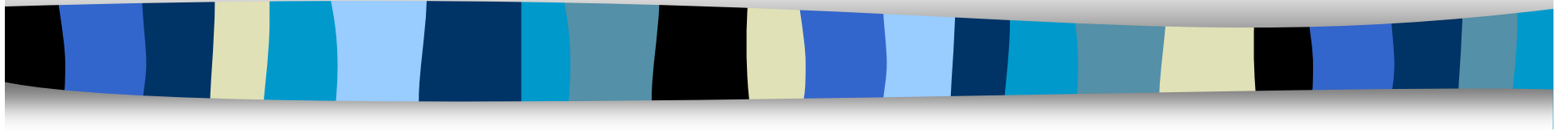
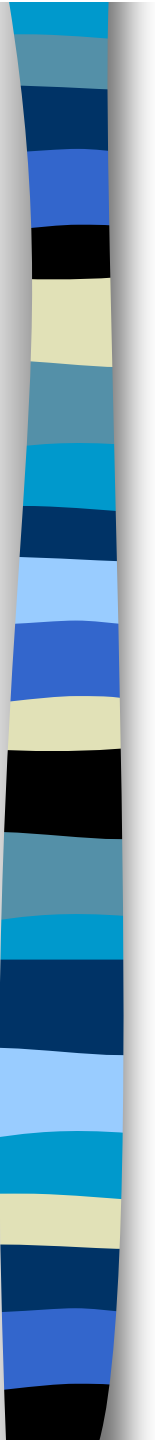
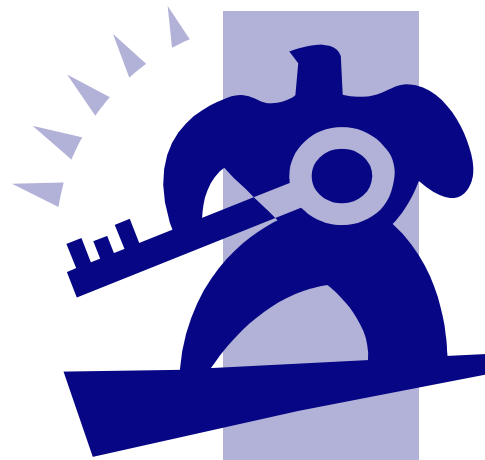


PLANNING & MANAGING GROWTH



Keys to Healthy Growth

Welcome





Learning Objectives

- Identify where your organization is in its life cycle
- Recognize the organizational shifts that take place as your organization expands
- Identify the signs that you are growing too fast
- Develop & apply planning strategies
- Develop & use tools to manage & track progress
- Apply valuable tools for managing and nurturing the culture as your organization grows



Overview

- The Life Cycle of an Organization
- Organizational Shift
- Growing Pains
- Strategic Thinking
- Strategic Planning
- Capacity Planning
- Scenario Planning
- Succession Planning
- Developing & Using a Dashboard
- Building a Shared Vision



Getting Started...

