

# Alliance

For philanthropy and social investment worldwide

## Strategic Plan 2022–2030

# Introduction

## The critical friend of philanthropy worldwide

### Developing an ambitious and achievable plan for *Alliance* to take us to 2030

Back in 2019 we first began to develop a vision for our long-term future – mapping out ideas to cement *Alliance*'s role at the heart of global philanthropy. Since then, despite the pandemic and challenges facing media in general, *Alliance* has continued to develop, successfully increasing readership, resources and staffing.

Over a six-month period using innovative and participatory methods, almost exclusively conducted online, Stone Soup Consulting have helped us address these questions, formulate and refine our strategic goals and create a shared understanding across the organisation.

We now have what we believe is an ambitious and achievable plan for our future which will enhance our coverage, better serve those working in all regions and build out a team to meet the needs of our readers in the global philanthropy sector and beyond.

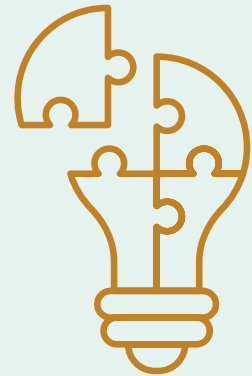
To support next stage of our organisational growth, *Alliance* retained Stone Soup Consulting in July 2021 specifically to:



**Improve**  
the articulation of our organisation's vision for 2030 and the steps to get there



**Examine**  
our existing roadmap and consider the best possible routes to the fulfilment of our vision



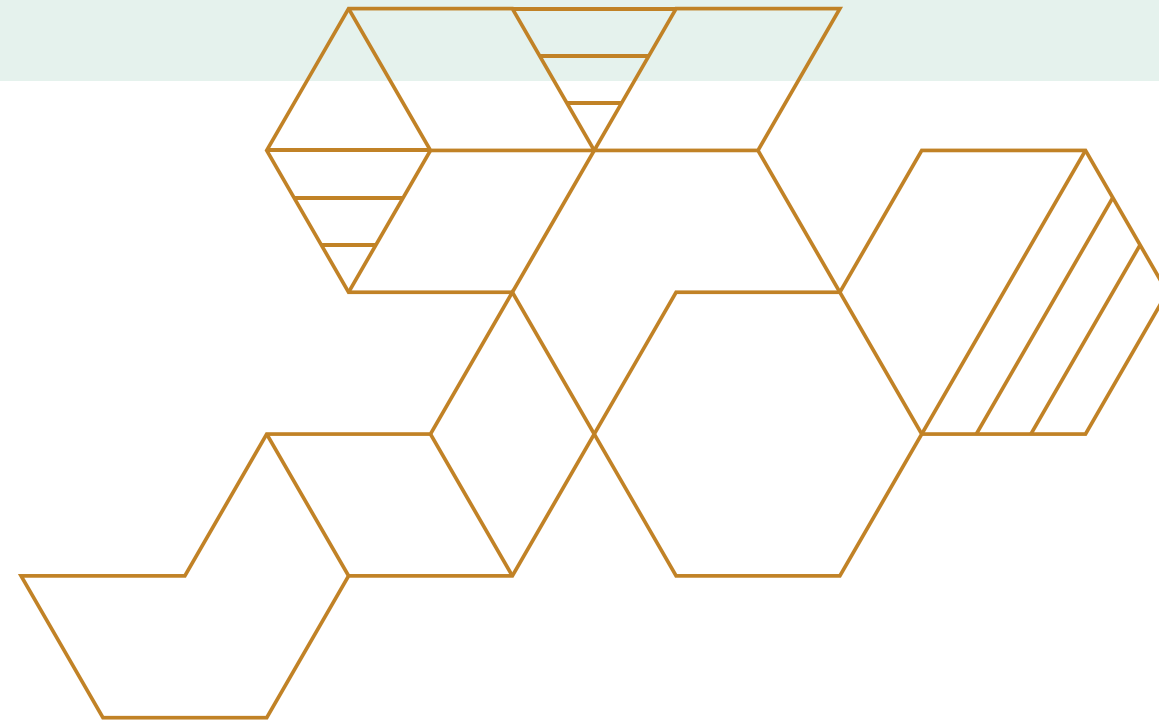
**Deepen**  
our understanding of the organisational changes required, and factors shaping our organisational health, resilience and well-being



**Articulate**  
our increased impact in 2030



**Our core charitable mission will always be at the heart of what we do – to facilitate the exchange of ideas among people in philanthropy working for social change worldwide.**



Our core charitable mission will always be at the heart of what we do – to facilitate the exchange of ideas among people in philanthropy working for social change worldwide. But our vision today goes even further: we want to play our part in building an effective and accountable philanthropy sector.

We believe that the strategic plan you're reading gives us both the framework and toolkit to do just that. By keeping us on the path to sustainable growth, we can continue to give philanthropy practitioners high quality news, debate and analysis and introduce new ways to raise up voices from all regions.

That includes the arrival of regional representatives sharpening access to local insight and expertise and diversifying both our team and our range of sources and contributors. Our digital first events programme will also connect thousands across the globe. These are just two examples of the developments on our journey to 2030.

*Alliance* magazine will continue to be a small media non-profit with big ambitions. Your commitment goes a long way to helping us realise our goals for the future. We hope we can count on your support along the journey.

