United Way of Greater St. Louis
STRATEGIC TRANSITION PLANNING SERIES
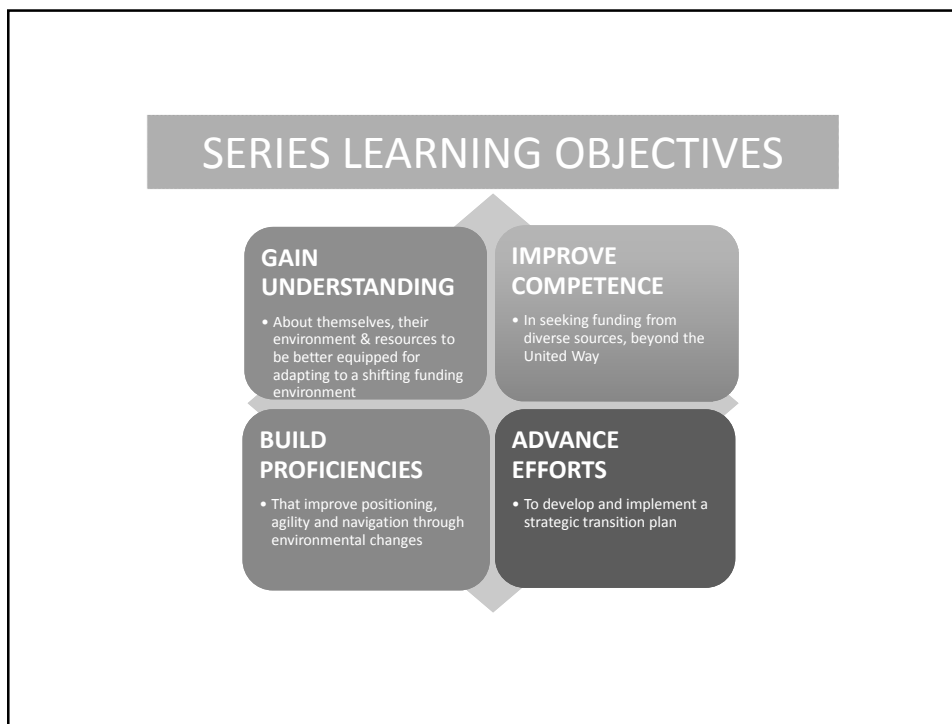2018-2019   10.10.19

1

TRANSITION SERIES GOAL

Help member agencies gain competence in: navigating through environmental changes, better securing diverse & sustainable funding streams, and exploring/pursuing options, all of which enhance the fulfillment of community needs-based missions

2

SERIES LEARNING OBJECTIVES

GAIN UNDERSTANDING
- About themselves, their environment & resources to be better equipped for adapting to a shifting funding environment

IMPROVE COMPETENCE
- In seeking funding from diverse sources, beyond the United Way

BUILD PROFICIENCIES
- That improve positioning, agility and navigation through environmental changes

ADVANCE EFFORTS
- To develop and implement a strategic transition plan

3

RACIAL EQUITY LENS CONTEXT

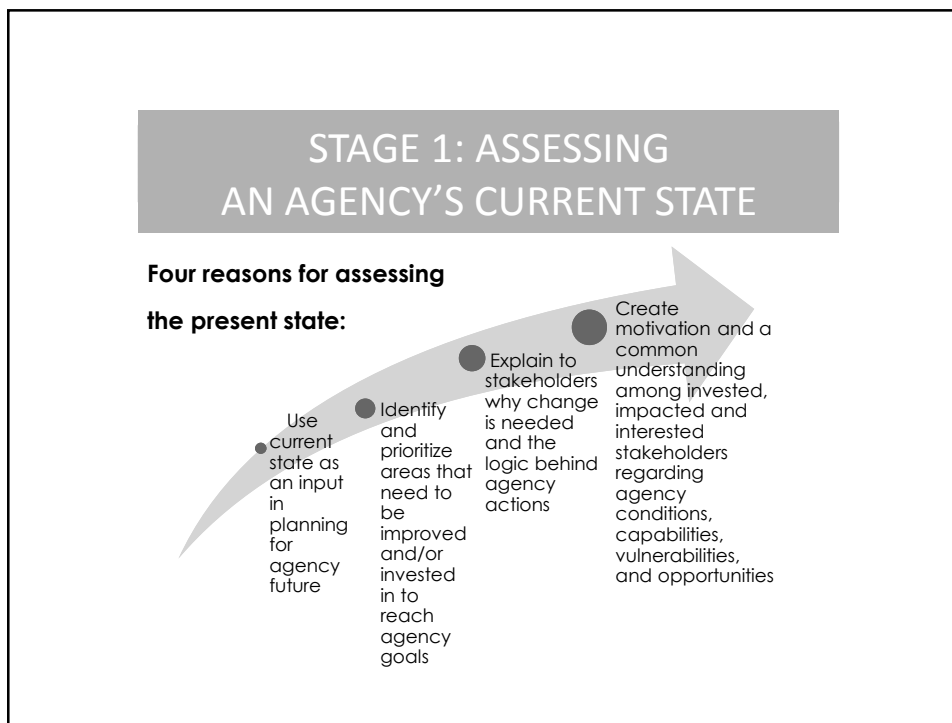EQUALITY   EQUITY   REALITY   Liberation

- Different communities (and individuals within communities) situated differently relative to each other
- Differences due to many factors, including history, education, language, access to community assets…
- While intent of policies & programs is to create access for all people (lifting all boats), in practice, universal policies create access to opportunity differently
- A rising tide brings less benefit or possibly hazard if one's boat is leaky or if one does not have a boat.
- Series sessions will provide an opportunity to apply a racial equity lens to topics in hopes of getting all members in our community a boat that floats so that all boats can be lifted.

