

Our Strategy

“Never doubt that a small group of thoughtful, committed citizens can change the world; indeed, it's the only thing that ever has.”



Margaret Mead



Introduction

This three year strategy comprises...

- An explanation about why Caplor Horizons exists
- Insights about our five priorities
- One page summary information in different formats



“This picture was taken at a gathering devoted to developing the ‘Caplor House’, our exciting new model for developing organisational effectiveness and leadership”

Liza Bewick, Business Development Advisor



Why Caplor Horizons?

- An overview - written by Charles Handy
- Our purpose, vision, mission and values
- What do we do?
- The Caplor House model
- What makes us different?

Strategic priorities: April 2015 to March 2018

- An overview
- Talent team
- Programmes and services
- Support base
- Impact
- Forum
- Top ten achievements by March 2018?

One page summary

- Diagrammatic format
- Picture format
- Still life format

Why Caplor Horizons?



Overview

“Caplor Horizons is a not-for-profit organisation. It was created to help charitable organisations think differently about themselves and the new horizons that they face. At the same time it provides opportunities for those able and willing to contribute their time and expertise for the lasting benefit of society.

Caplor is a farm in Herefordshire in the UK where Ian Williams, the founder of Caplor Horizons, spent his youth. It now lends its name to the organisation that he established, a charity that works for charities.

Caplor Horizons exists to help other organizations strengthen their leadership, renew their strategy and improve their influence, using their own model of learning, the Caplor House. In this way it aims to improve their effectiveness and ensure their sustainable future.”

*Written by Charles Handy for a booklet that Liz Handy
and he created about Caplor Horizons*



Charles Handy, Social Philosopher and Management Guru

Picture by Liz Handy

Our Purpose, Vision and Mission



Our Purpose

To inspire and enable leaders to deliver a sustainable future.

Our Vision

A world in which social, environmental and economic progress is balanced.

Our Mission

To make a remarkable contribution to organisational effectiveness and leadership within the not-for-profit sector.



“The world is facing immense challenges. Yet many opportunities for positive transformation exist.”

Jean Sellar
Partnerships and Programmes
Co-ordinator

“We must all think differently and take more steps to help bring about a sustainable future.”

Usha Ladwa-Thomas
Vice Chair of Trustees, Sustainability Advisor



Our Values



Inspiration



Improvement



Sustainability

Inspiration

Inspire people to think differently.

Improvement

Enable people to improve.

Sustainability

Help balance environmental, social and economic progress.



“Be the change that you want to see in the world.”

Gandhi

“Our values are at the heart of everything we do.”

Lorna Pearcey, Director of Development



What do we do?



“We are specialists in
organisational effectiveness
and leadership development.”

*Will Odling
Management and Leadership Advisor*

We will contribute to a movement for change. Our practical focus is on three activities...

- Facilitating the review and development of organisational visions and **strategy**.
- Carrying out **leadership** and team development programmes.
- Helping strengthen the abilities of individuals, teams and organisations to **influence** change.



What do we do?

“We are mainly a charity to other charities, but we work with responsible businesses too.”



Olivia Sawyer
Charity Services Advisor

We focus on small and medium sized charities - organisations that would otherwise struggle to afford such services

We have a team of highly talented Advisors - dedicated people that contribute their time as volunteers or at reduced rates

We align ourselves with strategic partners - so that we can leverage the difference we make

We concentrate on long term, organisational effectiveness – the learning from which we share with anyone who is interested



