

Summary toolkit for learned societies

1. Identify your key characteristics as a learned society. Identify other societies in the humanities and social sciences (not necessarily in a related subject area) with similar characteristics in terms of

- Scope of subject or disciplinary coverage
- Size of membership and of income
- Range of activities and audiences

Or Societies who have developed in ways that you think are interesting and may be relevant to your organisational development?

Do any of them have strategies or plans which might help to stimulate your thinking or provide a useful model for how to present your strategy

Are there staff or officers in those societies who would be willing to provide advice?

2. Read the advice on strategies and planning available from sources such as the National Council for Voluntary Organisations' [Knowhow Nonprofit](#) and the Local Government Association's [Planning Advisory Service](#) websites.
3. Draw up a list of the key questions and issues you need to address in the course of formulating a strategy, and the kinds and sources of evidence you need in order to address them, under two main heads:
 - Where are we now: what are our core purposes and how successful are we in achieving them for our members and other stakeholders; are our membership

and our income increasing or declining; how do we relate to other bodies operating in areas close to ours?

- Where do we want to be and how might we get there: how is the environment changing around us and what will the impact of those changes be; what are our ambitions in that changing environment; what challenges do we face and how might we address them; what do we need to do in order to achieve our ambitions; how do we resource those developments; are our governance arrangements and skills adequate to meet changing circumstances; are how might we need to develop our staff skills
4. Secure the agreement of senior officers and staff on a process to determine a strategy, with a timetable for completing the exercise.
- Who is going to lead and who is going to be actively involved?
 - Who else is going to be consulted, at what stage and how?
 - Specifically how will members be involved in the process?
5. Determine the strategy, including objectives and key actions to achieve them, for a given timeframe, and secure endorsement and approval by the governing body.
6. Implement the strategy:
- Communicate it, and the actions to be taken as a result, to the members and other key stakeholders
 - Embed the strategy in financial plans and budgets, business and/or operational plans, and annual work or activity plans for the society, and objectives for members of staff.
 - Monitor progress at least annually, and review the strategy as appropriate.
 - Be clear as to measures of success/what success will look like so that you can celebrate it when you get there.