4

				Member Agency Strategic Transition Planning Series 2018 – 2019 Schedule	

TOPIC	CODE*	DATE/TIME	DESCRIPTION	FACILITATORS
#1: Series Overview/SWOT Analysis (lunch provided)	B	May 17, 2018 9am – 1:30pm	Part 1: capacity building blocks for helping agencies adapt to new funding model; Part 2: SWOT analysis	Julie Simon & Rebeccah Bennett, *Emerging Wisdom*
#2: Financial Health	B	Thurs, June 14 9am – 12pm	Evaluating financial performance, cash flow & budgeting in alignment with Board fiduciary responsibilities	Judy Murphy & Amy Altholz, RubinBrown
#3: Fund Development		Thurs, July 12 9am – 12pm	Basic components of fund development/planning; data analysis; strategies for building on what works	Wendy Dyer, Wendy Dyer Fund Devp Consultants
#4: Program Financial Sustainability		Thurs, Sept 13 9am – 12pm	Functional expense allocation; assessing financial sustainability; mission alignment; calculating unit costs	Dick Goldbaum, Transitions in Leadership
#5: Contingency Planning	B	Thurs, Oct 11 9am – 12pm	Assessing risk; contributing factors & gravity of impact; developing action plans to mitigate/address risks	Pat Knoerle-Jordan, Experience On Demand
#6: Change Management		Thurs, Nov 8 9am – 12pm	Outlining indicators, pathways & impacts of change; deter-mining how, what, when & who changes, how to adapt	Marissa Paine, Painefree Coaching & Consulting
#7: Innovation		Fri, Nov 30, 2018 9am – 12pm	Exploring methods, ideas & approaches to process work more effectively, increase agility/responsiveness & advance impact	Joseph Steensma, Washington University
#8: Racial Equity Lens Application	B	Fri, Jan 11, 2019 9am – 12pm	Assessing agency infrastructure, culture and programs for fairness/justness & exploring how to apply a racial equity lens	Kira Hudson Banks, St. Louis University
#9: Board Engagement in Fund Development (lunch provided)	B	Fri, Feb 8 9am – 2pm	Framing Board member fundraising roles/responsibilities & support required for effectiveness; crafting compelling messages	Pete Werner, Consultant, & Wendy Dyer
#10: Optimizing Board Effectiveness	B	Fri, Mar 8 9am – 12pm	Optimizing Board effectiveness via proper recruitment, engagement, expectation-setting, accountability & facilitated decision-making	Laurna Godwin, Vector Communications
#11: Fund Development Deeper Dive		Fri, Apr 12 9am – 12pm	Expanding/improving development efforts to diversify and increase funding streams	Wendy Dyer & Rachel D'Souza-Siebert
#12: Strategic Alliances: Part I	B	Fri, May 10 9am – 12pm	Exploring the spectrum of collaboration; rationale for pursuit; phases of discovery, due diligence, negotiation & assimilation; defining success	Allie Chang Ray, Mutare Network
#13: Strategic Alliances: Part II	B	Fri, Jun 21 9am – 12pm		
#14: Succession Planning	B	Fri, Aug 2 9am – 12pm	Framing a pro-active process for effective staff leadership transition, emergency & planned, fulfilling current/anticipated leadership needs and retaining institutional memory and values	Dick Goldbaum & Allie Chang Ray
#15: Envisioning/Driving Direction (lunch provided)	B	Fri, Sep 13 9am – 2pm	Creating future vision & defining strategic priorities/direction to position, strive for and move toward that vision	Rebeccah Bennett, Emerging Wisdom
#16: Creating a Transition Plan: Part 1 (lunch provided)	B	Thurs, Oct 10 9am – 2pm	Operationalizing the transition for guiding toward better positioning & adapting to a changing environment	Rebeccah Bennett, Emerging Wisdom
#17: Creating a Transition Plan: Part 2 (lunch provided)	B	Fri, Nov 1, 2019 9am – 2pm		

* KEY: B = Board-Focused | Stage 1 = Assessing Position | 2 = Preparing for Change/ Innovation | 3 = Exploring Resources | 4 = Creating Plans

5

STAGE 1: ASSESSING
AN AGENCY'S CURRENT STATE

Four reasons for assessing

the present state:

Use current state as an input in planning for agency future

Identify and prioritize areas that need to be improved and/or invested in to reach agency goals

Explain to stakeholders why change is needed and the logic behind agency actions

Create motivation and a common understanding among invested, impacted and interested stakeholders regarding agency conditions, capabilities, vulnerabilities, and opportunities

6

SESSION 1: SWOT Analysis   5.17.18

**Presented by: Rebeccah Bennett
Emerging Wisdom**

- Grounds plan

- Provides realistic view of agency's capabilities and vulnerabilities

- Identifies internal strengths and weaknesses

- Examines external opportunities and threats

	Helpful	Harmful
Internal	Strengths S	Weaknesses W
External	Opportunities O	Threats T
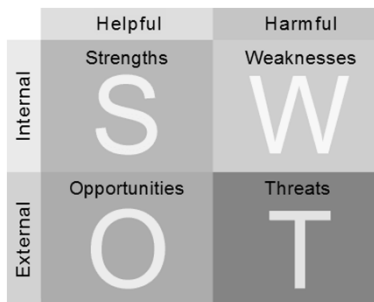
© 2018 Rebeccah Bennett, Emerging Wisdom

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SESSION 2: Financial Health   6.14.18

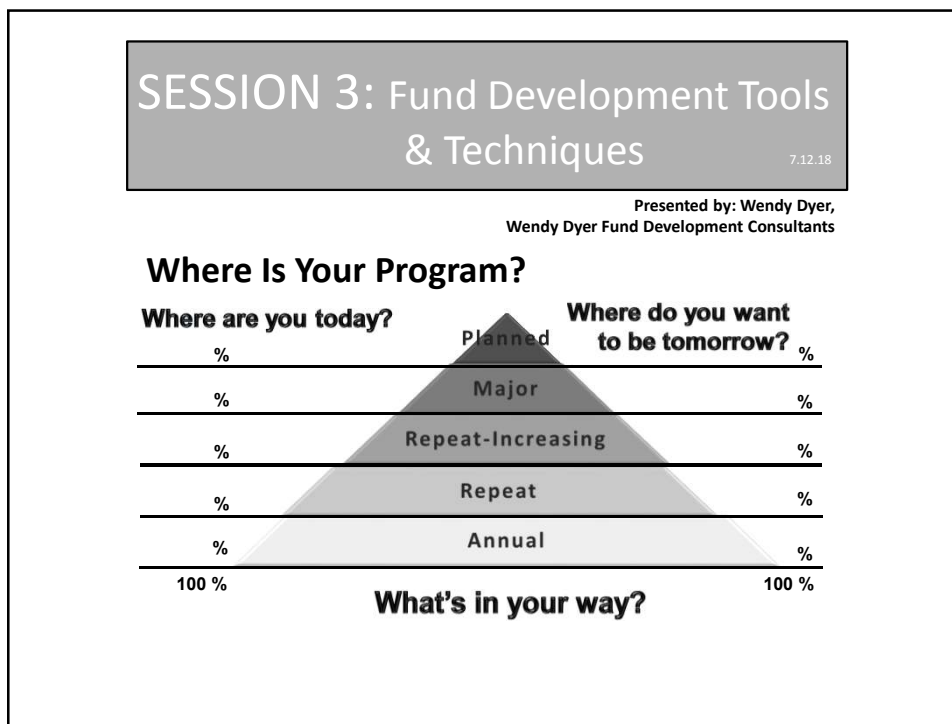**Presenters: Judy Murphy & Amy Altholz
RubinBrown**

Common financial sustainability benchmarks include:

- Operating reserves
- Liquidity evaluation
  - o Days of Cash on Hand to Pay Expenses
  - o Current Liquid Assets/Current Liabilities
- Funding gap analysis
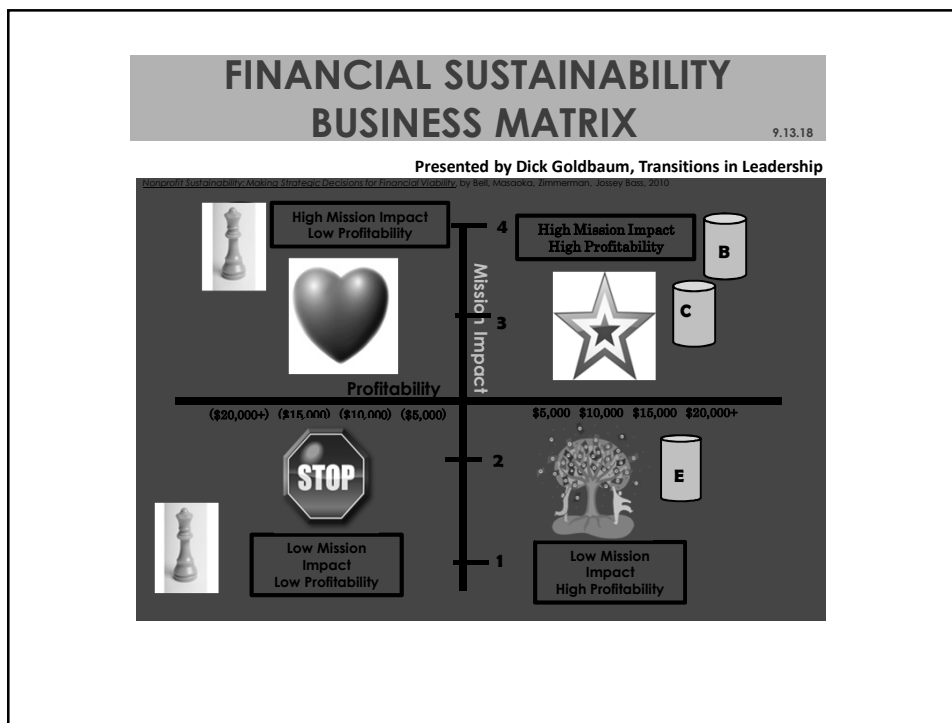- Diversified funding streams
- Budget vs. actual analysis

