

Plan to Execute

The Building Blocks of Execution

By Larry Bossidy, retired CEO and Chair of Allied Signal and Honeywell

What exactly does a leader who's in charge of execution do?

- Know your people and your business.
- Insist on realism.
- Set clear goals and priorities.
- Follow through.
- Reward the doers.
- Expand people's capabilities.
- Know yourself.



Pivot, Plan and Re-imagine

Building a strategic plan for the future – Part 4

Pulling it Together

Introductions

**Presenter:**

Sharon Danosky, President,
Danosky & Associates, LLC

Sharon@danosky.com

www.danosky.com



Jackie Downing

Director of Grantmaking and Nonprofit Effectiveness
The Community Foundation for Greater New Haven



Valerie Knight-DiGangi

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 Q&A 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.

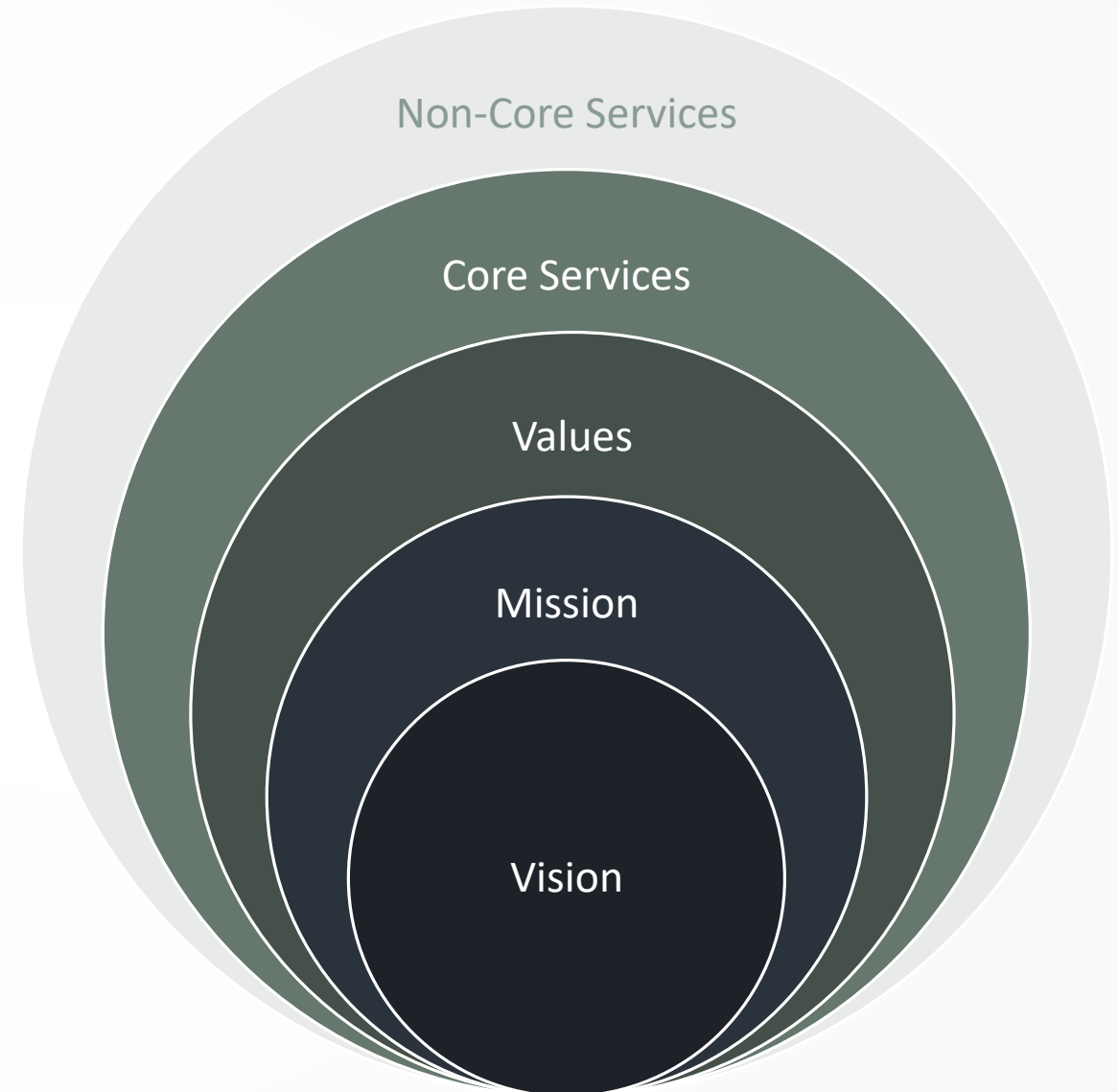
You started with your vision

You moved to your mission

These are enveloped with your values

Around the circles are your core services

Opportunities for partnerships wrap around those



Capacity Encircles Your Ability to Move Forward and Must be Discussed within the Context of Strategy

