

Strategy Development & Scaling for Reaching New Heights



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Partner La Piana Consulting

March 24th

8:30-10:00am Pacific







BUILDing for Growth

Selected Cohort





























































Overall Identified Challenges

STAFF	SYSTEMS	
 Naming and prioritizing needs 	Human Resources	
 Communication Organizational Culture 	 Organizational Structure & Mid-Level Management Facilities & COVID response 	
 Skills & Development Executive Leadership & Decision-Making Leadership Transitions 	 Operations & Systems Information Technology 	
Leadership Transitions	 Fund Development, Management, & Long- Term Financial Stability 	

Who We Are

La Piana Consulting is a national firm serving the social sector since 1998.

We partner with philanthropy to develop and deliver customized solutions to both individual nonprofits and grantee cohorts.



Lester Olmstead-Rose Partner







Getting the Most from Today's Workshop



Introduce Yourself

Post the organization you're representing, your role, & location in chat



Ask Questions

Use the "Raise Hand" function or post questions in chat



Share Your Experience

Offer your own perspective & experience w/ strategy development to your peers

We will cover a lot at a high level, but I will do my best to address specific questions.

Strategy Interests

Please share verbally or in chat:

- A question about strategy development and planning I have or...
- A situation my organization is experiencing that requires a strategic response, for example...
 - Geographic or program expansion or reduction
 - New program areas
 - New partnerships
 - Merger exploration
 - Other

Areas of Work

Strategy Development

The social sector needs great strategic thinking, but what it often gets is an inflexible long-term plan. Our highly customizable approach, described in our book, The Nonprofit Strategy Revolution, combines clarity about long-term direction with tools to guide ongoing strategic decision-making, building the organization's capacity to continually develop strategy in real-time.

Business Planning

Once a strategy is developed, our DARE² Succeed business planning methodology, described in The Nonprofit Business Plan, provides a rigorous methodology for analysis of its economic and operational requirements, projecting the financial and organizational impact of business model changes and growth strategies alike.

Mergers & Partnerships

Powerful partnerships can help organizations expand their reach, deliver more effective programs, and save money, advancing their missions. We guide the process from assessment to negotiations to integration. We are a trusted resource to the sector on a full continuum of partnership options, combining objective analysis with careful attention to the people and processes necessary for success. Our Nonprofit Mergers Workbooks are the classic desk references in the field.

Today's Focus

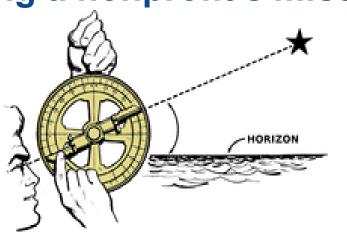
- Principles of Strategy Development
- Importance of Differentiating Strengths (Competitive Advantage)
- Introducing Tools and Developing a Strategy Screen

Principles of Strategy Development



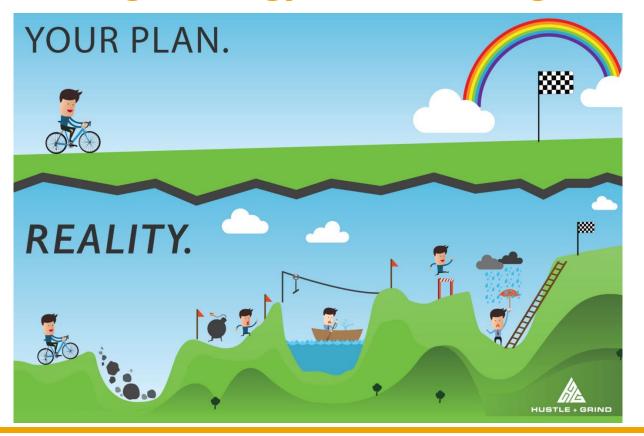
What is Strategy?

A coordinated set of actions designed to create and sustain a competitive advantage in achieving a nonprofit's mission.



Strategy is directional; it keeps your eye on the horizon and encourages measurement and accountability.

Understanding Strategy and Planning...



Strategy Pyramid – Begin with organizational strategy



Strategy in a Time of Change

Assess and analyze your current strategy

- Do you have a clear spot on the horizon that tells you where you want to get to?
- What are the trends impacting what you do or need to do?
- Have you assessed if current short-term activities and objectives are adaptive to new information or circumstances?
- Are your short-term activities moving you systematically towards the horizon?

