Key Concepts: Strategic Planning

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**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.
  

**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](https://hbr.org/2014/01/what-vuca-really-means-for-you)

- **PESTEL**
  
  - Political
  
  - Economic
  
  - Social
  
  - Technological
  
  - Environmental
  
  - Legal

**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
  o Hard Elements: Strategy, Structure, Systems
  o Soft Elements: Shared Values, Skills, Style, Staff

Programs & Purpose
• Logical framework, or “logframe”
  o Key for international development programming in particular
  o Terms vary, but commonly include: Goals – Objectives – Outcomes – Outputs – Activities
  o Logical “flow” from the bottom (activity) up to the top (goal)

  • SMART+C objectives
    o Specific
    o Measurable
    o Achievable
    o Relevant
    o Timed

Fundraising
• Ten Nonprofit Funding Models
  o Heartfelt Connector
  o Beneficiary Builder
  o Member Motivator
  o Big Bettor
  o Public Provider
  o Policy Innovator
  o Beneficiary Broker
  o Resource Recycler
  o Market Maker
  o Local Nationalizer

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