Strategic Visioning
Create the future you want for your organization

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PRESENTER:
ROOSEVELT SMITH
Opening/Welcome
Roosevelt Smith

Roosevelt Smith has over twenty-eight years of rich and extensive experience in the nonprofit sector.

Consulting work has included large, small and volunteer-run nonprofit organizations in a wide array of mission areas such as youth development, housing, human services, human rights/social justice, environmental justice, food justice and arts.

Recovering ED – prior to starting consulting practice served for 15 years combined as a founding Executive Director for two nonprofits in Boston, MA.
Sawubona
greeting in the
Zulu tribe
tradition

I see you…
I appreciate you…
I recognize & acknowledge this
moment and its importance with
you…
It’s hard to imagine a future when we are overwhelmed with the present and/or continue to dwell in the past. “The world continues to change faster. But our ability to keep up hasn’t kept pace.” – John Kotter

The **purpose** of today’s discussion is to outline a process to help you imagine what your organization wants to be and accomplish in the future considering changing circumstances, uncertainty, and instability – without adding to your already heavy burdens (time, resources, …).

**Agenda for Today**
- Opening & Welcome
- Mindset
- Definition & Terms
- Framework & tools
- Wrap up
Mindset
Reflective Conversations...

**What conversations are you having about your organization:**

- What conversations did your organization start with (to the extent you know or were around)?
- What conversations are you having now?
- Are today’s conversations helping or hurting your organization?
Mindset

“In the carriages of the past you can’t go anywhere.”

- Maxim Gorky

- Change thinking...change language
- Creative vs. Reactive
- What is Possible? Imagine ahead of evidence.
- Turn goals, visions, aspirations into results
- Curate, record, journal...
Paradoxes of Planning

There are paradoxes and dilemmas in planning. Our answers to these and other paradoxes and dilemmas dramatically effect how we approach planning.

For example:

Do we believe:
- We can predict the future
- We can’t predict the future
- Is it useful to pretend we can predict the future

Do we:
- Need the right plan (on paper)
- Need the right process (people involved)

Do we approach planning by saying:
- Planning - we intend to do what we say in our plan
- Planning - we pretend we know where we are going so we can set out on a journey today

Do we plan believing planning is more of a
- 1+2 = 3 problem (logical)
- 1+2 = 12 problem (creative)

Do we believe:
- we make our plans and define our choices
- our choices evolve and our plans document what's evolving.
Definitions & Terms
Key Terms: Strategy, Vision, Planning

**Strategy** in the context of nonprofits is a coordinated set of actions aimed at creating and sustaining a [distinctive] advantage in carrying out the nonprofit mission. – **David La Piana**

**Vision** a short phrase describing the future you are ultimately working towards or trying to create. Destination.

**Planning** is the process of deciding in detail how to do something before you actually start to do it. – **Collins Dictionary**
What makes a great *Strategic Vision*?

- Motivates people to take actions.
- Coordinates and aligns their actions.
- Without it, strategies can struggle to get activity behind them.
- Clarifies how the future will be different from the past, and how that future will become a reality.
- Ties directly to The Big Opportunity.

From John Kotter’s “8 Steps To Accelerate Change In Your Organization”
5 minute – Bio/Stretch break, feel free to mute and turn camera’s off for 5 minutes
Framework & Tools
Curated Frameworks/Tools/Wisdom

Interaction Institute for Social Change (IISC) – **Strategic Moments Framework**

Editable Triage *(Handout)* – **Assessment tool - current reality in the here and now**

Nonprofit Business Model Canvas NBMC Master Key *(Handout)* – **Interactive Tool**

Planning framework from Alan Kay – Fry the Monkeys Create a Solution – **Action Planning Framework**
IISC’s Strategic Moments Framework

**Context**
- Why is this important?
- What do we need to get out of this process now?
- What else is going on?

**Stakeholders**
- Who are the stakeholders?
- What is important to them?

Diagram:
- Current Reality
- Pathway to Action (The Process)
- Goals of the Process
- Key Stakeholders

1. Where are we now?
2. Where do we want to be?
3. How do we get from here to there?
Facing reality is an empowering act. Seeing things as they are not as they should be.

**Perspectives:**

- **External** – Ecosystem, environment, trends
- **Internal** – inside the organization, people

Current Reality
## External: The World Around Us...

<table>
<thead>
<tr>
<th>What’s happening:</th>
<th>Effects:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Covid 19 Pandemic</td>
<td>Volatility</td>
</tr>
<tr>
<td>Environmental/Natural Catastrophe’s</td>
<td>Uncertainty</td>
</tr>
<tr>
<td>Racial Justice</td>
<td>Change</td>
</tr>
<tr>
<td>Local, State, National and Global Politics</td>
<td>Dynamism</td>
</tr>
<tr>
<td>Day to Day Living (social, emotional, mental health)</td>
<td>Turbulence</td>
</tr>
</tbody>
</table>
A Triage Tool for Internal Assessment

Here and Now: A Triage Tool for Nonprofits and Their Boards

As part of the Big Reset Series, here’s a relatively quick way to identify and prioritize action items in times of crisis and change without adding to your already heavy burden. If you remember the TV series M*A*S*H (1972-1983), consider playing the role of Hawkeye (without the snark). As a new batch of soldiers was carried into Hawkeye’s field hospital, he did a quick scan to judge the severity of each patient’s injuries, which to take on, how, and in what order.

