



TEN KEYS REIMAGINED: Strategy As Continuous Practice

Nirvani Budhram

A companion to TCC Group's "Ten Keys" series (2004, 2014)

Introduction



Why Agile Strategy, Why Now?

In 2004, TCC Group published [Ten Keys to Successful Strategic Planning for Nonprofit and Foundation Leaders](#), a paper focused on the mechanics of an effective planning process.¹ A decade later, the firm published a companion update shifting emphasis to the ingredients of a successful plan—ecosystem awareness, non-grantmaking roles, and accountability for outcomes.²



Both papers assumed a stable planning horizon of three to five years. That assumption no longer holds. Since 2014, a global pandemic, the rapid rise of artificial intelligence, accelerating climate disruption, deepening political polarization, and seismic shifts in public trust have fundamentally reshaped the operating environment.

The emergence of AI alone has transformed how organizations collect data, measure outcomes, and make decisions—changes that neither predecessor paper could have anticipated. At the same time, a deepening commitment to equity has reshaped how organizations think about who sets priorities, who benefits from strategy, and whose voices are centered in the planning process.³ Foundations that locked in five-year strategies in 2019 found themselves in a fundamentally different world by 2021.

The response is not to abandon strategic planning but to reimagine it. Agile strategy is built on a core insight: in volatile environments, the most effective approach is to plan continuously, learn rapidly, and adapt deliberately.⁴ An adaptive strategic plan combines a stable core—mission, vision, values—with flexible, time-bound priorities regularly tested against emerging realities.

This companion piece offers ten keys for nonprofit and foundation leaders undertaking strategic planning today and beyond, building on enduring lessons from its predecessors while responding to a world that rewards adaptability as much as foresight.

Ten Keys for Agile Strategic Planning

The following keys are presented in no particular order of importance. Each reinforces the others, and together they form an integrated approach to strategic planning.

1. Embed real-time environmental awareness

The 2004 paper called for an external scan; the 2014 update elevated it to ecosystem mapping. Today, environmental awareness must be continuous, not episodic.⁵ Nonprofits and foundations should invest in dashboards, data partnerships, and horizon-scanning practices that surface emerging trends, policy shifts, and on-the-ground changes in the communities they serve—not just during a formal planning process, but on an ongoing basis. This requires replacing one-time research efforts with permanent infrastructure for staying informed: grantee feedback loops, media-monitoring tools, and cross-sector convenings that deliver actionable intelligence in something closer to real time.

2. Invest in organizational resilience and staff capacity

An organization's ability to deliver on its strategy depends on the well-being, skills, and adaptability of its people.⁶ Strategic plans must go beyond budgets and org charts to address talent development, succession planning, hybrid-work infrastructure, and staff mental health.

Resilience also means financial reserves, scenario-tested budgets, and operational continuity plans—the organizational equivalent of safety nets.⁷



A useful lens comes from the corporate sector, where strategists evaluate talent investments through four dimensions: people, productivity, profitability, and prosperity.⁸ Adapted for philanthropy, the logic is straightforward: investing in staff development drives higher-quality grantmaking, which generates greater mission impact per dollar, which strengthens the institution's long-term sustainability. When any part of this cycle is neglected—program officer workloads left unexamined, professional development treated as optional—the foundation's ability to deliver on its goals is compromised.

Some organizations are quantifying this through employee lifetime value, a measure of cumulative return on investment in a staff member over their tenure.⁹ For nonprofits and foundations, where institutional knowledge and grantee relationships accumulate over years, the cost of avoidable turnover is especially steep.

3. Center equity in every strategic choice

Equity is no longer a standalone program area or an addendum; it is a lens through which every strategic choice should be examined.¹⁰ Who benefits from our investments? Whose voices shaped our priorities? Do our grantmaking practices—application requirements, reporting burdens, funding timelines—create barriers for the communities we aim to serve?¹¹ A strategic plan should include an explicit equity framework with indicators that track not only programmatic outcomes but also the inclusiveness of the planning process itself.

