



Strategy Template

Getting Ready – *Strategy & Business Planning Series*

Strategy Template

OVERVIEW

The Strategy Template has been designed to capture the most important information generated in the strategic planning process. All strategies will be required to be mapped into this template – it is currently in draft form but can and should still be used for your SBP process. As conversations continue around the new global strategy, we will likely need to make some small revisions to the template, but do not anticipate major changes.

The reasons we'll be requiring this template globally include:

- Having a consistent way of communicating our strategy externally ensures that donors, partners, and other stakeholders in the ecosystem that might interact with different parts of our network can quickly recognize who we are and what we do, but also quickly understand what makes the different parts of our network unique.
- By summarizing your strategy, the key initiatives you will pursue to achieve it, and what you will need to do to build the organization capable of delivering it, Habitat for Humanity International will be able to make more informed decisions about network support and more easily monitor the progress.

The Strategy Template consists of 3 pages.

- *Page 1) External Strategy Template:* The simple, 1-page, external summary of your strategy. This is the only external facing component of the Strategy Template. It mirrors much of the narrative progression of Habitat's Theory of Change.
- *Page 2) Program Priorities:* Based on a simple logic model, the table asks for more detail about programs you'll be pursuing in your strategy. This table is designed to be adaptable based on changes that may occur throughout your strategy lifecycle, such as new grants/ awards or a changing operating environment.
- *Page 3): Enabling the Strategy:* Representing a consolidation of the different capabilities required to live into your strategic direction, this table succinctly captures the critical enablers required for change.

We have included a brief summary explaining the template on the following pages. Additionally, you can download a clean version of the template from the International Knowledge Center.



You'll be filling in different pieces of the Strategy Template throughout your SBP process. You can choose to either fill it in as you go or add in the content at the end of the process – and if you utilize an external consultant, they can work with you and your Area Office focal point to input the resulting strategy into this template.

In 2020, Habitat for Humanity adopted its **Theory of Change**, in 2021, we created the **Program Framework** as a way of applying our Theory of Change in our operations. In 2023, the MEAL team began testing a **results measurement framework** and we launched the final regional strategic framework in Asia Pacific.

At the heart of all of these is a greater integration of **people centered development** into program design and the integration of **systems change** in program strategy and measurement.

Affecting change in housing systems requires that Habitat become better at influencing others. Building is and will always be critical to our identity as a network. It is why we have a voice that others listen to. But, with more than 1.6 Billion in need, we will never realize our vision through building alone.

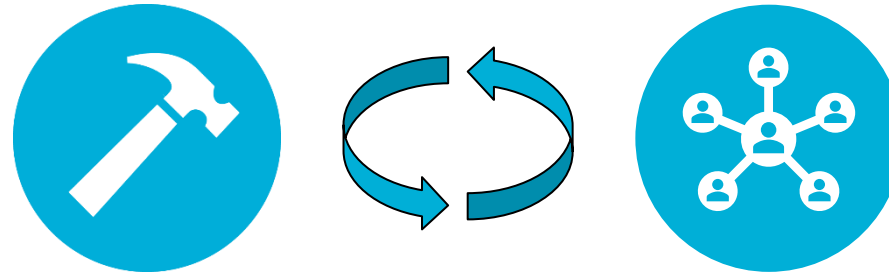
BUILD AND INFLUENCE: We build, so that we can influence, so that others can ultimately build even more.

Build & Influence

Build and Influence is a shorthand that we are using to capture our shift to pursuing sustainable change in the systems that affect access to housing. This is an evolving discussion, but we have reflected it throughout the SBP process and the suggested tools and templates you'll use to complete your strategy.

But what is different?

We have been influencing communities, volunteers, donors and other ecosystem stakeholders for more than four decades. If we go all the way back to our roots on Koinonia farm, building was our way of demonstrating a more inclusive way to live and influencing broader society. So, what has changed?



Intent: First and foremost, is an increased commitment to influencing systems. This includes more investment in the tools, skills, people, and activities that are required to positively influence housing systems. Knowledge, reputation, relationships, and voice are the assets that we'll need to invest in.

Integration: We have often viewed building in isolation from influencing activities. But imagine our network if building, the brand it has helped us cultivate, and the constituents that it has helped us engage, were fully integrated with our attempts to influence. Building becomes an opportunity for demonstration, learning and transfer of scalable solutions; our engagement of communities and broader advocates can become more intentional about education and building political will for positive change; and our ability to convene could be coupled with a more intentional effort to focus attention on promising policies and practices.