RubinBrown

8

SESSION 3: Fund Development Tools & Techniques

7.12.18

Presented by: Wendy Dyer,
Wendy Dyer Fund Development Consultants

Where Is Your Program?

Where are you today?

Where do you want to be tomorrow?

Planned

Major

Repeat-Increasing

Repeat

Annual

% %
% %
% %
% %
% %

100 % **100 %**

What's in your way?

9

FINANCIAL SUSTAINABILITY BUSINESS MATRIX

9.13.18

Presented by Dick Goldbaum, Transitions in Leadership

Nonprofit Sustainability: Making Strategic Decisions for Financial Viability, by Bell, Masaoka, Zimmerman, Jossey Bass, 2010

High Mission Impact
Low Profitability

4

High Mission Impact
High Profitability

B

Mission Impact

3

C

Profitability

($20,000+) ($15,000) ($10,000) ($5,000) $5,000 $10,000 $15,000 $20,000+

STOP

2

E

1

Low Mission Impact
Low Profitability

Low Mission Impact
High Profitability

10
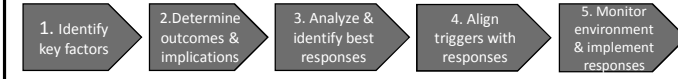
SESSION 5: Contingency Planning

10.11.18

Presented by: Pat Knoerle-Jordan
Experience on Demand

Definition: Risk mitigation process preparing an agency for potential challenges by navigating through worst-case scenarios to help ready itself for best responses if needed

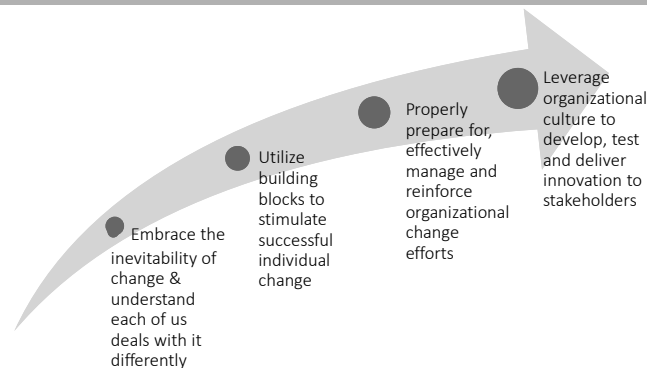Contingency Planning is used to:

- Achieve higher degree of shared experience and organizational learning

- Raise/challenge widely held beliefs & assumptions about agency and its direction

- Identify key levers to influence future course; incorporate change management into strategic analysis; & intentionally mitigate future negative impacts
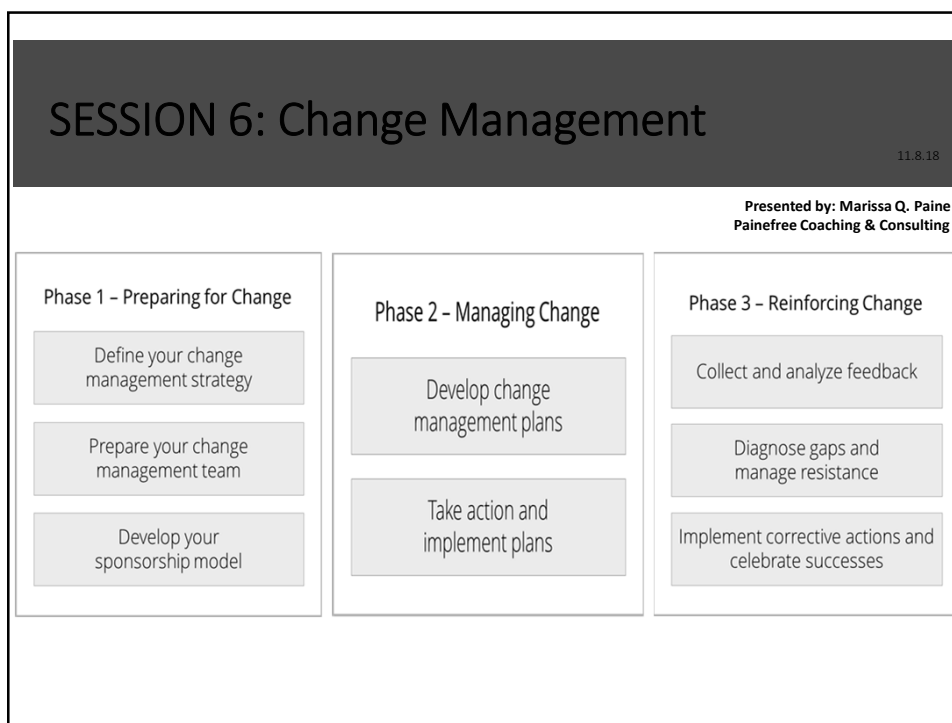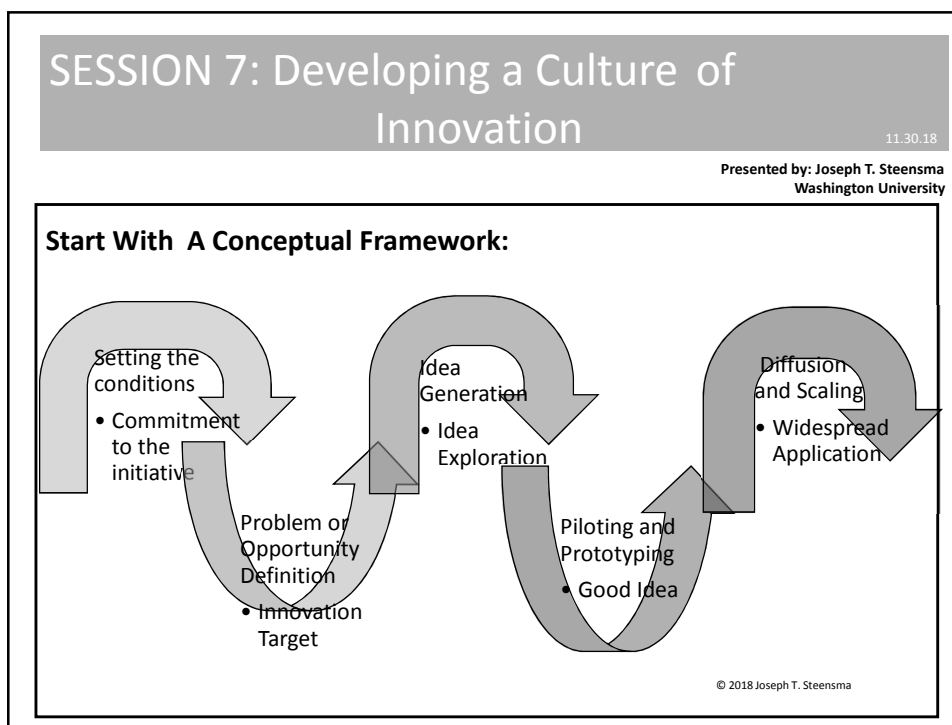
Contingency Planning Model:

| 1. Identify key factors | 2.Determine outcomes & implications | 3. Analyze & identify best responses | 4. Align triggers with responses | 5. Monitor environment & implement responses |