# Theory of Change

## Introduction

The Theory of Change is a framework to illustrate how and why impact is expected to be generated by the activities and strategies designed by the organisation. This is both a planning tool as well as a monitoring and evaluation one. Starting at the particular context, with identified challenges, it describes how specific strategies are expected to produce outputs (short term / immediate results from the activities), which in turn will generate outcomes and in return achieve the impact envisaged in the organisation's vision.



# Theory of Change



## Challenges

Business growth / Sustainability / Staff Capacity

Journalistic approach

Coverage of all voices in sector

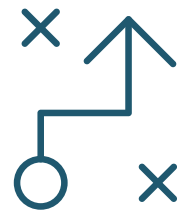
Global presence

Preparedness for media evolution - paper vs digital

Consistent diversity across stakeholders and content

Mainstream coverage and perception of philanthropy

Innovation



## Strategies

Governance and Engagement

Business Model and Sustainability

Unique Value Proposition

Communication and Brand awareness

New Audiences and Innovation Strategies

Scalability Model

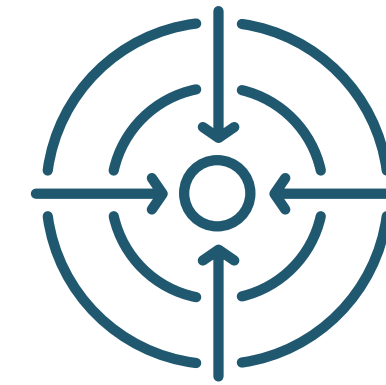


## Desired impact

Hold the sector to account

Increase the exchange of information

Increase diversity in sector



## Vision

Increase the effectiveness and accountability of philanthropic giving

# Vision

## Our vision for philanthropy in 2030

1

Playing a vital role attacking the root causes of the problems affecting people and planet

2

Fostering a pluralist and democratic civil society

3

Supporting people to achieve their potential

4

Operating ethically and transparently

5

An accepted mode of behaviour for people of all levels of wealth.

## Our vision is of a global philanthropy sector that is

1

Enjoying increased knowledge of traditions and best practices worldwide

2

Transparent and embraces debate in order to improve strategies, decision making and effectiveness- both in grant making and operating practice

3

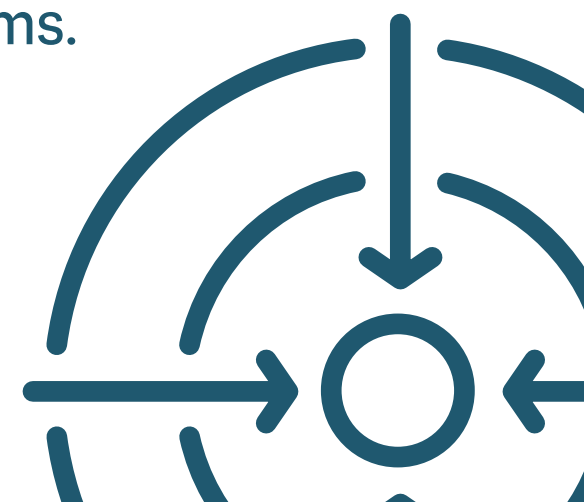
Equal in terms of coverage of, engagement with, and resources for, practitioners in all continents

4

Noted for its collaboration - within and between sectors - recognising that complex issues require time, investment and partnership

5

Trusted and has the legitimacy to play a significant role in addressing social problems.



# Mission

To develop philanthropy globally by



Exchanging  
knowledge



Encouraging  
diversity



Celebrating  
impact



Improving  
transparency  
and holding the  
field to account



Enhancing its  
effectiveness



Resulting in increased effectiveness  
and accountability of giving

# Value Proposition

There is a current perception of *Alliance* as being a friend of the philanthropy sector, capable of creating a safe space for discussion between the different stakeholders, however different their views are. The present value proposition could be summed as: 'Global philanthropy coverage with independent opinion, expert debate and trusted insight.'

Considering the *Alliance* 2021 Survey results with readers and followers, we can state that critical opinion and the global outreach are the two most appreciated variables and identified by them as the role for *Alliance*. Thus, the Strategic Plan is aligned with their view of the main differentiators as they see in *Alliance* as an organisation.

To state this role, the future value proposition is simpler, direct to the point and described as: 'The critical friend of philanthropy worldwide.'

## Present

Global philanthropy coverage with independent opinion, expert debate and trusted insight.

