I love the elegance of a beautiful question.

> What can a question do?

> What is our purpose here?

> Before we "lean in" what if we stepped back?

> Why does stepping back move us forward?

> Why do you move to action without asking?

> How do you move from asking to action?

> How can we create a culture of inquiry?

> What if you could not fail?

> What if our agency didn't exist?

> How can we make ourselves go out of business?

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Consulting for not-for-profit organizations

https://www.youtube.com/watch?v=9AjkUyX0rVw

Pivot, Plan and Re-imagine

Building a strategic plan for the future – Part 3

Pivoting our Programs

Introcuctions

Presenter:
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The Community Foundation for Greater New Haven

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Program Officer
Valley Community Foundation

About Today's Seminar

- Housekeeping:

  - Everyone's devices are muted and videos should be hidden to diminish background noise and distraction

  - You will receive a copy of the deck and a recording of this presentation at a later time

  - If you have a question or comments, please type them in the Chat box and I will try to get to as many as we can.

  - If I cannot answer your question during the webinar, please e-mail us at info@danosky.com and we will answer your question off-line.

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Poll

Who is participating in this webinar?
Choose one

- ▶ How many are Executive Directors?

- ▶ How many are operations/administrative or finance people?

- ▶ How many are responsible for implementing and overseeing programs?

- ▶ How many are development directors and responsible for raising money?

- ▶ Any Board members?

- ▶ Other?

Who Are You?

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Poll

What has happened to your programs or services during COVID-19

How is your organization faring this pandemic?

- We are functioning with 100 % of our services in tact

- We were able to pivot most of our services and are functioning close to normal

- We pivoted many of our services and are functioning at half capacity or more

- We have not been able to pivot most services and are functioning below half capacity

Creating Context

Bringing the pieces together

Weaving it together

- Vision/ Mission /Values /People Served and Not Served
- Internal Data
- External Data

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The Questions

1) **Vision:**
   a. Envision the world as you would like it to be. Picture the world from the perspective of Abundance
   b. In that world, how do your clients live? Envision their lives; how would they like to see it?
   c. Describe it in a few sentences or words
2) **Mission**
   a. What could your organization do to make your vision more or a reality for your clients?
   b. If your organization were founded today, what would you do; what would your mission be?
   c. How does that compare with what you are doing today?
3) **Who are you meant to serve?**
   a. In your vision who are you meant to serve? (Age, race, ethnicity, gender, socio-economic capacity, other)
   b. Who are you currently serving? (Age, race, ethnicity, gender, socio-economic capacity, etc.)
   c. Are there people who are missing?
      i. Did COVID-19 identify people falling through the cracks?
      ii. Have racial inequities highlighted people who are not being served?
      iii. Has the economic downturn identified other groups of people needing service?
      iv. Is there a greater need for services than you are currently providing?
4) **Values – (**_Give one or two word answers_)
   a. Why do people seek out your organization or refer others to you?
   b. What are the traits and values you look for when hiring people?
   c. When things didn't work out, why? What were the values that were missing?
   d. When you promote people, why those people over others?
   e. When you nailed something, what values were coming through?
   f. What kind of nonprofit do you want to be in the future?
5) **How do your answers above reflect the services you provide?**
   a. Are they sufficient the way they are?
   b. Should they be delivered differently? If so, how so?
   c. What services should be developed or considered to better reflect your vision or mission?
   d. Should any services be scaled back or eliminated?
   e. Are there organization you could partner with that would strengthen the services you offer?

Perfect World Implications

- In your vision, who are you meant to serve? (age, race, ethnicity, gender, socio-economic capacity, other)
- Who are you currently serving?
- Are there people missing?
- How do the following factors influence who you should be serving:
- COVID-19
- It's impact on minority populations
- Challenges of essential workers
- Education
- Economic Recovery
- Racial injustice

How to Probe Deeper

- Are there programs that should be expanded to meet the expectations of your mission?

- Should new programs be considered?

- Are current programs as relevant as they once were?

- Could current programs be adapted or evolved to meet a changed or changing environment?

- Should certain programs be eliminated?

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Examples

Mental Health Agency

- Identified people falling through the cracks
  - African Americans and people of color
  - People not in transitional housing
  - Families with no resources
- Potential new services
  - Supports
  - De-escalation

Early Childhood Collaborative

- Primary constituent pre-COVID-19
  - Families looking for resources
- Primary constituent during COVID-19
  - Child Care Providers looking for information, advice and resources
- Future consideration:
  - Expansion of services to both groups

Business Model Drivers

- Enrollment –
  - Dependent on numbers coming into the program each year
  - School, Childcare Center, Animal Shelter
- Retention –
  - Dependent on people coming back
  - Performing Arts Organization; Arts Council; YMCA, Environmental Organization; Community Foundation
- Liquidity –
  - Dependent on buildings, equipment and other capital to operate
  - Community Health Clinic, Hospitals, Domestic Violence Shelter
- Reduced Funding Dependence –
  - Dependent on generating revenue and self-sufficiency; reduce dependency on gvt.
  - Community Development Organization

How to Consider Implications of Your Model

- Business model drives revenue?

