

KEY CONCEPTS: STRATEGIC PLANNING

Vision, Mission & Values

- Develop a process for shared agreement on mission, vision and values from key stakeholders.
 - Mission = A statement of why the organization exists, at the most meaningful level. It is aspirational, in that it can never be fully achieved.
 - Vision = A clear, specific, compelling picture of what the organization will look like at a specific time in the future (one, two, or five years), including those few key metrics that define success.
 - Values = The boundaries within which the organization will operate in pursuit of its vision.
 - Strategy = A clear plan, time- and market-based, that describes the path by which an organization intends to reach its vision.
 - Stanford Business School, “Mission, Vision & Values Facilitation”:
<https://www.gsb.stanford.edu/alumni/volunteering/act/service-areas/mission-vision-values-facilitation>

External Environment

- VUCA
 - Volatility: Challenge is unexpected or unstable and may be of unknown duration, but not necessarily hard to understand.
 - Uncertainty: Despite a lack of other information, the event’s basic cause and effect are known. Change is possible but not a given.
 - Ambiguity: Causal relationships completely unclear. No precedents exist; you face “unknown unknowns.”
 - Complexity: Situation has many interconnected parts and variables. Some information is available or can be predicted, but volume or nature can be overwhelming to process.
 - Harvard Business Review, “What VUCA Really Means for You”:
<https://hbr.org/2014/01/what-vuca-really-means-for-you>
- PESTEL
 - Political
 - Economic
 - Social
 - Technological
 - Environmental
 - Legal
 - KnowHow NonProfit, “PESTEL Analysis”:
<https://knowhownonprofit.org/organisation/strategy/externalanalysis/pest#>

Stakeholder Engagement

- Five questions to identify key stakeholders:
 - Does the stakeholder have a fundamental impact on your organization’s performance?
 - Can you clearly identify what you want from the stakeholder?
 - Is the relationship dynamic – i.e., do you want it to grow?
 - Can you exist without or easily replace the stakeholder?
 - Has the stakeholder already been identified through another relationship?

- Harvard Business Review, “Five Questions to Identify Key Stakeholders”:
<https://hbr.org/2014/03/five-questions-to-identify-key-stakeholders>
- Stanford Social Innovation Review, “The Case for Stakeholder Engagement”:
https://ssir.org/articles/entry/the_case_for_stakeholder_engagement

Internal Environment

- McKinsey 7S Framework
 - Hard Elements: Strategy, Structure, Systems
 - Soft Elements: Shared Values, Skills, Style, Staff
 - Strategic Management Insight, “McKinsey 7s Model”:
<https://www.strategicmanagementinsight.com/tools/mckinsey-7s-model-framework.html>

Programs & Purpose

- Logical framework, or “logframe”
 - Key for international development programming in particular
 - Terms vary, but commonly include: Goals – Objectives – Outcomes – Outputs – Activities
 - Logical “flow” from the bottom (activity) up to the top (goal)
 - American Journal of Evaluation, “The Logical Framework Approach to Project Design and Management”:
<http://journals.sagepub.com/doi/abs/10.1177/109821409101200204?journalCode=ajeb>
- SMART+C objectives
 - Specific
 - Measurable
 - Achievable
 - Relevant
 - Timed
 - Challenging
 - Community Toolbox, KU, “Creating Objectives”: <http://ctb.ku.edu/en/table-of-contents/structure/strategic-planning/create-objectives/main>

Fundraising

- Ten Nonprofit Funding Models
 - Heartfelt Connector
 - Beneficiary Builder
 - Member Motivator
 - Big Bettor
 - Public Provider
 - Policy Innovator
 - Beneficiary Broker
 - Resource Recycler
 - Market Maker
 - Local Nationalizer
 - Stanford Social Innovation Review, “Ten Nonprofit Funding Models”:
https://ssir.org/articles/entry/ten_nonprofit_funding_models