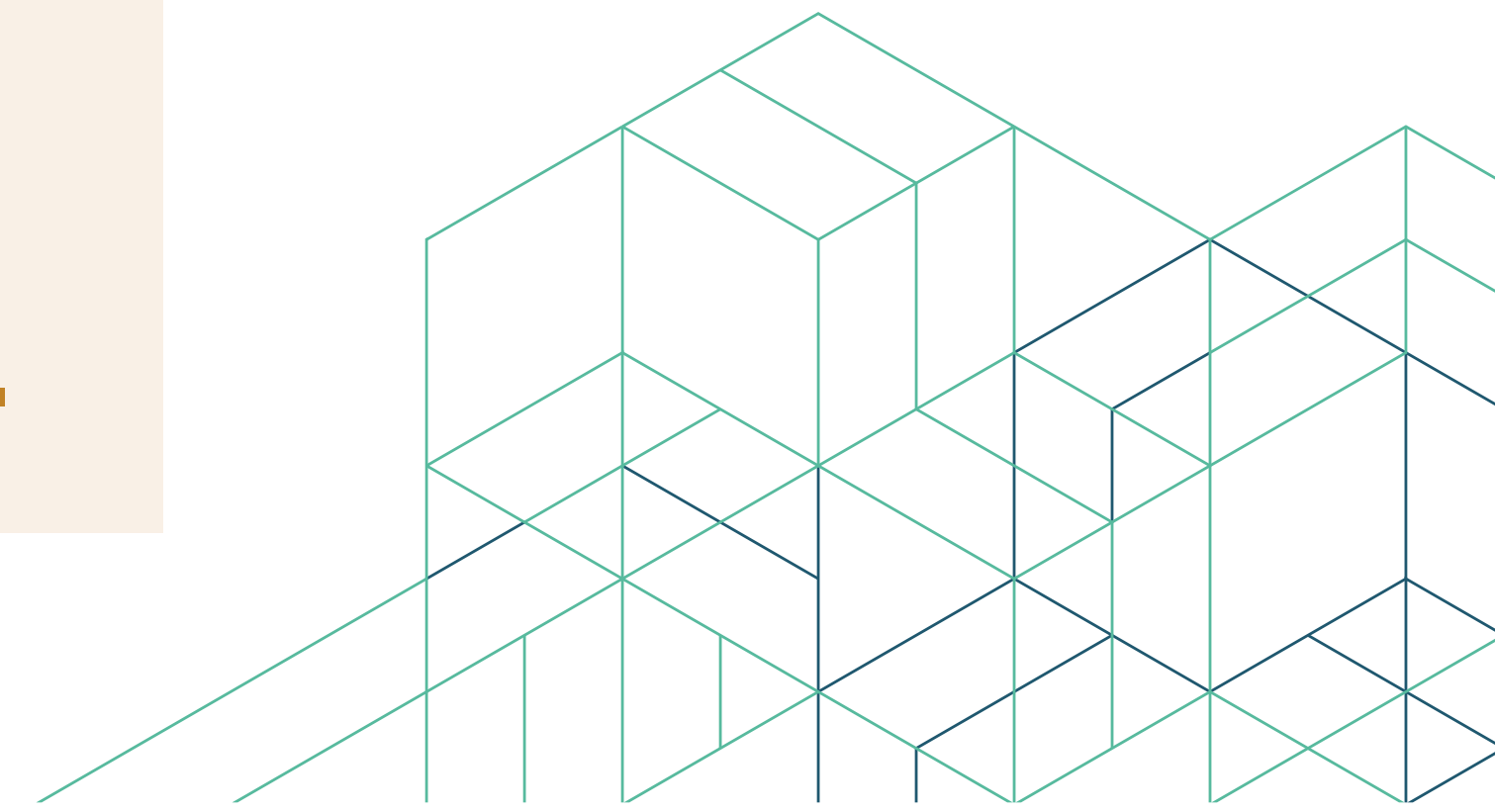


## Future

The critical friend of philanthropy worldwide.

