



Engaging Your Future

Building Blocks for Effective Strategies

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Presenter



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“I founded Snowflake after 15 years in “big consulting” to help non-profits transform lives and communities through strategy, organization, people, and marketing. Since 2014, we’ve worked with over 40 clients in the Mid-Atlantic and beyond.”



www.snowflakellc.com



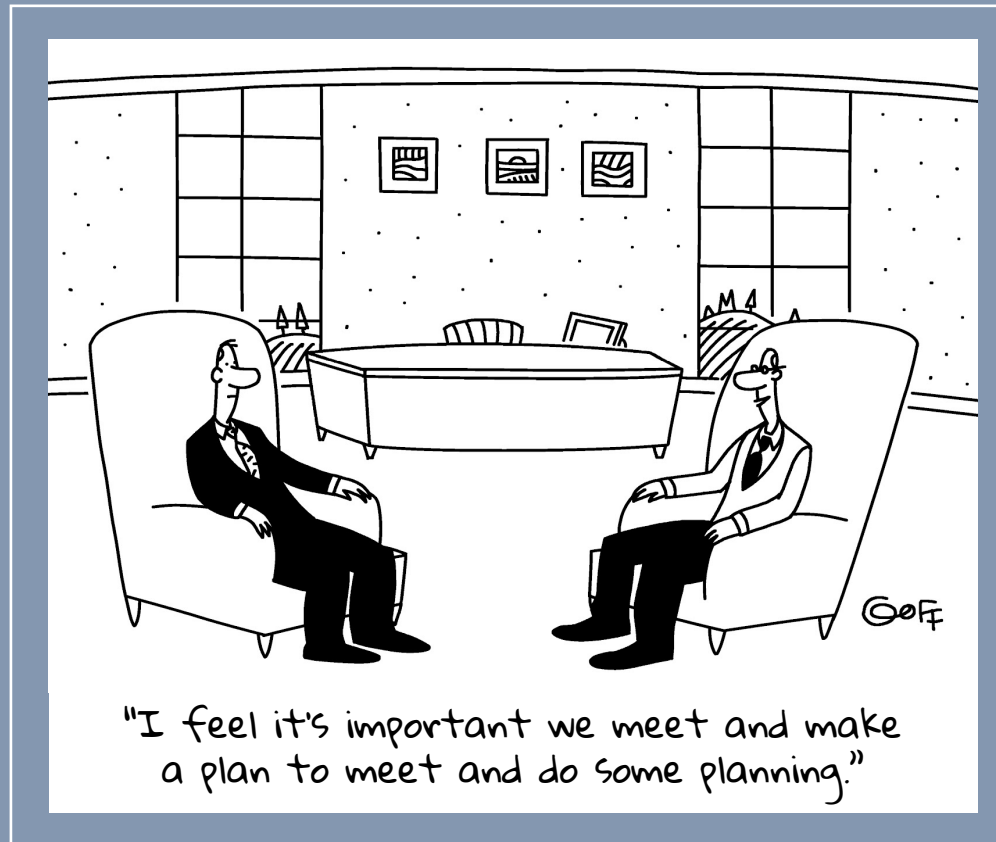
www.linkedin.com/company/snowflakellc



Strategy Building Blocks

Introduction

Introduction



Adapted from Ted Goff, 2009. Public domain.

Objectives

- › At the end of this discussion, you'll know:
 - › Why strategic planning doesn't deliver
 - › What it means to engage in strategy
 - › Steps to get the right outcomes
 - › Why investment in the process matters
 - › What you can accomplish on your own
 - › Steps to take next to get engaged

Problem

Too often, our strategic plans don't deliver

Unresponsive

Misinterpretation of the environment

Not implemented

Lack of resources to “see it through”