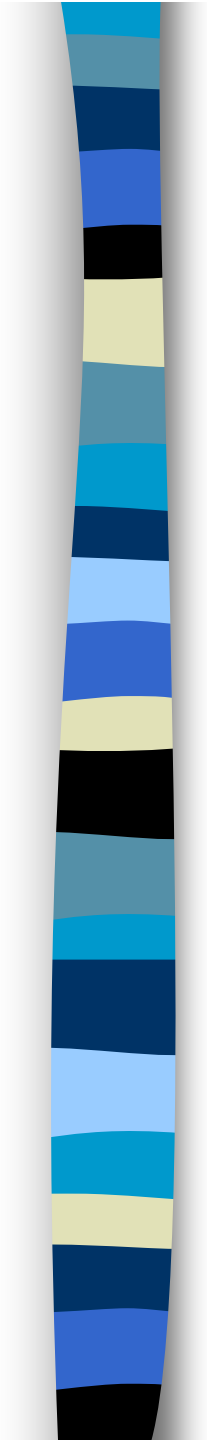
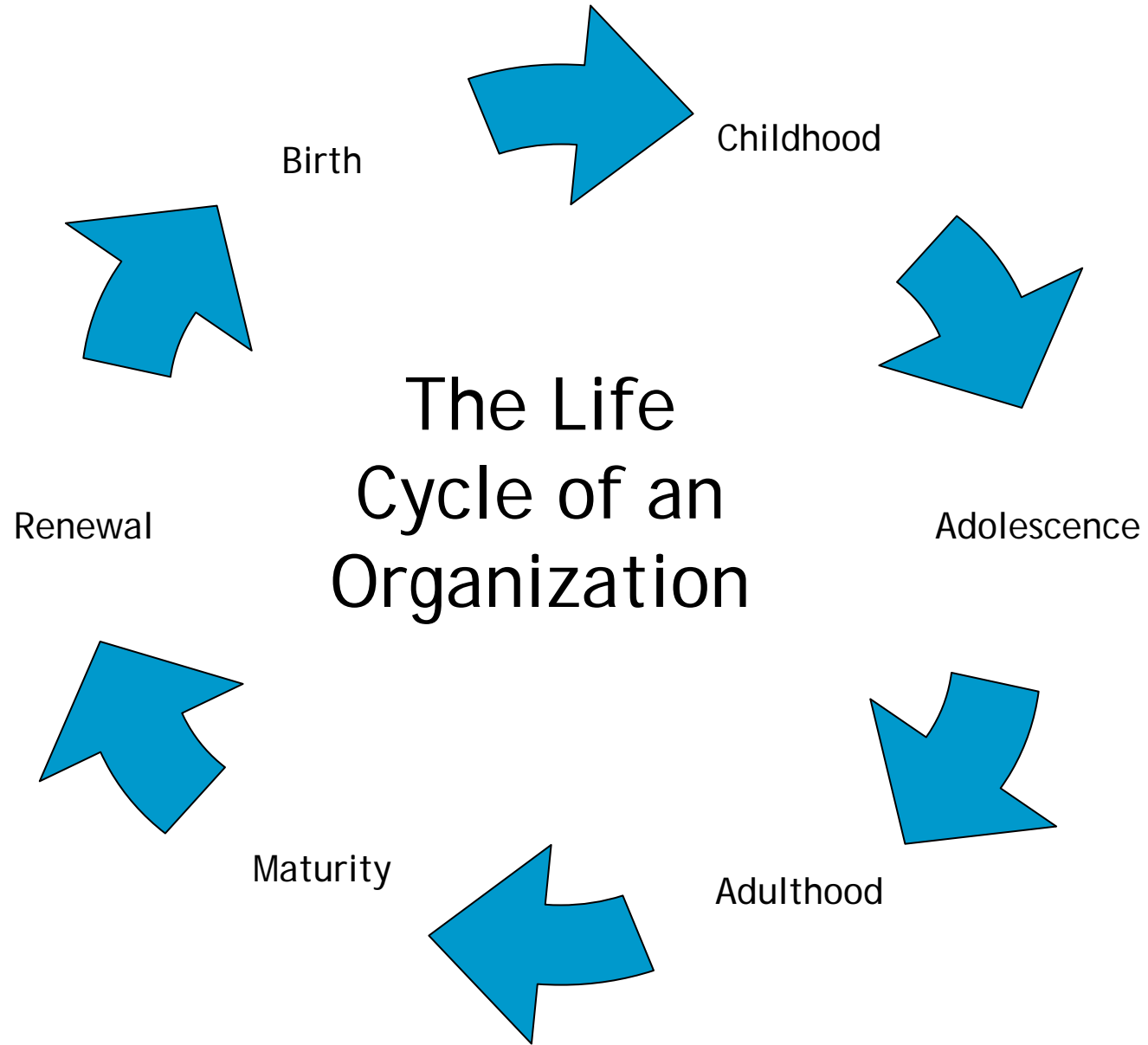
- Please share your name, your role and your organization.
- What is your comfort level and experience in planning and managing the growth of an organization?
- What do you want to learn today?



The Life Cycle of an Organization

- Birth
- Childhood
- Adolescence
- Adulthood
- Maturity
- Renewal

The Life Cycle of an Organization





Group Exercise

- What stage of the “life Cycle” is your organization currently in?
- What are some things your experiencing that indicates the stage it's in?

