

# Strategy Outside of a Plan

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U.S. CHAMBER OF COMMERCE FOUNDATION




# Strategy





# Strategy

A close-up photograph of a man's face, focusing on his eyes and forehead. He is wearing black-rimmed glasses. On his forehead, a small, rectangular piece of white paper is stuck, with the handwritten text "I have a plan." in blue ink. The man has dark hair and is looking directly at the camera with a serious expression.

I have a plan.

A plan of action or policy designed to achieve a major or overall aim





# Life Strategic Plans

## PROFESSIONAL



# Life Strategic Plans

- Bring organizations master level facilitation, so they can in turn craft stronger visions and paths to achieving those visions, impacting their members, communities, society, and the world



# Life Strategic Plans



Communal



# Life Strategic Plans

- Be of service to friends, colleagues, and those in need - serving as a hub of connection, catalyzing new relationships for mutual benefit.



# Life Strategic Plans



Personal



# Life Strategic Plans

- Be Abba before anything else in life
- Don't just speak to my children, but with them
- Give them room to learn and fail, but be safe
- Everyday, make sure they know how loved they are



# Life Strategic Plans

A photograph of the word 'YOU?' spelled out in large, teal-colored wooden letters. The letters are arranged on a light-colored wooden surface. The 'Y' is on the left, followed by 'O', 'U', and a question mark '?' on the right. Each letter has a small hole in the center, suggesting they might be part of a larger assembly or display.

Yours?



# Strategy Benefits

- Shared Vision, Mission
- Consensus definitions of success
- Targeted resource allocation/efforts
- Tool to communicate intended focus & impact
- Historical perspective & learning



# Strategy Deficits

- Moment in time - these are times of change
- Authors cycle off w/out new ownership
- Voice of the member/community
- Process expertise is not a requirement
- Created for, rather than with



# Strategic Plan

Frequency



# Strategic Plan



Components



# History



Where You Came From



# Vision

A close-up, high-contrast photograph of a human eye. The eye is looking directly at the viewer. Instead of a natural iris, the center of the eye is a detailed, realistic image of the Earth from space, showing blue oceans, white clouds, and brown/green landmasses. The eyelashes are dark and prominent, framing the eye. The skin around the eye is visible in a dark, moody tone.

## Your Ideal Future



# Vision

- Additive Listening



# Org Vision/Mission



## Why You Exist



# Org Vision/Mission

- Leadership litmus test
- Resonance in affiliation
- Definition to the external



# Org Vision/Mission

- Vision: Statement of the future because of your unique contribution
- Mission: How you will get there



# \*\*\*Identity

Key Organization Definitions



# \*\*\*Identity

- Profession or professional
- Experimentation & risk
- Diversity, Inclusivity, Equity, & Accessibility
- The place of money



# Audiences

The background of the slide is a dark, moody photograph. It shows several human hands and forearms reaching upwards from the bottom of the frame towards the top. The hands are illuminated by a warm, golden light, possibly from stage lights, which creates a strong contrast with the dark background. The lighting is focused on the hands, making them the central visual element. The overall atmosphere is one of aspiration or reaching for something.

Know Your Who



# Core Values

1. Deliver WOW Through Service
2. Embrace and Drive Change
3. Create Fun and a Little Weirdness
4. Be Adventurous, Creative, and Open-Minded
5. Pursue Growth and Learning
6. Build Open and Honest Relationships With Communication
7. Build a Positive Team and Family Spirit
8. Do More with Less

Key Tenants That Make You, You

9. Be Passionate and Determined
10. Be Humble



# Core Pillars

The background image is a photograph of a classical interior. It features several large, dark stone pillars supporting a ceiling. The floor is made of large, light-colored stone tiles. Bright, warm light streams in from a window or opening in the background, creating strong horizontal bands of light and shadow across the floor and pillars. The overall atmosphere is one of grandeur and historical significance.

Areas of Focus



# Core Pillars

- These are not programmatic areas
- These are the places where programmatic areas will advance the mission



# Success Statements



Broad Statements of Advancement



# Strategies



Paths to Achievement





# Unifying Vision

Direction, Strategy

Photos by  
Beau Considine



# Unifying Vision

A formation of six Navy fighter jets, likely F/A-18 Hornets, flying in a circular pattern against a blue sky. The jets are dark blue with yellow and orange markings on the wings and tails. They are leaving thick white smoke trails behind them, creating a circular pattern in the sky.

- What we have built can be a place of contribution, co-creation, and collaboration across the organization

Photos by  
Beau Considine



# Near Term Results

A photograph of a wooden ladder leaning against a blue wall. The ladder is made of light-colored wood and has several rungs. It is positioned diagonally, with the top of the ladder near the top right of the frame and the bottom near the bottom left. The background is a solid blue wall.