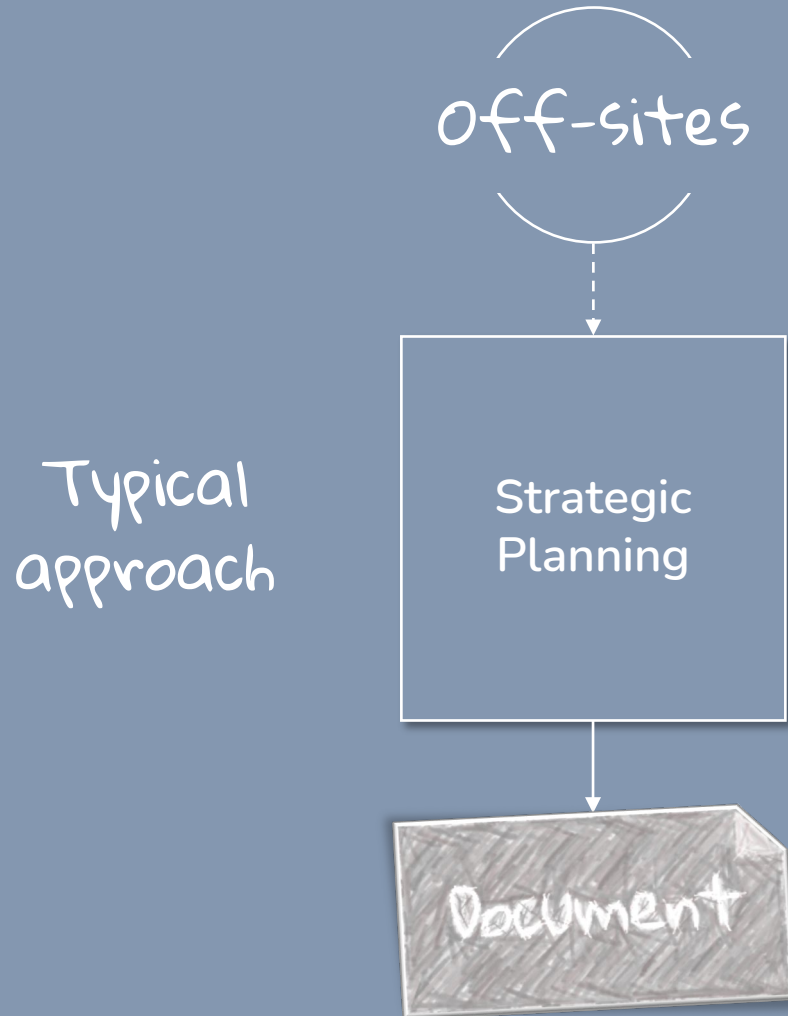
Ineffective

Wrong strategies for desired outcomes

Irrelevant

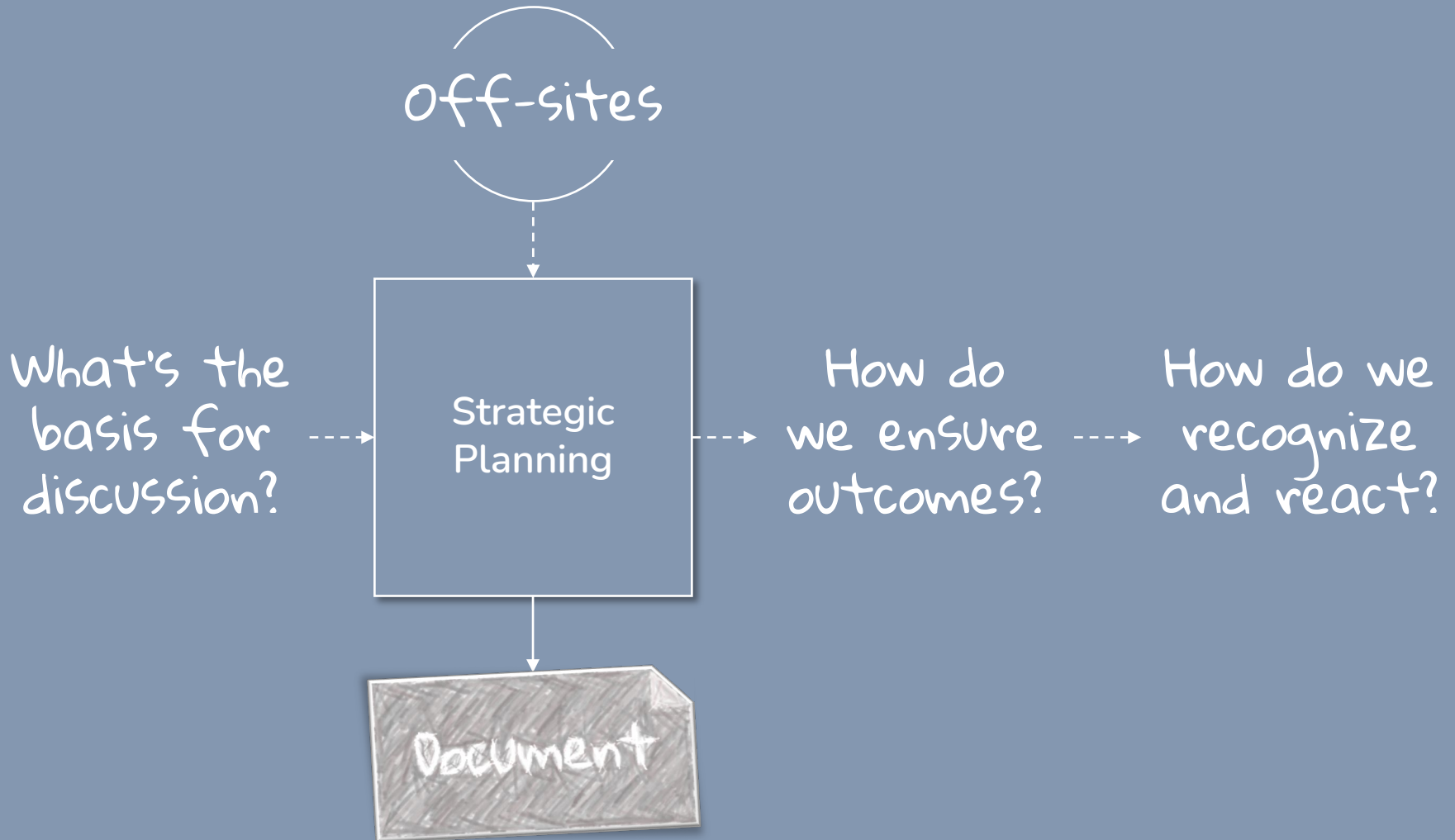
Failure to adjust to performance, changes, etc.

