

Bridging Columbia

Planning Session
September 28, 2022

Facilitated by The Weathers Group

Overview

- Increased understanding of external factors that impact your work.
- Explore relevant trends/changes.
- Clarify your current state and trajectory.
- Identifying priorities, goals, and success indicators.
- Collective reflection & consideration.

The Big Picture



**\$1.5 Trillion in
Revenue**

1,561,780+ Tax-Exempt (Nonprofits)

966,711– Public Charities

98,671 – Private Foundations

496,398 – Other 501-c's

**9% of
Economy's
Wages**

**61 Million
Volunteers**

**13 Million
Employees**

10% of Jobs

Nonprofit Strategy

An integrated and coherent explanation of how an organization is going to guide its performance in the future (*i.e. accomplish its mission*)....

Robert M. Sheehan

Nonprofit Strategy

- Story
- Context
- Connection
- Direction
- Sense-Making

Strategic Planning

The **process** of
developing and following
a **roadmap**
that sets and guides **direction**
from where you are
to where you want to be.

The Changing Landscape



The Changing Landscape – P.E.S.T.O.

What trends/changes should we be aware of?

Political	Economic	Social	Technology	Other
<ul style="list-style-type: none">• Policies• Bureaucracy• Regulation• Laws• Influence• Grants• Etc..	<ul style="list-style-type: none">• Industry growth• Costs• Taxes• Inflation• Income• Employment• Competition• Credit• Etc..	<ul style="list-style-type: none">• Attitudes• Behaviors• Norms• Culture• Shared beliefs• Demographics• Etc..	<ul style="list-style-type: none">• Access• Automation• Innovation• Intellectual property• Efficiencies• Business processes• Service delivery• Etc..	<ul style="list-style-type: none">• Anything of relevance that doesn't fit in the other columns

The Changing Landscape

- Competition
- Compliance
- Criticism
- Competency
- Costs



The Stages of Development

Forming

- Transition from individual to member status; explore boundaries of group.
- Testing the leader's guidance both formally and informally.

Storming

- Uncertainty – Why am I here? Why are we here?
- Difficult time for a team; resist collaborating with other team members.
- Groups debate about the approach and actions they need to take.