Bring together a small group of the best thinkers among your team, board, and other key stakeholders. Pick people with diverse backgrounds and lived experiences who are truth tellers and calm under pressure. Agree on what issues to include, and don’t spend more than a half day. Use SWAGs—strategic wild ass guesses—rather than trying to assemble perfect information. By the end of your session, you’ll have a better idea of where immediate attention is needed, where you need to dig further to know what to do, and where you might even find new opportunities.

In addition to helping you prioritize immediate actions, using this approach can serve as a “Fire starter” for discussions that engage your team, board, and/or funders. It will also give you guidance on where more data, constituent feedback, and/or planning are needed.

Or you can forgo the group approach and use the tool to help you frame your own areas of concern. Doing so may help organize your thinking as you prepare to engage your management, board, staff, funders, and others.

On the next page, you’ll find a set of 27 “here and now” issues that can be tailored to your organization’s needs. Use the following color codes to indicate the severity level of each issue. And then give thought to the positive possibilities that emerge from this process.

<table>
<thead>
<tr>
<th>Emergency</th>
<th>Priority</th>
<th>Non-Urgent</th>
<th>No Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Requires immediate corrective action</td>
<td>May be a problem and needs digging deeper to understand severity</td>
<td>May be a problem, but follow-up action can wait</td>
<td>Stable and doesn’t require action</td>
</tr>
</tbody>
</table>

Note: You can access all of The Big Reset resources at https://bighotreson.org/the-big-reset-home.
### NBMC Master Key - What if exploration...

<table>
<thead>
<tr>
<th>HOW</th>
<th>WHAT &amp; WHY</th>
<th>ENGAGEMENT</th>
<th>WHO</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>KEY ACTIVITIES</strong></td>
<td>Which key Activities do our Social Value Propositions require?</td>
<td>What activities are needed to sustain operations?</td>
<td></td>
</tr>
<tr>
<td>Categories</td>
<td>Marketing</td>
<td>Events</td>
<td>Production</td>
</tr>
<tr>
<td><strong>SOCIAL VALUE PROPOSITION</strong></td>
<td>What programs and services do we deliver?</td>
<td>What problems or challenges are we trying to solve?</td>
<td>What value do we deliver to Stakeholders?</td>
</tr>
<tr>
<td><strong>RELATIONS</strong></td>
<td>What type of relationship does each of our Customer Segments expect us to establish and maintain with them?</td>
<td>Which ones have we established?</td>
<td>How are they integrated with the rest of our business model?</td>
</tr>
<tr>
<td>Examples</td>
<td>Community</td>
<td>Co-creation</td>
<td>Accountability</td>
</tr>
<tr>
<td><strong>STAKEHOLDERS</strong></td>
<td>Who are our Stakeholders? For whom is value?</td>
<td>Who helps us create Outcomes?</td>
<td>Value Propositions?</td>
</tr>
<tr>
<td>Category 1</td>
<td>Clients</td>
<td>Constituencies</td>
<td>Recipients</td>
</tr>
<tr>
<td>Category 2</td>
<td>Volunteers</td>
<td>Collaborators</td>
<td>Advocacy</td>
</tr>
<tr>
<td>Category 3</td>
<td>Customers</td>
<td>Members</td>
<td>Low-End D.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>OPERATIONS</th>
<th><strong>CHANNELS</strong></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>KEY RESOURCES</strong></td>
<td>How do we reach Stakeholders? How do they want to be reached regarding the delivery of our Social Value Proposition? How do we provide ongoing communications, support, and awareness?</td>
<td>Examples</td>
</tr>
<tr>
<td>Categories</td>
<td>Financial</td>
<td>Digital</td>
</tr>
<tr>
<td>Examples</td>
<td>Financial</td>
<td>Online</td>
</tr>
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</table>
Action plan tool from Alan Kay – Fry the Monkeys Create a Solution

Things to Think About
1. You and your team are the resources for change and growth.
2. Include any groups and/or activities and whether you need to communicate your plans with others.
3. Think about how you will notice progress.

1. Our goal and what it will look like when our team has accomplished it.
2. How do we see this helping with the unique needs of our beneficiaries and/or how is this in service of our mission?
3. Where will we begin? What will be the first visible steps?
4. With whom do we see ourselves collaborating and communicating to help make this happen?
5. When? What time frame for the actions will we have set up?
6. How will we be communicating our successes?
To really understand the concept of “WE” you must lay down the selfish ways of “I”.
WE can go further than I can.
WE can accomplish more than I can.
WE can strategize better than I can.
WE can bare more than I can.
WE are stronger than I am.

All organizations are organic and perishable. They are created by people, and they need to be constantly re-created if they are to survive”. Ken Robinson Out of Our Minds

The power of “what if?”
“I’m no prophet. My job is making windows where there were once walls.” — Michel Foucault
In scenario planning, we ask “What if?” We do not need to become prophets. Scenarios are not predictions, but rather possibilities.

Curated Wisdom along the way...
Closing

Summary of today’s session
Additional questions you have?
Please complete survey
Thank you!

Yvette Close Out.