



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.
 - o **Mission:** A statement of why the organization exists, at the most meaningful level. It is aspirational, in that it can never be fully achieved.
 - o **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.
 - o **Values:** The boundaries within which the organization will operate in pursuit of its vision.
 - o **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/projects/service-areas>

External Environment

- VUCA
 - o **Volatility:** Challenge is unexpected or unstable and may be of unknown duration, but not necessarily hard to understand.
 - o **Uncertainty:** Despite a lack of other information, the event's basic cause and effect are known. Change is possible but not a given.
 - o **Ambiguity:** Causal relationships completely unclear. No precedents exist; you face "unknown unknowns."
 - o **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
 - o Political
 - o Economic
 - o Social
 - o Technological
 - o Environmental
 - o Legal

Stakeholder Engagement

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

- o Hard Elements: Strategy, Structure, Systems

- o Soft Elements: Shared Values, Skills, Style, Staff

Strategic Management Insight, “McKinsey 7s Model”:

<https://strategicmanagementinsight.com/tools/mckinsey-7s-model-framework/>

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)

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

- o Specific

- o Measurable

- o Achievable

- o Relevant

- o Timed

- o Challenging - *Community Toolbox, KU*, “Creating Objectives”: [https://ctb.ku.edu/en/table-of-](https://ctb.ku.edu/en/table-of-contents/structure/strategic-planning/create-objectives/main)

[contents/structure/strategic-planning/create-objectives/main](https://ctb.ku.edu/en/table-of-contents/structure/strategic-planning/create-objectives/main)

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

Stanford Social Innovation Review, “Ten Nonprofit Funding Models”:

https://ssir.org/articles/entry/ten_nonprofit_funding_models

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