VISTA COVA

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Why a Strategic Core is Needed Today More than Ever

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Coming out of two years of ongoing societal disruption, there are frames and phrases organizational leaderships are exhausted of hearing. Yet, the underlying commonality of these areas is a focus on the needs of change in the moment. There is only so long anyone can live in a crisis and have rapid-decision making serve as a recipe for success. Coming up for a breath of air, organizations are recognizing it is time to once again turn eyes to the horizon. How does the future we want to create look different? What new strengths have we discovered that we should invest in and leverage to bring about that future? Have we discovered new audiences who will be key partners, enabling the successful advancement of mission? These questions and more drive towards crafting, adopting, and living an organizational strategic core.

A **strategic core** does not try to encompass in the central strategy and goals of an organization the operational metrics and milestones of the past. Those more tactical elements are still necessary, as places of "how" rather than "why," and emerge subsequent to the visioning and approval of a direction. The key components of an organization's strategic core function at a higher level.

It is time to once again turn eyes to the horizon.

Shared and ever-evolving vision of a mission-impactful future	**Vision and mission statements**
Strategic priority areas	**Statements of purpose**
Statements of success and strategies	**Strategy-wide measures of progress**

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SHARED AND EVER-EVOLVING VISION OF A MISSION-IMPACTFUL FUTURE

This is a narrative description of elements of the inspirational tomorrow the organization is striving to create. Through a process of meaningful inquiry and additive listening, organizational leaders embrace their role as storytellers and champions for the organization to create this narrative. Once composed, the narrative serves both as a referendum on the significance and potential of the organization, and an entry point for new voices – of leadership and membership. These voices can add to that story, shifting the focus as new threats and opportunities arise. This narrative may not be part of the one-pager strategy summary on a website, but it is a living and ongoing true north connecting organizational value and meaning.

VISION AND MISSION STATEMENTS

Almost every industry and organization type have some version of a vision and mission statement. For non-profit organizations, these statements together should serve three primary purposes.

- **Leadership litmus test.** Before making critical resource investment decisions, organizational leaders should look at the vision and mission statements and reflect on whether the resources to be invested move the organization closer to those statements in the most efficient, effective, and impactful way possible.

- **Reason to affiliate.** The vision and mission statements should contain an aspirational future the organization is uniquely positioned to create. Those who find the vision and mission compelling will want to be part of the journey. This desire to affiliate may take on the frame of a member deciding to join or another organization deciding to become an ally.

- **External definition of identity and purpose.** Whether with legislators, regulators, educational partners, or the public, there will be key moments where an organization is connecting with those not in the industry. In these moments, the vision and mission statements serve as the introduction, ensuring those who may never be a part of the organization understand who they are meeting with for a more fruitful relationship.

STRATEGIC PRIORITY AREAS

An organization may have the capacity to do anything (within reason), but it certainly can not do everything. Priority areas, or sometimes goal areas, give focus to where an organization is going and enable it to shift efforts and resources to create the visioned future, often creating a better balance of depth and breadth. In articulating these areas there are two general schools of thought:

- **Priority areas by operational strengths.** This is the more traditional avenue of delineating focus and strategy. Functional areas taking or providing the most resources will drive the priority areas for the organization. It is not unusual to see these specified in terms such as advocacy, learning, meetings, or membership.

- **Priority areas by purpose.** This is a bigger leap for many organizations. Those who choose to take this approach transcend functional areas and answer the question of what is trying to be achieved in a given functional area. As an example, an organization does not exist for advocacy. It exists to communicate the value of its [insert industry, message, constituency, etc.]. By framing a goal area as 'communicating the value,' the organization shifts into a cross-functional operationalization of the goals. Indeed, traditional advocacy efforts fit in this arena, so too do education, public relations, and partnership efforts. Instead of perpetuating operational silos, the organization can map resource investment and expenditure efforts across priority areas to drive mission.