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STAGE #2: PREPARING FOR CHANGE AND INNOVATION

Embrace the inevitability of change & understand each of us deals with it differently

Utilize building blocks to stimulate successful individual change

Properly prepare for, effectively manage and reinforce organizational change efforts

Leverage organizational culture to develop, test and deliver innovation to stakeholders

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SESSION 6: Change Management

11.8.18

Presented by: Marissa Q. Paine
Painefree Coaching & Consulting

Phase 1 – Preparing for Change	Phase 2 – Managing Change	Phase 3 – Reinforcing Change
Define your change management strategy	Develop change management plans	Collect and analyze feedback
Prepare your change management team	Take action and implement plans	Diagnose gaps and manage resistance
Develop your sponsorship model		Implement corrective actions and celebrate successes

13

SESSION 7: Developing a Culture of Innovation

11.30.18

Presented by: Joseph T. Steensma
Washington University

Start With A Conceptual Framework:

Setting the conditions
• Commitment to the initiative

Problem or Opportunity Definition
• Innovation Target

Idea Generation
• Idea Exploration

Piloting and Prototyping
• Good Idea

Diffusion and Scaling
• Widespread Application

© 2018 Joseph T. Steensma

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STAGE 3: EXPLORING RESOURCES

Recognize agency's current state, organizational culture, readiness to manage change and to develop innovation

Be open to and better understand opportunities that can potentially support agency in adapting to the changing environment

Consider how resources can be utilized to better position agency for adapting to change

Identify internal & external resources that can best be utilized to leverage agency's ability for developing roadmaps that guide agency toward strengthening performance

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SESSION 8: Applying a Racial Equity Lens –
Exploring Ways to Advance Equity

1.11.19

Presented by: Kira Hudson Banks, PhD

A PATH TO RACIAL EQUITY

	Awareness of Inequity	Understanding of Why Inequity Exists	Transforming Towards Equity
Regional			
Institutional			
Individual			

	Awareness	Understanding	Transforming
Working On	Awareness Education "Lifting the veil"	Uncomfortable: • Learnings • Explorations • Considerations History	Focus on data and outcomes New and intentional: • Habits • Policies • Choices • Behavior
Common Language	Diversity, Inclusion, Tolerance, Cultural Competency, Race as a social construct	Institutional racism, Intersectionality, Internalized oppression, Internalized superiority	Disaggregated data, Racial Equity Lens, Structural Racism, Equity-driven strategy, Liberation

TOWARD EQUITY

STL FORWARD THROUGH FERGUSON

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SESSION 9:
Board Engagement in Fund Development

2.8.19

**Presented by: Pete Werner, Nonprofit Consultant (P1) and
Wendy Dyer, Wendy Dyer Fund Development Consultants (P2)**

.

P1/ Board Engagement in F/R requires:

- A partnership structure

- Potential tough decisions re: current board membership

- Recruiting & onboarding new members in a strategic and intentional manner

- Members understand the business model

- Members always ask questions & evaluate progress/results

- Strategy in how to ask the Board to fundraise

- Focus on mission, passion & program understanding

- A compelling case statement members can deliver

© 2019 Pete Werner, Nonprofit Consultant

P2/ Crafting Compelling Messages

The "Why" we exist

What it costs

Where the $ gets spent

What it changes

Make it tender and relatable

© 2019 Wendy Dyer, wendy dyer fund development consultants

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Session #10: Optimizing Board Effectiveness

3.8.19

Gold Standard Boards:

Presented by: Laurna Godwin
Vector Communications

GOLD

- ☐ Meet regularly with majority of members attending
- ☐ Understand/perform legal & fiduciary responsibilities
- ☐ Set policy & direction; provide financial oversight; monitor organizational performance (programs & services); hire, evaluate, guide and support CEO
- ☐ Utilize Committee structure to reflect agency strategic priorities & change as needed
- ☐ Strong Board Chair-Chief Executive partnership
- ☐ Board meetings focus on problem solving, inquiry, exploring root causes/new ideas
- ☐ Strategically select Board candidates to advance agency's work
- ☐ Conduct ongoing training about agency, its programs, field & landscape
- ☐ Participate in fundraising; advocate for agency; serve as ambassador
- ☐ Complete annual individual member self-assessment; and periodic board assessment

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SESSION 13: Strategic Alliances – Part 2

6.21.19

Presented by: Allie Chang Ray,
MUTARE Network

Reasons to pursue Strategic Alliances:

- Gain leverage among stakeholders
- Address complex issues
- Better integrate continuum of services
- Strengthen program quality and performance
- Gain administrative efficiencies
- Create economies of program scale
- Extend reach with new

The Collaborative Map

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SESSION 14:
Executive Succession Planning

8.2.19

Presented by: Dick Goldbaum, Transitions in Leadership;
Allie Chang Ray, MUTARE Network

Succession Planning:
A systematic approach for creating continuity of leadership in an organization
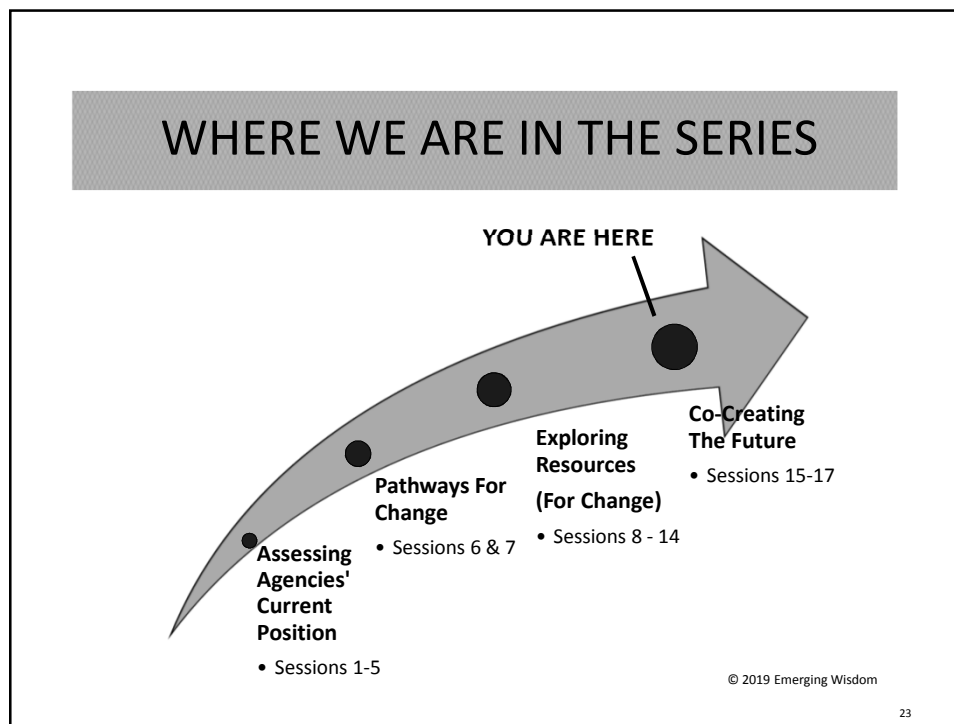
Components of Executive Succession Plan
- ❑ Sudden loss
- ❑ Planned departure
- ❑ Talent/Leadership development