Organizational Shift



- Generalist → Specialist
- Internal Focus → External Focus
- Informal → Formal
- Tactical → Strategic



Signs You're Growing too Fast

- Space and equipment battles
- Overuse of temps, contractors or volunteers
- Low morale
- High turnover
- Low productivity
- You aren't paying attention to the small stuff
- Operate in crisis mode
- Drop in cash reserves
- Increased complaints



Strategic Thinking

- Ongoing - not an event
- A way of seeing the world
- Move from boardroom to front lines
- Everyone's job - all the time



Deliberate Strategy

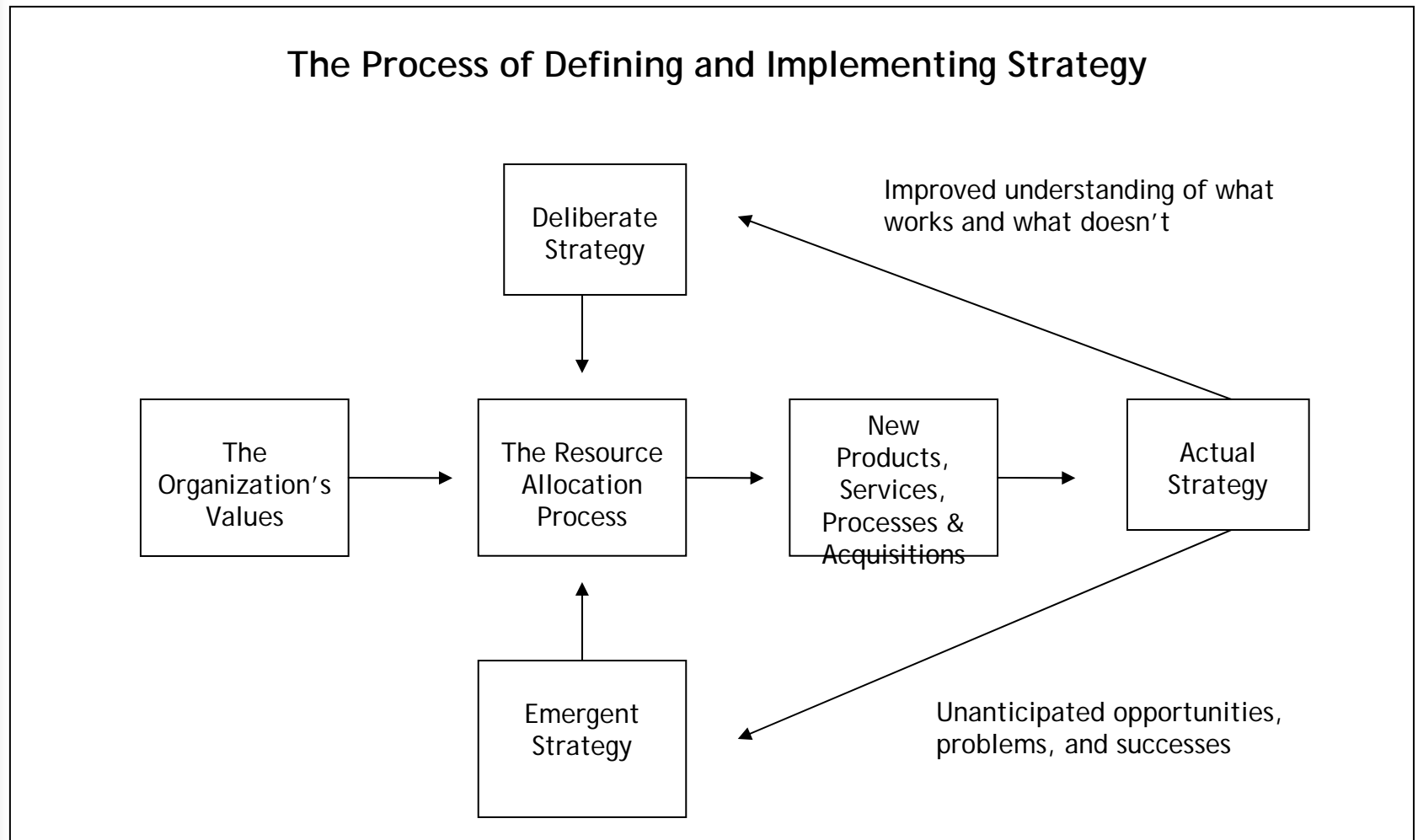
- Addresses all requirements to succeed
- Makes sense to all employees and senior management
- Little unanticipated influence from outside forces



Emergent Strategy

- Surface from within
- Cumulative effects of day to day decisions
- Result from responses to problems or opportunities
- Can be transformed into deliberate strategy
- Best where future is hard to read