The Caplor House

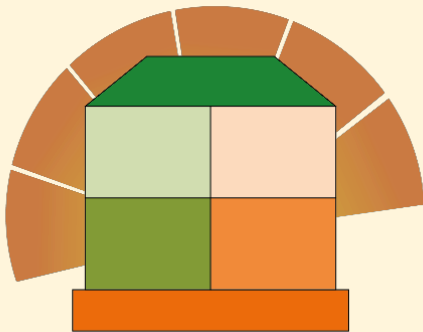
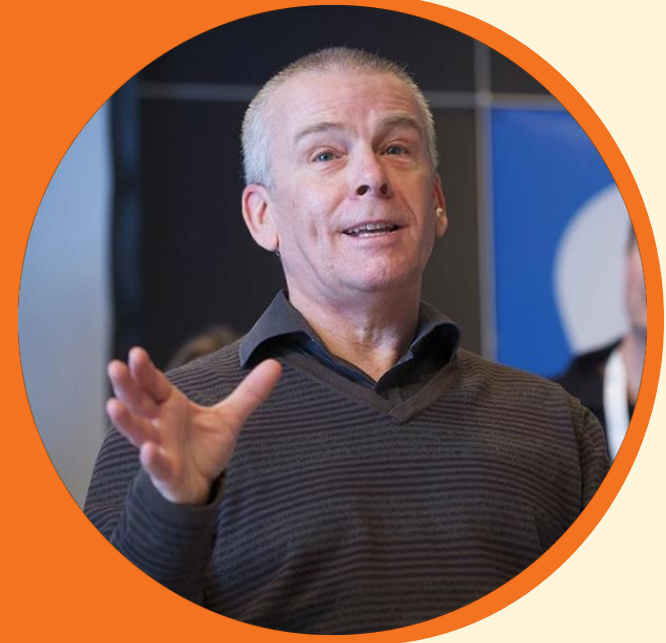


“We have created a unique model for learning, the ‘Caplor House’.

The Caplor House is an integrative organisational effectiveness and leadership development model that inspires and enables learning.

Based on our initial construction, we built the House with other people from Caplor Horizons. It has become **the DNA** of the organisation. It enables consistency in the design and delivery of our work”

*Ann Alder, Experiential Learning Advisor and
Dr Geoff Cox, Learning Design Advisor*



The Caplor House

“The Caplor House has...

- A solid foundation, based on effective learning
- Four rooms, linked to peoples thinking preferences
- A sheltering roof - holding within it the keys to enabling a sustainable future.”