Standard



Why doesn't
this work well?

Deficiencies



Solution

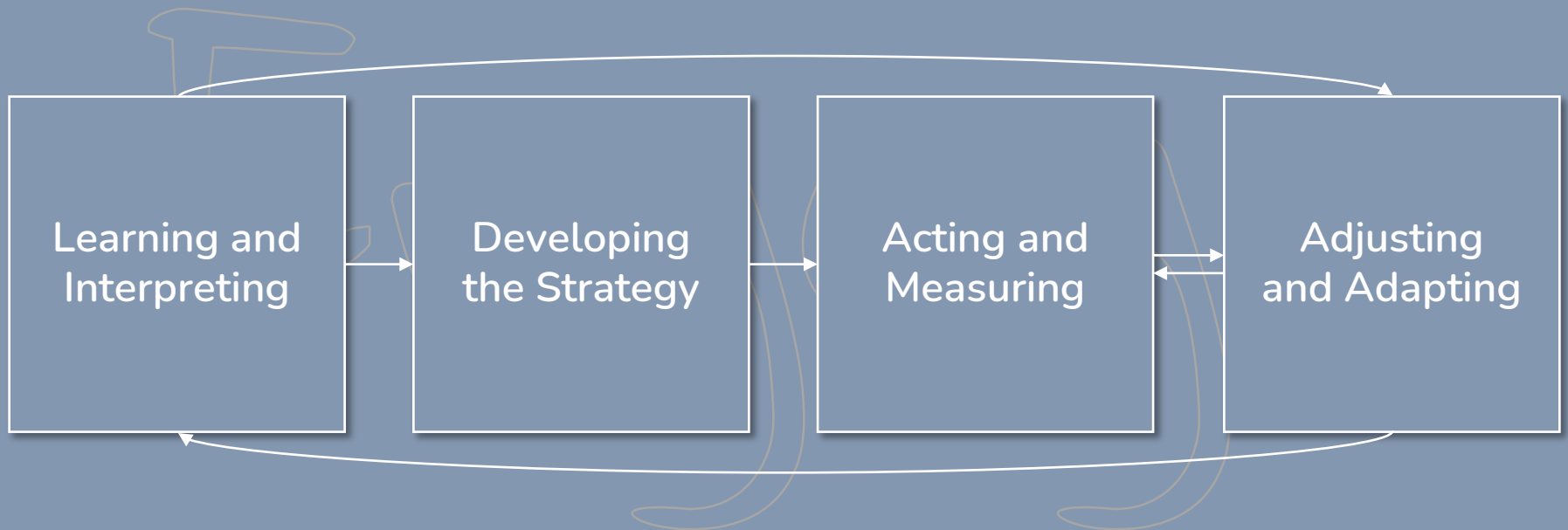
We should do probably do things differently