4. Leverage AI and data infrastructure as strategic assets

Artificial intelligence, advanced analytics, and integrated data systems have moved from novelty to necessity.¹² Nonprofits and foundations should consider how these tools can support grantee selection, portfolio analysis, outcome measurement, and equity-focused resource allocation. Equally important is data governance: who owns it, how it is shared, and how algorithmic tools are audited for bias.¹³ A strategic plan should address the organization's technology posture as explicitly as it addresses program strategy.

5. Elevate the CEO as the driver of continuous strategy

The 2014 paper stressed a clear CEO vision. In an agile context, the CEO's role expands from setting an initial direction to continuously stewarding strategy—interpreting signals, brokering trade-offs, and keeping the organization aligned as priorities shift.¹⁴ This requires not only vision, but the temperament to lead through ambiguity. Boards should evaluate CEO performance partly on the ability to adjust course without losing organizational coherence.



6. Lead through networks and partnerships, not in isolation

The ecosystem orientation introduced in 2014 has matured into a full-fledged network paradigm.¹⁵ Effective organizations now co-create strategy with grantees, peer funders, government partners, and community members instead of just consulting them.

This means sharing power in agenda-setting, pooling resources through collaborative funds, and accepting that the foundation's brand may be less visible when impact is shared.¹⁶ Strategic planning should identify which goals require coalition action, and design governance structures for genuine shared decision-making.

7. Build a culture of disciplined experimentation

Adaptive organizations do not simply react to change; they actively test assumptions through pilot programs, rapid prototyping, and structured learn-and-iterate cycles.¹⁷ This means building evaluation into program design from the outset, setting explicit decision points where data will inform direction, and creating psychological safety for staff to report what is not working.¹⁸

Experimentation is only as powerful as the story it tells. Data without narrative is unpersuasive; narrative without data is insubstantial.¹⁹ Nonprofit and foundation leaders should translate evaluation findings into compelling cases that connect results to mission impact. This is how experimentation feeds back into strategy rather than sitting in a report.

8. Plan the plan's evolution: build in review, sunset, and renewal

An adaptive strategic plan is incomplete without a clear process for its own revision. Every plan should specify when and how it will be reviewed, what triggers would prompt an off-cycle reassessment, and what metrics will determine whether a strategy is renewed, revised, or retired.²⁰ Sunset clauses prevent inertia. Regularly scheduled "strategy sprints"—short, intensive sessions where leadership revisits assumptions—keep the plan from becoming the dusty binder that prompted skepticism back in 2004.²¹

A practical rhythm follows a three-phase cycle: diagnose, develop, and evolve.²² Leaders assess their current strategic position, refine the narrative linking past investments to current results, and articulate how future investments align with committed goals—incorporating external signals that may require course corrections. Repeating this cycle quarterly or semiannually transforms strategic planning from a periodic event into a continuous discipline.

9. Design for optionality, not certainty

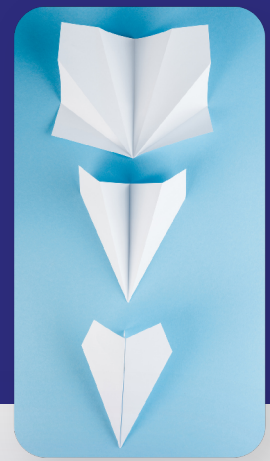
Adaptive strategy acknowledges that the future is inherently uncertain. Rather than betting the organization on a single scenario, effective organizations build optionality into their plans.²³ This can take the form of scenario-based planning that prepares leadership to pivot quickly, or a discretionary “opportunity fund” that can be deployed when unexpected opportunities or crises arise. The goal is to be decisive without being rigid—to make clear choices today while preserving the capacity to make different choices tomorrow.

10. Treat strategy as a living system, not a static document

The traditional three-to-five-year planning cycle assumes environmental stability that no longer exists. AI-driven disruption, shifting political landscapes, climate volatility, and rapid changes in public sentiment can render assumptions obsolete within months.²⁴ Adaptive strategy replaces the monolithic plan with a continuously evolving framework: a durable mission and vision anchored by an adaptive set of priorities reviewed and recalibrated on a quarterly or semiannual basis. The plan itself becomes a living artifact—openly shared and expected to change.