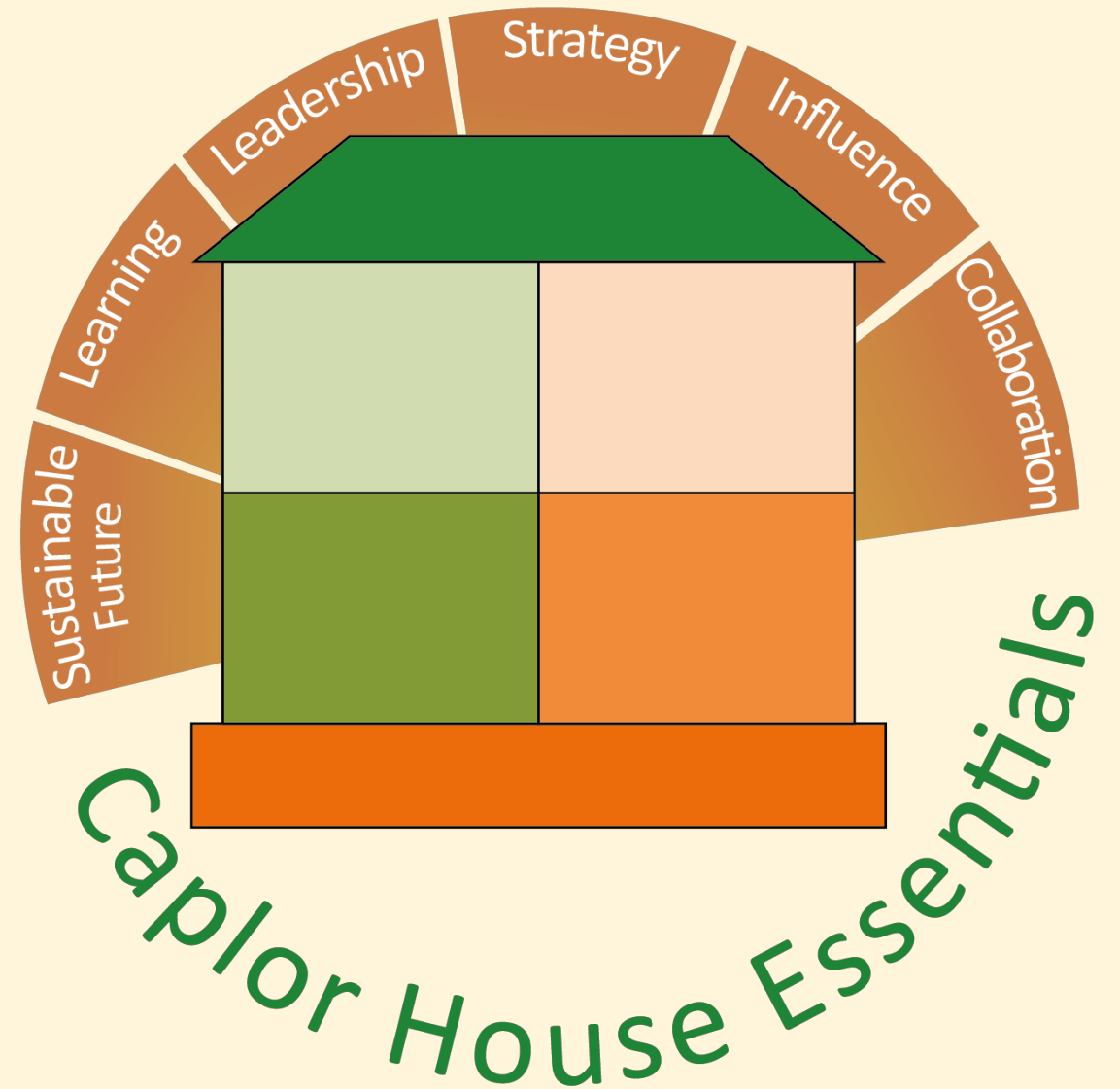
Simon Oldroyd, Marketing Advisor



The Caplor House

“During 2015 we put the final touches on the Caplor House model. Based on this, we then created a core curriculum for organisational effectiveness and leadership development: this is called The Essentials series.”

Vicki Howe, Sustainability and Leadership Development Advisor



What makes us different?



We have a remarkable group of Advisors that contribute their time as volunteers or at reduced rates. This enables us to provide very high quality services and programmes at an accessible cost.

We have a unique model for learning, the Caplor House.”

Sally Ross, Charity Development Advisor



“If you want to go fast, go alone.
If you want to go far, go together.”

African Proverb

“We will keep our organisation small and our costs low. However, we will grow the scale of our work through our approach being adapted and adopted by others”.

John Berry, Business and Marketing Advisor



What makes us different?



“Caplor Horizons is an independent charity and part of the Caplor Group. We want to inspire others about how business and not-for-profits can work together towards a bigger purpose.”

*Gareth Williams, Managing Director:
Caplor Energy, Caplor Property and Caplor Farming*



Picture of Caplor Hill and Caplor Farm in Herefordshire, UK

Three Year Strategy - Overview

Caplor Horizons was established in April 2014

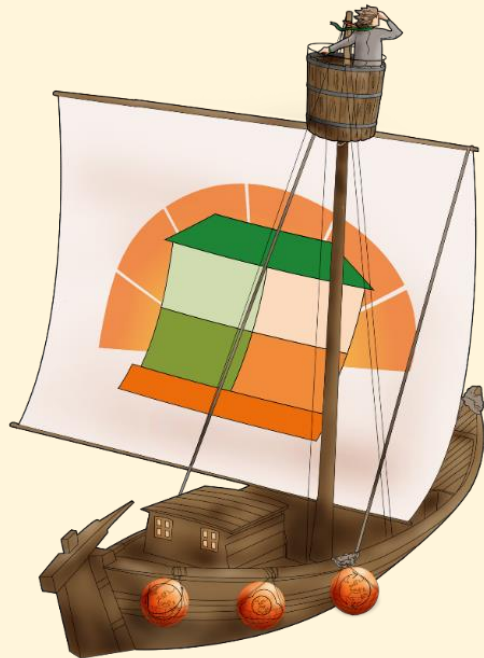


“This strategy is for three years: April 2015-March 2018. It will be shaped by our experience and learning: **the ship will be built as it sails along.**”

*Professor Sharon Turnbull
Organisational Development Advisor*

“As we look out to the horizon, five strategic priorities guide us. Small teams of Advisors and staff lead on each. Plans are developed to make each priority a reality.”