# 97%

found analysis & opinion and global updates valuable



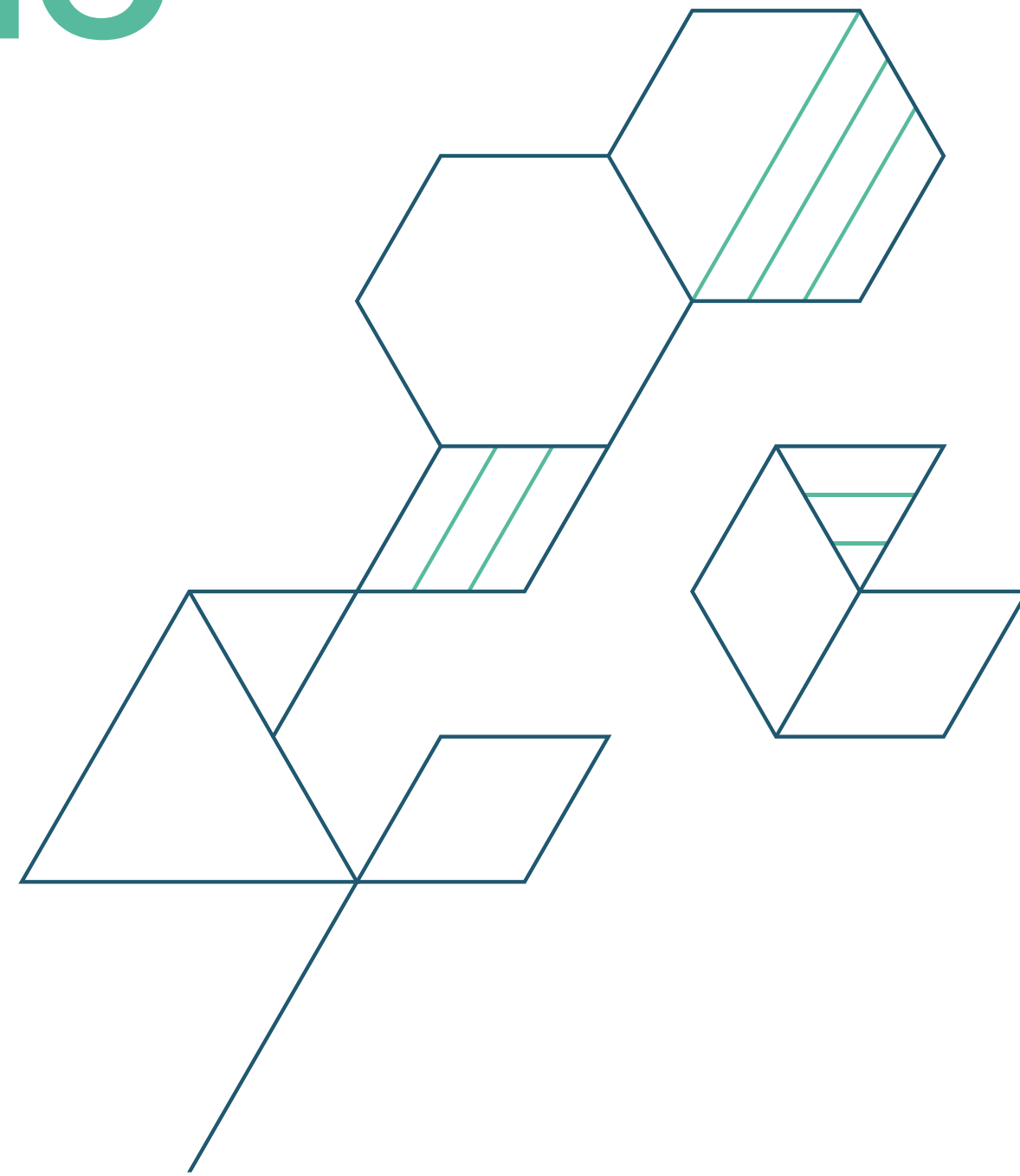
# Value Proposition

## The **critical** friend of philanthropy **worldwide**

**Being critical and acting worldwide are the two key messages that need to be addressed constantly.**

As with any communication issue, there is a clear need for consistency in sending this message to the whole network in a creative, attractive and regular form. To be able to do that, the main steps for a communication strategy were created.

The two key messages can and should be linked in all communications materials.



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## Being **critical**

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Regarding, being critical, *Alliance* can always state their independent opinion showing full transparency: describing in detail the funding and editorial process.

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## Acting **worldwide**

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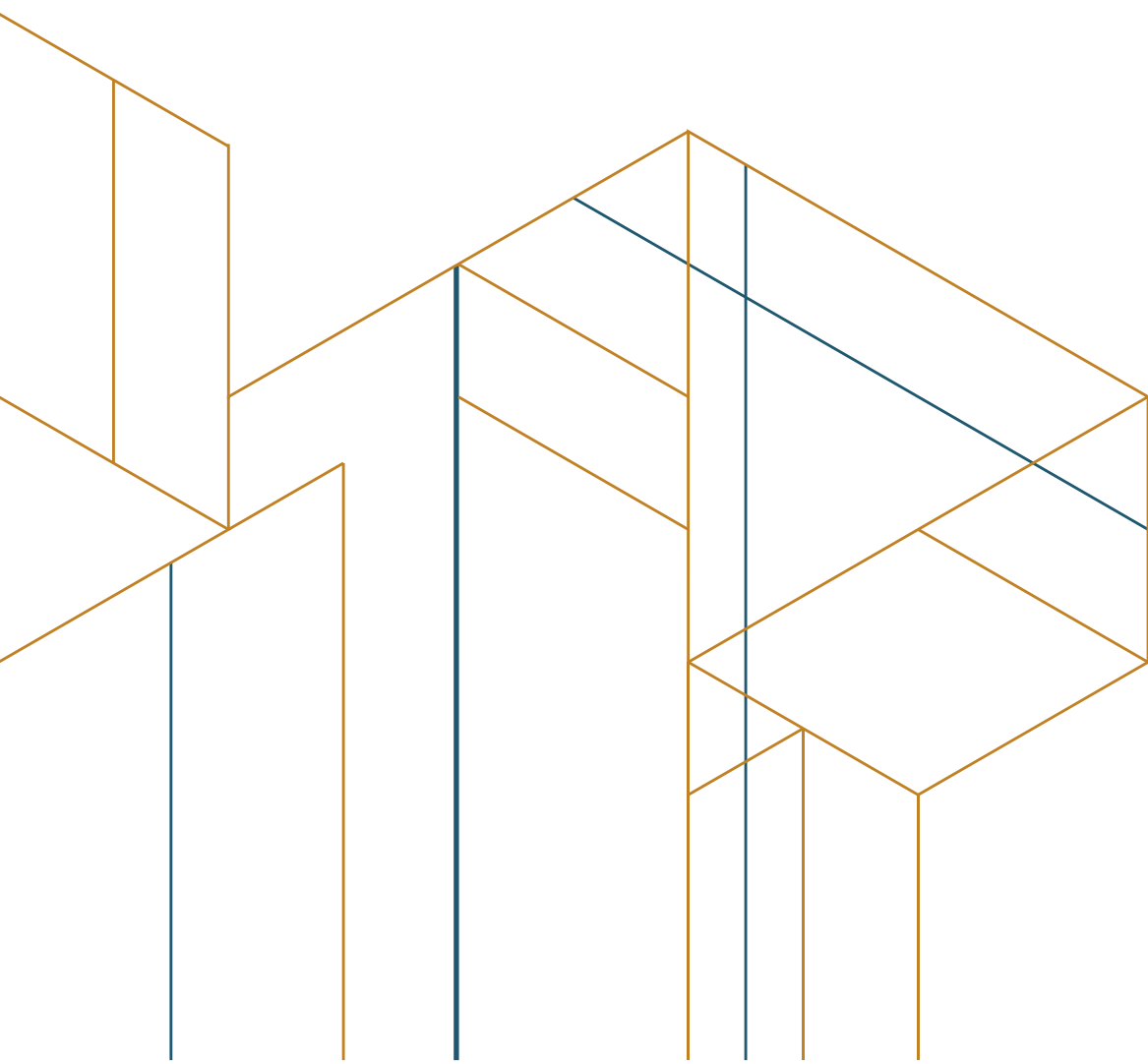
When talking about being global, data could be provided related to how diverse contributions to *Alliance* were over the year.