The Evolution of Strategic Planning



➔ The Plan: From Process to Substance to Adaptability

The focus of strategic planning has evolved. Early thinking centered on the planning process itself: including the right people, empowering committees, exercising patience, and committing to change. Over time, that focus shifted to the content of the plan, which ideally included a CEO vision, data-driven decisions, ecosystem awareness, and accountability metrics. In today's landscape, the focus is on how an organization relates to the plan over time—treating strategy as a living system, building in experimentation, and planning for the plan's own evolution.

➔ The Environment: From Periodic Scanning to Continuous Awareness

Environmental awareness has progressed from a discrete research phase to a structured ecosystem analysis to an always-on monitoring capability. The underlying principle—understand the world you operate in—has not changed. What has changed is the speed at which that world moves, and therefore the frequency with which leaders need updated intelligence.

➔ The People: From Inclusion to Equity

Strategic planning has moved from championing inclusiveness in the process to embedding stakeholder voice into decision making. Today, that trajectory extends further, calling for equity to be a lens applied to every strategic choice—not only who participates in planning but who benefits from implementation and whose power is increased or diminished as a result.

➔ The Learning: From Best Practices to Experimentation

Learning from peer organizations has long been a tenet of good strategy. The evolution is in how that learning happens: rather than simply adopting what has worked elsewhere, adaptive organizations now run their own experiments, testing hypotheses in controlled ways and generating evidence specific to their context. This reflects a broader cultural shift toward learning as a core competency rather than a reporting requirement.



The Evidence: From Data Collection to Data Storytelling

Data has moved from a background input to a central driver of strategic decisions. But data alone is not enough. It must be translated into narrative to drive action. Evaluation findings and performance metrics only influence strategy when they are woven into a compelling story connecting evidence to mission. This means investing not only in measurement systems but also in the organizational capacity to interpret, communicate, and act on what the data reveals.



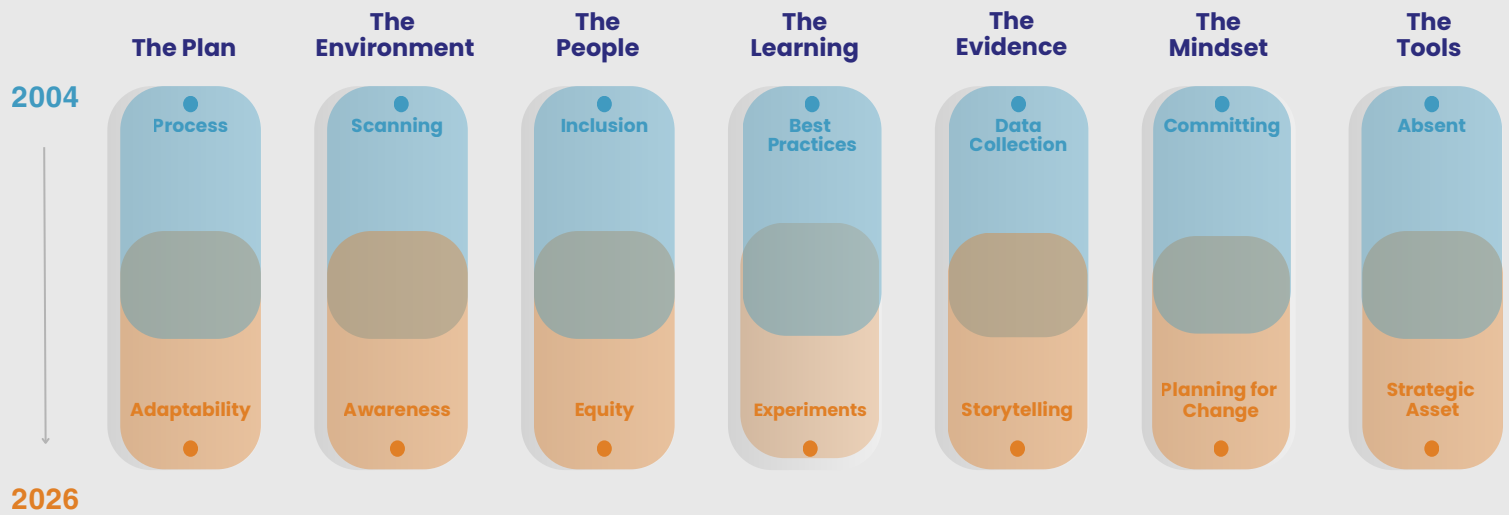
The Mindset: From Commitment to Change to Planning for Change