Deliberate and Emergent Strategy



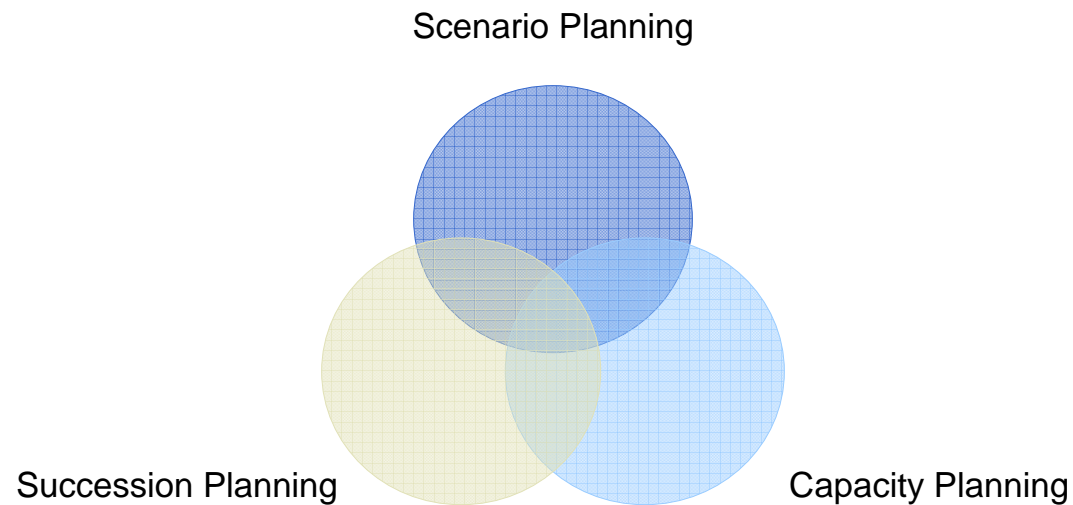
Adapted from *The Innovator's Solution*, Clayton M. Christensen, 2003



Pair Exercise

- What are some examples of deliberate strategies that drive your organization?
- What are some emergent strategies that have presented themselves in the past?

Strategic Planning



"Better go home and make a net, rather than dive for fish at random."

- Chinese proverb



Capacity Planning

- Identifying strengths
- Determining which core skills & capabilities need to be developed
- Allocating resources



Resource Allocation

- Resource allocation determines what strategy gets implemented
- Allocation must be closely tied to strategy or disparities occur
- Strategy is what comes out of resource allocation process - not what goes in



Capacities CDCs Should Focus on

- Resource Capacity
- Organization Capacity
- Networking Capacity
- Programmatic Capacity
- Political Capacity



Pair Exercise

- Discuss an area where a gap exists in your organization.
- Talk about how you can 'close the gap' and what resources are necessary to do so.