You started with your vision

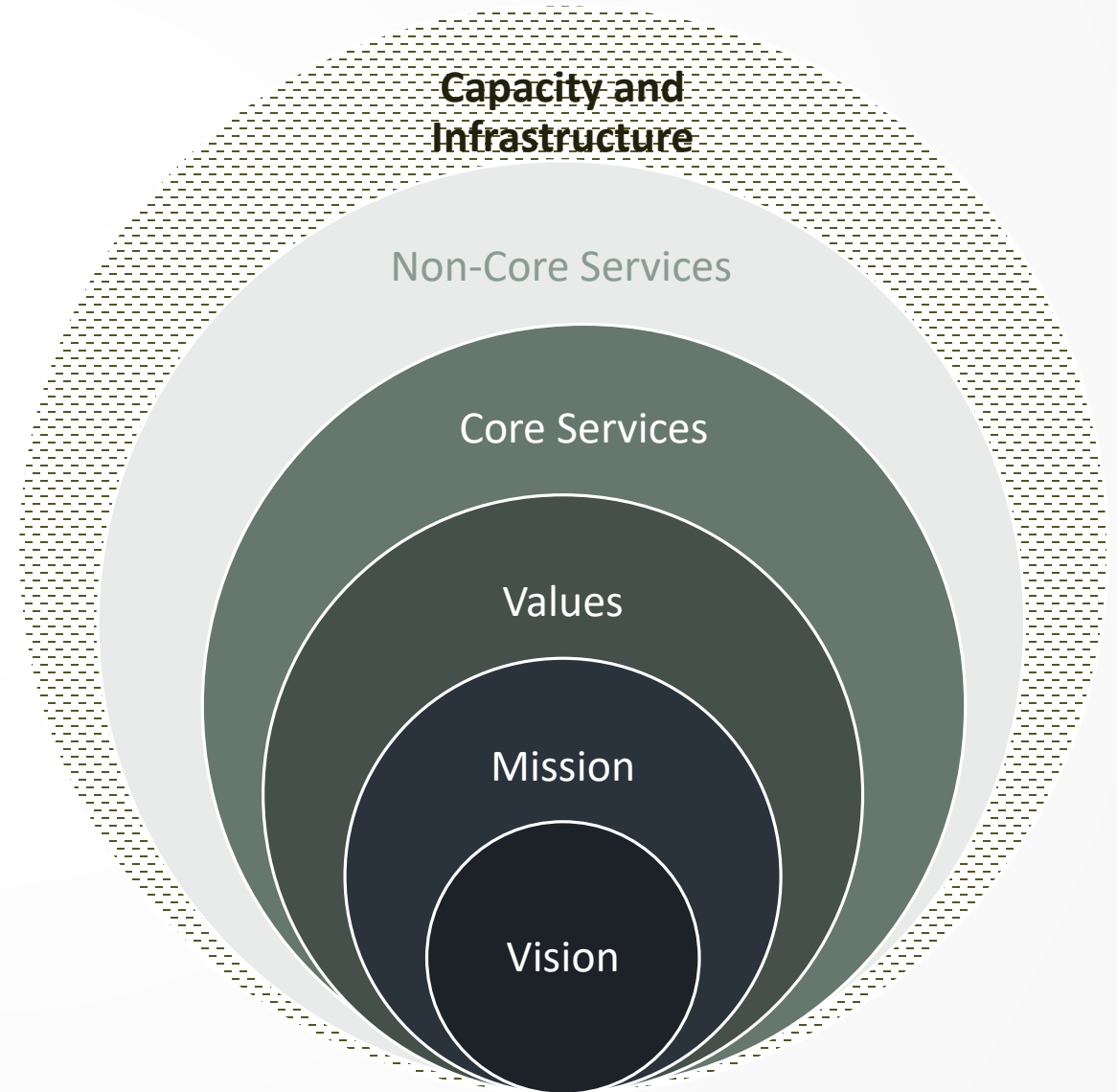
You moved to your mission

These are enveloped with your values

Around the circles are your core services

Opportunities for partnerships wrap
around services which are not core

Capacity and infrastructure limits or
expands what you can do.



Weaving it together



- Vision/ Mission /Values /People Served and Not Served
- Internal Data
- External Data
- Assessment of Programs – Past, Current and Future

Next Step: Build the Planning Template

Planning Element	Explanation	Example
Vision Why	How the world would look if the nonprofit is successful in its mission	
Mission What	Why the nonprofit exists	
Goals Where to?	What you hope to accomplish this year	
Objectives What?	Goals that are clearly defined and measurable.	
Strategies How?	How will you achieve your goals	
KPI How much?	The key indicators for measuring the success of your strategies	
Tactic What	The concrete action steps that implement the plan	
Metric How much	Indicators to measure the success of your tactics	

What has emerged as you have gone through these exercises?

The Plan Needs to Begin With Goals and Objectives

Goals

The goal is what you hope to accomplish this year:

- Strengthen our arts offerings to meet the needs of returning students

Objectives

The objectives is the goal re-defined by specific metrics:

- 80% of students return to take a follow-up or different course.



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Programs Drive Your Strategic Framework

Data and Mission Defines the Services that will frame your strategy

Data

- What is the community need?
- What is your internal data?

Mission

- How does the data stack up against the mission
- How do your programs rate on the Mission Margin Matrix

Review Programs from a Strategic Framework

- Identify all possible new programs
- Identify programs to expand
- Identify programs that have been adapted
- Identify programs that are falling away
- Identify programs that are no longer relevant
- Create a long list
- Curate that list with staff and board
- Identify a few programs that warrant greater exploration because of:
 - Mission fit
 - Revenue opportunities
 - Partnership opportunities
 - Ease of implementation

Develop a Strategy Around Programs or Services

- Explore new services
- Expand existing services
- Reduce services
- Enhance reach of services

Define Your Status

- Vulnerabilities
- Strengths
- Obstacles
- Opportunities

Where is your organization most vulnerable?

- Financial –
 - How can you adjust your business model
 - Is fundraising a concern
- What about your staffing
 - Do you have the right staff?
 - Will staff need additional training?
- Technology
 - Do you have sufficient technology?
 - Will you need to upgrade
- Facilities
 - Have you considered what your paced-based programs need?
 - Do changes need to be made?

What are your greatest strengths today?

- Staffing
- Virtual Programming
- Outreach
- Partnerships
- Community Connections

What or how can you expand?

What are your obstacles to success

- Look beyond money – because the money questions can be addressed
- What else is causing limitations?
- Are there internal factors that are blocking success?
- Are there external threats?

The answers will uncover other strategies to pursue

- Staffing
- Technology
- Infrastructure
- Fundraising
- Other revenue-generating opportunities
- Even capital campaigns

Pulling it together

- Board and Staff answer questions about vision, mission, values, people served
- Management and Board research and gather data
- Answers to Questions and data re presented to a Planning Committee
- The Planning Committee and ED identifies potential goals, objectives and strategies,
- Planning Committee develops a retreat agenda that includes
 - Review of Questions and Data and potential goals and objectives
 - Board breakout group to discuss
 - Reconvene board to share discussion
 - Board breakout around strategies
 - Reconvene board to share discussion
- Planning Committee and ED develop a draft plan to share with the Board

The Planning Platform

THE PLAN

- What is Your Vision?
- What is Your Mission?
- What are your Goals?
- What are your Measurable Objectives?
- What are your Key Performance Indicators?
- What are your Strategies?