Early strategic planning frameworks ended with an exhortation to embrace change. Today, the field has moved beyond aspiration to architecture, building change into the plan itself through sunset clauses, strategy sprints, and explicit revision triggers. The goal is no longer to summon the courage to change when the time comes, but to create structures that make change a routine part of strategic life.



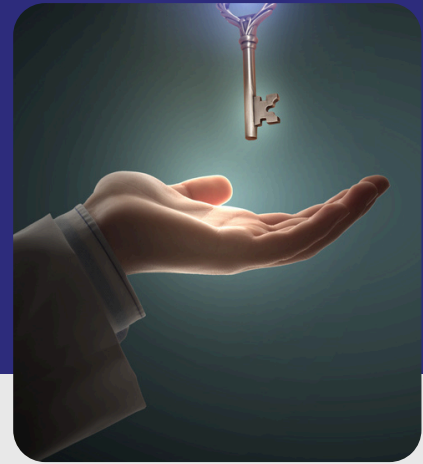
The Tools: The Rise of Technology as a Strategic Variable

Technology was notably absent from earlier strategic planning frameworks. Today, AI and data infrastructure are strategic assets that shape how organizations understand need, allocate resources, and measure impact. Ignoring them is no longer an option—and governing them responsibly is an emerging obligation.



The 2004 keys appear in their original order. The 2014 and 2026 keys are aligned thematically.

A Final Word, For Now



For too long, strategic plans have been latchkey kids, handed a set of instructions and expected to manage on their own. Adaptive organizations build that same resilience and resourcefulness, but by design, not by neglect.

The fundamentals of strategic planning endure: know yourself, know your environment, involve the right people, make hard choices, and follow through. What has changed is the tempo and texture of the work. The most effective organizations will hold their mission constant while holding their methods lightly—planning continuously, learning throughout, and building organizations that can thrive when the next disruption arrives.

The ten keys offered here are not a repudiation of their predecessors. They are an extension—a recognition that today, agility is not the opposite of strategy but its highest expression. And like any living strategy, this paper is itself a snapshot, not a final word. The best test of these ideas will be what nonprofit and foundation leaders do with them next.

Appendix

Three Decades of Strategic Planning

	2004 Keys	2014 Keys	2026 Keys
1	A clear and comprehensive grasp of opportunities and challenges	Agree on reason for planning	Embed real-time environmental awareness
2	A realistic and comprehensive assessment of the organization's strengths and limitations	Create a clear CEO vision for the organization	Invest in organizational resilience and staff capacity
3	An inclusive approach	Develop strong board/staff relationship based on candor and communication	Center equity in every strategic choice
4	An empowered planning committee	Use data to ground decision-making	Leverage AI and data infrastructure as strategic assets
5	Involvement of senior leadership	Use all of the tools in your toolbox	Elevate the CEO as the driver of continuous strategy
6	Sharing of responsibility by board and staff	Learn from the experience of others	Lead through networks and partnership, not in isolation
7	Learning from best practices	Define success and decide how to hold yourself accountable	Build a culture of disciplined experimentation and evaluation
8	Clear priorities and an implementation plan	Understand your palce in the ecosystem in which you operate	Plan the plan's evolution
9	Patience	Assess organizational strengths and challenges	Design for optionality, not certainty
10	Commitment to change	Remember the plan includes a roadmap for implementation	Treat strategy as a living system, not a static document

