

# Strategic Visioning

Create the future you want for your organization

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PRESENTER:  
ROOSEVELT SMITH



Opening/Welcome

# About Me

## **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...



# Purpose & Agenda

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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...

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## **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

Paul Bullen Management Alternatives

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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

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**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*?

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- 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"

# Break

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5 minute – Bio/Stretch break, feel free to mute and turn camera's off for 5 minutes



# Framework & Tools

# Curated Frameworks/Tools/Wisdom

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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?



**1** where are  
we now?

**3** how do we get from  
here to there?

**2** where do we  
want to be?





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...

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## **What's happening:**

Covid 19 Pandemic

Environmental/Natural Catastrophe's

Racial Justice

Local, State, National and Global Politics

Day to Day Living (social, emotional, mental health)

## **Effects:**

Volatility

Uncertainty

Change

Dynamism

Turbulence

# 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 person'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.

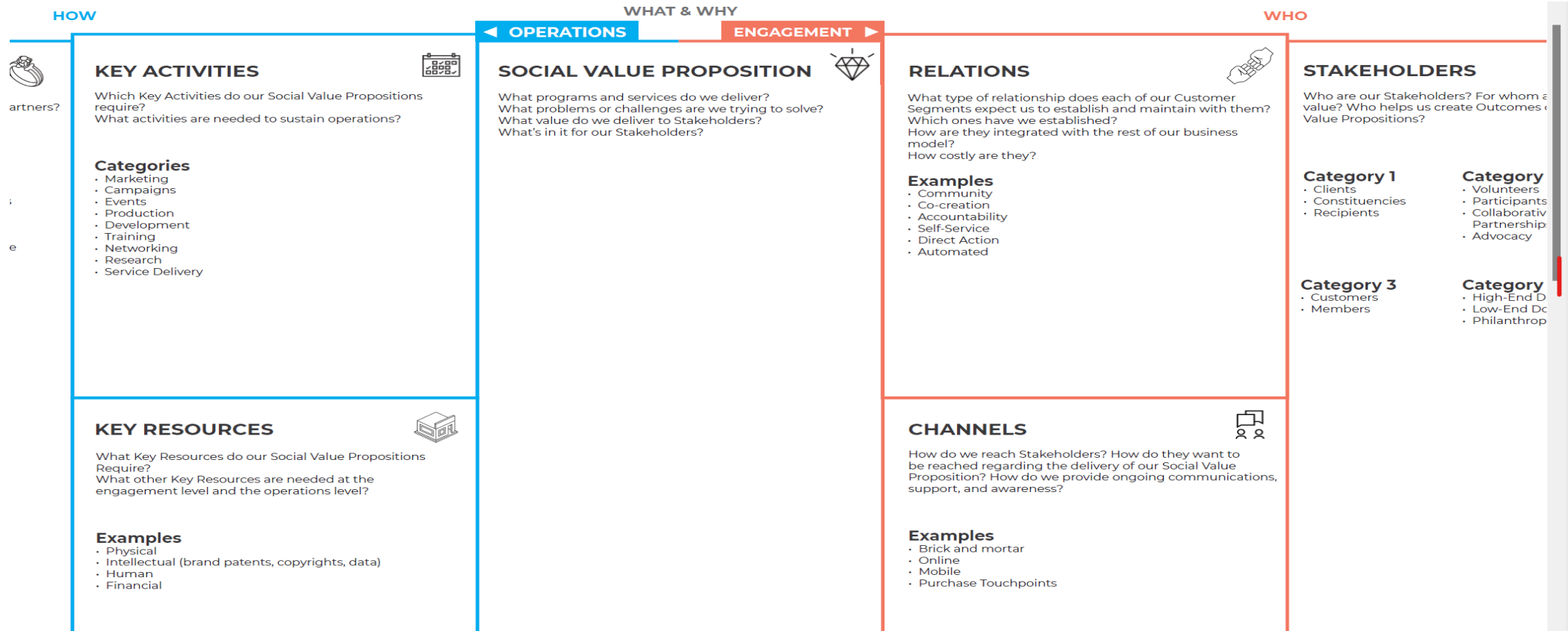
On the next page, you'll find a set of 27 "here and now" issues that can be tailored to your organization's needs. Use the following color codes to indicate the severity level of each issue. And then give thought to the positive possibilities that emerge from this process.

Emergency	Priority	Non-Urgent	No Action
Requires immediate corrective action	May be a problem and needs digging deeper to understand severity	May be a problem, but follow-up action can wait	Stable and doesn't require action

Note: You can access all of The Big Reset resources at <https://leapofreason.org/the-big-reset-home>.

"Here and Now" Issues	Severity
<b>MISSION</b>	
Is our organization deemed essential by stakeholders and network?	
Can our organization survive the impact of COVID-19 and economic downturn?	
Does our organization truly value diversity, equity, and inclusion (e.g., race, gender, age, sexual orientation, disability) across our board, management, and staff?	
Is our business model viable with these changed conditions?	
<b>LEADERSHIP</b>	
Are our board and executive management the right people in right roles at right time?	
Is our board open, responsive, adaptive, and nimble enough to manage the organization through the difficult times that lie ahead?	
Can our leadership offer credible hope during difficult times to our board, management, staff, volunteers, clients, funders, and partners?	
<b>MANAGEMENT AND OPERATIONS</b>	
Does our management and staff have the mindset and resilience to cope with unpredictable or abrupt changes (e.g., unexpected shortages, soaring demand, loss of staff, or other disruptions)?	
Do we have the overall capacity to be responsive, adaptive, and resourceful enough to sustain operations?	
Do we have the advocacy capacity to respond to policy threats and opportunities at the local, state, or federal levels which could harm or help our mission?	
Can we respond to operational disruptions (e.g., backup players and recovery plans in place in case key members are unable to work for extended periods)?	
Can we protect staff, volunteers, and clients from COVID-19 infection (e.g., necessary screening, testing, PPE, disinfectant cleaning, safe spacing, air filtration)?	
Can we change to operate more effectively in a virtual/digital environment (e.g., management, fundraising, remote staff, and/or program/services delivery)?	
Do we have all of our expense reduction options on the table (e.g., in operations; facility costs; personnel via temporary furloughs, reduced hours, cuts in pay and benefits, and/or layoffs)?	
Can we outsource and/or share functions (e.g., back-office operations, marketing, program components) to defer and/or reduce cost?	
<b>FINANCIAL HEALTH AND SUSTAINABILITY</b>	
Do we have the unrestricted cash on hand to sustain operations for at least three months?	
Will our projected cash flow cover 6 to 12 months of operations?	

# NBMC Master Key - What if exploration...



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.

<b>1. Our goal and what it will look like when our team has accomplished it.</b>	<b>4. With whom do we see ourselves collaborating and communicating to help make this happen?</b>
2. How do we see this helping with the unique needs of our beneficiaries and/or how is this in service of our mission?	5. When? What time frame for the actions will we have set up?
3. Where will we begin? What will be the first visible steps? A. B. C.	6. How will we be communicating our successes?

# Action Planning

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## Curated Wisdom along the way...

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.

### 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.

"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*



Wrap Up

# Closing

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Summary of today's session

Additional questions you have?

Please complete survey

Thank you!

Yvette Close Out.