# Strategic and Specific Goals

An in-depth review of the current situation of the organisation based on the active engagement of stakeholders and SWOT and PESTLE analysis enabled *Alliance* to review its strategic goals for 2022-2030. In coherence with *Alliance*'s vision and mission, 5 strategic goals have been defined.

For each strategic goal, specific goals have been defined and each of them implies specific activities that are or will be lead by a specific person or group of people, with specific deadlines.



## 1

To be recognised within the **global philanthropy sector** as a **leading source of information on philanthropy**

Diversity fundraising techniques and funding streams	Increase transparency and accountability regarding funding independence
Promote interactivity with stakeholders	Highlight good practices and share relevant information

## 2

To be a **platform for new thinking on philanthropy**, and for *Alliance*'s own **reporting, comment and analysis**

Promote <i>Alliance</i> 's unique value proposition	Increase risk preparedness
Assure quality control proceseses	Assure sustainable scalability
Increase journalistic approach	

# Strategic and Specific Goals

## 3

To increase coverage of, and voices from, currently under-represented regions

Promote diversity as a strategic differentiator

Raising the voice of under represented groups

## 4

To foster a community of practitioners who will, by their participation in debate and discussion, be shaping the future of philanthropy

Increase awareness of different types of philanthropy

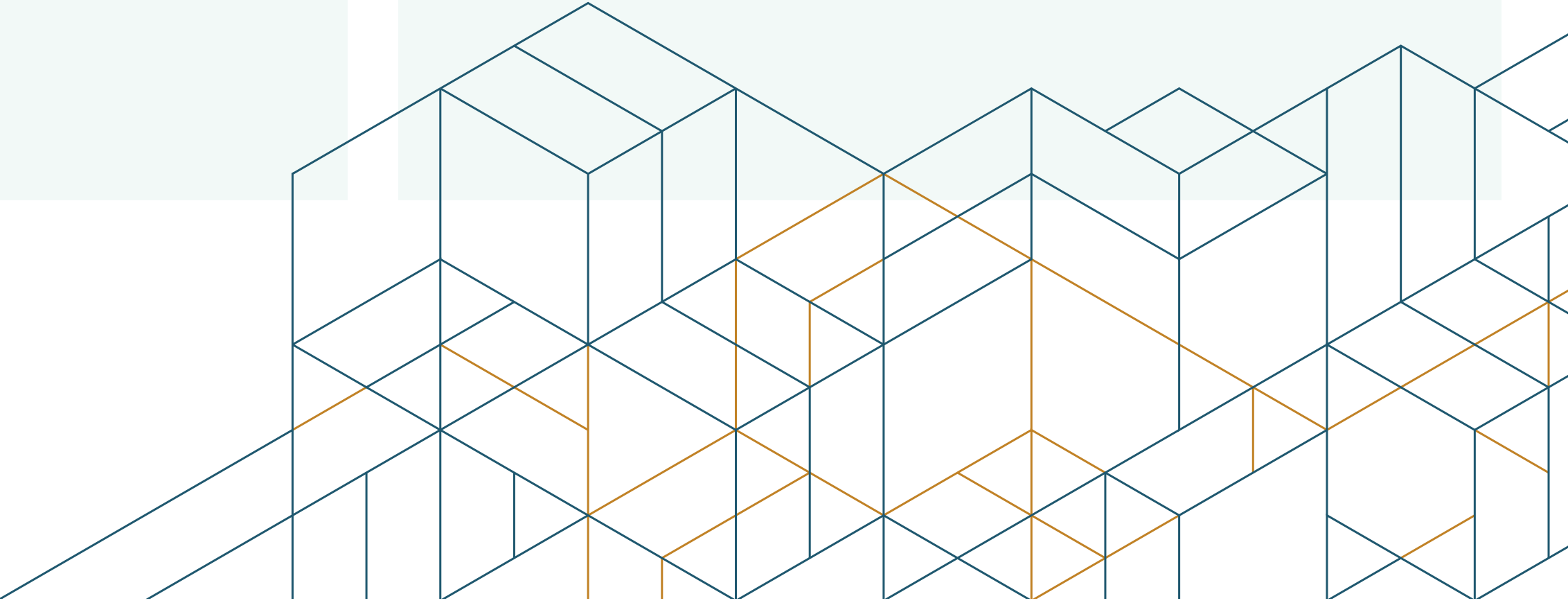
Develop a trusted voice for different communities