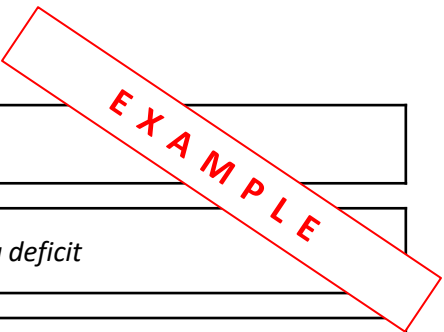


[Country]

Strategic Plan 20XX – 20XX

Example: The housing deficit in X is estimated to be around X and is anticipated to grow to X by X. People across X have trouble accessing adequate and affordable housing due to X, X, and X - and trends such as X, X and X continue to exacerbate the deficit and challenge people’s ability to achieve a decent place to live. In the decades ahead, we need to be prepared for a loss of habitable land and denser cities and work to both help people cope with these challenges and address the systemic failures that allow these trends to perpetuate.

The housing deficit is larger than any one organization could tackle on its own. We build to demonstrate more inclusive solutions; we influence by transferring our knowledge, by advocating for more equitable housing policies and practices, and elevating the agency of the communities we serve so that housing systems can ultimately yield greater volumes of adequate, sustainable housing.



Vision	A world where everyone has a decent place to live		
Sector Target	By 2050, Habitat will contribute to a XX% reduction in [Region’s] housing deficit		
20XX Goal	Habitat will reach XX people in [Country], helping people achieve greater resilience, improved health and well-being and enjoy inclusive, social, educational and economic lives through better access to adequate housing solutions		
Program	Build: Improve access to resilient, sustainable, and affordable housing	Influence: Improve the systems that affect access to resilient, sustainable, and affordable housing	
	Program Short, high-level statement on how you’ll both build and influence in this area		
	Example: Housing Finance for Women & Youth Removing barriers to accessing housing finance for women and youth, helping overcome challenges to accessing funds for housing, while working with sector players to make the housing finance landscape more inclusive through product enhancement and addressing regulatory hurdles.		
Target Populations	Habitat works with people whose housing conditions are inadequate due to systemic exclusion and vulnerability		
	Example: Women	Example: Youth	Example: Religious Minorities
Deficit Drivers	Habitat responds to the stressors and shocks that allow the housing deficit to persist and grow		
	Example: Climate Change	Example: Urbanization	Example: Migration

Why include this information?

