



Strategic Planning for Non Profits:

How to Prevent your Strategy Session from Turning into a Loong Board meeting.

Over the past fifteen years, we have employed numerous strategic planning tools and resources with varying degrees of success. In this article, we will review five of the more popular resources we have used, compare their common themes and recommend seven steps you should apply to your non-profit mission.

While there are numerous books and resources available, we will consider the following five:

1. Good to Great: Why Some Companies make the Leap and Others Don't – Jim Collins
2. 7 Measures of Success: What Remarkable Associations do that others don't – ASAE
3. Think Big Act Small; How America's Best Performing Companies Keep the Start up Spirit Alive – Jason Jennings
4. Forces for Good: Six Practices of High Impact Non Profits – Crutchfield and Grant
5. The Breakthrough Imperative: Achieving Breakthrough Performance – Bain & Co.

1. Good to Great: Why Some Companies make the Leap and Others Don't – Jim Collins

Collins' Key Points:

Level 5 Leaders - company success first

First Who - Get the right people on the bus

Confront the Brutal Facts - be honest and open

The Hedgehog Concept (Three Circles) - Passionate about it, good at it, get paid for it

A Culture of Discipline - people knowing what to do

Technology Accelerators

The Flywheel and the Doom Loop - building momentum vs changing direction.

Preserve the Core/Stimulate Progress

2. 7 Measures of Success: What Remarkable Associations do that others don't – ASAE

Key Points:

Customer Service Culture

Alignment of Services to Mission

Data-Driven Strategies

Dialogue & Engagement

CEO as Broker of Ideas

Organizational Adaptability

Alliance Building

3. Think Big Act Small; How America's Best Performing Companies Keep the Start up Spirit Alive – Jason Jennings





Key Points:

- Down to Earth/ Humble leadership
- Keep your hands dirty - know your product intimately
- Make Short term goals and long term horizons
- Let Go - if it isn't working, get rid of it.
- Have everyone think and act like an owner
- Invent new businesses - be flexible
- Create win-win solutions
- Choose your competitors - own your market
- Build communities of workers, customers, and fans
- Grow Future Leaders

4. Forces for Good: Six Practices of High Impact Non Profits – Crutchfield and Grant

Key Points:

- Gov't Advocacy & Local Service
- Make Markets Work - work w/ businesses
- Inspire Evangelists
- Nurture Non Profit Networks - collaborate, don't compete
- Master the Art of Adaptation
- Share Leadership

5. The Breakthrough Imperative: Achieving Breakthrough Performance – Bain & Co.

Key Points:

- Cost of Serving Should Always Decline
- Market Position Determines Your Options
- Clients & Funding Pools Don't Stand Still
- Simplicity Gets Results

A side by side comparison of the key points of these great resources shows the following common threads:

- 1) An organization needs to have a visionary CEO, but importantly one who also embraces a servant attitude. The CEO needs to be humble and check his or her ego at the door. This is a tough characteristic to find in many CEOs as it sometimes is their ego and belief that they are great which propels them to the CEO seat in the first place. Key attributes in a CEO are someone that quickly gives credit to others when things go right and takes the blame/responsibility when things do not.
- 2) Flexibility/Adaptability – smaller organizations tend to be able to move more quickly than larger ones when faced with opportunities or adversity. But that doesn't have to be the case. Frequent and open dialogue among





the organization's leadership is the key to being able to adapt. Another key element is to ask for feedback and to listen to what your customers are saying and wanting. They are paying your salary, listen to them!

3) Focus on your mission, and nothing else! It is so easy for an organization to get sidetracked by offering a new product or service that may appeal to a sliver of the market, and to be convinced that strategy will lead to growth. What resources are being pulled away from your mission – the reason your organization exists? If a program or service doesn't further your mission – get rid of it!

4) People – It should go without saying that your organization is only as good as the people working for it. If that's the case, why are there so many books that continue to be written on this subject? Apparently, you are not getting the message. Hire people that are smarter than you. In my case, that's easy! Spend the money to develop the skills and talents of your people. It amazes me that some companies take the position that they don't want to hire someone smarter or spend money on them to make them better, for fear that the person will 1) try to take their job or 2) leave the company for a better offer. What is the alternative? You are left with dumb, lazy, unmotivated workers! If the CEO fears an employee will take his or her job and uses that as rationale for poor hiring choices, you have the wrong CEO – see item #1.

5) Form alliances – Ever heard the saying “there's an association for everything.” Well, that's not exactly true. There are multiple associations for everything and some serve the same mission and markets. You don't have to be the originator of every great idea, you just need to know where to find great ideas. If you are facing a tough legislative issue, find out who else stands to lose as a result of it and reach out to work with them. You may be surprised at the potential allies who support your position. Maybe it's co-locating a conference with another group. The goal is to find the people or organizations that make 1+1=3, or more!

6) Get Emotional! – People do not become engaged in causes based solely on the facts. They are moved by personal stories and emotion. But we are taught in business school to avoid topics that are controversial or that may upset someone. Baloney! Tell your story, make it personal, but only if, and especially if, it furthers the mission of the organization – see item # 3.

7) Infrastructure- Technology matters, especially today. Have you ever tried to look up a company only to find out they don't have a website? Does it make you want to do business with them? How many times have you heard someone say “I don't do social media.” What they are really saying is I'm not interested in finding out what people want or being involved in conversations unless it's convenient and comfortable for me.

A further look at these seven common characteristics shows that there are really only four main questions you need to ask of your organization:

1. Why do we exist?
2. Do we have the right tools in place (people and technology) in place to make this mission work?
3. Do our programs and services align with our mission?
4. Who or what else can help us achieve our mission?



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If your leadership can have a serious dialogue about these four questions, and follow up with action, your organization is on the path to great success.



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