

**Strategic Plan**

**OAKTREE**  
**FOUNDATION**



*2010-2012*



# Mission

Young people working together to end global poverty



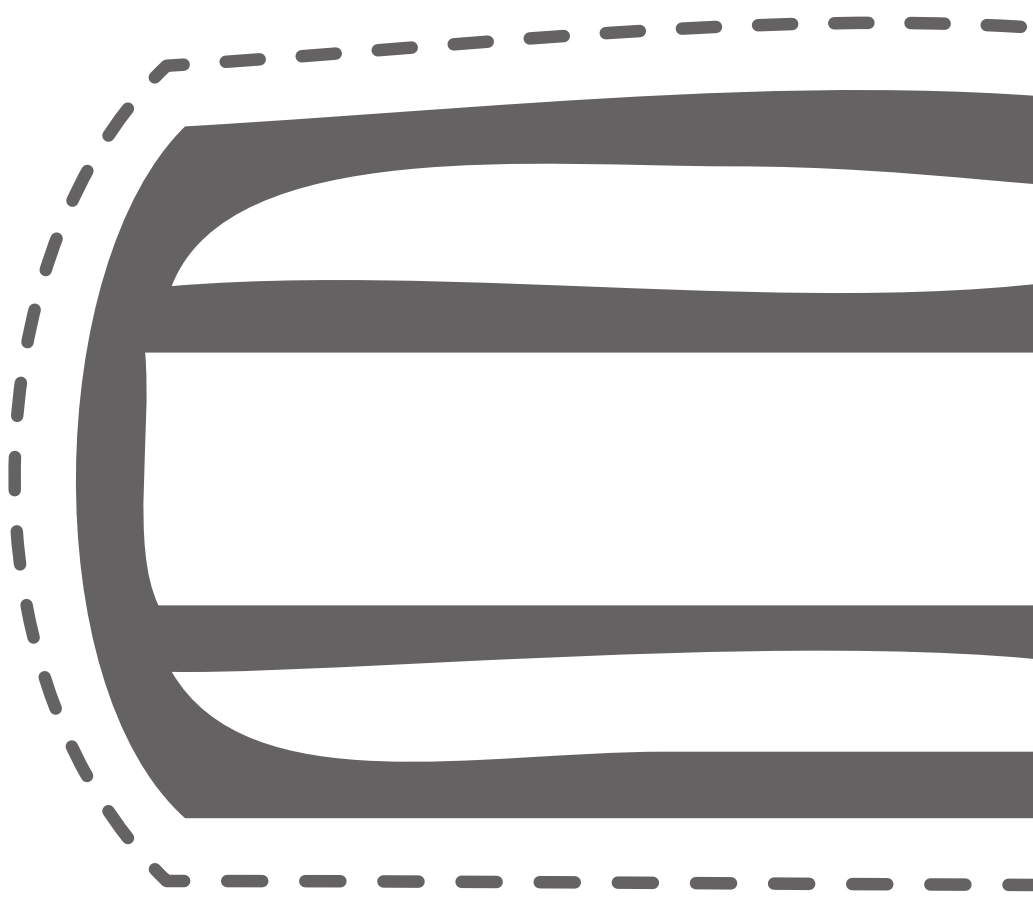
# Vision

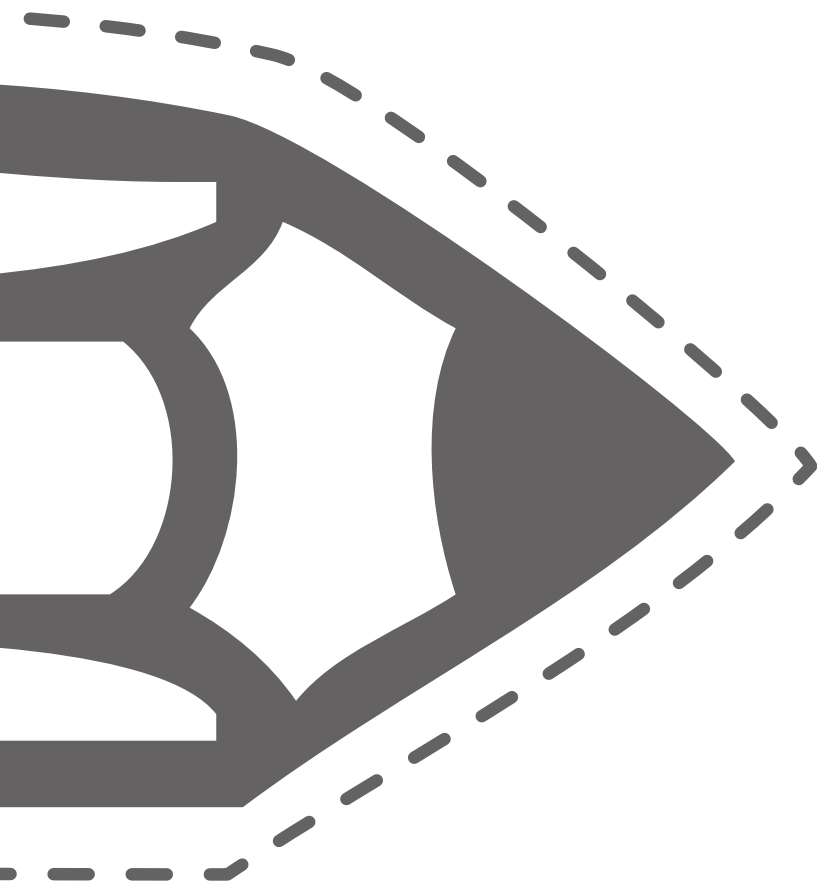
We believe education is the most powerful tool we have to end global poverty.

We partner with developing communities to support quality educational opportunities for young people.

We invest in young people at home to be dedicated and effective agents of change.

We lead a growing grassroots movement for systemic change.





## Goals

By 2013 we will:

- \* Invest \$750,000 each year in projects to support quality educational opportunities for young people in the developing world
- \* Invest in 2500 young people each year to be dedicated and effective agents of change
- \* See Australians and our decision makers take the lead on the realisation of the millennium development goals
- \* Sustain the Organisation

# **OAKTREE**

**FOUNDATION**



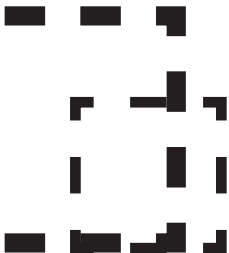


## Contents

	<b>6</b> Principles
	<b>7</b> Strategy
	<b>8</b> Measuring Progress and Success