Endnotes

1. Richard A. Mittenenthal, *Ten Keys to Successful Strategic Planning for Nonprofit and Foundation Leaders* (New York: TCC Group, 2004). The paper drew on TCC Group's 25-plus years of consulting experience and included case studies from the Brooklyn Public Library, Safe Horizon, the Knight Foundation, and Citizens' Committee for Children of New York.
2. Richard Mittenenthal, Chris Cardona, and Ashley Blanchard, *Ten Keys – Ten Years Later. Successful Strategic Planning for Foundation Leaders* (New York: TCC Group, August 2014). The update narrowed its focus to funders and introduced ecosystem positioning and non-grantmaking roles.
3. The concept of a "VUCA" environment—volatile, uncertain, complex, and ambiguous—originated in U.S. military strategy in the late 1980s. For a nonprofit-sector application, see Alice Korngold, *A Better World, Inc.* (New York: Palgrave Macmillan, 2014).
4. The application of agile principles to strategy has roots in the *Manifesto for Agile Software Development* (2001) and has been extended to organizational strategy by Rita Gunther McGrath, *The End of Competitive Advantage* (Boston: Harvard Business Review Press, 2013).
5. Horizon scanning as a formalized practice for funders is explored in Lucy Bernholz, *How We Give Now* (Cambridge, MA: MIT Press, 2021), particularly Chapter 7 on infrastructure for ongoing learning.
6. The 2022 Nonprofit Workforce Survey conducted by Nonprofit HR found that 45 percent of nonprofit employees planned to seek new employment within two years, citing burnout and inadequate compensation as leading factors.
7. On financial resilience, see the National Council of Nonprofits' guidance on operating reserves and Ruth McCambridge, "**What Does a Resilient Nonprofit Look Like?**," *Nonprofit Quarterly* (March 2021).
8. The "four P's" framework—people, productivity, profitability, and prosperity—is developed by SHRM as a lens for evaluating talent investments. See Ashleigh Popera, "*Strategic Planning for 2026: What Business Leaders Need to Know*," SHRM (September 8, 2025). While oriented toward corporate HR, its logic applies to any organization where human capital drives strategy.
9. Employee lifetime value (ELTV) calculates the cumulative return an organization receives from a staff member over their tenure. The concept is discussed in Popera (*note 8*), where JobNimbus VP of People Experience Jared Olsen describes using ELTV to quantify how talent strategy affects long-term outcomes.
10. See National Committee for Responsive Philanthropy (NCRP), *Power Moves: Your Essential Philanthropy Assessment Guide for Equity and Justice* (Washington, DC: NCRP, 2018).
11. Trust-based philanthropy calls for reducing reporting burdens and sharing power with grantees. See the *Trust-Based Philanthropy Project's published principles* (2020) and Edgar Villanueva, *Decolonizing Wealth* (Oakland, CA: Berrett-Koehler, 2018).
12. On the growing role of AI in philanthropy, see the Knight Foundation's 2024 report, *Artificial Intelligence and the Future of Philanthropy*, and Beth Kanter and Allison Fine, *The Smart Nonprofit* (Hoboken, NJ: Wiley, 2022).
13. On algorithmic accountability, see Virginia Eubanks, *Automating Inequality* (New York: St. Martin's Press, 2018), and the Data & Society Research Institute's work on fairness in automated decision-making.