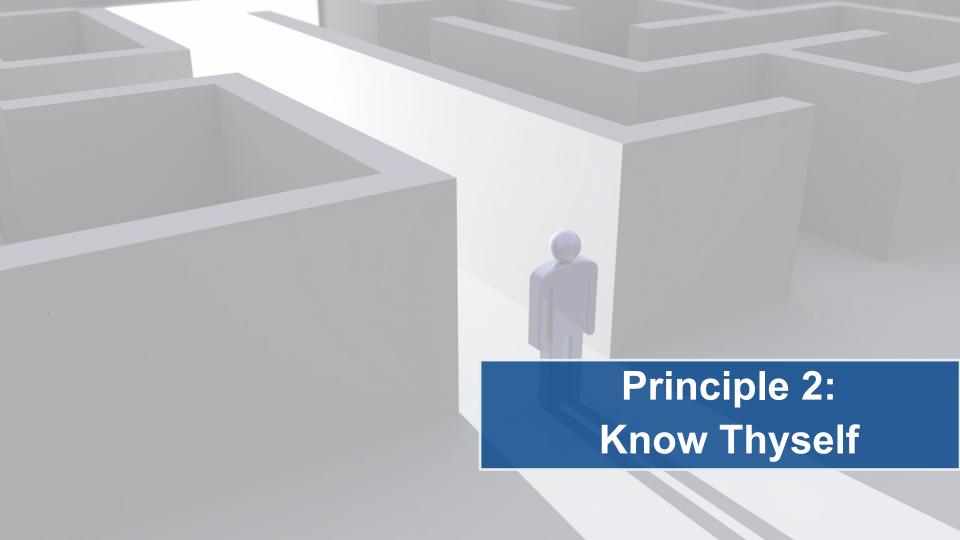
Poll

Big Question

Based on the analysis, do you need a new organizational strategy altogether?

If so, then what Big Question are you seeking to answer? A "good" Big Question is mission-oriented and, if answered, provides clear guidance about how to answer other questions. For example:

- Should we expand geographically?
- Should we deepen our program offerings?
- Should we pursue new partnerships or a merger?
- What areas of work do we prioritize?



Clarifying your Identity

Creating clarity about who you are is critical to your success







- Where you work? (geography)
- Who you serve? (clients/constituents)
- B How you do it? (programs/services)
- \$ How you fund it? (income sources)
- Competitive Advantage

Identity Statement

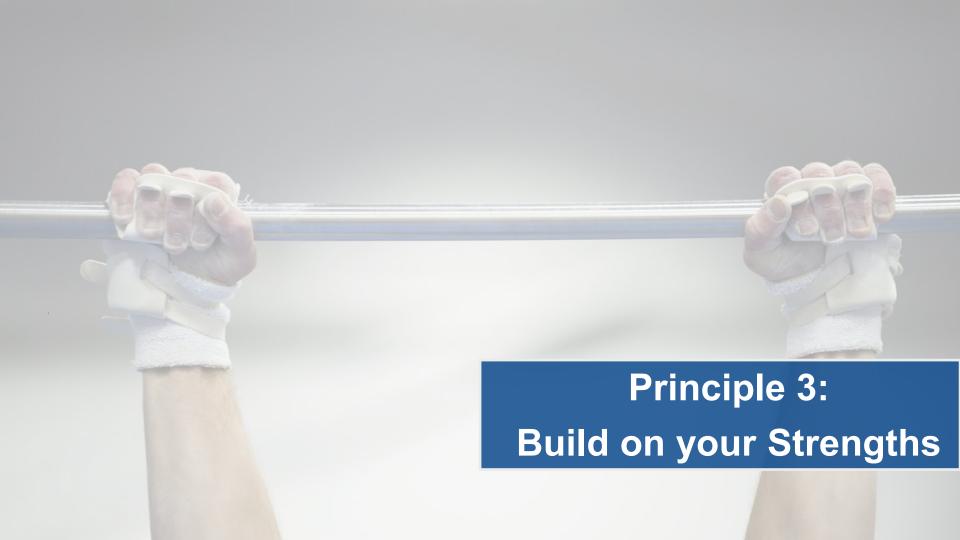
An honest description of an organization at a moment in time. It incorporates critical defining elements of an organization related to mission, business model, and organizational strengths. Effective strategic choices are rooted in a firm understanding of "who we are" as an organization.

	Included	Not Included
Mission		(Not applicable)
Result / impact (vision)		(Not applicable)
Who we serve (who we work with)		
Where we work		
What we do / how we do this (programs)		
Our competitive advantage		(Not applicable)
How we are funded		

Who Does Our Work Benefit?

Who Do We Work with Primarily?





Differentiating Strengths

Your competitive advantage will help determine...