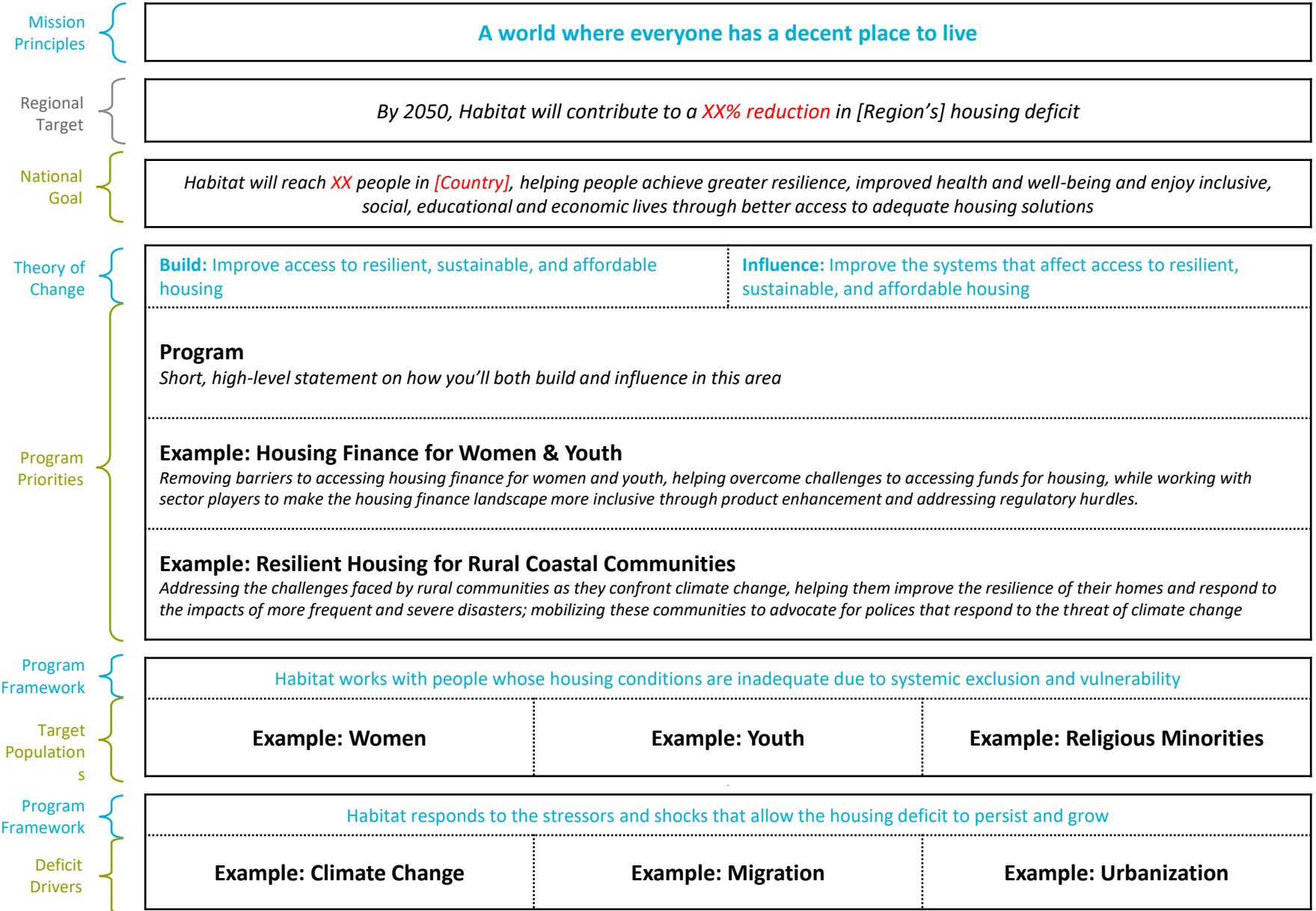
A significant amount of strategic intent is already defined at a global level. Including our foundational mission principles and the more recent development of our “Theory of Change” and “Program Framework”.

The template is designed to integrate our **global strategic intent** with the **local decisions** you’re making for your national strategy.

At the bottom of the template, there is space to identify the marginalized populations that your program will focus on as well as the key stressors, shocks and trends that are driving the growth of the housing deficit in your context.

“**Programs**” define a portfolio of projects aimed at a particular outcome or in response to a particular need. This is where we articulate our contribution to the broader sector goal. Programs need to be responsive to learning and you will not be able to anticipate all of the types of interventions you will pursue. Rather, we recommend you identify your intent and maintain flexibility in project selection. We recommend identifying no more than three program lines.

“**Targets**” are intended to be aspirational but achievable. They communicate the ambition of the plan. We’re recommending a joined-up target based on the reach of your programs. The pages that follow allow for more detailed targets related to individual “Program Lines.”





[Country]

Strategic Plan 20XX – 20XX

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Mission
Vision
Goal
Program
Deficit Drivers
Target Populations

Additional Context

A critical part of communicating your response is communicating your understanding of the problem. The template leaves room for your team tell the story of how you understand the housing problems facing your service area, the populations most affected, and the trends that are shaping need over time. This narrative helps to bring your strategy to life for external audiences.

This section should be kept short, but it is a great place to introduce statistics that support your strategy and communicate the level of need. Think about the numbers that are going grab the attention of your key stakeholders, particularly external stakeholders when filling out this section. Under your summary, you have an opportunity to

communicate the comparative advantage of Habitat in helping to address the housing deficit in your country.

Comparative advantages are the things that differentiate us in the market as a partner of choice for the communities we work with, governments, private sector partners, donors, or any broader constituent groups. The critical element of this definition is that it is a statement of how the value we bring is understood by the market, not just how we understand it internally. This section also provides an opportunity to highlight who you are working with – such as public and private sectors, civil society organizations or the government.

