

# 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

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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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- **Questions and Answers**

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**Thank you!**

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