## 5

To be established as a preeminent destination for the wider public seeking information on philanthropy

Be opinion leaders on philanthropy

Use innovation as a strategy to attract new audiences



# Roadmap to 2030

## Phase 1 2020-21

First new funders since 2010

Completion of Strategic Plan  
2022-2030

Addition of Digital Editor

Expansion of events  
program & *Alliance's*  
25th anniversary activities

Introducing  
membership scheme

## Phase 2 2022-23

Increase in non-grant income

Introduction of six regional  
representatives

Addition of Subscriptions  
Manager & Features Editor

EDI Audit of *Alliance's*  
network and output

Launch of new website

## Phase 3 2024-26

Focus on readership growth  
with core team in place

Addition of Assistant Editor

Addition of Partnerships  
Manager

Use of freelance reporters to  
upgrade our news coverage

Expansion of our audio  
and video content

## Phase 4 2027-29

Continuation of sustainable  
income strategy

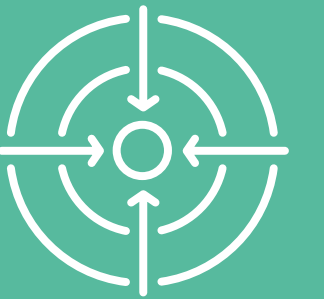
Addition of  
Fundraising Officer

Addition of Senior Reporter  
to oversee investigations

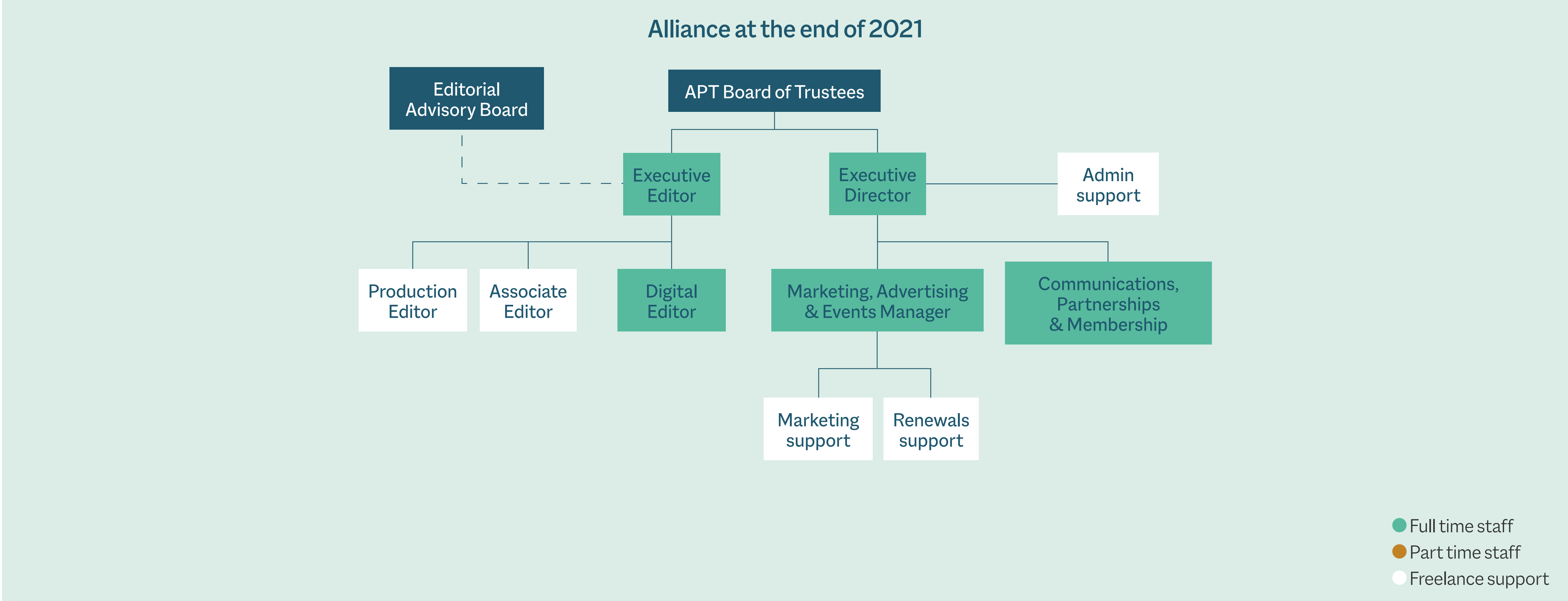
Expansion of global  
network of contributors