- What is your primary driver?

- How closely are your programs aligned with that model?

- How can programs support that model?

- How will new programs you are considering align with that model?

- Do you want to change that model?

  - What would be the implications

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Example

Mental Health Agency

- Business Model
  - Retention; Liquidity
- Family Support Services
  - Private pay to provide cash flow for liquidity
- De-Escalation Services
  - Protects existing people they serve
  - Funding to support other services
 - Needed skill set for community services

Arts Center

- Discussion over which model
- Primary revenue comes from enrollment
- What to do about building as it is not central but beneficial to the model
- Critical question is how to increase enrollment
- Secondary question – how to increase enrollment or offer services to minorities, people who can't afford enrollment, etc. to meet mission?

Questions to Consider

- Is your current business model working?
  - If not, why not?
- Is your business model aligned with your mission?
- How can you develop programs that will strengthen the business model?
- Are there programs that can augment your business model?
- What would it mean for your programs and services if you modified or changed your business model?
- Most of all – how can you embrace your business model and really make it work for you?

The Mission Margin Matrix

Arts Center
Mission Margin Matrix
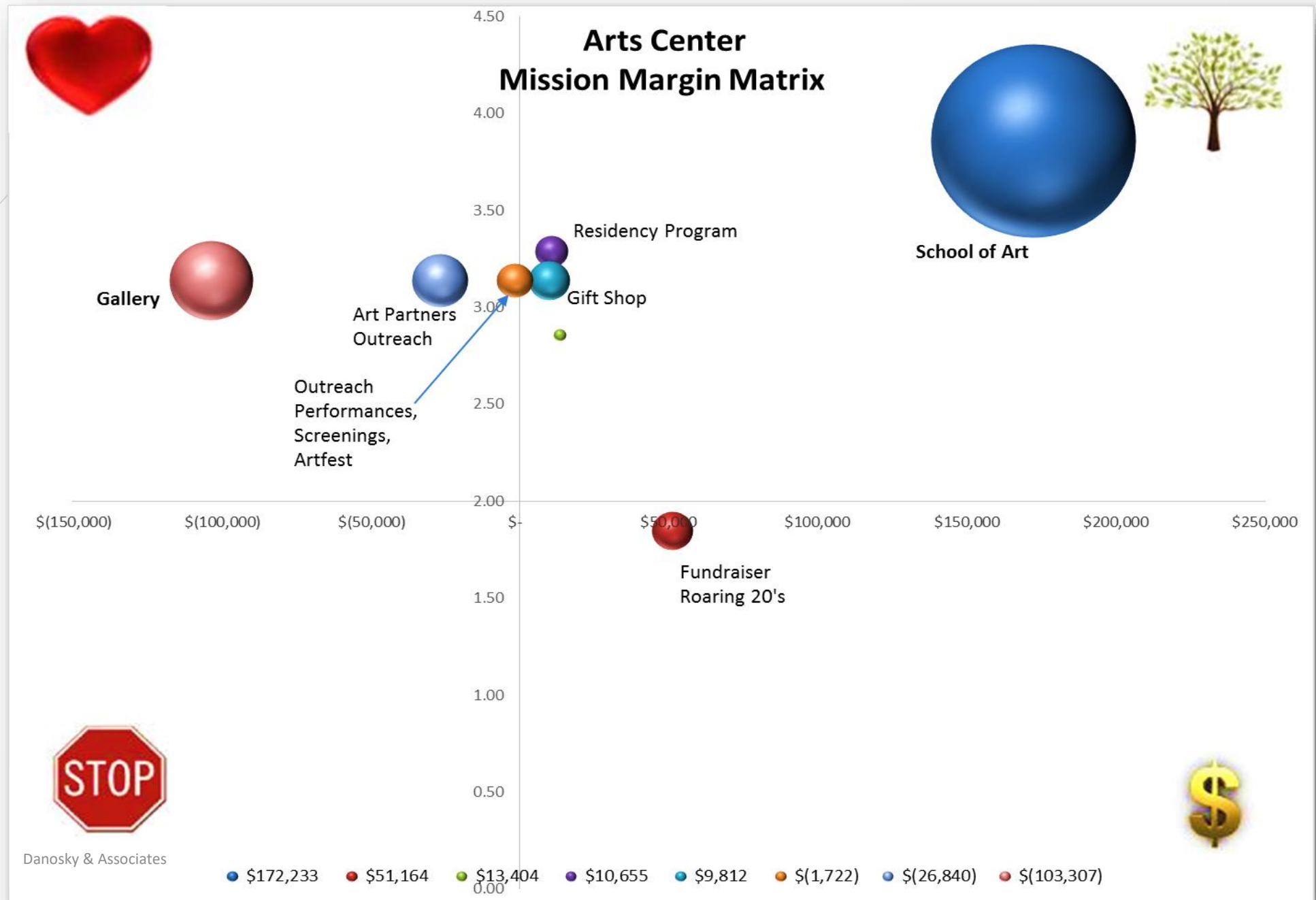
The Question . . .