	<b>18</b> Sustain the Organisation



## Principles



The Oaktree Foundation is a Christian organisation that welcomes people of all faiths or no faith, who share Oaktree's core values<sup>1</sup>, to join with us in achieving our mission. Whilst the motivations of those at Oaktree and the reasons why we share these core values may differ, we are united behind a common mission.

*Our work will be guided by:*

### **Commitment to the poor**

The existence of poverty is our core motivating force, and we strive to put a wholehearted commitment to the global poor at the centre of our decision-making.

### **Partnership**

In working to end global poverty, we see ourselves as part of a broader movement and choose to act in partnership with other organisations to achieve our mission.

### **Return on investment**

We pursue activities that will provide the highest social return on the resources we invest.

### **Accountability**

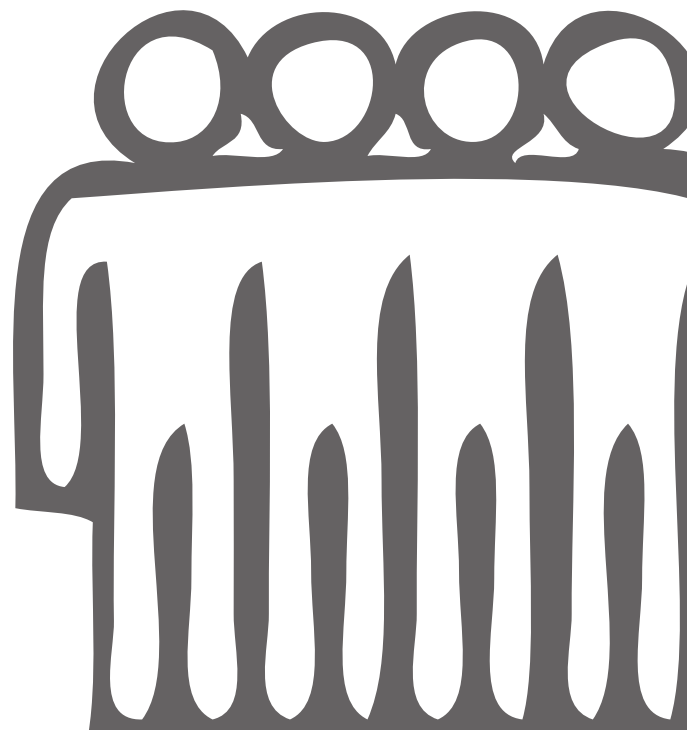
We seek the highest levels of accountability to the public and to our stakeholders for the delivery of our projects and programs.