Milestones to Measure



# Operational Plan



Action Items, Finance and Resource Allocation, etc.



# Strategic Plan

- History
- Mission/Vision
- Core Audiences/Values
- Pillars
- Success Statements
- Strategies
- Near Term Results
- Operational Plan



# Strategy Outside the Plan



## Daily Conversation



# Plan Ahead Team



Moment of Shift



# Plan Ahead Team

- Starting position
- Develop scenarios
- Posture/broad direction of travel
- Robust moves against scenarios
- Set trigger points



# Listening as a Board Competency





# Listening as a Board Competency

- 6 month member survey
- Monthly Calls
- Member site visits
- Partner Advisory Group
- Audience Advisory Groups
- Competition Awareness
- Event Survey/Focus Groups



# Listening as a Board Competency



## Master Listener



# Priority Input to Governance





A photograph of a two-lane asphalt road with a double yellow center line, receding into the distance. The road is flanked by green fields and dark, forested mountains under a grey, overcast sky. The text "Listening Start" is overlaid in white on a semi-transparent dark band across the middle of the image.

# Listening Start



# Strategic Refresh

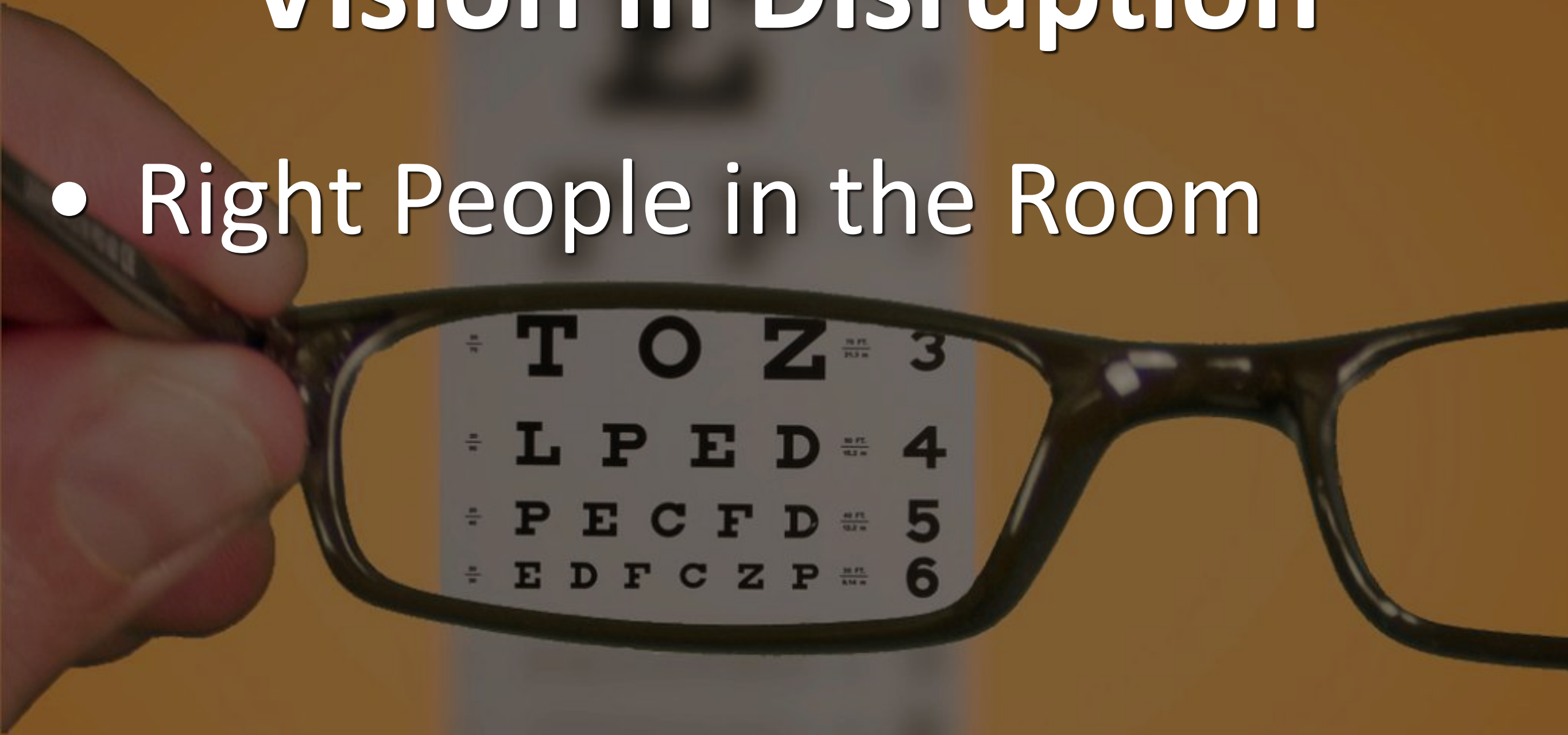


Vision in Disruption



# Vision in Disruption

- Right People in the Room






# Right People in the Room

- How you constitute your Board
- If you had no onus of title, who are the people that are skilled in foresight, that have a strong organizational foundation, that can focus on tomorrow?