Engage

Let's embrace “strategy,” not “planning,” for our futures

Engagement

More than planning, more than a one-time event



Commit to learn, respond, implement, and be vigilant

Strategy Building Blocks

Learning and Interpreting

Context

What is our strategy responding to?

Issues

What are the problems you need to “fix?”

Conditions

What’s influencing these challenges?

Awareness

Who knows what about your nonprofit?

Capacity

What resources are out there to help you?

Answers

“We know all of these things”

80%

Most non-profits we surveyed said they addressed these questions in their strategies.

That's great—everyone should

Answers

“Seriously, we know them”

75%

These same non-profits said they haven't done any research to support their conclusions.

Where are they getting their information?

Answers

Learn what's really going on

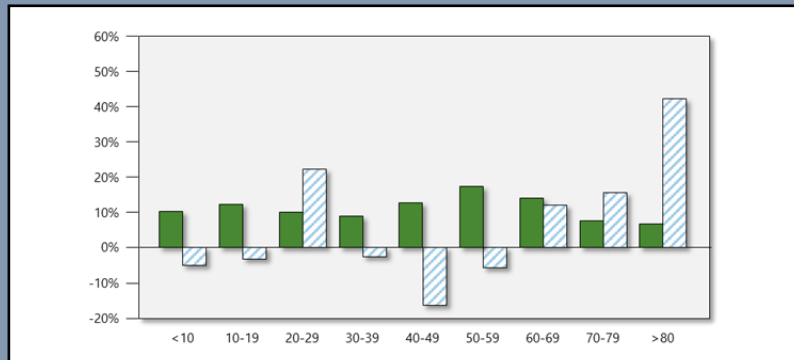
A large, translucent bubble with a cartoon face and a hand pointing at it. The bubble is the central focus of the slide. Inside the bubble, there is a cartoon face with a wide-eyed, questioning expression. A hand is pointing towards the bubble from the right side. The word 'How?' is written in large, white, stylized letters across the middle of the bubble.

How?

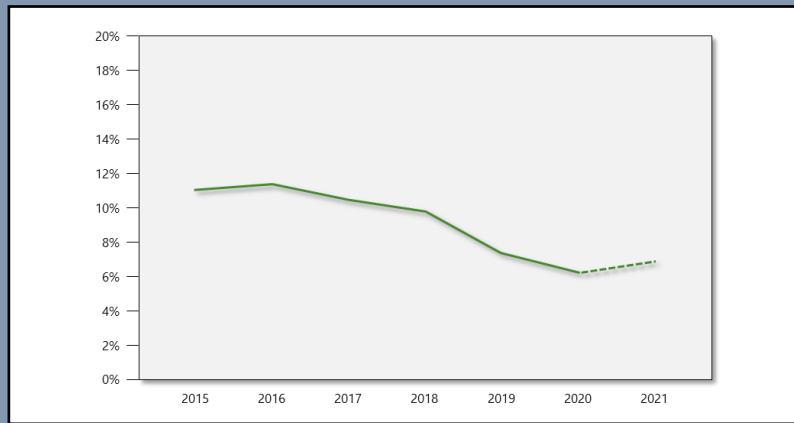
Get out of the “board bubble”

