

MISSION, VISION AND STRATEGIC PLANNING

Getting the Most from Your Volunteer Time and Effort

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OVERVIEW

Mark's Background

Nonprofit law and consulting practice 20+ years

Nonprofit (220 staff, \$5M budget) Associate Executive 6 years

About Today

Focus on doing things that make a difference

Focus on building volunteer participation and engagement

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OVERVIEW (CONTINUED)

TODAY: CONNECTING MISSION, VISION AND STRATEGIC PLANNING

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GROUND RULES FOR TODAY

- Ask questions any time
- Share your suggestions and experiences any time
- Challenge the content any time
- Have fun

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MISSION STATEMENT

A mission statement describes the purpose for which the entity exists.

Important, but one dimensional

It does little to identify who you are, what you are about, your aspirations and your determination

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VISION STATEMENT

Differing views of what a Vision Statement should be

My definition of Vision Statement:

- Brief, one-page, large font; readable in 30 seconds
- Communicates core ideology (your core values and the core reason(s) you are there)
- Communicates your envisioned future (where you are going, what you are trying to make happen)

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VISION STATEMENT (CON'T)

A Vision Statement is:

Clear and concise

Bold

Unapologetic

Likely to make some uncomfortable

Arguably the most powerful single component of leadership

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VISION STATEMENT (CON'T)

Vision statement distinguished from Mission statement:

A Vision Statement

(a) articulates values and purposes that are FUNDAMENTAL, COMPELLING AND PERSONAL to the association's leaders, so much so that they would refuse to compromise on them.

(b) specifically identifies what it intends to do in the future, and that accomplishment is a big deal to the people involved.

A Mission Statement merely describes the reason the entity exists.

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VISION STATEMENT (CON'T)

Vision statement distinguished from a Strategic Plan:

A Vision Statement

- (a) articulates values and purposes that are personal to the people involved. Those people care a LOT about those values and purposes, and are willing to fight for them.
- (b) specifically identifies what it intends to do in the future, and that accomplishment is compelling to the people involved.

A Strategic Plan

- (a) Identifies things the group wants to change (ie: goals)
- (b) Identifies the actions to be taken to achieve those goals

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VISION STATEMENT (CON'T)

Giving credit where credit is due:

Jim Collins

Good to Great

Build to Last

The Seven Measures of Success

HBR: Building Your Company's Vision

HBR: The Power of Catalytic Mechanisms

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VISION STATEMENT (CON'T)

Sample Vision Statements
(See Handouts A, B and C)

Sample Vision Building Meeting Agenda
(See Handout D)

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VISION STATEMENT (CON'T)

Why is Vision so important?

It connects people directly to the work; they don't just care about it, it is genuinely important to them; they would be willing to sacrifice for it

It provides a beacon that helps the group navigate through fog and confusion

It undermines power struggles and conflict

It makes strategic planning easier and more effective

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STRATEGIC PLANNING

Strategic Planning is simply change planning.

It focuses on WHAT we want to change about the entity, not necessarily HOW we will do so.

It is essential to agree on WHAT change we want to make before discussing HOW we will make those changes.

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STRATEGIC PLANNING (CON'T)

It is much easier and efficient to identify the changes to be made when you know where you want to end up.

Therefore,

Strategic Planning should take place AFTER the Vision is articulated.

The Vision serves as the inspiration for Strategic Planning.

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STRATEGIC PLANNING STEPS

STEP ONE: Have an articulated Vision

STEP TWO: Have the right people in the room

STEP THREE: Prepare for Strategic Planning

Environmental scanning

Review current context

SWOT analysis

Review pertinent available data

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STRATEGIC PLANNING STEPS (CON'T)

STEP FOUR: Generate ideas for change

Set rules for generating ideas for change

Rule #1: Ideas be in the form of an “Outcome Statement” without preambles, advocacy, discussion or criticism.

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STRATEGIC PLANNING STEPS (CON'T)

WHAT IS AN “OUTCOME IDEA?”

An Outcome Idea is (1) a statement that describes the proposed future condition/change/capability, and (2) the approximate date by which the Outcome will be achieved.

By [approximate date], we will have [insert specific description of a proposed future condition, change or capability.]

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STRATEGIC PLANNING STEPS (CON'T)

Examples:

By January 2021, we will have created and launched a formal program and curriculum for training volunteer leaders to do grassroots legislative advocacy.

By June 2021, we will be capable of generating 250 calls to state legislators from well informed and prepared members, with 48 hours notice.

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STRATEGIC PLANNING STEPS (CON'T)

STEP FIVE: Discuss Outcome Ideas and agree on your best choices.

Time consuming

Likely to entail modification and tailoring of Outcome Ideas

Danger of getting off track, into the weeds, focusing on the HOWs rather than the WHATs.

Danger of trying to do too much

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STRATEGIC PLANNING STEPS (CON'T)

STEP SIX: Discuss and agree on implementation steps

Discussion of HOWs may or may not be appropriate here. Outside expertise may be needed. If so, the implementation step is to plan how the outside expertise will be engaged.

Should identify who will do what, deadlines, perhaps some descriptions of "How" (implementation ideas, tactics, etc.), and provide necessary resources (time, \$, etc.)

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STRATEGIC PLANNING STEPS (CON'T)

STEP SEVEN: Implementation

Managed by Executive

Overseen by the Board. This is among the most fundamental functions of the Board.

**Sample Strategic Planning Meeting Agenda
(See Handout E)**

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VISION AND STRATEGIC PLANNING

Integration of VISION and STRATEGIC PLANNING

Flip Chart Illustration

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STRATEGIC ACTIVITIES
TACTICAL ACTIVITIES
OPERATIONAL ACTIVITIES

See/discuss Handout F

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BARRIERS TO SUCCESSFUL CHANGE

1. **Trying to do too much. Stick to 2 or 3 strategic initiatives per year. Keep it simple.**
2. **Failing to anchor Vision into the fabric of the organization.**

Communicate it constantly

Use it at every Board meeting

Measure ideas and performance against it

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BARRIERS TO SUCCESSFUL CHANGE (CON'T)

3. **Untrained Board, which leads to lack of clarity about director roles, not staying focused on the big picture, doing staff work, micromanaging**
4. **Failing to use outside facilitators**
5. **Failing to agree on the WHAT before focusing on the HOW; doing the engineering too soon**

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ROLE OF THE BOARD OF DIRECTORS

- **Set vision**
- **Establish and oversee strategic goals and objectives**
- **Hire, evaluate and support the Executive Director**
- **Oversee leadership, operations and culture
(Entails environmental scanning and assessment)**

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ROLE OF THE BOARD OF DIRECTORS (CON'T)

- Establish appropriate organizational policies
- Approve budget and significant program proposals
- Recruit and nurture future leaders
- Promote its programs and ideals to members and the community
- Meet fiduciary duties of care, inquiry and loyalty

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VISION BUILDING AND PLANNING WITHOUT STAFF

**Vision building and planning without a knowledgeable staff
will be substantially more challenging; extraordinary
leadership will be necessary to achieve big things**

**Staff disciplined to guide volunteer leaders, keeping them
focused on their role and next steps**

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MISSION, VISION AND STRATEGIC PLANNING

- Questions and Answers

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MISSION, VISION AND STRATEGIC PLANNING

Thank you!

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