Board Succession Planning
- ❑ View holistically & align w/ current & future goals
- ❑ Consider Board's overall composition
- ❑ Focus on key leadership roles needed for the Board
- ❑ Define skills, expertise & traits
- ❑ Build Board knowledge on the nominating process

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WHERE WE ARE IN THE SERIES

YOU ARE HERE

**Co-Creating
The Future**
• Sessions 15-17

**Exploring
Resources
(For Change)**
• Sessions 8 - 14

**Pathways For
Change**
• Sessions 6 & 7

**Assessing
Agencies'
Current
Position**
• Sessions 1-5

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SESSION 15: Strategic Visioning

9.13.19

Presented by: Rebeccah Bennett
Emerging Wisdom

Visioning

A process that
supports a group
of stakeholders
in developing a
shared vision of
the future. It
involves asking
participants to
appraise where
they are now and
where they can
realistically
expect to be in
the future.

CORE COMPONENTS

**CURRENT STATE
ANALYSIS**
• Strengths
• Weaknesses
• Opportunities
• Threats

**FUTURE LANDSCAPE
FORECAST**
• Trends
• Disruptive changes
• Organizational
preparedness

IMAGE OF SUCCESS
• Desired impacts
• Core organizational
attributes

STRATEGIC PRIORITIES
• Areas of organizational
focus, action and
investment that
advance the vision

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Member Agency
Strategic Transition Planning Series

Please contact Julie Simon at
Julie.simon@stl.unitedway.org
with questions, comments or concerns

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United Way
STRATEGIC TRANSITION
PLANNING SERIES 2018-2019
Strategic Visioning
October 10, 2019

emergingwisdom

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SESSION PURPOSE

- Better position member agencies to adapt to a shifting funding environment

- Integrate insights and learning from previous sessions to help establish a path forward

- Develop a guiding vision that crystallizes organizational priorities and direction in the midst of environmental change

- Operationalize strategic vision via the development of transition strategies and action plans

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LEARNING OBJECTIVES
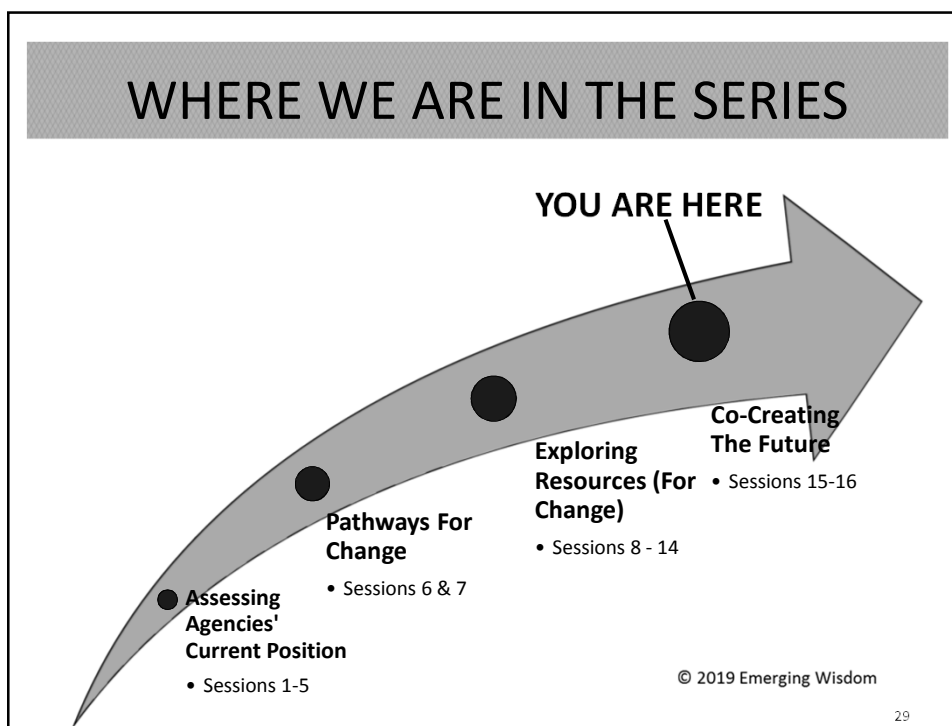
Participants:

- Understand the roadmap for moving from strategic visioning to transition planning and implementation

- Determine their agency's transitional strategic priorities

- Gain insight on framing organizational goals, objectives and strategies that support their transitional priorities

- Know how to build game-changing action plans that lead to operational transformation

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WHERE WE ARE IN THE SERIES

YOU ARE HERE

Co-Creating The Future
- Sessions 15-16

Exploring Resources (For Change)
- Sessions 8 - 14

Pathways For Change
- Sessions 6 & 7

Assessing Agencies' Current Position
- Sessions 1-5

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TODAY'S AGENDA

- Welcome, Session Purpose & Introductions **(9:00 am)**
- Agenda Review
- Transition Planning Overview
- Foundational Elements of Planning
- Strategic Visioning Review
- Strategic Priority Development
- Break **(11:00 am)**
- Operational Transformations
- Lunch **(12:00 pm)**
- Devising Goals & Objectives
- Strategy Development
- Wrap-Up & Survey
- Adjourn **(2:00 pm)**

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ROLES & RULES

Roles

Facilitator

- Guides learning and sharing
- Conducts exercises
- Maintains schedule

Participants

- Are open to learning
- Share knowledge & insight
- Check for understanding

Rules

- Manage your comfort
- Listen actively
- Ask questions and encourage others to share
- Minimize distractions
- Respect all views and opinions
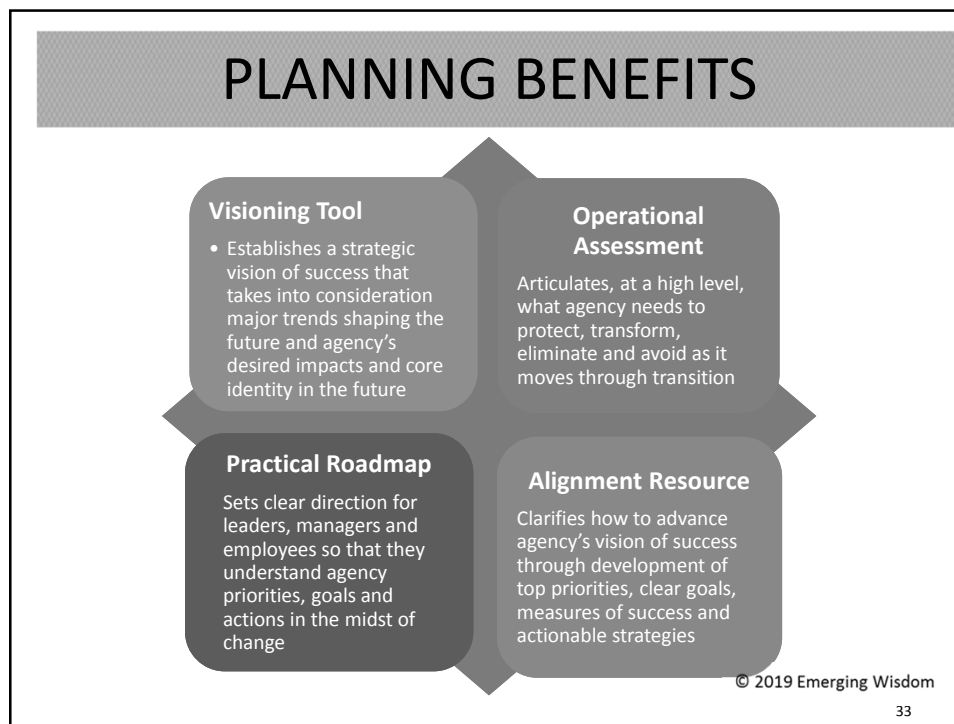- Enjoy yourself!