- Why your organization is better suited to do certain work or how you can deliver a higher mission impact than another organization
- The role you play in the ecosystem
- Why others should trust you and invest in you

And it will serve to guide your strategic choices: choose to do more of what you are best at doing.

Differentiating Strengths

The more you understand your *competitive advantage*, the more strategic you can be about deciding whether to take an action and how to partner effectively!



Competitor/Collaborator/Peer Network Analysis

- **Direct competitors** Those organizations with the same market focus as your organization they do what you do (that is, they have a similar program/service) within the same geographic area, for the same types of constituents.
- Substitutable competitors Those organizations that meet the same need that you meet, but in a different way.
- Resource competitors Those organizations that do not compete with you for constituents, but do compete for other resources such as funding, board members, other volunteers, paid staff, and media attention

Examine the following:

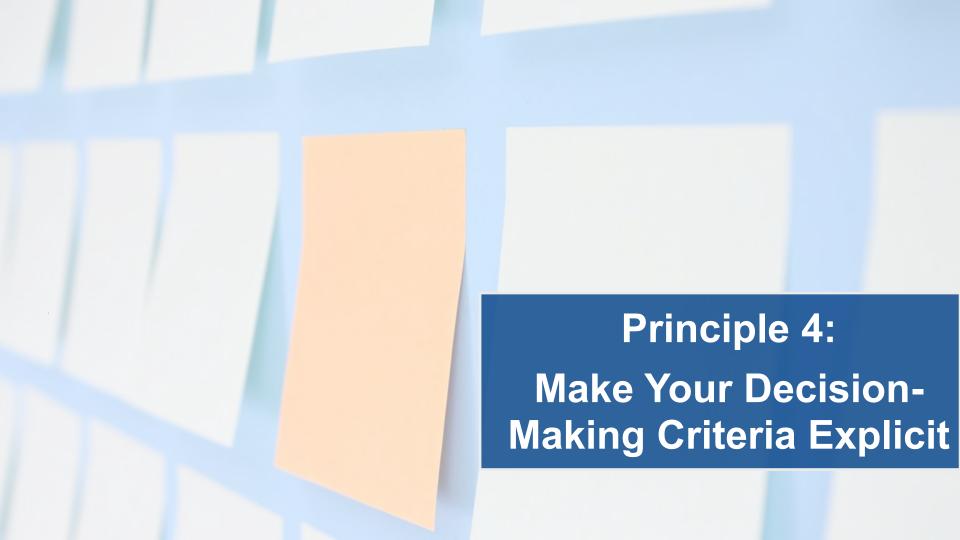
- Board
- Volunteers
- Diversity of funding
- Availability/amount/types of funding
- Programs or services (type, quality, number of services provided)
- Mission-related impact
- Other

Differentiating Strengths

What are one or two strengths my organization enjoys that set us apart?

Note: comparison is with organizations that have overlapping missions or areas of work.

Share conversation highlights in Padlet.



Strategy Screen



What it is

Explicit criteria for decision-making

Tool to challenge the organization's thinking

Aid in weighing choices



What it is not

A rigid framework

A checklist

A set of absolute values

Strategy Screen: Decision-making Criteria

Is this decision...

the best way to achieve our mission?		
leveraging and/or supporting our competitive advantage?		
advancing racial or social equity?		
achievable through staff and funding resources we have or can obtain?		
financially sustainable?		
supported by our core stakeholders?		

Strategy Screen: What Elements Would I Add?

Is this decision...

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...the best way to achieve our mission?
...leveraging and/or supporting our competitive advantage?
...advancing racial or social justice?
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Additional Criteria:

	environmentally sustainable	
•	being told needed/wanted	•
	Capacity to take on	
		•
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Applying the Strategy Screen: Example

Big Question: Should we focus on expanding our community building efforts or our policy capacity?

Criterion	Community Building	Policy - Insider
the best way to achieve our mission?		
leveraging and/or supporting our competitive advantage?		
advancing racial or social equity?		
achievable through staff and funding resources we have or can get?		
fills a gap not provided by others		

Tools

Tools

Tools can be found on the BUILDing for Growth webpage and will be emailed out after this workshop.

Tools provided include:

- Identity Statement
- Funding Sources Worksheet
- Trends Analysis Worksheet
- Competitor Analysis Worksheet
- Applying the Strategy Screen
- Future Identity Statement Template



- Focus on Organizational Strategy
- Know who you are and build from that
- Leverage the strengths that differentiate you from others
- Be intentional about what drives your decisions



Exit Poll

Thank you!

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