Statistics

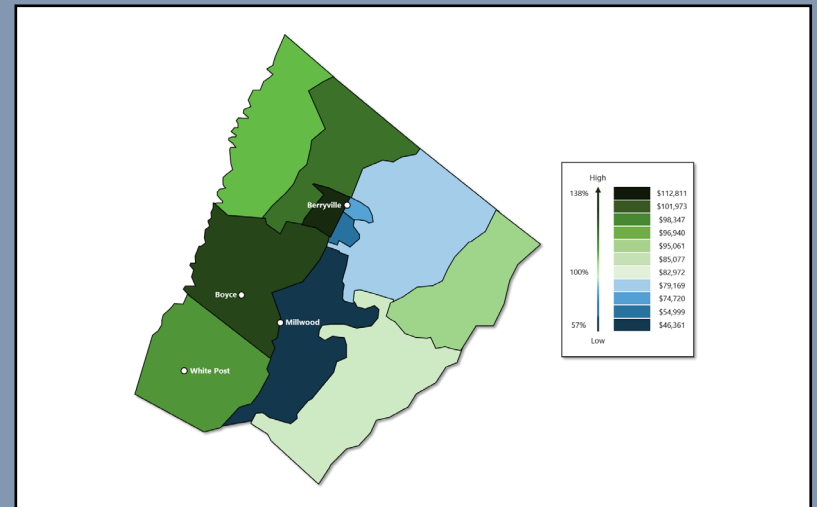
Hard data is an important part of the story



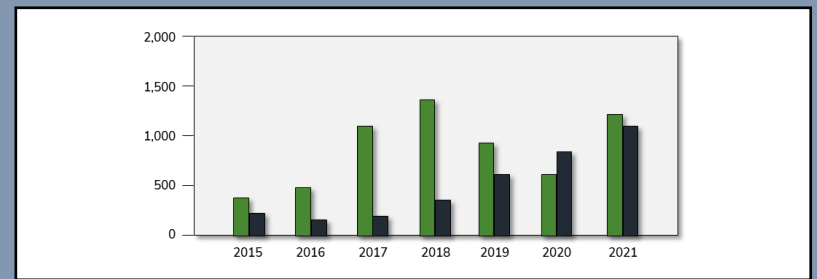
Demographic Trends



Economic Conditions



Geographic Distributions



Service Utilization

Listening

Stakeholder perspectives complete the picture

Demand

Needs for services and delivery methods

Influencers

External party agendas, capabilities, etc.

Perceptions

Community brand awareness and image gaps

Opportunities

Collaborations, improvements, and growth

Barriers

Client obstacles to accessing assistance

Relationships

Sponsor, donor, and foundation “wants”

Voices

Who can tell us what we want to know?



Approach

How to learn from the people

Who's out there?



Scan the environment
List key groups

How will you hear?



Evaluate participants
Select methods

What are you asking?



Define desired data points
Develop questions

How will you connect?



Identify value proposition(s)
Conduct outreach

Who will facilitate?



Be objective and confidential
Use a third party

Strategy Building Blocks

Developing the Strategy

Context

How will we respond to what we learned?

Vision, Mission, Values

What future do you see, and what's your role?

Aspirational Goals

What do you want to be or become?

Objectives and Measures

What will you accomplish to advance the goals?

Strategic Actions

How will you meet the objectives?