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STRATEGIC EMPHASIS	Program	Outcomes	Outputs, Key Results or Milestones	Key Projects & Activities				
	<i>Ex: Housing Finance for Women & Youth</i>	<ul style="list-style-type: none"> • Increase the proportion of HMF loans going to female headed households • Increase the adoption of housing microloans across the microfinance sector in Bangladesh • Total outside capital invested in HMF products 	<table border="1"> <tr> <td data-bbox="886 339 952 491"><i>Build</i></td> <td data-bbox="952 339 1684 491"> <ul style="list-style-type: none"> • # of woman head of households trained in financial literacy • # of young adults trained in financial literacy • # of products brought to market for incremental housing • # of incremental loans issued to women or young adults </td> </tr> <tr> <td data-bbox="886 491 952 625"><i>Influence</i></td> <td data-bbox="952 491 1684 625"></td> </tr> </table>	<i>Build</i>	<ul style="list-style-type: none"> • # of woman head of households trained in financial literacy • # of young adults trained in financial literacy • # of products brought to market for incremental housing • # of incremental loans issued to women or young adults 	<i>Influence</i>		<ul style="list-style-type: none"> • Informal Settlement Upgrading in Dhaka <ul style="list-style-type: none"> • Objective 2: Financial Literacy Training • Inclusive Rural Financial Systems • HMF Product Development Consulting • Capital investments
<i>Build</i>	<ul style="list-style-type: none"> • # of woman head of households trained in financial literacy • # of young adults trained in financial literacy • # of products brought to market for incremental housing • # of incremental loans issued to women or young adults 							
<i>Influence</i>								

STRATEGIC EMPHASIS

Ex: Resilient Housing for Rural Coastal Communities

Simplified logic models

This template allows you to elaborate the critical outcomes that you hope to achieve through your priority programs. Working your way across the page, you have the option to introduce the key outcomes that you hope to achieve through the program, key outputs and key projects or activities that you will pursue to make that happen. We've added one example to help explain the role of this template in the process.

We are recommending that any such adjustments be part of an annual strategy review process. This is an opportunity to speak with your Board and other Habitat stakeholders about what you're learning, what is working, and why you believe you should adjust the content of your portfolio.

The Results Measurement Framework provides an excellent starting point for building these models as well as some standard indicators that you can use to monitor your reach and effectiveness.

Ex: Inclusive Informal Settlements

The template is designed to be updated over the life of your strategy. We recognize that new projects will come up year on year and that you will likely need to adjust the things that you measure as a result.

We expect that program priorities and outcomes will be the least likely to change over the course of implementation. Outputs will likely shift based on the type of programming you choose to pursue; and projects will shift as funding allows you to scale up and scale back in your program portfolio.

This chart is meant primarily for internal communication, monitoring and reporting on your priority programs and not for external distribution.

Office of Strategy Management ● ● ●

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STRATEGIC EMPHASIS	Program	Outcomes	Outputs, Key Results or Milestones	Key Projects & Activities				
	<i>Ex: Housing Finance for Women & Youth</i>	<ul style="list-style-type: none"> • Increase the proportion of HMF loans going to female headed households • Increase the adoption of housing microloans across the microfinance sector in Bangladesh • Total outside capital invested in HMF products 	<table border="1"> <tr> <td data-bbox="886 339 955 478"><i>Build</i></td> <td data-bbox="955 339 1686 478"> <ul style="list-style-type: none"> • # of woman head of households trained in financial literacy • # of young adults trained in financial literacy • # of products brought to market for incremental housing • # of incremental loans issued to women or young adults </td> </tr> <tr> <td data-bbox="886 478 955 628"><i>Influence</i></td> <td data-bbox="955 478 1686 628"></td> </tr> </table>	<i>Build</i>	<ul style="list-style-type: none"> • # of woman head of households trained in financial literacy • # of young adults trained in financial literacy • # of products brought to market for incremental housing • # of incremental loans issued to women or young adults 	<i>Influence</i>		<ul style="list-style-type: none"> • Informal Settlement Upgrading in Dhaka <ul style="list-style-type: none"> • Objective 2: Financial Literacy Training • Inclusive Rural Financial Systems • HMF Product Development Consulting • Capital investments
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<i>Influence</i>								

Changing how we fundraise

Ex: Resilient Housing for Rural Coastal Communities

- In the past, we have had significant success in selling different types of products and services as programs. We're known for the types of interventions we pursue and the experiences that we offer to our volunteers. Focusing on the tangible output of our work is easy for donors to understand. The house or the opportunity to experience a build is tangible.

By shifting to program priorities, we can have conversations with donors about long-term change around key themes that are driving our program design and decision making. The detailed projects are still critical to finalizing a proposal. But we can have discussions with donors about multi-year partnerships if we invite them to support our effort to "increase access to housing finance for women and youth". We can also tell a better story within that program priority of how activities related to influencing the mindset of communities are just as important as the incremental repairs that corporate volunteer teams supported in a nearby community.