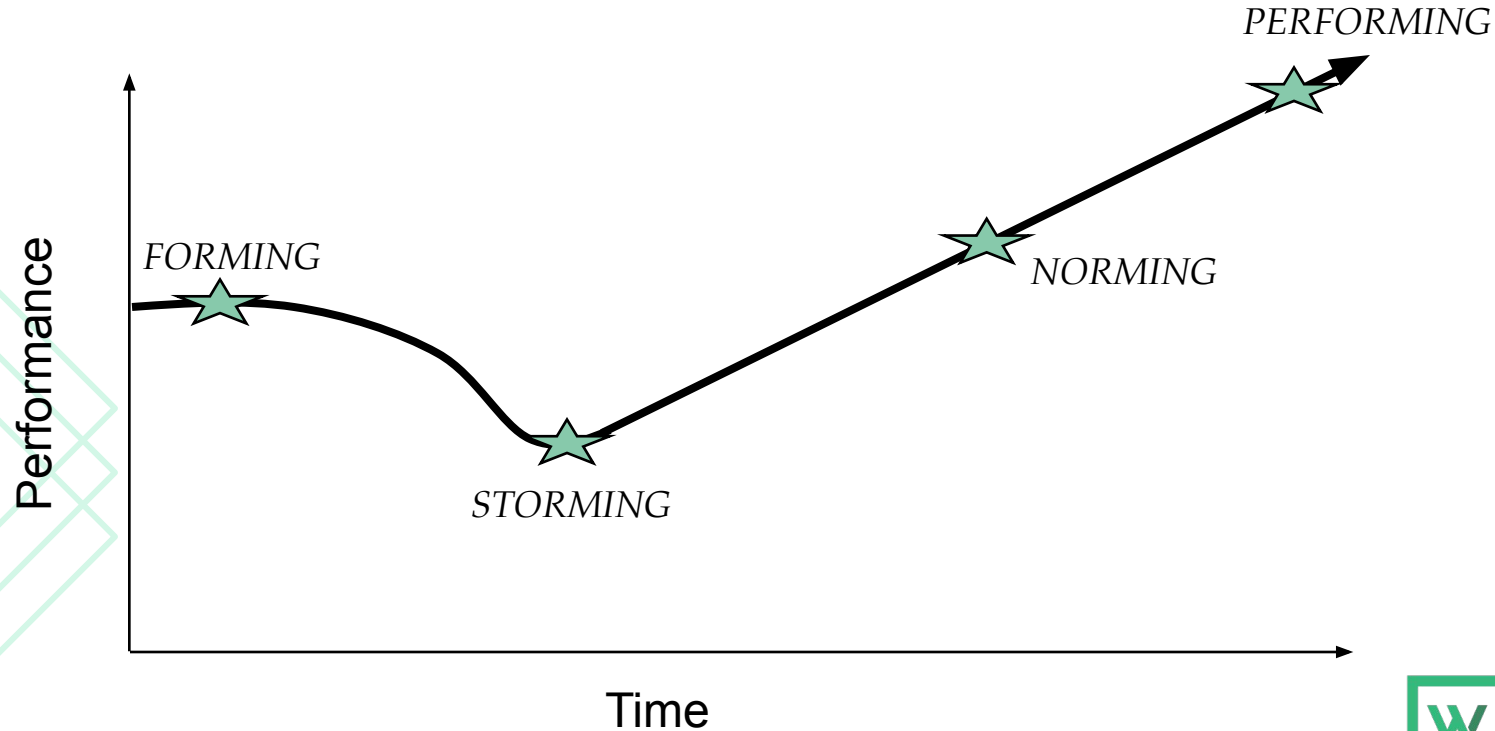
Norming

- Clarity and understanding.
- Members reconcile competing loyalties and responsibilities.
- Ground rules (or “norms”) are accepted; Begin to assist one another.