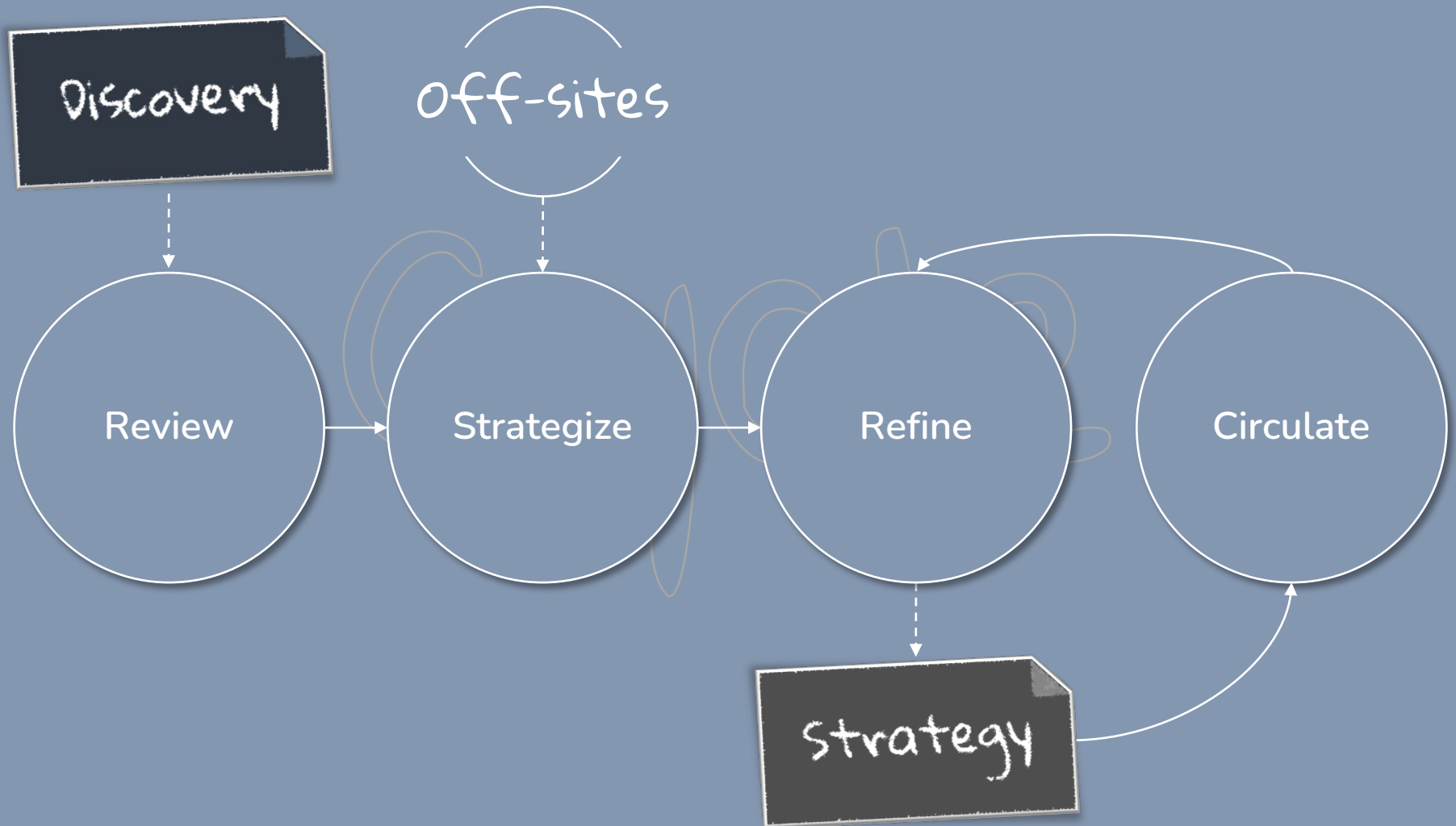
Elements

Engaging is more than one big off-site

Cycle

It's an iterative process that requires commitment

Elements



Review

What we learned provides the guideposts



Strategy

The initial attempt is open field brainstorming

Ideas



Strategies

Everything should be put on the table!

Refinement

What's required to take the actions?



Where are the gaps, and is it feasible to fill them?

Refinement

How can we adjust to make the strategy realistic?



