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](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.
      [https://hbr.org/2014/01/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 Analaysis”:
      [https://knowhownonprofit.org/organisation/strategy/externalanalysis/pest#](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

**Internal Environment**
- McKinsey 7S Framework
  - Hard Elements: Strategy, Structure, Systems
  - Soft Elements: Shared Values, Skills, Style, Staff

**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)
- SMART+C objectives
  - Specific
  - Measurable
  - Achievable
  - Relevant
  - Timed
  - Challenging

**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