HOW DO YOU MOVE THE MATRIX?

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Poll

Programs as they relate to internal capacity

- Do you have sufficient capacity now for the programs you administer?

- What happened during Covid?

  - Were there opportunities?

  - Can those opportunities continue?

  - Can you expand them differently? What would you need?

- Were there programs that were temporarily closed?

  - Should you bring them back – in what capacity?

- Could you offer a program (new or existing) in a different way.

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Research from your community

- What does it tell you about need?
    - Are your programs filling that need?
        - If so, how and can they be enhanced. If not, should they?
- Are your programs ideally located?
    - In an area with greatest opportunity or not?
    - What would happen if you relocated programs?
    - Are there census tracts where there is a greater need? Or opportunity?
- Do you need a building? Or did things move virtually?
    - Do you need a full building or satellite offices?
- Do you need bi-lingual staff?

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Talking to people with lived experiences

▶ Do you have data that you've gathered?

  ▶ What does it say about your programs?

  ▶ Have you evolved your programs based on data?

▶ Have you brought people with lived experiences together?

  ▶ What do they want to see?

  ▶ Are you able to provide it?

Examples

- Mental Health Agency
  - Revamping its community living services after COVID-19
- Community health center
  - Offered more same-next day appointments
  - Utilizing Electronic health record resulted in increased prescriptions filled
- Danbury Collective Impact
  - Switched gears after getting feedback

Questions around National Trends

- What is coming down the pike?

- What are the implications for your programs?

  - How will it affect the people you serve?

  - How can you offer services differently?

- What are similar organizations doing?

- Is anything replicable?

- CASE methodology

Pivot – Not Just For Crisis …
… *but because it makes good sense!*

- Pacific Pride Foundation online programs will be a core of their services going forward.

    "We are seeing even more attendance and engagement online from our youth, and we are reaching youth who otherwise might not have transportation to either our typical Santa Maria or Santa Barbara meeting places," the foundation staff told the Santa Barbara News-Press.

- *The National Childbirth Trust is offering antenatal online courses to mums-to-be,*

- *St Barnabas Hospice has put together a digital bereavement guide*

- *Shooting Star Children's Hospices is providing online support groups via Zoom*

Do these have staying power?

- Virtual concerts and virtual talks by authors are changing symphonies and libraries

- After school programs are becoming remote learning tutoring centers

- Literacy Programs are helping adults teach children

What will pivot mean as the world evolves from COVID-19

- Customer behaviors and preferred interactions have changed significantly and will continue to shift

- Demand recovery will be unpredictable

- People have already shifted to digital experiences

- Businesses and nonprofits will need more agile engagement strategies if they want to thrive.

Practical Questions to Ask

- What environmental trends do you need to be aware of?

- What are the greatest areas of need for our clients/our community?

- What do they have to say?

- How has this changed and how will it change?

- What opportunities are there for the organization to make a greater impact?

- Who are your competitors and collaborators? What are their agendas and priorities?

- How well do you perform relative to your competitors?

You don't need to go it alone …

➡ What does your business model tell you?

➡ What does the MMM tell you?

➡ What does the data tell you?

➡ What are people with lived experiences telling you?

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You can dance with a partner ….
You just need to decide the music (and the partner)

- Strategic Partnership

- Strategic Alliance

- Systems Change

- Merged Entity –

  - Partially for a service

  - Total for improved service delivery

How Will You Deliver Your Services?

Visiting Nurses in NYC in the 1890's

Big, Meaningful, Beautiful Questions

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INNOVATIVE STRATEGY FOR WHAT COMES NEXT

STRATEGY
Maximizing Impact

GOVERNANCE
Strengthening Leadership

FUNDING
Fostering Sustainability

FINANCE
Building Resilience

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