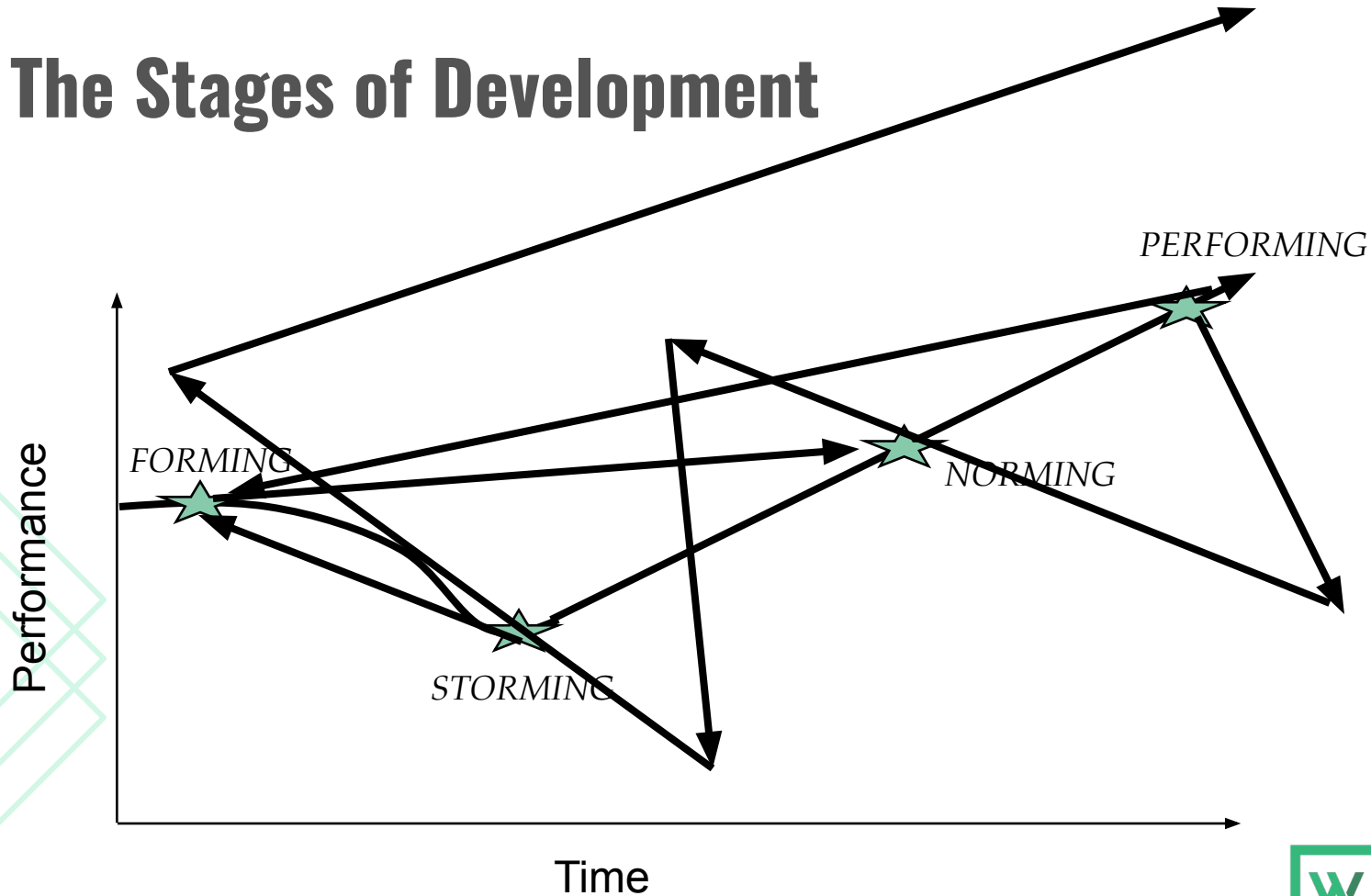
Performing

- Members have discovered/accepted each other's strengths and weaknesses.
- Roles, Relationships and expectations are clear.
- Progress is evident

The Stages of Development



The Stages of Development



STRATEGIC FRAMEWORK

An Expression of Purpose



S.W.O.T. Exercise

- **Strengths** and **Weaknesses**

- **Opportunities** and **Threats**





- 1) What are your strengths?
2) What unique capabilities do you possess?

STRENGTHS



- 1) What are your weaknesses?
2) Where are you struggling?

WEAKNESSES

SWOT Analysis

THREATS

- 1) Do you have solid financial support?
2) What trends may negatively impact you?



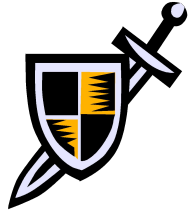
OPPORTUNITIES

- 1) What trends may positively impact you?
2) What opportunities are available to you?



S.W.O.T. Analysis

(S) Protection/Leverage



(W) Elimination/Reduce



(O) Attainment/Achieve



(T) Prevent/Avoid



Priorities

What's **MOST**
important?

Goals Overview

- An outcome statement that defines what you are trying to accomplish.
 - Broad-Based
 - Mission-Related
 - A reflection of the major action of the organization.



Sample Goals

- Reduce underage drinking
- Improve literacy rates in Utopia County.
- Increase outreach efforts in the Hispanic community.
- Extend and improve access to automated services for our clients.

Performance and Success Indicators

- Gifts Secured
- Donation Growth
- Average Gift Size Growth
- Pledge Fulfillment %
- Fundraising ROI
- CPDR
- Online Gift %
- % of Contributions Matched through Corporate Philanthropy
- Recurring gift %
- Email Opt-Out Rate
- Amplification Rate



Performance and Success Indicators

- Diversity of revenue streams
- People served
- TA assistant provided
- Program/service reach/growth
- # of referrals made
- # of referrals received
- # of sites
- # of partnerships
- Client satisfaction
- Staff turnover
- Board engagement
- Board giving
- Volunteer engagement



Next Steps





Thank You.

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