Rachel Ritchie, Environmental Advisor



- Priority one:** Develop a formidable Talent Team
- Priority two:** Design and deliver high quality, bespoke services and distinctive programmes
- Priority three:** Build a strong support base
- Priority four:** Improve impact
- Priority five:** Develop a ‘Forum’ – a learning platform

Priority 1 – Talent Team



“By March 2018, our target is to have 75 Advisors, all contributing at least one day per year. By March 2016 we had 50 Advisors. We will keep strong relationships between everyone involved. I work with a small Talent Team group. Our role is to develop plans and review progress.”

Sandy Hanson, Talent Team Advisor

“This is an opportunity for you to do the best work you’ve ever done! Let us know if you are interested in becoming involved. And, if so, what is your unique contribution? For background about the people already involved, see the Team section of our website.”

John White, Chair of Trustees, Business and Leadership Development Advisor



Priority 1 – Talent Team

Inter-connected elements

- Primacy of relationships
- Unique contribution
- Diversity
- Human Scale



“We all need to keep thinking differently about ourselves and the new horizons we face.”

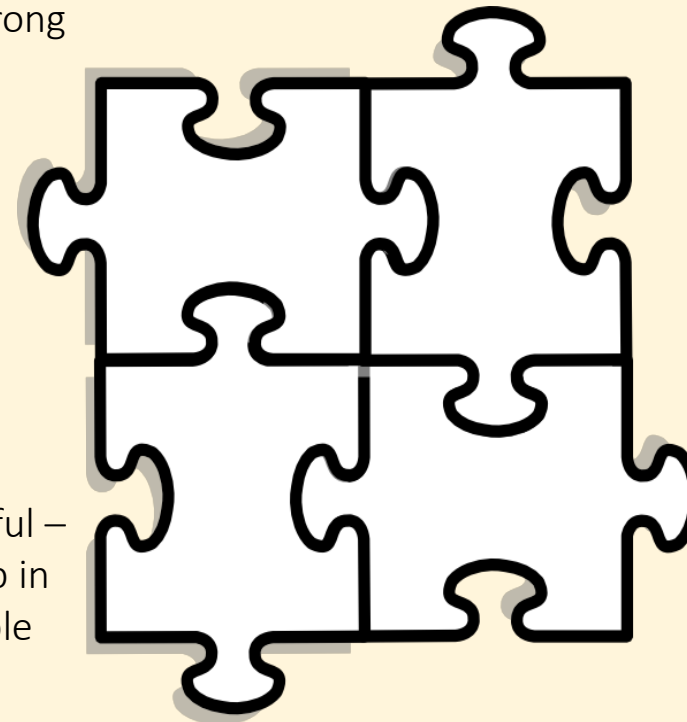
Mike Lloyd, Trustee, Chair of Finance Committee

Primacy of relationships

Maintaining strong relationships is central to the way we work

Human scale

Small is beautiful – we will develop in ways that enable us to keep a human scale (around 150 people involved) e.g. a federal structure



Unique contribution

Creating distinctive opportunities for people to do the best at what they are best at for the benefit of others

Diversity

The strength of the weave is in the different threads – we need a strong, diverse team working together in complimentary ways

Priority 2 – Services and Programmes



“By March 2018 our target is to have provided services to over **50 clients** (over 20 in 2015/16) and over **5 programmes** (3 in 2015/16).”

Lord Paul Tyler CBE, Advocacy Advisor

“If your actions inspire others to dream more, learn more, do more and you become more, you are a leader”

John Quincy Adams



Priority 2 – Services and Programmes



“Many of the organisations that we have worked are cited in this section. Case studies and testimonials are on our website.”

Denise Mulligan, Leadership Development and Coaching Advisor



CITY UNIVERSITY
LONDON

Centre for Charity Effectiveness



Priority 2 – Services and Programmes

Provide high quality, bespoke services and distinctive programmes



“We provide mentoring and coaching to strengthen our work on leadership.”