### **The unique ability of young people**

We believe that young people can be unique agents of social change, and have great untapped potential in the fight against global poverty.

### **Education**

We believe that education is fundamental in empowering people and breaking the poverty cycle.



<sup>1</sup> See Oaktree's Statement of Values.

# Strategy

Our strategic plan doesn't define everything that we'll be doing as an organisation over the next 3 years; it provides high-level guidance by proposing where we will focus in order to be most effective.

It's not an unchangeable road map, rather a set of guide rails, which will help us decide where to and where not to put our energy and resources

## **Invest \$750,000 each year in projects to support quality educational opportunities for young people in the developing world**

*Between 2010 and 2013, our key strategic paths to achieving this will be:*

- ✦ To create high return revenue models from our core programs
- ✦ To build and develop a Signature annual fundraising campaign
- ✦ To build and develop a targeted ongoing giving strategy

## **Invest in 2500 young people to be dedicated and effective agents of change**

*Between 2010 and 2013, our key strategic paths to achieving this will be:*

- ✦ Focusing on developing a few excellent core products  
(Schools 4 Schools, Generate)
- ✦ Increasing development literacy in the organisation and our core programs
- ✦ Diversifying the base of young people we engage with at home

## **See Australians and our decision makers take a lead on the realisation of the Millennium Development Goals**

*Between 2010 and 2013, our key strategic paths to achieving this will be:*

- ✦ A high impact, large-scale mobilisation that peaks every two years
- ✦ To establish a dynamic platform for open source activism
- ✦ To develop an agile and tactical capacity to respond to current issues
- ✦ To build the capacity to consistently produce compelling communications

## **Sustain the Organisation**

*Between 2010 and 2013, our key strategic paths to achieving this will be:*

- ✦ Establishing an industry-leading volunteer program that is effective, resourced and sustainable
- ✦ Establishing a \$3million Future Fund
- ✦ Implementing processes and capacity that ensures compliance
- ✦ Implementing effective and holistic approaches to knowledge management



## Measuring Progress & Success

### *These are our Aspirational Targets*

As an organisation we are committing to these figures and the future they represent, but not in the strong sense that annually proposed targets will suggest (the ones we determine in consultation on a yearly basis).

These figures are best understood as a representation of the future we are striving for, and an understanding of the path towards them, than as non-negotiable targets that we will all be held to on a year-by-year basis. Having said that, they are carefully considered aspirations that we believe are very much achievable, albeit given the difficulty in predicting the future with any certainty.

It provides the intersection between the question 'Where do we want to be in three years time?', and 'Realistically where do we think we could be in 3 years time?', and guides in a stepwise fashion to that point ('Where do we need to be at the end of each year in order to get there?').

These estimates have been carefully modelled based on current trends, but of course remain open to annual review.

*Does this prevent us from making any strategic decisions other than those outlined in the document?*

No. Of course, no organisation can afford inflexibility, and both a review of our internal strengths and weaknesses, and a review of our external opportunities and threats as they are all better understood with time, will be expected to propose modifications to the strategic plan. Accordingly, this strategic plan will be reviewed annually, and every strategic decision weighed up against it. This is a living document. But by putting in place this foundation, we make it clear that we always want to be thinking about the ramifications of our decisions with a three-year horizon.