PLAN IMPLEMENTATION

- What will your Plan Cost?
- What are the Tactics?
- Who is responsible for each Strategy?
- What Committee of the Board is Responsible?
- What is the Sequence?
- What is the Timeline

Financing The Plan

- Not a perfect science but you can do some reasonable estimates and forecasts
- Look at each of your strategies and determine what is needed
- Then consider potential revenue
- Next consider all potential expenses
- And engage in a financial “What if ”

Identify likely expenses and potential revenue

Revenue

- Government funding
- Grants
- Service/Fee based income
- Philanthropy
- Endowments
- In-kind
- Other

Expense

- Employees
- Benefits
- Training
- Technology
- Facilities
- Supplies

Scenario Planning

- Best Case Scenario
- Moderate Case Scenario
- Worst Case Scenario – think through disruptions

Do not create endless scenarios

Be thought provoking

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Income Type	Source of income (by category or specific)	Total Original Budget	Estimated likelihood %	Scenario Budget	Potential budget change	Comments and strategies
Individual contributions	Annual fund			-		
	Board giving			-		
	Special event gala			-		
				-		
Subtotal		\$ -		\$ -	\$ -	
General operating grants	Committed grants			-		
	From known sources			-		
	Unidentified foundations			-		
				-		
Subtotal		\$ -		\$ -	\$ -	
Program grants	Committed grants			-		
	Pending grants			-		
	Unidentified foundations			-		
				-		
Subtotal		\$ -		\$ -	\$ -	
Government funding	State Agency A			-		
	State Agency B			-		
	County Agency			-		
	New state grant			-		
Subtotal		\$ -		\$ -	\$ -	
Program service fees	Contract with Agency A			-		
	Participant fees			-		
	Summer program			-		
				-		
Subtotal		\$ -		\$ -	\$ -	
All other types	Rent sublet			-		
	Interest income			-		
				-		
				-		
Subtotal		\$ -		\$ -	\$ -	
Total Income		\$ -		\$ -	\$ -	
Scenario changes in total income					#DIV/0!	

Expense type	Expense item	Total Original Budget	Changes in Expenses	Scenario Expense Budget	Comments and potential impact
Salaries & wages	Leadership team			-	
	Youth program staff			-	
	Health program staff			-	
	Admin staff			-	
	Summer program staff			-	
	All other salaries & wages			-	
Subtotal		\$ -	0	\$ -	
Benefits and other	FICA & Medicare			-	
	Insurance plans			-	
	Other benefits			-	
	Staff training and recognition			-	
Subtotal		\$ -	0	\$ -	
Occupancy and Operations	Tech vendor			-	
	Phone/internet			-	
	Rent & fixed costs			-	
	Depreciation			-	
Subtotal		\$ -	0	\$ -	
Consumables	Supplies			-	
	Meals and annual meeting			-	
	Printing			-	
	Website			-	
	Other expenses			-	
Subtotal		\$ -	0	\$ -	
Program contracts & services	Contracted client assistance			-	
	Program development			-	
	Evaluation			-	
	Other program expenses			-	
Subtotal		\$ -	0	\$ -	
Professional fees	Accounting services			-	
	Legal			-	
	Strategic planning			-	
	Marketing & PR			-	
	Other professional fees			-	
Subtotal		\$ -	\$ -	\$ -	
Total changes			\$ -		
Grand Total Expenses		\$ -		\$ -	
Scenario change in total expenses			#DIV/0!		

BUDGET IMPACT	SCENARIO SUMMARY	Scenario 1
	If income changes by	#DIV/0!
	Total Income will be	\$ -
	Scenario 1	
	Expense changes	\$ -
	Total expenses will be	\$ -
PROGRAMMATIC AND ORGANIZATIONAL IMPACT		
	Scenario Budget Surplus/Deficit	\$ -
PROGRAMMATIC AND ORGANIZATIONAL IMPACT	Programmatic impact narrative	
	Organizational impact narrative	

The Final Plan and How It Looks

- Vision
- Mission
- Goals
- Objectives
- Strategies
- KPI's

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What's Your purpose

Vision

- ▶ How would the world look if your organization were successful?

