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

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www.danosky.com

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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.

Danosky & Associates
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

Danosky & Associates
Next Step: Build the Planning Template

<table>
<thead>
<tr>
<th>Planning Element</th>
<th>Explanation</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vision Why</td>
<td>How the world would look if the nonprofit is successful in its mission</td>
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<td>Mission What</td>
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<td>Goals Where to?</td>
<td>What you hope to accomplish this year</td>
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<tr>
<td>Objectives What?</td>
<td>Goals that are clearly defined and measurable.</td>
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<td>Strategies How?</td>
<td>How will you achieve your goals</td>
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<td>KPI How much?</td>
<td>The key indicators for measuring the success of your strategies</td>
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<td>Tactic What</td>
<td>The concrete action steps that implement the plan</td>
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<td>Metric How much</td>
<td>Indicators to measure the success of your tactics</td>
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</tbody>
</table>
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.
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 are 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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[www.propelnonprofits.org](http://www.propelnonprofits.org)
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### PROGRAMMATIC IMPACT

- Programmatic impact narrative

### ORGANIZATIONAL IMPACT

- Organizational impact narrative
The Final Plan and How It Looks

- Vision
- Mission
- Goals
- Objectives
- Strategies
- KPI’s
Next Step: Build the Planning Template

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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
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
   - Achieve Accreditation
   - Support CCG as it develops the accreditation pathway
   - Submit application

2. Grow the APTA Membership
   - 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.

3. Strengthen the financial base
   - Strengthen Financial Base
     - In conjunction with Strategic Objective 2, implement strong outreach initiative for building school membership
     - Brainstorm and test potential for additional revenue generating opportunities. Identify marketing opportunities.
     - Select one or two best options and develop them into a business plan. Seek professional guidance in developing and evaluating the plans.

4. Build greater awareness of polarity therapy
   - Strengthen Financial Base
     - Launch one novel revenue initiative
     - Research grants to initiate an APTA research initiative to support Strategic Objective 4: Build greater awareness of polarity therapy

Strategic Plan 2018-2021

Year 1
- Achieve Accreditation
  - Support CCG as it develops the accreditation pathway
  - Submit application

Year 2
- Grow APTA membership
  - In conjunction with Strategic Objective 2: Launch membership program

Year 3
- Strengthen Financial Base
  - Launch one novel 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
INNOVATIVE STRATEGY FOR WHAT COMES NEXT