**Investing \$750,000 each year in projects to support quality educational opportunities for young people in the developing world.**

	KPI	2010	2011	2012
Quantity	Dollars invested in the developing world	\$311,672	\$500,000	\$750,000

	KPI	2010	2011	2012
Alignment with Philosophy	Money invested in line with our project philosophy (completed and confirmed by February 28, 2010)	n/a	Yes	Yes
Quality	% of Oaktree Quality Measures met by our projects (measures completed by March 31, 2010)	n/a	80%	80%



Between 2010 and 2013, our key strategic paths to achieving this will be:

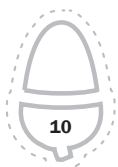
**\* Create high return revenue models from our core programs**

We believe that a central part of sustained focus on our core programs (Schools 4 Schools, Generate) is the improved ability of them to be a significant financial contributor to our development projects. Our program teams are committed to this, and over the next three years we expect sustained growth in their performance.

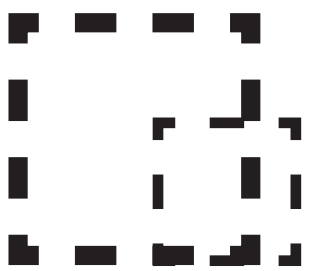
**Our targets:**

S4S	2010	2011	2012
% of schools that meet fundraising targets	65%	70%	75%
Funds raised <sup>2</sup>	\$165,600	\$270,000	\$432,000

Generate	2010	2011	2012
% of State Branches that meet fundraising target	80%	80%	80%
Funds raised <sup>3</sup>	\$94,000	\$160,000	\$180,000



2 See appendix for breakdown: Metric Breakdown – Investing in educational opportunities.  
 3 See appendix for breakdown: Metric Breakdown – Investing in educational opportunities.



**\* Signature annual fundraising campaign**

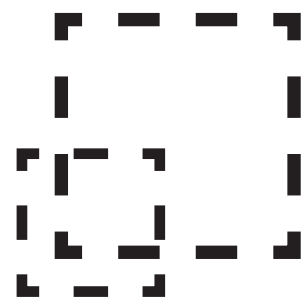
Oaktree will invest in a signature brand that would be used each year. The brand would become a high return on investment model, requiring comparatively little resources to run each year. Of course, this means simultaneously growing the capacity for state-based fundraising in our State Branches, which we are committing to doing.

**Our targets:**

	2010	2011	2012
Funds raised through annual campaign	\$115,000	\$150,000	\$200,000
Number of State Branches feeling adequately resourced to implement signature campaign	4	5	6

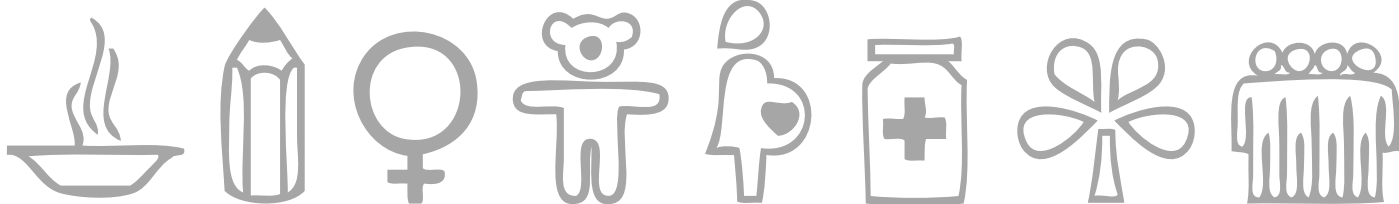
**\* Targeted ongoing giving strategy**

We are planning for an ongoing giving program to be a significant contributor to our fundraising by 2012, although accept that progress will be slow. In moving towards a comprehensive ongoing giving program, we need to begin by targeting particular audiences. Our first target market will be young professionals. We see particular opportunity in working better with the Oaktree alumni, many of whom are now working full time, and hopefully have seen the value of our work firsthand.



**Our targets:**

	2010	2011	2012
Percentage of funds raised through ongoing giving	0%	1%	5%



## Investing in 2500 young people each year to be dedicated and effective agents of change.

A dedicated agent of change is connected to the cause to eradicate poverty, committed to action and believes in the possibility of change.

