

## Key Strategy Questions for Leadership

The following questions are intended to reinforce the thinking that we often do during a strategy and planning process. The questions encourage strategic thinking and help to ensure that the organization remains aligned with strategy, goals, and community outcomes.

**Framing Commitment:** As a fiduciary of this organization I am committed to ensuring that the assets of this organization (both financial and non-financial) are effectively and efficiently used to achieve the organization's intended community outcomes in a way that is sustainable and in line with our values!

**Framing Question:** What will it take for me to be able to consistently meet this commitment with integrity?

### Vision & Outcomes

#### Communication

- Does our communication with the community focus on both the community outcomes (vision) we contribute to and the way in which we do our work (strategy and programs)?
  - What will it take to do and sustain this type of communication?

#### Feedback

- What do constituent stories tell us about the organization's benefit to people and the community? (We often have moments where we hear from those who have used our organization's services. When we hear those stories consider the following follow-up questions to discuss)
  - What does this person's or organization's experience tell me about what our organization's work/effort makes possible for people?
  - What is this person/organization enabled to do or be, that they attribute to the work of our organization?
  - Are these outcomes in line with our organization's articulated community outcomes?
  - What questions does this story evoke about the community impact/benefit of our organization?
  - Is there anything that could compromise our ability to have this type of impact in the future?

### Assets & Finance

#### Business Model

- Do I understand the organization's simple business model?  
*(simple business model refers to a high level understanding of the assets – both financial and nonfinancial - required to deliver services and knowing where those assets come from and where they are allocated programmatically. "Assets" are not simply money. Think of assets as all the things utilized to deliver a service – in essence the actual things money buys or people donate)*
- What partnerships and/or relationships contribute to the organization's success?

#### Budget Planning

*About the business model*

- Did we bring in assets the way that we expected?
  - Did revenue come from the places and in the amounts that we anticipated?
  - Did other non-financial resources get raised/donated as expected?
  - (Projecting) Based on what we know and what we should be anticipating in the next 1-3 years, are there any changes in approach or strategy that need to be considered?
- Were assets allocated in the way that we expected?
  - Are programs and infrastructure receiving and utilizing assets as anticipated?
  - (Projecting) Based on what we know and what we should be anticipating in the next 1-3 years, are there any changes in approach or strategy that need to be considered?

#### *About strategy and outcomes*

- Based on past performance, intended outcomes, AND strategic priorities, what programs (existing and new) will the organization invest in to advance its desired community outcomes?
  - What are the specific investments in terms of financial and non-financial assets that are required to execute the work effectively?

#### **Budget Review/Approval**

- Does this budget reflect and reinforce our desired outcomes and strategy?
  - Are we clearly investing in efforts that advance community benefit in alignment with our mission and strategic priorities?
- What non-financial assets are required to achieve success that are not reflected in the financial budget?
- What assumptions are we making about our income and its sources?
  - Are we comfortable with the estimates and models used to project them?
  - Is there anything that we believe could jeopardize these assumptions?
  - What does income flow look like for the next 12 months based on these assumptions? Will that cover expense flows for the next 12 months?
- What assumptions are we making about our expenses and their allocation?
  - Are we comfortable with the estimates and models used to project them?
  - Is there anything that we believe could jeopardize these assumptions?
  - What does expense flow look like for the next 12 months based on these assumptions? Will that be covered by revenue flows for the next 12 months?
- Does this budget contribute to sustainability and allow for contingencies and investment?
  - Does this budget allocate revenue to reserves?
  - Are their future investments, expenditures, or risks we should be funding now?
  - Do we know where principled cuts could be made if necessary?

#### **Financial Reporting**

##### *Assets*

- Did the organization bring in assets the way that we expected?
  - Did revenue come from the places and in the amounts that we anticipated?
  - Did other non-financial resources get raised/donated as expected?
- Were assets allocated in the way that we expected?
  - Are programs and infrastructure receiving and utilizing the resources as anticipated?

##### *Outcomes*

- Did the way the organization acquired and used its assets create the results expected when we approved the budget and work plan?
- What investments/adjustments will it take to ensure outcomes are achieved?
- What might compromise the organization's ability to secure the assets needed moving forward?

## **Strategy and Programs**

#### **Strategy**

- Do the organization's strategies align with what it takes to advance our intended outcomes in the community?
  - Are there any current or developing factors that could challenge the effectiveness or efficacy of the organization's strategy?
- Are we executing the strategies as designed/intended?
- Are we achieving the organization's desired community outcomes?

#### **Programs**

- Do programs align with the organization's strategy, guiding principles, and values?
  - Are programs designed to and effectively creating the benefits that lead to the community outcomes of the organization?
- Is the overall mix of programs appropriate for advancing the community outcomes of the organization?

- Is it clear what it takes to achieve program outcomes in terms of assets, leadership, relationships, and infrastructure?
  - Are these conditions present for each program?
  - If not, what would it take to secure these resources and/or create these conditions?

#### **Infrastructure**

- Are the policies throughout the organization focused on advancing outcomes and supporting people's ability to make decisions?
- Are the policies in line with our values and guiding principles?
- Do the operational systems (finance, personnel, fundraising, evaluation, administration) support the effectiveness of the programs and their ability to achieve intended outcomes?

### **Leadership**

#### **Values and Guiding Principles**

- What do I need to understand about the values and guiding principles in order to be sure my leadership and decision making aligns with and reinforces them?
- What will it take to make sure I am, individually, and are we, collectively, behaving in accordance with our values in how we interact with each other and those in our community?
- What will it take to make sure this decision reflects our values and guiding principles?
- What will it take to make sure the organization's programs and operations reinforce our values and principles in design, structure, and implementation?

#### **Talent and Capacity**

- What leadership competencies and capacity are required to deliver our services, maintain operations, and engage the community in alignment with the organization's intended outcomes?
- What will it take to ensure that that competency and capacity are present within the organization?

#### **Risk**

- What commitments have we made to the community or other entities (funders, gov't, partner agencies)?
  - Is there anything that may compromise our ability to meet that commitment?
  - What will it take to ensure we meet that commitment?