Sue Stockdale, Inspirational Speaking, Coaching and Leadership Advisor



Vennture

KENTUNION
Building a better future for students



The CB and HH Taylor Trust



Priority 2 – Services and Programmes



“To date we have designed and delivered three programmes:

An Effective Humanitarian Leadership programme with 44 Red Cross leaders - in collaboration with the International Centre for Humanitarian Affairs (ICHA), part of the Kenya Red Cross.

A programme to improve how organisations influence policy with 24 organisations in the West Midlands delivered by Lord Paul Tyler CBE and Lorna Pearcey. Also organising national level presentations to the not-for-profit sector by Charles Handy

A Sustainable Leadership Development programme with 28 NGO leaders in Uganda - in collaboration with the Welsh Government.”

*Hannah Newcomb, Corporate Social Responsibility Advisor and
Bill Ross, Leadership Development Advisor*



Priority 3 – Support Base



“We earn income from the clients we work with. Our supporters also provide very important financial help by enabling us to work with clients that would otherwise struggle to meet the full costs of services we provide.”

*Richard Harvey, Strategy Advisor
(former CEO of Aviva; Chair of PZ Cussons)*

“We are growing our membership. By March 2018 we will have 4 times the number of individual members that we had in 2014/15; and 5 times the number of organisational supporters.”

Dr Ann-Marie Brouder, Sustainability Advisor



*“Rather than being passive donors, we prefer that people **contribute to a cause** that they believe in”*

*Rupert Cadbury, Philanthropy Advisor
(Business Director; Trustee of Cadbury family Trusts)*



Priority 4 - Impact



“We will prove and improve the difference we make by reviewing our **impact**. Each year we produce Impact Reports. To date we have also carried out three substantial evaluations of programmes.”

David Coates, Leadership and Coaching Advisor

“Everything we do with our Advisors and clients has some form of **exchange** involved. We want to ensure that those exchanges are as productive, meaningful and positive as possible.”

William Eccles, Conservation Advisor

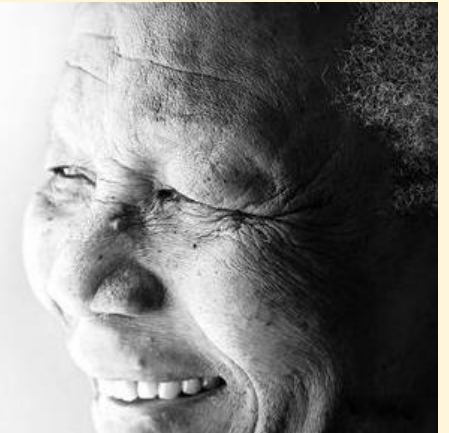


“We will assess and increase the difference that we make, not only with the clients that we work with, but also with the Advisors who design and deliver our services. We will benchmark against similar organisations and strive to reach the **top of the league**.”

Laura Vickery, Corporate Social Responsibility Advisor

*“Action without vision
is only passing time,
vision without action
is merely day dreaming,
but vision with action
can change the world.”*

- Nelson Mandela



Priority 5 – The Forum



“We will increase the difference we make via our online Forum. The Forum will be a place for collaboration, resources, systems, learning and communications.”

*Professor Ian Bruce, Charity Effectiveness Advisor
(Founder of the Centre for Charity Effectiveness, Cass Business School
and former Director General, Royal National Institute of the Blind)*



“By March 2018, more than a 1000 people will have engaged with us.”

Deven Thakkar, IT & Web Development Advisor

“During 2015/16 we engaged with over 500 people.”

Vanessa Bradbury, Social Media Advisor



Top 10 achievements by March 2018?