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I. Transition Planning Overview

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PLANNING BENEFITS

Visioning Tool
- Establishes a strategic vision of success that takes into consideration major trends shaping the future and agency's desired impacts and core identity in the future

Operational Assessment

Articulates, at a high level, what agency needs to protect, transform, eliminate and avoid as it moves through transition

Practical Roadmap

Sets clear direction for leaders, managers and employees so that they understand agency priorities, goals and actions in the midst of change

Alignment Resource

Clarifies how to advance agency's vision of success through development of top priorities, clear goals, measures of success and actionable strategies

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TRANSITION PLAN COMPONENTS

- Mission
- Current State / SWOT Analysis
- Strategic Vision (Landscape & Image of Success)
- Strategic Priorities
- Goals
- Objectives / Success Pathways
- Strategies

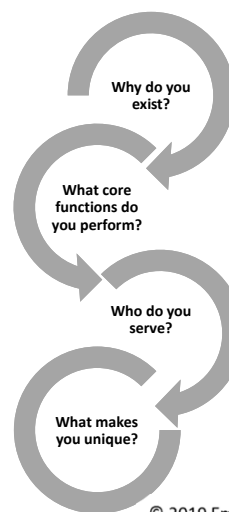© 2019 Emerging Wisdom
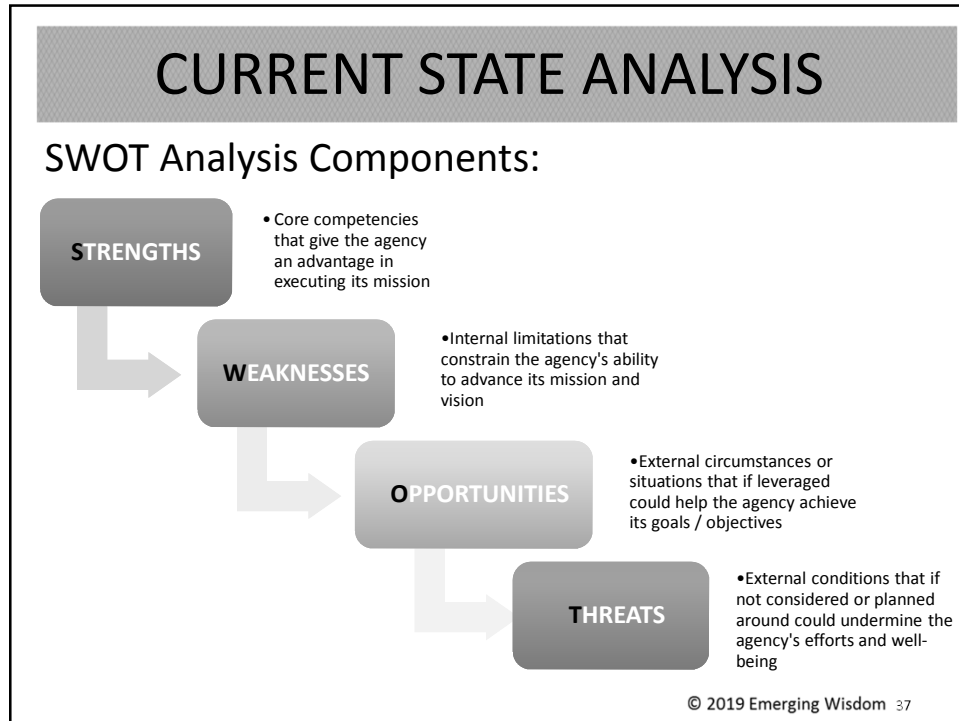
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II. Foundational Elements of Planning

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AGENCY MISSION

- Drives transition plan

- Declares agency's core purpose and focus

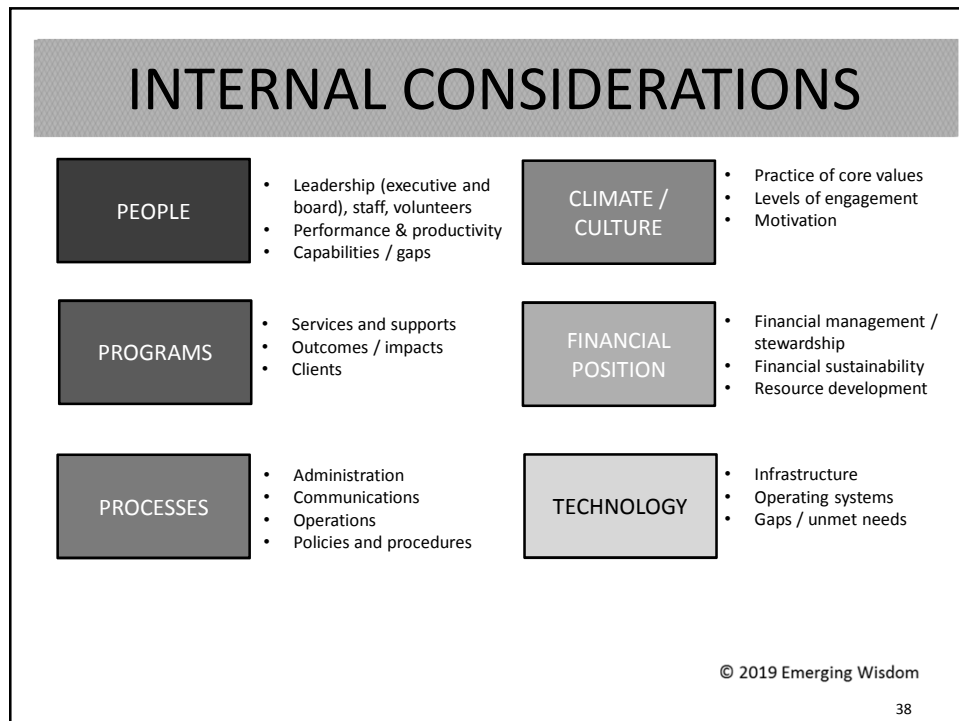- Rarely changes

- Should answer four essential questions:

Why do you exist?

What core functions do you perform?

Who do you serve?

What makes you unique?