Outreach to mainstream  
media to talk about  
philanthropy

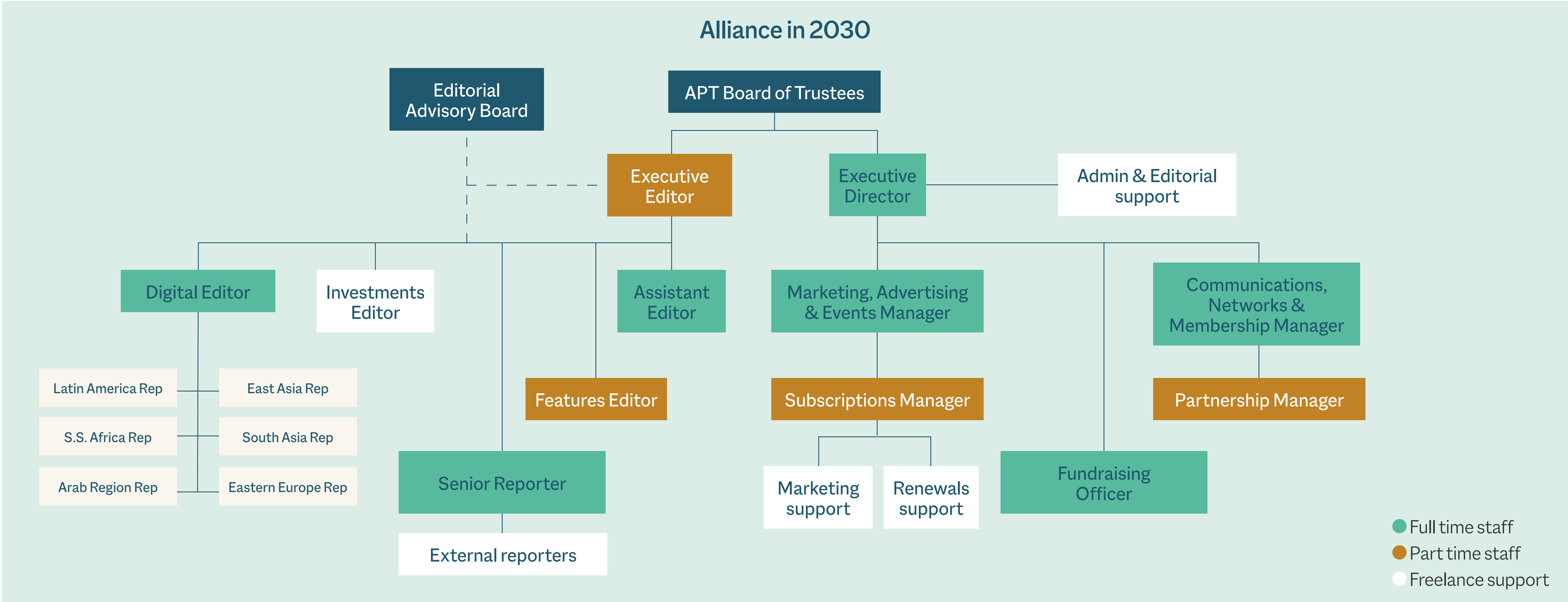
2030



# Roadmap to 2030



# Roadmap to 2030



# Operational Planning

## Activity

After carrying out an in-depth strategic reflection it was important to tie the strategic goals to more specific goals and to activities that will help realise both.

To do so, *Alliance* carried out a process of identifying key strategic activities, priorities for the next eight years and assignments to specific staff to make sure the goals are being fulfilled. A **sample** of that exercise is below.

- Executive Director
- Communication and partnerships
- Marketing, advertising and events manager
- Executive Editor