STATEMENTS OF PURPOSE

Once the priority areas are established, an organization then looks to craft a brief statement for each to clarify what achievement looks like in the area. These are not yet milestones or tactics, instead they are statements of effort designating achievement.

STATEMENTS OF SUCCESS AND STRATEGIES

Once the priorities have been authored, leaders establish two additional, high-level guidance pieces.

- **Statements of success.** Statements are multi-year narratives describing the indicators of success for a future state of the organization. The success statements will often serve as the basis for establishing yearly metrics in an action/operational plan.

- **Key strategies.** The strategies a are focal, high-potential efforts essential to enacting shared and evolving vision of the future.

STRATEGY-WIDE MEASURES OF PROGRESS

There are often a number of operational or organizational priorities against which leaders want to see EVERY goal or priority area measured. These often include progress or success measures for fiscal sustainability/responsibility, effective communications, or governance excellence. Setting these measures is a clear indication from leaders about which areas deserve the most attention and planning.

In the description of the strategic core, there is not a focus on tactics or short-term milestones. As disruption moves from occasional to a weekly occurrence, the strategic core can surf the wave of disruption with rapid strategy-driven responses. An organization can affirm and continue to pursue its vision even as it changes how it does so. The strategic core also provides a stability in focus and articulation of direction through the greatest of instabilities.

It is worthwhile to pause to note the unique place diversity, equity, inclusion, justice, and access (DEIJA) plays for all organizations. While the definition and priority/approach ascribed to DEIJA may be specific from organization to organization, the topic is a piece of reflection and intention in strategic core work. DEIJA plays a role in organizational values (what you experience when you come to the organization – the culture) and in governance (how DEIJA impact the pathways to, ethos, and decisions of leadership). It also appears in strategy work.

1 **DEIJA as a strategy-wide measure.** Every priority area of the organization must measure progress and intention against DEIJA as it pertains to each strategic priority.

2 **DEIJA as a strategic priority area.** There are times when organizations are called to bring additional focus to growth and improvement in DEIJA and must measure progress separate from other strategic priorities.

3 **DEIJA as both a strategy wide measure and key strategic priority area.** When an organization is looking to measure the progress of all DEIJA efforts in relation to strategic priorities and make specific investments as part of the strategic core.

The value of crafting a strategic core includes several key leadership development and connection opportunities. The most powerful of which is in the alignment of vision with the path to get to the vision. The identification of priority areas enforces the importance of prioritizing, sequencing, and choosing activities with the greatest potential. Boards of excellence are incredibly talented at saying no. The more leaders can discern where NOT to expend effort and resources, the greater the capacity to invest in the places of greatest potential. The work of a strategic core – in authorship and continuation – builds this skill.

As a supplementary strategic effort, many organizations will build or refine an annual process of programmatic impact measurement. Combined with the strategic core, measuring the fiscal and mission impact of each programmatic investment further helps leaders decide which areas to sunset, pause, maintain, adapt, invest in, or create.

A strategic core also serves as a nexus from which an organization can reflect on its current system of governance and evaluate relevance. Much like going to a doctor for a check-up, healthy organizations will take a larger step back every five to seven years to examine governance holistically and will ensure there are routines to conduct regular, annual pressure testing and adjustment of governance processes. It is common, after developing a new strategic core, to take a fresh look at committee and council structures, ensuring each aligns to the strategic priorities of the organization. This can recommit the work of volunteer groups to organizational priorities, creating more meaningful volunteer experiences.

Finally, a strategic core crafted, refined, approved, and executed in a concordant action plan will not reach its potential without a mindset and system of communication, conversation, and evolution. Strategy done for a membership is much different than strategy crafted and advanced with the membership. It is critically important that the strategic core be crafted with meaningful places of input and engagement with members. Doing so will result in a strategic core and priority areas with accessible opportunities for members to take action and contribute to priority advancement.

The strategic core is the north star by which an organization can better set direction and tell the story of past accomplishment, present strength, and future aspiration. Through a strategic core, leaders can assure all parts of the organization are better aligned with the purpose, vision, and mission.