Every change affects other elements of our strategy

Circulation

Feedback has multiple purposes

Evaluation

Strategy is aligned and responsive

Ownership

People feel a part of the strategy

Participation

Partners are aware and want to be involved

Who should see our draft strategy?

Strategy Building Blocks

Acting and Measuring

Context

This is where the rubber meets the road

Blueprint

Our strategy now becomes a program

Owner

Someone has to own “macro” execution

Actions

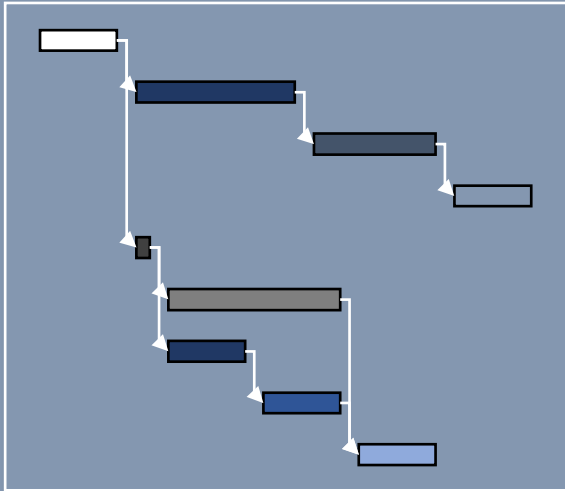
Every strategic action is now an individual project

Managers

Each project has a manager to keep it on track

Components

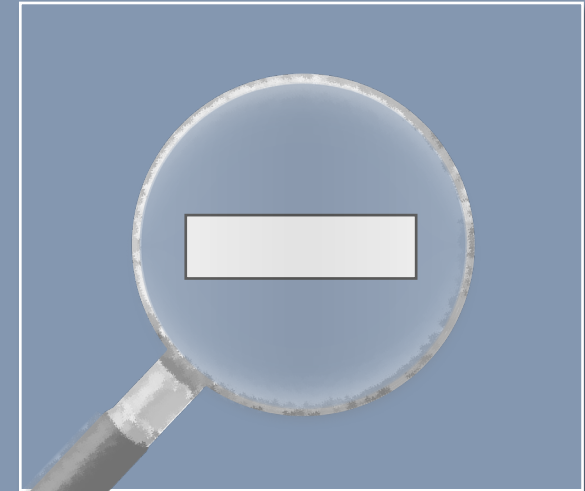
Program



Program Owner

Monitor
Coordinate
Facilitate
Measure

Project



Project Manager

Plan
Execute
Manage
Report



Tools

Three types of applications can help us

Project management

MS Project, OpenProject (open source), etc.

Document management and collaboration

MS Teams, Google Drive, Slack, Dropbox*, etc.