An effective agent of change is influential (towards individuals, their community and decision makers), active and equipped (with skills and knowledge).

### KPI's:

Quantity <sup>4</sup>	KPI	2010	2011	2012
S4S	Number of participants	621	1140	1550
Generate	Number of participants	250	380	450
Campaign	Number of committed participants (not in S4S or Generate)	800		1000 <sup>5</sup>
Total		1671	2020	2500

Quality	KPI	2010	2011	2012
Dedicated and Effective Agents of Change	Median 'Dedicated and Effective Matrix' score	60%	70%	80%

4 Estimates of numbers are broken down in the appendix – Metric Breakdown: D+E Agents of Change.

5 Note that here the suggestion is 1000 people to be involved in high impact, large-scale campaign, which would most likely take place in 2012. However, to annualise the return for Dedicated and Effective agents of change, this is allocated 500 per year. Gaining clarity on the nature of our campaigning in 2011 and 2012 is a large question to be answered throughout January and February. At this point this strategic plan is recognising that it appears unrealistic to run something of the scale of the Road Trip annually, and that a large part of our campaigning is foreseen to be done through open source activism, which will not directly contribute to our work in developing dedicated and effective agents of change.

6 Under the proposed 'Dedicated and Effective Matrix', participants are given a score out of 10 for each attribute of dedicated (connected, committed, believes) and effective (influential, active, equipped). This score would be given to them by their direct overseer in the program (ie a S4S mentor, or a Generate facilitator). This matrix will be developed by 1st March 2010.



Between 2010 and 2013, our key strategic paths to achieving this will be:

**\* Focusing on developing a few excellent core products  
(Schools 4 Schools, Generate)**

Rather than spreading ourselves thinly, the way forward for Oaktree is to focus our resources into our core programs, developing them in their ability to meet their outcomes. These programs are Schools 4 Schools and our Generate entry-level volunteering program.

The standard of our core products will be measured by a) the achievement of desired outcomes and b) the level of participant satisfaction.

**Our targets:**

S4S	2010	2011	2012
Median dedicated and effective score for S4S participants	60%	70%	80%
% of schools that meet fundraising targets	65%	70%	75%
% of schools which report a high level of satisfaction	80%	85%	90%

Generate	2010	2011	2012
Median dedicated and effective score for Generate participants	60%	70%	80%
Median dedicated and effective score for Generate participants	80%	80%	80%
% of participants which report a high level of satisfaction	80%	85%	90%

**\* Increasing development literacy in the organisation and our core programs**

Central to the development of dedicated and effective agents of change is a holistic understanding of development work. Our participants and volunteers need to be aware and engaging with the issues facing developing communities, and to do with development work.

**Our targets:**

<i>Increased Development Literacy</i>	2010	2011	2012
% of volunteers who feel confident to explain the basic features of our projects and needs met	75%	80%	90%
% of volunteers who feel confident to speak with understanding on issues facing developing community and regarding development work, (particularly: How the MDG's work; Role of education in development; Oaktree's development philosophy; Common objections to development work)	60%	70%	75%

**\* Diversifying the base of young people we engage with at home**

We want to be an organisation that unites Australians from any and every background to work towards the end of global poverty. This is central to our ability to lead a growing grassroots movement of Australians.

**Our targets:**

<i>Diversified Base</i>	2010	2011	2012
% annual increase in program participants from either a low socioeconomic or disadvantaged background <sup>7</sup>	10%	10%	10%

<sup>7</sup> Whilst perhaps a crude estimate, the standard approach to measuring this is according to postcode. The Australian Bureau of Statistics assigns to each postcode a level of socioeconomic status (high, medium or low).

## See Australians and our decision makers take a lead on the realisation of the Millennium Development Goals

A lead on the realisation of Millennium Development goals a commitment from our decision makers to increased spending in quality aid, and also the support of the public for it.