- We will have a highly experienced and diverse team of 75 Advisors. These will largely be based in the UK and will be connected, through strong relationships, to a small staff team of 5 people. We will also have an effective group of trustees, with 10 people on our Board.
 - Our Advisors will be involved with delivering work with clients. They will also contribute to other activities, such as helping build the supporter base.
 - Our staff will be involved with developing relationships between Advisors and clients. They will also directly deliver activities.
 - Our Board will compliment their governance responsibilities by engaging with our clients.
 - We will have worked successfully with over 50 clients, proactively developing strategic relationships when appropriate.
 - We will have significantly progressed our unique model of learning - the Caplor House. And the curriculum of programmes stemming from this - the Essentials Series.
 - We will have enabled anyone who is interested to gain insights, at no cost, into the Caplor House model via an online tool.
 - We will have created over 25 resource papers. We will also make these available online and at no cost.
- We will have provided our Advisors and staff with the skills and knowledge that they need to deliver the Caplor House model and Essentials Series.
 - We will have sought out key people within our existing client and contact base that are agents for change within their organisations.
 - We will provide them with the opportunity to know how to apply the Caplor House and Essentials Series subject matter that they have learnt. They, in turn, can then deliver it within their organisation and the wider community. Online resources will support them in their ongoing application of the content.
 - We will have targeted developing relationships with new clients and contacts that can leverage the difference we can make. This approach will help us to stay small whilst extending our reach and multiplying our impact.
 - We will have between a half and three quarters of our income from fees paid by clients.
 - We will have produced an Impact Report every year, each one improving on the last one.
 - We will have a highly effective on-line forum.
 - We will have established an organisation that can be replicated.



TOP 10

Our Strategy – Summary On A Page

Diagrammatic format

We are specialists in organisational effectiveness

We concentrate on three activities

- Leadership
- Strategy
- Influence

We have a unique Caplor House model for learning that enables us to work in a highly distinctive way.

We provide high quality services and programmes at an accessible cost via our Advisors and staff

Our Advisors are experienced & skilled people who are committed to contributing their time as volunteers or at reduced cost

We are a charity to other charities. And we work with responsible businesses too. Our focus is small and medium sized organisations



Our Purpose

To inspire & enable leaders to deliver a sustainable future

Our Vision

A world in which social, environmental and economic progress is balanced.

Our Mission

To make a remarkable contribution to organisational effectiveness and leadership within the not-for-profit sector.

Our five Strategic Priorities: April 2015-March 2018

Develop a formidable Talent Team

By March 2018: retain 75 active Advisors (over 50 in 2015/16)

Provide high quality, bespoke services and distinctive programmes

By March 2018: to have provided services to over 50 clients (20 in 2015/16) & over 5 programmes (3 in 2015/16)

Build a strong support base

By March 2018: have over 75 individual members and 25 organisational members (40 in total in 2015/16)

Create a robust process for proving and improving impact

By March 2018: have an above benchmark process in place (second impact report in 2015/16)

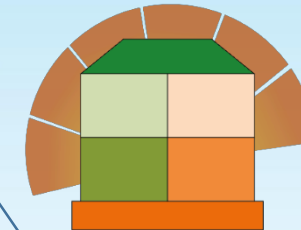
Establish an 'Forum' for learning, collaboration and communication

By March 2018: have engaged over 1000 people via our on line Forum, including through social media (over 500 in 2015/16)

Our Values



The Caplor House



We will create an organisation

that is as much a movement for change as an organisation for delivering services and programmes

Strong relationships will exist between everyone involved

We will keep the organisation small and the costs low

We will grow by being adapted and adopted by others (e.g. via a Franchise or Federation structure)

We will provide our Advisors with opportunities to make a unique contribution - to do the best work they have ever done!

Our Strategy Picture Format



“One of our specialities is to work with organisations summarise important information and create a ‘strategy on a page’. Different formats boost communication. A compelling summary helps people to engage with strategy”

*Ben Oldroyd,
Graphics and Visual
Communication Advisor*

CaplorHorizons
OUR STRATEGY ON A PAGE

OUR PURPOSE
TO INSPIRE & ENABLE LEADERS TO DELIVER A SUSTAINABLE FUTURE

OUR VISION
A WORLD IN WHICH SOCIAL, ENVIRONMENTAL AND ECONOMIC PROGRESS IS BALANCED

OUR MISSION
TO MAKE A REMARKABLE CONTRIBUTION TO ORGANISATIONAL EFFECTIVENESS AND LEADERSHIP WITHIN THE NOT-FOR-PROFIT SECTOR

OUR VALUES
IMPROVEMENT INSPIRATION SUSTAINABILITY

OUR FIVE STRATEGIC PRIORITIES

WE CONCENTRATE ON THREE ACTIVITIES:

- LEADERSHIP
- STRATEGY
- INFLUENCE

ADVISORS USING THEIR TIME WISELY

THE CAPLOR HOUSE...