- ▲ 2022-23
- ▲ 2024-26
- ▲ 2027-29

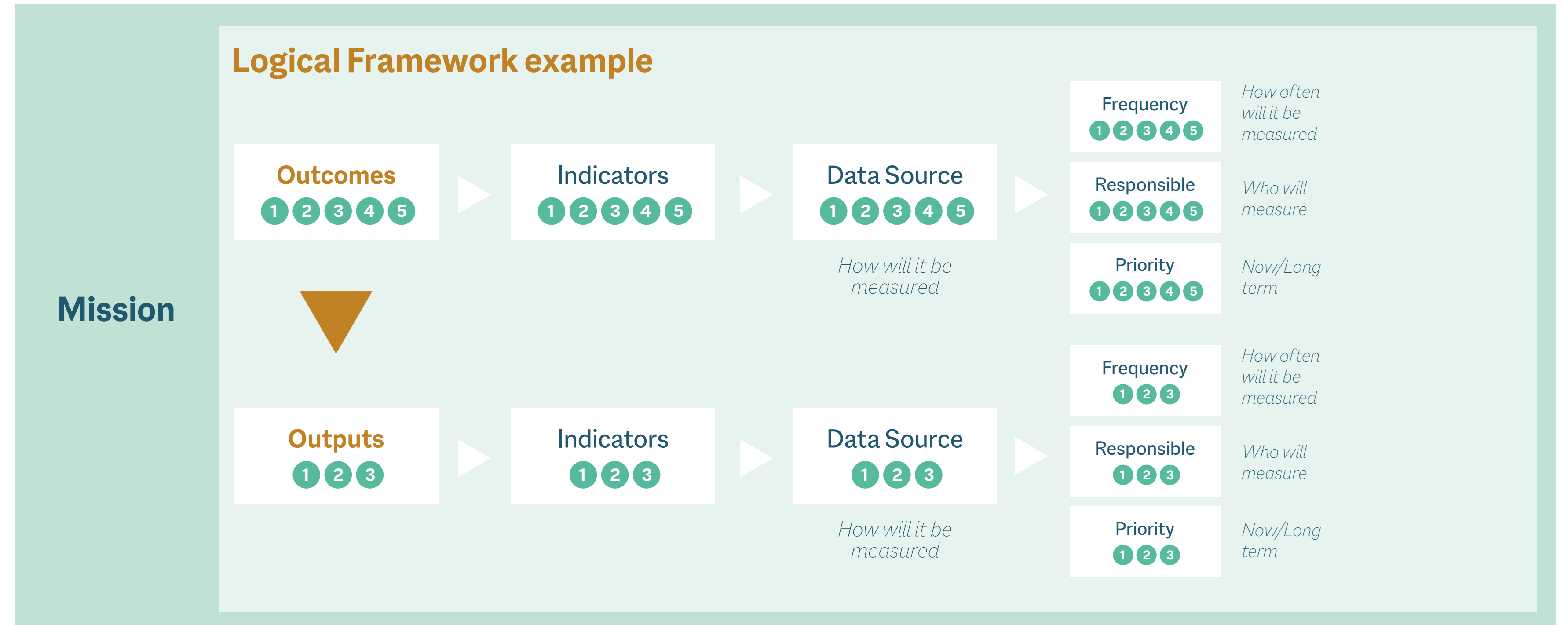
<p><b>1</b></p> <p><b>Have reserves and known priorities for cost cutting</b></p> <p><i>Team/staff member responsible</i></p> <p>●</p>	<p><b>2</b></p> <p><b>Introduce team member focused on increasing subscriptions and promote the printed magazine</b></p> <p><i>Team/staff member responsible</i></p> <p>● ●</p>	<p><b>3</b></p> <p><b>Advertising &amp; Events Manager to work more on strategy, advertising and events</b></p> <p><i>Team/staff member responsible</i></p> <p>● ●</p>	<p><b>4</b></p> <p><b>Increased audio and video content</b></p> <p><i>Team/staff member responsible</i></p> <p>● ●</p>	<p><b>5</b></p> <p><b>Have Trustees and representatives on the Editorial Advisory Board in every continent</b></p> <p><i>Team/staff member responsible</i></p> <p>● ●</p>	<p><b>6</b></p> <p><b>Budget for investigative freelancers to produce deep dives into philanthropy</b></p> <p><i>Team/staff member responsible</i></p> <p>● ●</p>
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# Monitoring and Evaluation

**A good monitoring tool is essential to evidence the impact achieved by the strategic planning and implementation. A tool has been created where the team can record and track indicators through time.**

The tool uses a Logical Framework approach, identifying the expected outputs and outcomes of the activities designed to achieve each of the key strategic goals. As with the Theory of Change, 'outputs' refer to the short-term results of the activities, while 'outcomes' refer to the longer-term impact generated by them.

The tool identifies key indicators to measure, as well as the suggested frequency to measure, a designated team member to track them, a baseline and a target. Some indicators are measurable today, but some (labelled as "Long term" in the priority section) will require some work prior to do so (like for example the design of a survey to collect the data).



# Financial Sustainability

**In the strategic reflection process, it was important for *Alliance* to understand how the organisation's financial sustainability could increase in the long-term and help implement its mission.**

Strategically, *Alliance* will continue to rely on private and individual donors, not pursuing public funding. This means that all fundraising techniques, from direct protocols to tenders and proposal writing are not considered for the near future.

In regards to income strategy, *Alliance* has a hybrid model, with a business model both of a charity and a media outlet. Thus, *Alliance* will continue to work on advertising, event creation and subscriptions sales – as a media outlet – but also with memberships, sponsorships and donations – as a charity. The single largest funding source will be private funders, namely foundations.

In line with best practice for UK charities, *Alliance* classifies our income into four categories: Gifts, Grants, Contracts, Trading.

To be truly sustainable no one type of income should form more than 60% of the total and all future budgets are designed to preserve this balance.



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*Alliance* will continue to develop its subscription model, as well as membership schemes, and plans on increasing donations, event income, sponsors, and private funding, especially to allow for diversification and more global presence. That means finding readerships, sponsorships, and funders from different places around the world. *Alliance* also wants to continue working on innovative and engaging formats, that bring in diverse audiences and attract them to the quality information provided. This is true both for the magazine, website, as well as the events organised.

*Alliance* will also explore new partnership processes with companies and high net worth individuals, bringing them in as major donors for the organisation. Other ideas to explore include creating big donor match schemes and using current funders to attract new ones. To improve the efficiency and the monitoring of fundraising success, *Alliance* will implement new management platforms to track and study performance and increase results.

As part of the strategic reflection, *Alliance* thought about how the organisation is perceived by their readership/ supporters and how clear the model of financial sustainability may be to the public. To clarify it, *Alliance* will carry out specific campaigns/ posts/ articles to increase transparency. This includes the creation of an accountability newsletter and a critical friend campaign. Both will help explain that despite having large private foundations as funders and sponsors, content is neither controlled nor driven by them.

All underpinning documents mentioned in this strategy are available on request.

To find out more about *Alliance* please visit [www.alliancemagazine.org](http://www.alliancemagazine.org)