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CURRENT STATE ANALYSIS

SWOT Analysis Components:

STRENGTHS
• Core competencies that give the agency an advantage in executing its mission

WEAKNESSES
• Internal limitations that constrain the agency's ability to advance its mission and vision

OPPORTUNITIES
• External circumstances or situations that if leveraged could help the agency achieve its goals / objectives

THREATS
• External conditions that if not considered or planned around could undermine the agency's efforts and well-being

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INTERNAL CONSIDERATIONS

PEOPLE
• Leadership (executive and board), staff, volunteers
• Performance & productivity
• Capabilities / gaps

CLIMATE / CULTURE
• Practice of core values
• Levels of engagement
• Motivation

PROGRAMS
• Services and supports
• Outcomes / impacts
• Clients

FINANCIAL POSITION
• Financial management / stewardship
• Financial sustainability
• Resource development

PROCESSES
• Administration
• Communications
• Operations
• Policies and procedures

TECHNOLOGY
• Infrastructure
• Operating systems
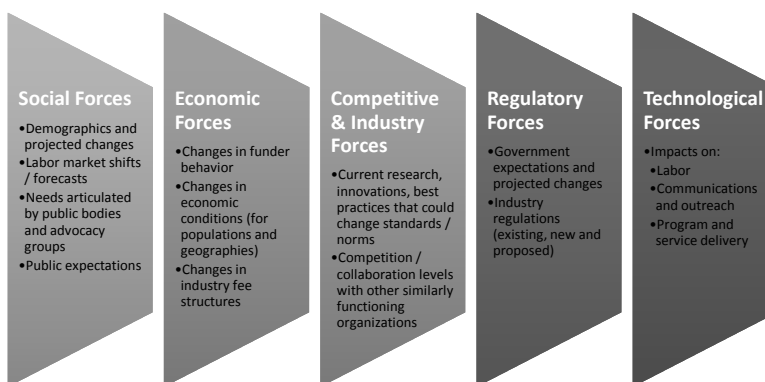• Gaps / unmet needs

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EXTERNAL CONSIDERATIONS

Agencies gather info about the external world, their competitors and themselves to identify external opportunities and threats.

Social Forces
- Demographics and projected changes
- Labor market shifts / forecasts
- Needs articulated by public bodies and advocacy groups
- Public expectations

Economic Forces
- Changes in funder behavior
- Changes in economic conditions (for populations and geographies)
- Changes in industry fee structures

Competitive & Industry Forces
- Current research, innovations, best practices that could change standards / norms
- Competition / collaboration levels with other similarly functioning organizations

Regulatory Forces
- Government expectations and projected changes
- Industry regulations (existing, new and proposed)

Technological Forces
- Impacts on:
- Labor
- Communications and outreach
- Program and service delivery

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III. Strategic Visioning Review

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STRATEGIC VISIONING IS…

A process that supports a group of stakeholders in developing a shared vision of the future. It builds upon an agency's current state appraisal and asks its stakeholders where it can realistically expect to be in the future.

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GUESTIMATING THE FUTURE

- Considers how our operating and external environments will most likely change in the future

- Involves making predictions of the future based on past and present data and most commonly by analysis of trends

- Informs planning, decision-making and resource allocation

- Does not reduce the complications and uncertainty of the future

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FUTURE LANDSCAPE CONSIDERATIONS

1. Where do we expect great change? What changes will most likely occur?

   ➤ **Internally:** people, programs, processes, culture / climate, financial position, technology

   ➤ **Externally:** society, economy, competition and industry, regulation, technology

2. What will likely be the most disruptive changes? What are the future trends the agency **MUST NOT** ignore?

3. What prepares the agency for change?

4. What makes the agency resistant to change?

THE BIG HEAVIES

PEOPLE	SOCIAL CONDITIONS
PROGRAMS	ECONOMIC CONDITIONS
FINANCES	INDUSTRY CONDITIONS
TECHNOLOGY	

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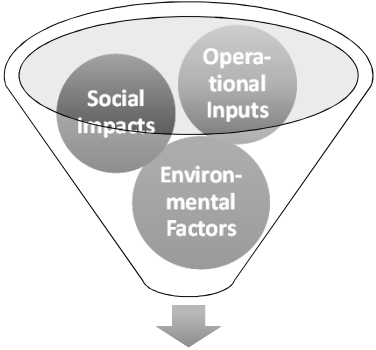43

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YOU IN THE FUTURE

Vision of Success: Helps agency discern who it wants to be in its anticipated future. Emerges in response to mission mandate, current state analysis, and future landscape trends.

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VISION OF SUCCESS

- Orients transition planning efforts
- Describes what reality would be like if your mission were being accomplished in optimal ways
- Is both aspirational and practical
- Evolves in response to environmental and operational turbulence

Social impacts

Operational Inputs

Environmental Factors

Comprehensive Vision

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VISION COMPONENTS

DESIRED SOCIAL IMPACTS	What positive outcomes / impacts will occur for the agency's community / clients as a result of its work?
CORE OFFERINGS / SERVICES	What programs and services will the agency provide? What "Best in class" offerings will distinguish it from others?
CLIENT BASE	Who will the agency serve through its programs and services?
WORKFORCE	Who will execute the agency's programs and services? Who will be its employees and team members?
REVENUE SOURCES	How will the agency make money to support its programs / services and sustain its mission?
FOOTPRINT	Where will the agency offer its services? In what geographic and electronic spaces will it operate?

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IV. Strategic Priority Development: Clarifying The Drivers of Success

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GETTING TO THE FUTURE

Strategic Priorities: Answer the question, "On what MUST the agency focus to advance its vision of success in the future landscape that it anticipates?

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STRATEGIC PRIORITIES

- Focus transition planning efforts

- Arise from SWOT analysis, future landscape assessment and vision of success.
  - Are the bridge between agency's current state and its future state

- Articulate high-level priorities for agency to invest in and take action on

- Frame organizational goals, objectives and strategies

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SAMPLE PRIORITY ANALYSIS

What Are Key Drivers of Future Success?	Rationale – Why Is This Strategic & Not Just Urgent?	What Do We Intend To Achieve By Focusing Here?	What Will Happen If We Do Nothing?
Staff Engagement & Support	• Agency is only as strong as its staff • Staff satisfaction and engagement determine program delivery and quality • Staff need development, support and resources to advance client outcomes	• Heighten staff productivity and performance • Create a culture of collaboration that advances learning and connection	• Inability to attract and retain employees • More staff stress / disengagement • Weakened client services
Branding & Marketing	• Visibility and reputation impact agency's base of support • Reputation influences funding, client referrals and organizational partnerships	• Increase visibility and influence among target audiences • Market agency consistently across all programs and platforms	• Inability to differentiate agency from competitors • Diminished base of support • Difficulty recruiting

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PRIORITY ANALYSIS EXERCISE

What Are Key Drivers of Future Success?	Rationale – Why Is This Strategic & Not Just Urgent?	What Do We Intend To Achieve By Focusing Here?	What Will Happen If We Do Nothing?

