programme costs which are specifically based on the needs identified through our self-assessment and planning processes with our CBOs and delivery partners in South Africa and the capacity required to deliver.
- b. Research, identify and approach Trusts and Foundations with the objective of securing £10,000 of unrestricted funding each year by April 2021.
- c. Research, identify and approach Trusts and Foundations with the objective of securing £10,000 of restricted funding each year by April 2021.
- d. Research, identify and approach institutional funders with the objective of securing £50,000 of restricted funding each year by April 2021.

- e. Develop strategic alliances and develop collaborations with the objective of securing a minimum of £50,000 of designated funding each year by April 2021.
- f. Establish a strategic and systematic approach to legacies: develop an 'in memoriam' campaign to maximise the potential of such gifts to secure circa £10,000 per year by April 2021.
- g. Maintain and develop a sustained and predictable income stream from regular giving via continued support for existing supporters and the recruitment of new supporters from our local constituency, rising to £50,000 per year by April 2021.
- h. Identify potential corporate donors, build an understanding of their expectation and values, develop relationships with them whereby we secure £20,000 per year by April 2021.
- i. Consolidate events and community fundraising by assisting existing and new supporters in their fundraising efforts, through which we will secure £10,000 per year by 2021.

4 To generate a diversified income stream in South Africa.

- 4.1 **CBO Led Resource Mobilisation:** ensure that our South Africa partners are working with our CBO partners to assure that the resources we provide are used where no other resources are available: map the community resources available to them in line with their organisational and service development plans, such that any direct support provided by the Trust is only used in those instances where resources are not locally available to our CBO partners.
- a. Community resource map produced for each CBO supported;
 - b. Identify those local resources and services which respond to the CBO needs identified in their development plans and support them in accessing them
 - c. Assure that where resources provided by the Trust are allocated that they are only in instances where no other resources are locally available to our CBO partners.
- 4.2 **South African Fundraising:** we will work closely with our operational partners, community partners and our network of strategic contacts in South Africa to identify opportunities and secure funding in-country which help us to achieve our strategic objectives and build the independent sustainability of services developed:

- a. Identify local funding opportunities which we can support CBO in pursuing in order to develop their skills, confidence and independent ability to secure resources to maintain sustainable services.
- b. Work with our community partners to identify and secure funding from institutional sources, corporate funders, etc. based in South Africa which are aligned with our strategic objectives and programmes.
- c. Work with our network of strategic contacts to identify and pursue funding opportunities in South Africa that may contribute towards 4.2.a and 4.2.b.

5 To build and maintain a strong and effective organisation in the UK and South Africa

- 5.1 **Financial Management:** ensure that we have rigorous financial procedures in place and that we demonstrate transparency, accountability and value for money in all we do.
 - a. Maintain transparent financial management and reporting processes, via annual budget plans aligned with operational plans, monthly financial reporting and quarterly review of the financial position with the Treasurer for reporting to the Board of Trustees.

- b. Produce the annual reports and accounts for the Trust in advance of the statutory submission deadlines and review financial management processes and planning with learning from this.
- c. Assure that we have the appropriate systems, resources and skills in place to maintain finances to best practice standards through regularly review during annual reporting, planning and quarterly reviews.

5.2 **Human Resources:** maintain strong Human Resource management and support systems, valuing and respecting our people and encouraging innovation, personal learning and growth.

- a. Assure that each member of staff has in place clear annual objectives and action plans which are aligned with the business plan and strategy for the Trust.
- b. Staff will participate in monthly supervisions with their line manager, with records kept of meetings which are focussed on review and progress against annual action plans and objectives.
- c. Staff will participate in annual appraisals whereby their performance against annual objectives will be reviewed, new objectives identified for the following year and annual training and development plans identified.

- d. Staff will follow the policies within the Trust's Employee Handbook, which will be reviewed in line with legislative change and feedback from implementation.

5.3 **Internal Communications:** maintain and develop an effective internal communications system.

- a. Maintain staff communications via monthly Team Meetings for which records are kept focused on agreed actions which are shared across the staff, partners and the Board of Trustees.
- b. Staff and partners will use Salesforce Chatter as a day to day point of interaction, as well as working together on collaborative activities identified in relation to action planning.
- c. Maintain transparent communications between the Board of Trustees, staff team and operational partners, via quarterly Board Meetings with reports provided by all internal stakeholders, as well as via monthly operational updates inclusive of financial reports from the Director.

5.4 **Monitoring and Evaluation:** continue the ongoing review and development of our planning, monitoring and reporting processes which support management and monitoring of activities in line with plans and policies.

- a. Review and document operational, project and monitoring processes to assure that these support programme planning and monitoring in the UK and South Africa.
- b. Assure that all staff and partners have an understanding of and access to Salesforce as the Trust's key knowledge management system and that this is central to planning, monitoring and reporting.
- c. All staff and partners provide structured feedback via existing meetings and reporting to inform improvements on the monitoring, evaluation and knowledge management systems used.

5.5 **Organisational Capacity:** apply our own organisational development processes to ourselves in order to assure that we have sufficient capacity to achieve our mission and support our strategic objectives.

- a. Implement the Organisation Self-Assessment Tool for ourselves in order to identify our own strengths and a development plan to address our weaknesses.
- b. Review our human resources capacity in light of our action planning to achieve our objectives, assuring that this is sufficient and well budgeted.

- c. Seek to develop our operational partnerships such that there is sufficient capacity to support the development delivery of our programme objectives and action plans.
- d. Our Board will develop a champions approach so that members or sub-groups of members will lead on specific areas in support of staff.

5.6 **South African Profile:** we will seek to build recognition of our work in South Africa to increase our influence and effectiveness.

- a. Recruit champions for our work that are based in South Africa.
- b. Ensure that our operational partners in South Africa have sufficient capacity to deliver our commitments and represent the Trust.
- c. Develop our own network of strategic contacts in South Africa who can support is in the furtherance of our strategic objectives.