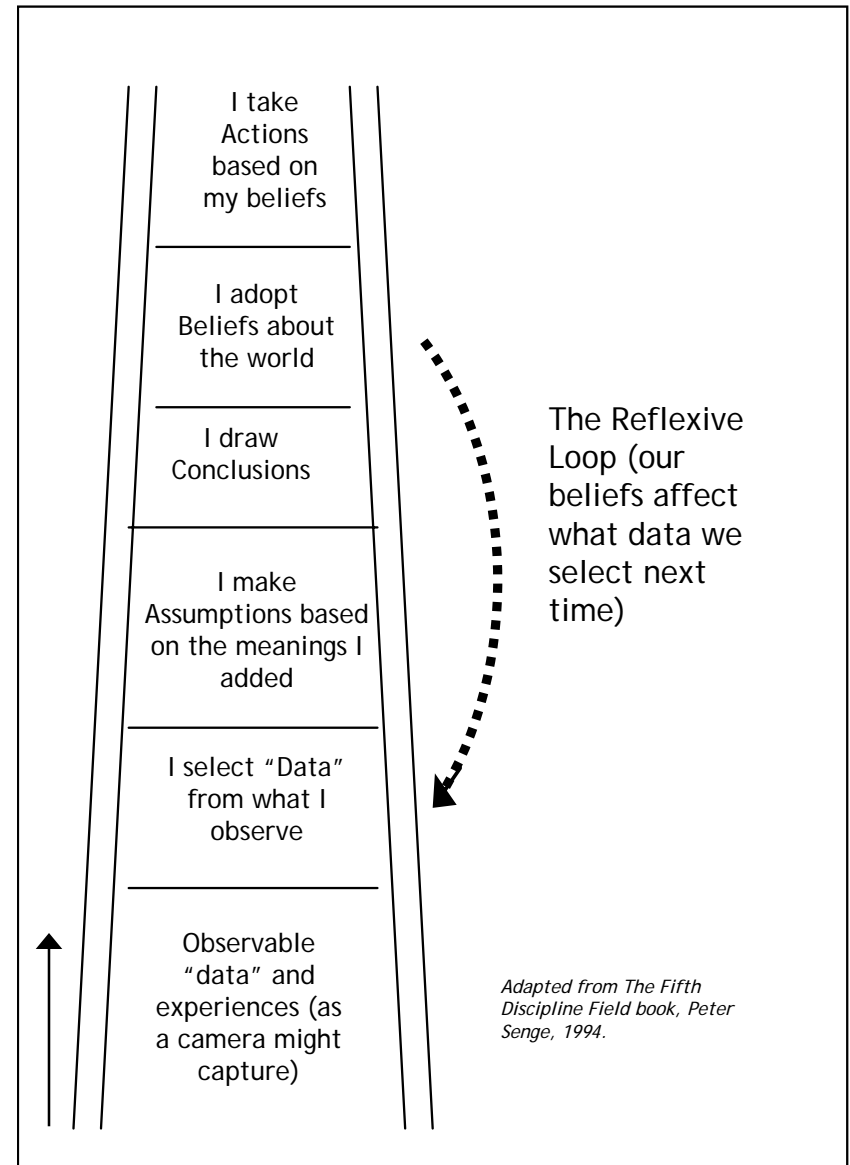


Scenario Planning

- Research current key trends and determine which are predictable and which are uncertain
- Decide which uncertainties are most influential
- Base some stories of the future on those uncertainties
- Imaginatively play out the implications

Scenario Planning

- Mental Models
- Ladder of Inference
- Reflexive Loop



Building Scenarios



- Step 1: Identify focal issue or decision
- Step 2: Assess key factors in the environment
- Step 3: Identify driving forces
- Step 4: Rank the key factors and driving forces
- Step 5: Select scenario logistics
- Step 6: Flesh out the scenarios
- Step 7: Assess the implications
- Step 8: Select the leading indicators

Adapted from The Art of the Long View, Peter Schwartz, 1991



Scenario Planning

Discussion & Analysis

- What are the surprises?
- Where are the gaps in data or knowledge?
- Does what you discovered fit in to current plans?
- Outcome - a portfolio of strategic actions



Succession Planning

- 75% of EDs leaving in 4-5 years
- 1 in 3 EDs fired
- 29% of EDs have a succession plan
- 12 of 15 in NPF study had no plan

Emergency Succession Planning

- Identifies key positions
- Addresses how positions will be filled
- By whom
- Management / Governance issues



Ongoing Succession Planning

- Identifies management roles and people resources needed
- 3 to 5 year outlook
- Identifies key jobs
- Identifies succession candidates
- Customized development plan for succession candidates





Group Exercise

- What are the key positions in your organization that require continuity?
- What would happen today if the person in that position left abruptly?
- Do you know who your high performance / high potential employees are?
- How are you actively develop the skills and abilities of high performance / high potential team members?

Developing & Using a Dashboard



- Graphic report
- Performance metrics linked to key performance indicators
- Tracks progress toward goals
- Quickly detect trends
- Take corrective action as needed