<i>Decision makers</i>		<i>KPI</i>	<i>2010</i>	<i>2011</i>	<i>2012</i>
Quality aid <sup>8</sup>	% of agreed donor targets met, as prescribed by OECD high level forums on aid effectiveness (Paris 05, Accra 08) <sup>9</sup>			80%	100%
Quantity	Government commitment to 0.7% of GNI by 2015		No	No	Yes

<i>Australians</i>		<i>KPI</i>	<i>2010</i>	<i>2011</i>	<i>2012</i>
Recognised mainstream support for a movement behind the MDG's	% of Australians who believe the government should spend more on foreign aid <sup>10</sup>		45%	50%	60%

<sup>8</sup> Our targets here regarding quality aid are not aspirational, recognising our inability to directly influence. Rather, they recognise explicitly and quantitatively the need for quality of aid to be always alongside quantity of aid in any discussion about aid leadership from Australia.

<sup>9</sup> The Paris declaration set 2010 targets for 12 indicators of quality aid. Our progress could be summed up as being adequate – currently on track for achieving 6. For more information see <http://www.oecd.org/dataoecd/58/41/41202121.pdf>.

Progress reports anticipated to arrive every two years (in 2010 and 2012).

<sup>10</sup> Surveys conducted by AusAID every 3-4 years estimate the number of Australians who think the government should spend more on foreign aid: 1998: 24%, 2001: 34%, 2005: 39%, 2009: 42%.



Between 2010 and 2013, our key strategic paths to achieving this will be:

**\* High impact, large-scale mobilisation that peaks every two years**

By high impact, we mean action that engages both the public and politicians in a significant way: a large-scale, organisation-wide, strongly-media recognised venture. As we look to the future we want to consider committing to a venture of this scale every two years.

We have seen the ability of our organisation to pull-off high impact, large-scale campaigns, and the growth and recognition we gain from them (MPH Concert 2006, ZEROSEVEN, 2010 Road Trip) – yet we also recognise the significant amount of effort and resourcing they require to implement.

**Our targets:**

S4S	2010	2011	2012
Number of direct participants in mobilisation	1000		1200
Number of people reached through quality media hits	10million		15million
Number of people that engage with a politician through our campaign (including low-level modes - sending an email)	1000		2000

**\* To establish a dynamic platform for open source activism**

Open source activism involves creating the platforms, resources, objectives and focal points necessary to mobilise a distributed network of campaigners to take action within their own communities in a meaningful way. It is low resource intensive and highly scalable as a model for activism. It allows for actions to be taken in local communities, which is ultimately far more powerful than centralised action.

**Our targets:**

S4S	2010	2011	2012
Size of active source database <sup>11</sup>	20,000	40,000	80,000
% of database taking offline action	1%	2%	3%
% of database taking online action	5%	7%	9%

<sup>11</sup> Currently our database stands at approximately 12,000. 35,000 people participated in Face Up To Poverty, giving as an indicator of what level of access is achievable (ie we missed the opportunity to maintain the database of participants from Face Up).

**\* To develop an agile and tactical capacity to respond to current issues**

Regular events will take place, and issues will be raised before the eyes of the public, to which a response from Oaktree would be valuable. The nature of these events could range from corporations making a decision to align with Fairtrade, to a global summit, to a relevant political announcement.

**Our targets:**

	2010	2011	2012
Number of current events to which Oaktree is recognised publicly as having responded	4	7	12