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PARTICIPANT SHARING

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V. Operational Transformations

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OPERATIONAL TRANSFORMATIONS

- Consider how agency will have to both stabilize and transform its operations to advance its priorities in the midst of transition

- Focus on what agency will need to protect, modify, eliminate and avoid in light of its priorities and goals

- Invite agency to be proactive, rather than reactive, during periods of great change

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TRANSFORMATION MATRIX

- For each strategic priority, agency develops a transformation matrix:

Strategic Priority / Driver
A critical area of focus in which the agency will invest to advance its vision of success and be ready for the future

Desired Achievements
Critical outcomes / goals that ensure progress on agency vision

Preserve
What agency must protect, build upon, leverage

Modify
What agency must transform and/or improve

Eliminate
What agency must stop doing / discontinue

Avoid
What agency must prevent from happening

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SAMPLE MATRIX

Communications & Outreach

Desired Achievements
Build agency's bases of support (people and financial); Elevate agency visibility and influence; Support growth

Preserve
Positive stakeholder and community reputation

Modify
Key messaging so that it is consistent across all platforms

Eliminate
Narratives that focus on programs, but not impacts and real stories

Avoid
Reliance on social and electronic media only; alienating existing base of support

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OPERATIONAL MATRIX EXERCISE

STRATEGIC PRIORITY	DESIRED ACHIEMENTS / GOALS	PRESERVE / PROTECT	MODIFY / TRANSFORM	ELIMINATE / DISCONTINUE	AVOID / PREVENT

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PARTICIPANT SHARING

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VI. Devising Goals & Objectives

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GOAL SETTING

GOALS:

- Are the aims toward which agency's efforts are directed

- Answer "what," not "how"

- May be pursued in phases (what's critical in the coming year?)

- Typically are broad statements, but can be targeted

- Serve as stair steps to agency vision and fulfillment of its mission

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SAMPLE GOAL STATEMENTS

FOCUS St. Louis

- *FOCUS St. Louis:*
  - Heighten performance, engagement and satisfaction among employees and consultants
  - Create a culture of collaboration that advances learning and connection across programs and functions
- *Collegiate School of Medicine & Bioscience:*
  - Increase the school's visibility and positive community recognition to broaden its base of support
 - Raise $26 million dollars to finance the school's expansion

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OBJECTIVE DEVELOPMENT

OBJECTIVES:

- Indicate the most efficient and effective pathways for reaching agency goals

- Usually focus on cornerstone issues / opportunities

- Answer "how"

- Serve as specific and measurable milestones that must be achieved to advance progress

Specific

Measurable

Attainable

Relevant

Timed
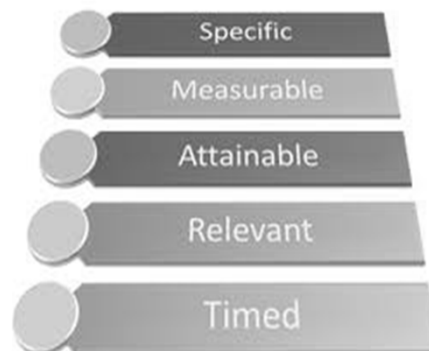
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SAMPLE OBJECTIVES

Strategic Priority	Goal	Objective / Success Pathway
Exemplary & Engaging Learning Experience For Every Student	All students experience dynamic and engaging programs of study and enrichment that advance their success and love of learning	In the fall semester, build the social skills, competencies and confidence that students need to thrive at school.
Health & Well-Being	Grow employee participation in the company's wellness program	In six months, involve at least half of the workforce in the EAP weight management initiative

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GOAL & OBJECTIVE EXERCISE

STRATEGIC PRIORITY	DESIRED ACHIEVEMENT / GOAL	OBJECTIVE / SUCCESS PATHWAY

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VII. Strategy Development

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STRATEGY DEVELOPMENT

Common Definition

A Strategy Is: A game changing action designed to achieve an objective. Serves as the legs of a transition plan

Core Work

Answers: What are you going to do specifically to fulfill your objectives and advance progress on your goals?

Describes: How you are going to get things done

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SAMPLE STRATEGIES

Goal
- Raise $5 million dollars to finance school expansion

Objective
- Undertake a 24 month capital building campaign to finance construction of CSMB's new state-of-the-art facility.

Strategy
- Produce a case statement that explains: the school's fundraising needs, plans for addressing these needs; and what can be achieved with additional resources
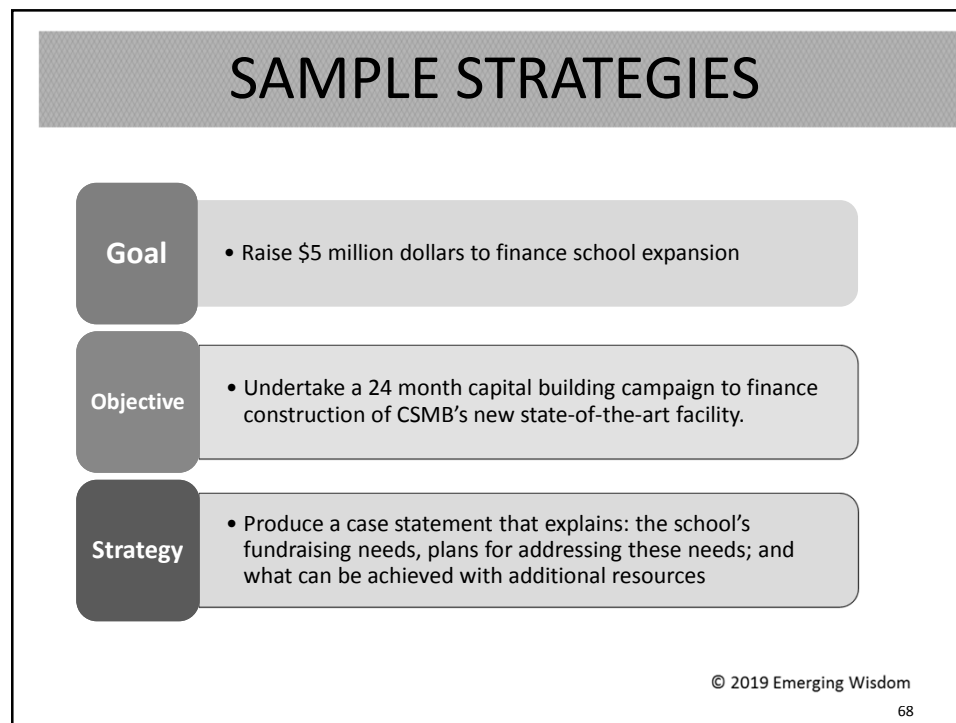
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SAMPLE STRATEGIES

Strategy
- Conduct a feasibility study that identifies prospective funding sources and effective means for cultivating support. Execute study recommendations

Strategy
- Identify an initial funding champion to kick-off major contributions to the capital campaign. Use this commitment to build momentum around fundraising efforts with other donor prospects

Strategy
- Partner with the SLPS Foundation to increase donor investment
- Create campaign collateral that increases prospective donors' interest in CSMB

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STRATEGY CONSIDERATIONS

Focus only on those actions that provide the greatest returns for the effort expended.

- Impact is defined as return on investment.

- Effort is defined as the amount of resources (time, money, labor) required for implementation

  - High Impact / Low Effort Actions: optimal return with minimal effort – Quick Wins

  - High Impact / High Effort Actions: optimal return with major effort – Major Projects

  - Low Impact / Low Effort Actions: minimal return with minimal effort – Fill Ins

  - Low Impact / High Effort Projects: Thankless Tasks

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STRATEGY DEVELOPMENT EXERCISE

STRATEGIC PRIORITY	GOAL / DESIRED ACHIEVEMENT	OBJECTIVE / SUCCESS PATHWAY	GAME CHANGING ACTIONS / STRATEGIES

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PARTICIPANT SHARING

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THANK YOU!

For more information about Rebeccah Bennett and Emerging Wisdom:

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