- ORGANISATION: ...HAS FOUR ROOMS UNDER A SHELTERING, SUSTAINABLE ROOF
- TEAM
- INDIVIDUAL

AND IS BUILT ON SOLID FOUNDATIONS, BASED ON FIVE PRINCIPLES OF EFFECTIVE LIFE-LONG LEARNING

WE WILL CREATE A MOVEMENT FOR CHANGE

IMPROVE IMPACT
BY MARCH 2018: HAVE AN 'ABOVE BENCHMARK' PROCESS IN PLACE (FIRST IMPACT REPORT CREATED IN 2014/15)

DESIGN AND DELIVER HIGH QUALITY SERVICES AND BESPOKE PROGRAMMES
BY MARCH 2018: HAVE PROVIDED SERVICES TO OVER 50 CLIENTS (12 IN 2014/15) & OVER 5 PROGRAMMES (2 IN 2014/15)

DEVELOP A 'FORUM'
BY MARCH 2018: HAVE ENGAGED OVER 1000 PEOPLE WITHIN OUR FORUM, INCLUDING SOCIAL MEDIA (100 IN 2014/15)

DEVELOP A FORMIDABLE 'TALENT TEAM' OF ADVISORS AND PARTNERS
BY MARCH 2018: HAVE RETAINED 75 ACTIVE ADVISORS (OVER 25 IN 2014/15) & 5 PARTNERS (1 IN 2014/15)

BUILD A STRONG SUPPORT BASE
BY MARCH 2018: HAVE ATTAINED OVER 75 INDIVIDUAL MEMBERS (20 IN 2014/15); & HAVE MORE THAN 25 ORGANISATIONAL SUPPORTERS (5 IN 2014/15)

Our Strategy Still Life Format



“A Still Life is an innovative way to capture the essence of an organisation. We had the privilege of working with Liz and Charles Handy to create this Still Life picture for Caplor Horizons. The next page has insights about each item.”

*Dr Peter Moore,
Governance Advisor*

Picture by Liz Handy



Our Strategy – Still Life format

The Lighthouse



A lighthouse is a navigational aid. We want our organisation to be a beacon of light for others, not just helping them to navigate the best way forward, but also focusing (like a lighthouse lens) on specific actions that will make the biggest difference.

The Morris Dancer's Hat



Morris dancing is an English cultural folk dance. The hat epitomises our respect for the diversity and richness of differing cultures around the world and signifies that we ensure that *their* traditions and ethos remain at the heart of any contribution we make.

The Orchid



The orchid has around twenty-five thousand species – more than twice the number of bird species and four times the number of mammal species. As well as symbolising the importance of biodiversity and sustainability, the orchid's many beautiful flowers also represent the unique influence that each individual within the Caplor team puts into practice through their distinctive contribution.

The Boot



At Caplor Horizons, we are committed to putting 'boots on the ground', walking the talk and providing practical support for charities and responsible businesses. By inspiring and enabling positive change, we help organisations to strengthen their effectiveness towards achieving a sustainable future.

The Patchwork Quilt



The strength of Caplor's weave is in the diversity of its different threads. The patchwork quilt characterises the wide range of skills and experience that Caplor Horizons' staff, advisors and partners bring to the organisation, fostering a culture of creativity and an atmosphere of dynamic innovation.

The Peace Rose



The Peace Rose encapsulates the importance of new life and renewal. It also represents the generosity and philanthropy of our Advisors who contribute their time and experience, and whose actions cascade to bring about lasting and meaningful change for the benefit of society.

Contact Us



“The purpose of Caplor Horizons is to inspire and enable leaders to deliver a sustainable future. Charles Handy encourages all of us “to do the best at what we are best at for the benefit of others”. Within the parameters of our purpose, this sums up Caplor Horizons. We want to help individuals, teams and organisations to do the best at what they are best at for the benefit of others.”

Picture by Liz Handy

Ian Williams, Executive Director

Ian Williams - Executive Director

Lorna Pearcey – Director of Development

Jean Sellar – Partnerships and Programmes Co-ordinator
Office Land-line

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