**\* Build the capacity to consistently produce compelling communications**

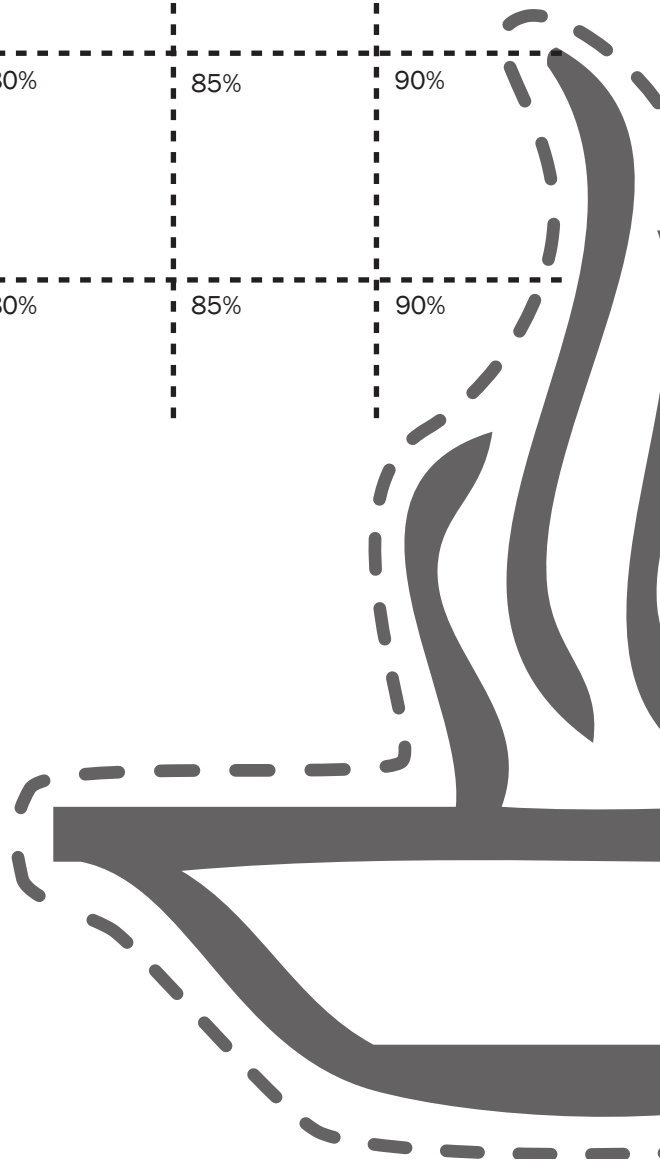
Central to effective advocacy is compelling communications. Over the next three years we are committed to investing in this aspect of our organisation.

**Our targets:**

	2010	2011	2012
% of focus group that regard our communications as compelling	50%	75%	80%

## Sustain the Organisation

Area	KPI	2010	2011	2012
Finance	% of turnover in uncommitted cash reserves	TBA <sup>12</sup>	TBA	TBA
Governance	% of reports to key regulatory bodies completed accurately and on time	100%	100%	100%
Infrastructure	% of ideal infrastructure provided	80%	85%	90%
Human Resources	% of required positions filled by November of preceding year	80%	85%	90%



<sup>12</sup> By January 1, 2010 we will have a policy here that this will align with.

Between 2010 and 2013, our key strategic paths to achieving this will be:

**\* Establishing an industry-leading volunteer program that is effective, resourced and sustainable**

We believe that our volunteer program needs to be recognised alongside our core programs and campaigns as a central part of what we offer as an organisation. Our organisation is committing to achieving recognition for this program as excellent over the next three years. We would also like to note here that a crucial cog in a sustainable and effective volunteer program is the establishment of community. Being part of Oaktree should be an enjoyable, relational experience.

**Our targets:**

	2010	2011	2012
% increase in average volunteer life span	20%	20%	20%
% exit interviews reporting satisfaction with Oaktree volunteer experience	60%	70%	80%

**\* Establishing a \$3million Future Fund**

The purpose of the Oaktree Future Fund is to develop and maintain a sustainable funding base for the Oaktree Foundation. By 2012 we will have built up a \$3million endowment fund that will be this base into the future, a large part of our strategy to ensure our long-term sustainability.

**Our targets:**

	2010	2011	2012
Future Fund Balance	\$0.75million	\$1.5million	\$3million



**\* Implement processes and capacity that ensures compliance**

Central to sustainability is our compliance with relevant regulatory bodies, to ensure we meet the necessary standards for our work. Oaktree is explicitly committing to working to ensure this.

**Our targets:**

	2010	2011	2012
% of indicators complied with in ACFID code	100%	100%	100%
% of core Finance, Compliance & Operational reports completed accurately and submitted to the Board on time	100%	100%	100%

**\* Effective and holistic approaches to knowledge management**

An organisation’s overall performance depends heavily on the extent to which its members can mobilise all of the knowledge resources held by individuals and teams and turn these resources into value-creating activities. Crucial to sustained growth is effective and holistic approaches to the management of knowledge – developing, retaining and sharing it.

**Our targets:**

	2010	2011	2012
% of volunteers regularly using centralised information base	50%	60%	70%
% of projects, campaigns and initiatives which have completed assessment and documentation requirements	75%	80%	85%



