

A PRACTICAL GUIDE FOR CHARITY BOARDS AND LEADERS

Strategy That Outlasts You

*Ten steps from where you are
to where you want to be*



where we are



the gap



where we are going

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CONSULTING GROUP

A PRACTICAL GUIDE

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A practical ten-step guide for charity boards and leaders

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The examples in this book are drawn from real engagements. Names and identifying details have been changed or withheld, and some figures have been rounded. Nothing in this book is legal, financial or religious advice; trustees should take advice specific to their charity.

Charity Commission guidance and figures are quoted as published at the time of writing.

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How to use this book

This is a working book. It is written for the people who carry responsibility for a charity's direction: trustees and chairs, chief executives and founders, and the senior staff who end up turning a board's intentions into a plan that someone can actually deliver. It assumes you know your sector. It does not assume you have ever run a strategy process, and it does not assume you have a consultant's budget.

The method is set out as ten steps, preceded by a readiness check that I now regard as the most important page in the book. Each step has the same shape. It opens with what the step is for and the mistake I see most often, then sets out the thinking, then gives an exercise you can run with your board or team, and closes with what good looks like when the step is done. Most steps also carry an "in practice" box drawn from a real engagement, so you can see how the step behaved in a room of real people with real disagreements.

You can read it in three ways. A chair preparing for an away day should read Part One, skim the steps, and read the chapter on running the day closely, because the quality of that day depends far more on preparation and facilitation than on the tools. A chief executive who has been asked to "bring a strategy to the board" should read it from start to finish, and pay particular attention to the readiness check, because a strategy written for a board that is not ready to own it will not survive the first difficult meeting. Anyone facilitating the process, internal or external, should treat Part Three and the templates as the core of the book and the steps as the content they are facilitating.

Every copy comes with an editable template pack, matched to the free Board Readiness and Strategy Diagnostic: a twelve-minute assessment that emails you a report showing which of the steps your organisation most needs, what each gap is likely to lead to, and some immediate fixes. The reader resources page that follows has the code and QR codes. I suggest taking the diagnostic before you start Part Two.

The examples are real. They come from engagements I have led over almost two decades with faith-based and non-faith-based charities, foundations, government agencies and start-ups in the UK and abroad, and from my own years as a charity chief executive. Names and identifying details have been changed or withheld, and some figures have been rounded. Where I quote research I say where it comes from, and where the evidence is thinner than the sector usually admits, I say that too.

Preface

I began this book in 2019. It was called *Strategy in 10 Steps for Charities*, it ran to about nine thousand words, and three generous colleagues read it and covered it in comments. One of them asked, in the margin next to a statistic I had used twice, whether it rested on any substantial evidence or was simply "a limp way of encouraging someone to read your book". He was right, and I put the draft away.

What happened next was more useful than any rewrite. In March 2020 I took on the leadership of Muslim Aid UK, first as interim and then as chief executive, and spent nearly three years on the receiving end of my own advice. I learned what it is like to inherit a strategy, to rebuild governance under regulatory scrutiny, to take a transformation programme through a pandemic, and to discover how quickly old habits return when the pressure is off. Since 2023 I have worked as an adviser again, running strategy days for boards, setting up foundations and grant-making machinery for family offices, chairing grants committees, coaching chief executives, and sitting on boards of my own.

The 2019 draft was about tools: SWOT, PESTLE, vision statements, Gantt charts. The tools are still here, because they work. What the draft lacked was everything that happens around them. It said nothing about whether a board was ready to make a strategy, nothing about how to get a room of trustees to actually choose, nothing about the money, and very little about what happens three months later when the energy has gone. Those are the places where strategies fail, and they are where most of the new material in this book sits.

There are good books on charity strategy, and I have listed the ones I rate at the back. Most are long, most are American, and almost none of them deal with the reality of a small or medium-sized UK charity with a thin board, a seasonal income and a regulator that has become noticeably sharper since 2024. None that I have found deal seriously with faith-based charities, whose donors give for reasons that carry their own rules, and whose money arrives in patterns that make long-term planning harder than it needs to be. This book is written for every charity, but it does not pretend those organisations are the same as everyone else.

The title comes from a session I gave at the Prophetic Strategy Summit in Istanbul in July 2026. The question that came back from leaders on every continent that week was the same one: how do I build something that survives me? I think that is the real test of a strategy. Not whether it is beautifully written, or whether the funder liked it, but whether the organisation would still know where it was going and why if its founder, its chief executive or its most energetic trustee left tomorrow.

Kashif Shabir, October 2026.

PART ONE

Before you begin



CHAPTER I

Why charities need strategy, and why most strategies fail

A strategy is a plan that takes you from where you are now to where you want to be. That is all it is. Every tool in this book serves one of three questions: where are we, where are we going, and what will it take to close the gap between the two. If a piece of work does not help answer one of those questions, it is not strategy, however impressive the document looks.



Strategy is the plan that takes you from where you are to where you want to be.

The strategy journey: every tool in this book helps answer one of three questions.

I start here because the word has been inflated. Charities produce documents called strategies that are really fundraising brochures, lists of everything the organisation already does arranged under four or five headings, or statements of aspiration with no route attached. None of these is a strategy in the sense that matters, which is a set of choices that tells the organisation what to do, what to stop doing and what to refuse, and that makes those choices hold when money, people or circumstances push against them.

The case for having one at all

Charities exist to serve a purpose, and the people who give to them, work for them and depend on them are entitled to expect that the purpose is being pursued deliberately rather than by habit. That is a governance argument before it is a management one. The Charity Commission's guidance to trustees, *The essential trustee* (CC3), puts the first duty plainly: trustees must make sure the charity is carrying out its purposes for the public benefit. The same guidance is explicit about planning: trustees are responsible for deciding and planning how the charity will carry out its purposes, and those of larger charities should take responsibility for setting its strategic aims and direction. The refreshed Charity Governance Code, published in 2025 with a new foundation principle and seven principles beneath it, keeps organisational purpose at its centre and expects boards to be clear about the charity's aims and to make sure they are being delivered effectively and sustainably. The law does not require a document called a strategy. It does describe a board that cannot do its job without one.

I put it more bluntly in my own work. A board's first strategic duty is not to approve whatever strategy lands on its desk. It is to make sure a genuine strategy exists at all. Strategy was never meant to sit with the chief executive alone, and a board that treats it as a management deliverable to be noted has misunderstood its role.

The practical case is just as strong. A real strategy makes decisions easier, because most of them have already been made in principle. It tells the fundraising team which money to chase and which to decline. It tells the chief executive which opportunities are distractions. It gives trustees a basis for holding the executive to account that is not simply the latest set of numbers. And it gives staff something to belong to, which matters more in a charity than almost anywhere else, because people often accept lower pay in exchange for meaning.

END OF THE SAMPLE

Continue reading Strategy That Outlasts You

The full book continues with the readiness check, the ten steps from where you are to where you want to be, and how to run a strategy day that ends in decisions.

Every copy comes with seventeen editable Word and Excel templates and the Board Readiness and Strategy Diagnostic, which produces a full PDF report on your board.

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