“A world without hunger”

Mission

- ▶ What do you do, why do you exist? What is your role in relation to your vision

“To provide access to fresh food for every household in our community.”

“What do you want to Achieve

Goals

- ▶ What are the 2 or maybe 3 overarching things you want to accomplish

“Grow the agency to be the preferred provider in serving people with mental illness”

Objectives

- ▶ How do you put that in terms that are measurable?

“Agency will serve 45% more people with mental illness who live in underserved populations.”

How will you do it?

Strategy - How you will achieve your goal

“Determine best model of delivering services and align facility and technology needs”

How will you measure it?

Key Performance Indicators: The key indicators for measuring the success of your strategy

- Number of people served
- Location of people served

How will you implement?

- Each strategy is assigned to a Committee or Task Force comprised of both board members and staff
 - Staff recommends and executes
 - Board members ensure mission and financial alignment and provides oversight and guidance
- Each strategy will contain a number of tactics or actions steps required to assess and implement. Similar to a business plan.
- A timeline is developed for each strategy.
- Board monitors progress and reports out at each board meeting



— AMERICAN —
**POLARITY
THERAPY**
— ASSOCIATION —

MISSION:

To create an interactive community and expand the awareness of Polarity Therapy worldwide

VISION:

A world where true health is the harmony of life within us

How the mission is reflected in values:

- **Compassion** – kindness, tolerance, inclusive and being charitable with one another
- **Integrity** – transparent, accountable, credible and fiscally responsible
- **Excellence** – professional, clear and neutral with a focus on wellness
- **Joy** – inspiring and unifying others

Achieving our vision:

To pursue our vision requires three critical elements:

1. A stronger profession that inspires greater understanding of polarity therapy
2. An expanded and strong base of members
3. An cohesive organization that is financially secure

Strategies to Achieve Vision:

1

Achieve Accreditation

2

Grow the APTA Membership

3

Strengthen the financial base

4

Build greater awareness of polarity therapy

Strategic Plan 2018-2021

Year 1

- **Achieve Accreditation**
 - Support CGC as it develops the accreditation pathway
 - Submit application
- **Grow APTA membership**
 - Create a task force comprised of members and professional affiliates from other fields (i.e., doctors, therapists, etc.)
 - Evaluate the benefits you provide at each member tier – from general level to advanced and assess pricing
 - Assess School Member Benefits. Develop plan on how to build a strong school membership and marketing initiative. As this drives much of APTA's referrals, a strong marketing partnership with schools can be developed which is mutually beneficial.
- **Strengthen Financial Base**
 - Create a task force comprised of board and members to pursue this initiative. There might be cross-over representation from the Membership Task Force.
 - Build upon and strengthen process for membership renewals and acquisitions using process that is currently in place.

Year 2

- **Grow APTA membership**
 - Roll out revised membership program
 - Implement strong outreach initiative for building school membership
- **Strengthen Financial Base**
 - In conjunction with Strategic Objective 2: Launch membership program
 - In conjunction with Strategic Objective 2: Implement strong outreach for building school membership
 - Brainstorm and test potential for additional revenue-generating opportunities. o-marketing opportunities.
 - Select one or two best options and develop them into a business plan. Seek professional guidance in developing and evaluating the plans.
- **Build Greater Awareness**
 - Create a task force comprised of members and professional affiliates from other fields
 - Review and assess how members and the new membership plan can be used as a platform for spreading the work about APTA.
 - Consider a research project APTA can undertake to build credibility and achieve greater recognition.

Year 3

- **Strengthen Financial Base**
 - Launch one new revenue initiative
 - Research grants to initiate an APTA research initiative to support Strategic Objective 4: Build greater awareness of polarity therapy
- **Build Greater Awareness**
 - Launch research initiative if funding is procured.
- **Assess impact of all initiatives and adjust or build as appropriate.**

Design from the heart ... and the head

Put mission first

Aim for speed over elegance

Own the narrative ... it's yours

Embrace the long view



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