- 14.** On the CEO as continuous strategy steward, see Frances Hesselbein, *“The Key to Cultural Transformation,”* *Leader to Leader* 12 (Spring 1999): 6–8. The 2014 TCC paper emphasized CEO ownership; the distinction here is that adaptive strategy requires ongoing stewardship, not a single moment of vision-setting.
- 15.** The shift to network strategy is theorized in Jane Wei-Skillern et al., *“The Network Mindset,”* *Stanford Social Innovation Review* (Winter 2015), and David Ehrlichman, *Impact Networks* (Oakland, CA: Berrett-Koehler, 2021).
- 16.** Funder collaboratives are examined in Bridgespan Group, *“How Philanthropic Collaborations Succeed,”* 2020. Effective collaboratives require clear governance, shared measurement, and willingness to subordinate individual branding to collective impact.
- 17.** The lean startup methodology has been adapted for the social sector. See Eric Ries, *The Lean Startup* (New York: Crown Business, 2011), and Michael Quinn Patton, *Developmental Evaluation* (New York: Guilford Press, 2010).
- 18.** On psychological safety as a precondition for learning, see Amy C. Edmondson, *The Fearless Organization* (Hoboken, NJ: Wiley, 2019). Staff must feel safe surfacing evidence that a strategy is not working.
- 19.** The principle that data without storytelling is unpersuasive is articulated in Popera (*note 8*). Leaders must weave quantitative evidence into a narrative connecting outcomes to strategy.
- 20.** On revision triggers in strategic plans, see John M. Bryson, *Strategic Planning for Public and Nonprofit Organizations*, 5th ed. (Hoboken, NJ: Wiley, 2018), Chapter 10.
- 21.** “Strategy sprints” adapt the sprint methodology from agile software development. See Jake Knapp et al., *Sprint* (New York: Simon & Schuster, 2016). In a foundation context, strategy sprints typically last one to two days and focus on a single strategic question.
- 22.** The diagnose–develop–evolve cycle is adapted from Popera (*note 8*). The original formulation targets corporate departments; here it is reframed as a rhythm for nonprofit and foundation leaders conducting regular strategic reviews.
- 23.** The concept of “real options” in strategy was popularized by Timothy A. Luehrman, *“Strategy as a Portfolio of Real Options,”* *Harvard Business Review* 76, no. 5 (1998): 89–99. For philanthropy, see Paul Brest and Hal Harvey, *Money Well Spent* (Stanford, CA: Stanford Business Books, 2008).
- 24.** A 2023 Center for Effective Philanthropy survey found that 68 percent of foundation CEOs reported external change outpacing their planning cycle, up from 41 percent in 2017. See CEP, *Foundations Responding to Crisis* (Cambridge, MA: CEP, 2023).
-

About TCC Group

TCC Group is a mission-driven consulting firm and certified B Corporation. With four decades of experience navigating shifts across the social sector, including healthcare, immigration, LGBTQ issues, education, and workforce development, we offer clients both long-term perspective and practical insight. We bring strategy, grantmaking, implementation, and evaluation together under one roof, closing the consulting gap between high-level philanthropic vision and the technical rigor required to put it into practice.

Grounded in empathy and attentive to organizational dynamics, we deliver solutions that are realistic, culturally aligned, and built to last, while extending beyond traditional consulting through community activations, event production, and learning communities that foster genuine connection.

Our Services

Strategy

Our approach to strategy is a diagnose-develop-evolve cycle; a continuous practice of assessing where you are; refining what you're doing; and adapting as you learn. It's both data and community driven and built to evolve. We treat strategy as a living system, not a document to be looked at every few years. Organizational strengthening and capacity building is integrated into our strategy work; it's what makes strategy executable.

Evaluation and Learning

Our Evaluation and Learning team acts as a strategic and we serve as an organizational Learning partner to foundations, helping navigate and measure impact across a diverse range of modern social levers. We bring deep sectoral expertise in healthcare, workforce development, education, and advocacy.

Grantmaking and Foundation Management

With strong issue-focused backgrounds and deep experience in philanthropy, we provide a high-touch, comprehensive suite of services for families, companies, and foundations looking to outsource the strategic program officer role and/or critical back-office operations. We bridge the gap between high-level philanthropic strategy and day-to-day administration, and beyond operations, we serve as expert facilitators during sensitive organizational transition.

Contact Us

New York

333 7th Ave, 9th Floor
NY, NY 10001

212-949-0990

Philadelphia

123 S. Broad St
Philadelphia, PA 19109

215-568-0399

Website

www.tccgrp.com

Email

info@tccgrp.com

 [@tcc-group](https://www.linkedin.com/company/tcc-group)

 [@tccgrp](https://www.facebook.com/tccgrp)