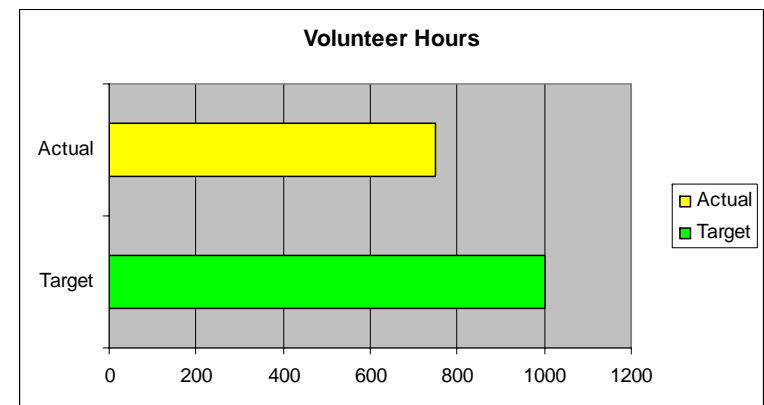
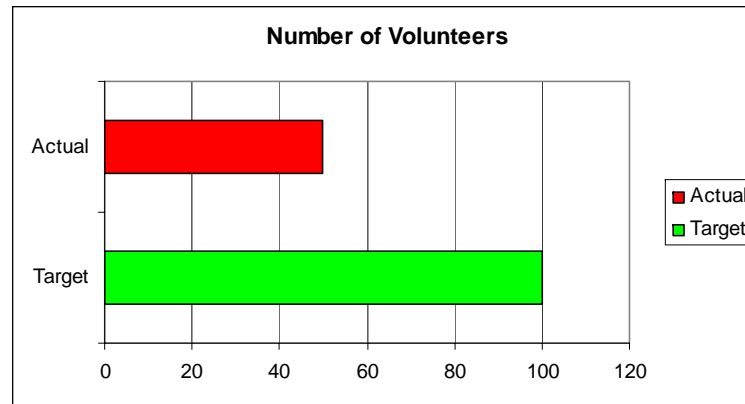


Developing a Dashboard

- Identify top priorities or objectives
- Identify key performance indicators linked to those objectives
 - Which do you want to monitor?
- Identify targeted outcomes
- Develop reporting format
- Determine reporting frequency

Developing a Dashboard

Sample Dashboard





Pair Exercise

- Talk about the performance indicators you would like to include - or have used - on a Dashboard.
- Which performance indicators would you like to include on a Dashboard for presenting to your board?



Dashboard Metrics

Program / Service

of housing units built/acquired

of new residents

Resident satisfaction

Resident Services Programs implemented

Management / Board Effectiveness

% of board member attendance

of new board members joining

Employee turnover

Financial Sustainability

% spent on fundraising

of individual and corporate donors

Total non-government revenue

Community Support / Engagement

of volunteers

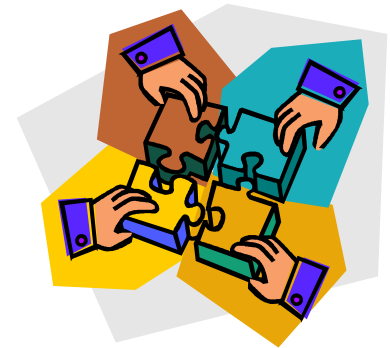
Total volunteer hours

of community partnerships

Managing / Nurturing the Culture

Building a shared vision

- Telling
- Selling
- Testing
- Consulting
- Co-Creating



Adapted from *The Fifth Discipline Fieldbook*, Peter Senge, 1994



Building a Shared Vision -

Telling, Selling, Testing, Consulting, Co-creating

- What the boss says, goes
- Takes place in a crisis situation
- When dramatic change is necessary
- Can seem authoritarian but if delivered correctly, others will understand the need and support it



Building a Shared Vision -

Telling, Selling, Testing, Consulting, Co-creating

- Inform people directly, clearly and concisely
- Tell the truth about current reality
- Be clear on what is negotiable and what is not
- Give the details but not too many



Building a Shared Vision -

Telling, Selling, Testing, Consulting, Co-creating

- Top leader seeks buy-in
- Keeps channels open for responses
- Supports enrollment, not manipulation
- Builds on your relationship with your employees
- Focuses on benefits, not features
- Moves from the royal “we” to the personal “I”



Building a Shared Vision -

Telling, Selling, Testing, Consulting, Co-creating

- Lay the vision out for testing
- Solicit feedback
- Refine & redesign
- Provide as much information as possible
- Make a clean test
- Protect people's privacy
- Survey questionnaires / face-to-face interviews
- Test for motivation, utility, capability



Building a Shared Vision -

Telling, Selling, Testing, Consulting, Co-creating

- Use the “cascade” process to gather information
- Build in protections against distortion of the message
- Gather and disseminate results.
- Don't try to “tell” and “consult” simultaneously



Building a Shared Vision -

Telling, Selling, Testing, Consulting, Co-creating

- Start with a personal vision
- Treat everyone as equals
- Seek alignment, not agreement
- Avoid “sampling”
- Have people speak out only for themselves
- Expect and foster reverence for each other
- Consider using an “interim vision” to build momentum
- Focus on dialogue



Individual Exercise

- Read the scenario
- Consider which approach to building a shared vision you would use

Questions / Comments