Donor engagement is unique to every donor, but we want to facilitate an engagement that builds partnerships to support long-term systems change. By fixing our program priorities, describing what we are hoping to accomplish through the types of outcomes we're pursuing, and identifying the concrete types of outputs and projects we will pursue in that effort, we are shifting our conversation on impact rather than products and services and opening the door to funding for the range of activities that systems change requires.

Ex: Inclusive Informal Settlements

- However, defining our projects and programs in this way also limits the opportunity for long-term donor engagement in systems change. We limit each ask to a set of projects that are time-bound and this leads to a series of, often annual, renewals of gifts. It also means that deepening engagement is tied more to volume of activity rather than deepening impact.

Objectives	Initiatives	Key Results and Targets
Fund the Mission: Cultivate the pipeline of resources and partners to fuel the growth of programming	<ul style="list-style-type: none"> Develop relationships with FOI donors 	<ul style="list-style-type: none"> Build an active portfolio of projects valued at 5M or more and pipeline of 10M or more with FOI within the next five years
Constituent Engagement: Build and deepen stakeholder engagement to advance Habitat’s mission	<ul style="list-style-type: none"> ... 	<ul style="list-style-type: none"> ...
Systems and Processes: Accelerate our work through improved processes and systems	<ul style="list-style-type: none"> ... 	<ul style="list-style-type: none"> ...
Capacity Building: Build the skills, knowledge and capabilities of Habitat’s staff and Board to advance the mission	<ul style="list-style-type: none"> ... 	<ul style="list-style-type: none"> ...

Building a stronger organization

This last section of the template allows you to dig into what it will take to build the organization capable of delivering on your strategy.

We have identified four key areas of focus to get you started:

- Fund the Mission
- Constituent Engagement
- Systems and Processes
- Capacity Building

These 4 categories are highly recommended for all countries. However, if you need to add additional categories to support your operations, you can. For example, if you primarily work with partners, fund other organizations or have a network of local affiliates, you might need to add a “Network Management” category.

Within each element, you can add specific initiatives aimed at building a stronger organization or optimizing the existing operation. For each initiative, you should develop key results and targets. This page directly builds off the Strategy Map & Balanced Scorecard tool.

This template links most closely with the operational planning process. These are the things that will often require investments of unrestricted funding or staff time beyond what can be included in program proposals. This makes the decision about what to pursue, and how quickly to pursue it, particularly important.

We recommend reviewing and updating this page annually with your team at the start of

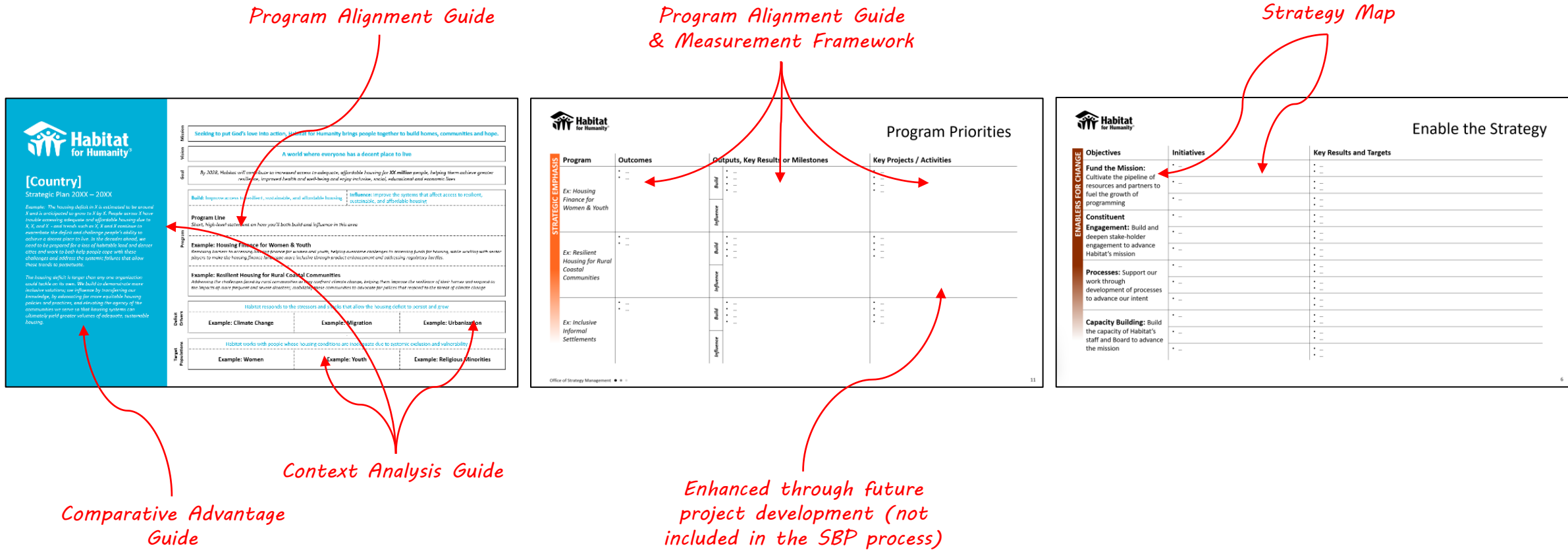
your annual planning cycle. This template is internal facing and generally not meant to be shared with external stakeholders, but it does provide an important way to communicate how you’re building the organization capable of delivering on your strategy.