# Vision in Disruption

- Right People in the Room
- Confirm Vision/Mission



L P E D 40 FT. 15.2 M 4  
P E C F D 40 FT. 15.2 M 5  
E D F C Z P 40 FT. 15.2 M 6



# . Vision In Disruption

- Right People in the Room
- Vision/Mission Confirmation
- 12/6/3 efforts



# . Vision in Disruption

- 12 months from now, what do we want our members to say about our organization?



A photograph of a two-lane asphalt road with a double yellow line down the center, receding into the distance. The road is flanked by green fields and dark, forested mountains under a cloudy sky. A semi-transparent dark band across the middle of the image contains the title text.

# Strategic Refresh Start



# Core Audiences

Remembering your Who



# Core Audiences

- Universal
- Core
- Needs
- Solutions
- What don't we know



# Core Audiences

- Governance and staff systems to pursue knowledge
- Advisory groups for strategy input
- Measures
- Ongoing strategic input



A photograph of a two-lane asphalt road with a double yellow center line, receding into the distance. The road is flanked by green fields and dark, forested mountains under a grey, overcast sky. The perspective is from a low angle, looking down the road.

# Core Audiences Start



# Program Impact Matrix

Sacred Cows - Buh-Bye



# Program Impact Matrix

- All programs/products
- Services/experiences
- Fiscal/Mission Impact





High Mission Impact  
Low Profitability



High Mission Impact  
High Profitability

Impact ↑

Profitability →



Low Mission Impact  
Low Profitability



Low Mission Impact  
High Profitability



**HIGH MERIT**



Program E



Program F



Program A

**NET LOSS**

**NET SURPL**

**Financial Sustainability**

**Mission Merit**



Program D



Program B

**LOW MERIT**



# Program Impact Matrix

- All programs/products
- Services/experiences
- Fiscal/Mission Impact
- Invest/Sunset Conversation
- Impact Awareness



A photograph of a two-lane asphalt road with a double yellow line down the center, receding into the distance. The road is flanked by green fields and dark, forested mountains under a cloudy sky. The text "Program Impact Start" is overlaid in white on a dark horizontal band across the middle of the image.

# Program Impact Start



# Creating Space for Innovation

Imagining



# Creating Space for Innovation

- Voices of Innovation
- Focus need your are trying to meet
- Tolerance for risk & failure
- Curiosity and learning
- Resource commitment
- Evolutionary practices



# Creating Space for Innovation

- Culture of Innovation - Experience Design?
- What is, What if, What wows, What works
- Tolerance for experimentation



# Forced Innovation Lessons

- From our past year, what strengths have we found?
- If we were our own case study, what would we have done differently?



A photograph of a two-lane asphalt road with a double yellow line down the center, receding into the distance. The road is flanked by green fields and dark, forested mountains under a cloudy sky. The text "Innovation Start" is overlaid in white on a dark horizontal band across the middle of the image.

# Innovation Start



The background of the slide features three stylized, colorful monkeys (yellow, blue, and red) jumping and holding hands against a bright blue sky with scattered white clouds. A semi-transparent dark grey horizontal band is positioned across the middle of the image, serving as a backdrop for the title text.

# Building Board Relationships



# Building Board Relationships

- Relationship ebbs & flows
- Priority of relationship strength in partnership and communications



# Building Board Relationships

- Calendar mapping relationships
- Key personal info
- Self assessed state of the relationship





# Communication, Relationships, Community



# Communication

- Town Halls
- Quality vs. quantity
- Personal, varied voices



# Relationships

- Board connection with leaders
- Leadership connection with members
- Board relationship dashboard



# Community

- Platforms of content
- Platforms of convening
- Platforms for community & relationships



# Governance Alignment

Regular Cycle with Strategy



# A Strategic Plan

Should Seed Strength & Unity



# Strategic Focus



Is Your Constant



# Strategic Expertise



Nature vs. Nurture



# Moment of Malleability

New Patterns & Practices



# Space & Grace





# Questions?



Thank you



# Questions?

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