



**Center for
Economic Opportunity**

NYC CEO Program Management Forum *Managing for Innovation Course*

Session 2 | Strategy and Planning
March 8, 2013

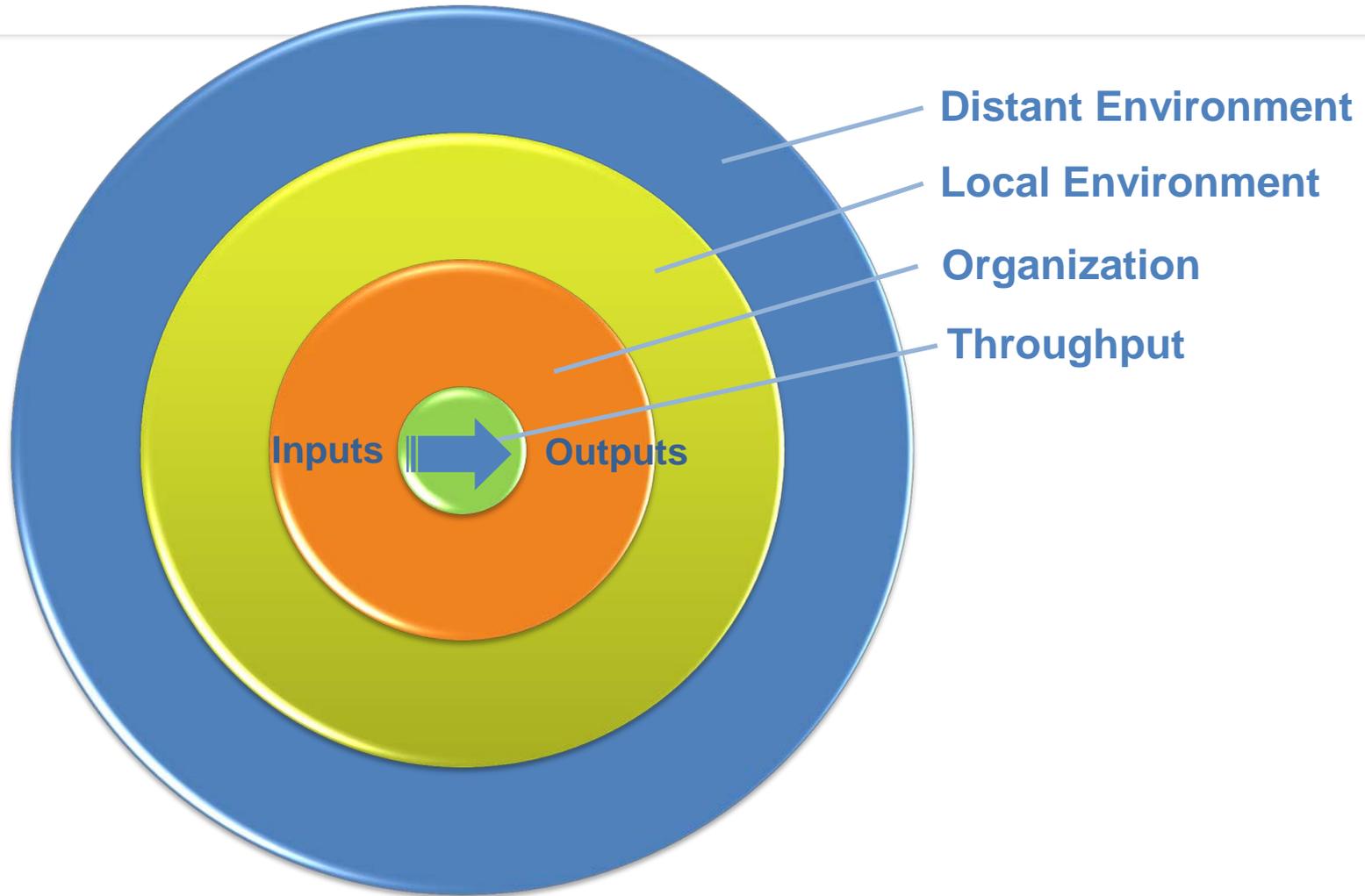
Learning Objectives

- Communicate clearly the mission, vision, and goals for a program and its alignment to the funders' objectives
- Using a management matrix, identify components of an organization's hierarchy of purpose
- Define vision, mission, goals, and objectives
- List criteria for SMART objectives

Organizational Systems

- Name all the non-profit organizations to which you/your family belong, receive services, and/or make contributions.

Organization Systems



Organizational Systems

- Organizations are:
 - Holistic
 - Interactive
 - Open/closed systems
 - Dynamic
- Organizations need:
 - Purposes
 - Values
 - Leadership

Hierarchy of Purpose

Nonprofit organizations should be:

- Results-oriented
- Achievement-oriented
- Measurement-oriented
- Consumer-specific

Key Terms for Purposes

- Vision
- Mission Statement
- Goals
- Objectives
- Individual Objectives

Management Matrix

Purpose	Org. Level	Timeframe	Who is Responsible

Management Matrix

Purpose	Org. Level	Time Frames	Board/ Exec Staff
Vision			
Mission			
Goals			
Objectives			
Individual Objectives			

Management Matrix - Example

Purpose	Org. Level	Timeframe	Who is Responsible
Vision	Whole Organization		
Mission	Whole Organization		
Goals	Departments		
Objectives	Employee		
Individual Objectives	Customer		

Management Matrix - Example

Purpose	Org. Level	Time Frame	Who's Responsible
Vision	Whole Organization	Long (5 to 10 yrs)	
Mission	Whole Organization	Long (5 to 10 yrs)	
Goals	Departments	Intermediate (3 to 5 yrs)	
Objectives	Employee	Short (6 mos to 1 yr)	
Individual Objectives	Customer	Short (Up to 6 mos)	

Management Matrix - Example

Purpose	Org. Level	Time Frame	Who is Responsible
Vision	Whole Organization	Long (5 to 10 yrs)	Board/ Executive Staff
Mission	Whole Organization	Long (5 to 10 yrs)	Board/ Executive Staff
Goals	Departments	Intermediate (3 to 5 yrs)	Executive Staff/ Dept Head
Objectives	Employee	Short (6 mos to 1 yr)	Dept Head/ Employee
Individual Objectives	Customer	Short (Up to 8 mos)	Worker/ Customer

Mission Statement

- Mission statements should identify:
 - End result sought
 - Target population
 - General methods to be used

Vision

- Visions should be:
 - Aspirational
 - Depictions of a future state

Goals

- According to Green and Hauser, SMART goals should be:
 - **S**trategic
 - **M**easurable
 - **A**ctivities (versus Outcomes)
 - **A**mbitious
 - **R**ealistic
 - **T**ime Bound

Alison Green and Jerry Hauser, *Managing to Change the World: The Nonprofit Manager's Guide to Getting Results*
San Francisco, CA: Joffrey Bass, 2012, 39-45.

Objectives

- SMART objectives should be:
 - **S**pecific
 - **M**easurable
 - **A**ttainable
 - **R**esults oriented
 - **T**ime limited

Benefits of Objectives

- Objectives provide:
 - Alignment with the mission of the program
 - A health urgency and tension
 - Fresh thinking about continuous improvement
 - The basis for accountability and reflection
 - Meaning and motivation

Alison Green and Jerry Hauser, *Managing to Change the World: The Nonprofit Manager's Guide to Getting Results*, San Francisco, CA: Joffrey-Bass, 2012, 38-39.

Wrap Up

- *If you can't tell me what your goals are without looking at a piece of paper, then you don't have real goals.*
- Jon Cowan, President, Third Way