At a regional and global level, this information informs decision making about how to best support the broader network in enabling their strategies and investment in shared services.

This template is not meant to capture any program-related information but rather focus on your internal operations.

Where does this information come from?

The strategy template has been designed to serve as a succinct summary of the SBP process. The below slide summarizes which phases and tools you'll draw from to fill out your strategy template. We recognize that you may use external consultants to drive your strategy process, so you can work with them and your Area Office focal point to figure out how to use this template with the outputs generated.



<p>[Country] Strategic Plan 20XX – 20XX</p> <p>Example: The housing deficit in X is estimated to be around X and is anticipated to grow to X by X. People across X have trouble accessing adequate and affordable housing due to X, X, and X – and trends such as X, X, and X continue to exacerbate the deficit and challenge people's ability to achieve a decent place to live. In the decades ahead, we need to do more for a more livable and decent place and work to help help people cope with these challenges and address the systemic failures that allow these trends to persist.</p> <p>The housing deficit is larger than any one organization could tackle on its own. The field of alternative energy, inclusive education, and agriculture has influenced our knowledge, by allowing for more equitable housing options and practices, and ensuring the agency of the communities we serve so that housing systems can ultimately yield greater volumes of adequate, sustainable housing.</p>	<p>Seeking to put God's love into action, Habitat for Humanity brings people together to build homes, communities and hope.</p> <p>A world where everyone has a decent place to live</p>
	<p>By 2028, Habitat will continue to increase access to adequate, affordable housing for 20 million people, helping them achieve greater resilience, improved health and well-being and enjoy education, social, recreational and economic gains</p>
	<p>Build: Improve access to resilient, sustainable, and affordable housing</p> <p>Influence: Improve the systems that affect access to resilient, sustainable, and affordable housing</p>
	<p>Program Line Start: High-level statement on how you'll both build and influence in this area</p> <p>Example: Housing Finance for Women & Youth Increasing access to housing finance for women and youth, helping overcome roadblocks to secure funds for housing, better working with service providers to make the housing finance system more inclusive through product enhancement and addressing regulatory barriers.</p> <p>Example: Resilient Housing for Rural Coastal Communities Addressing the medium-term risk to rural communities by supporting climate resilience, ensuring their income the resilience of their homes and required to meet impacts of more frequent and severe disasters, making rural communities more resilient to disasters that result in the loss of coastal change</p> <p>Habitat responds to the stresses and shocks that allow the housing deficit to persist and grow</p> <p>Example: Climate Change Example: Migration Example: Urbanization</p> <p>Habitat works with people whose housing conditions are most at risk due to systemic exclusion and vulnerability</p> <p>Example: Women Example: Youth Example: Religious Minorities</p>

Program	Outcomes	Outputs, Key Results or Milestones	Key Projects / Activities
STRATEGIC EMPHASIS Ex: Housing Finance for Women & Youth	Build	Influence	Build
	Build	Influence	Build
Ex: Resilient Housing for Rural Coastal Communities	Build	Influence	Build
	Build	Influence	Build
Ex: Inclusive Informal Settlements	Build	Influence	Build
	Build	Influence	Build

Objectives	Initiatives	Key Results and Targets
Fund the Mission: Cultivate the pipeline of resources and partners to fuel the growth of programming

Constituent Engagement: Build and deepen stakeholder engagement to advance Habitat's mission

Processes: Support our work through development of processes to advance our intent

Capacity Building: Build the capacity of Habitat's staff and Board to advance the mission