Metrics dashboard

MS Excel, ClicData, etc., depending on needs

Get them, but don't go overboard

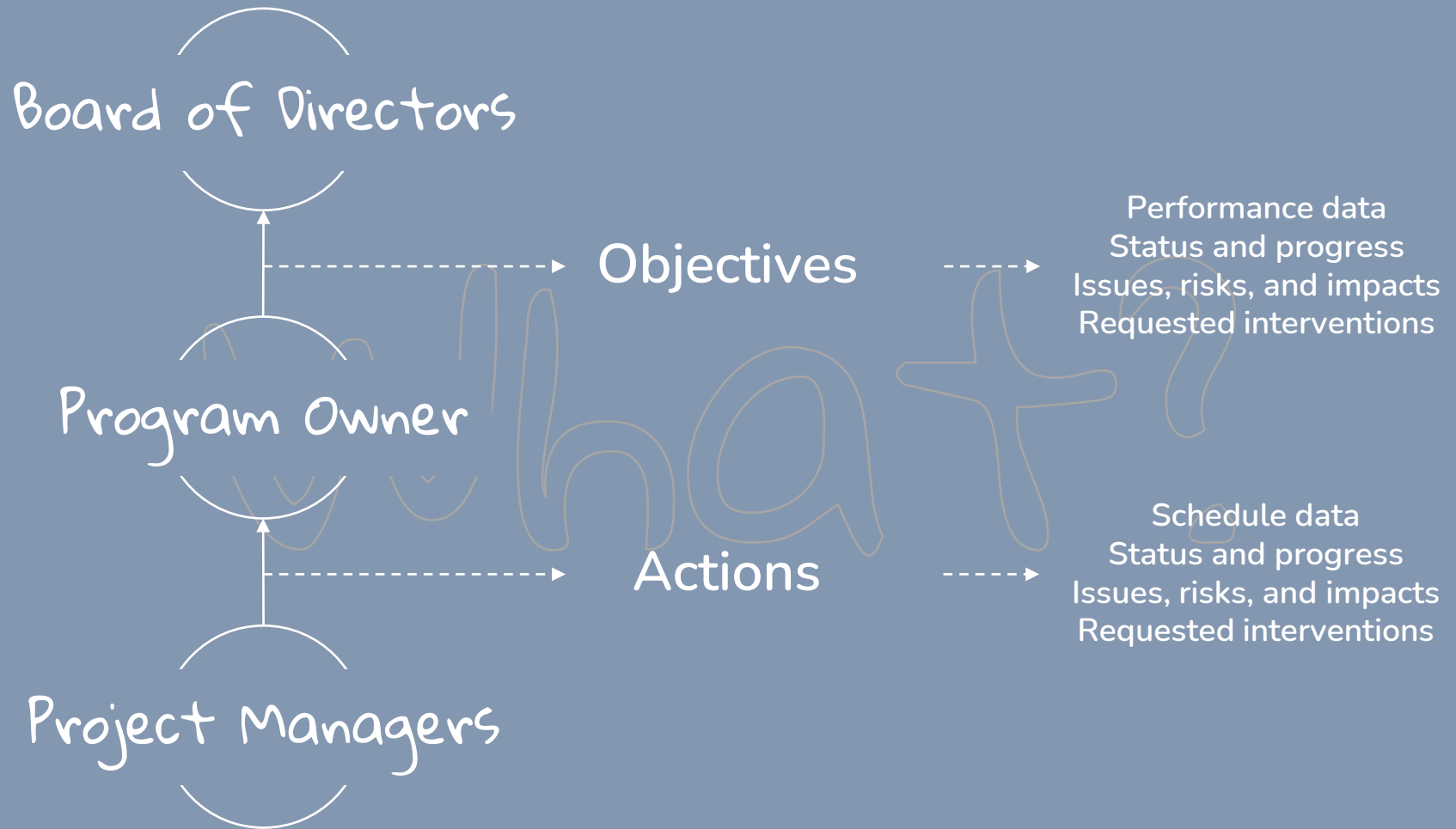
Reporting

People need to know things about our strategy

What?

Let's focus on what they should be seeing

Reporting



Strategy Building Blocks

Adjusting and Adapting

Context

What are we watching for?

Progress

Are we on schedule with key actions?
If not, how do we make that happen?

Results

Are we on track to meet targets?
If not, what do we need to do?

Environment

What's going on outside our organization?
How will it affect clients, partners, finances, etc.?

Governance

Continuous engagement really does matter

Why?

Timeliness, risk, responsiveness, relevance

Progress

What do we do if things aren't moving?

Reallocate

“Borrow” resources from other actions and adjust

Get new resources

When dependent deadlines are fixed, find more people

Modify the plan

Push dates back, temper outcome expectations

Let it go

Know when to say “when”

Results

How do we leverage performance data?

	Target	YTD	Forecast	Gap	Change
# of unique patients seen per year	2,500	600	1,200	-1,300	+35
# of visits per patient	5.0	8.2	7.5	+2.5	-0.2
# of patients applying for eligibility	3,000	1,000	2,000	-1,000	+113
% of new applicants who are eligible	95%	60%	75%	-20%	+5%
Average days for eligibility verification	2	2	2	-	-
# of community outreach events	12	6	12	-	-
# of new patients from outreach events	500	120	360	-140	+38
Overall patient satisfaction	5.0	4.0	4.0	-1.0	+0.1

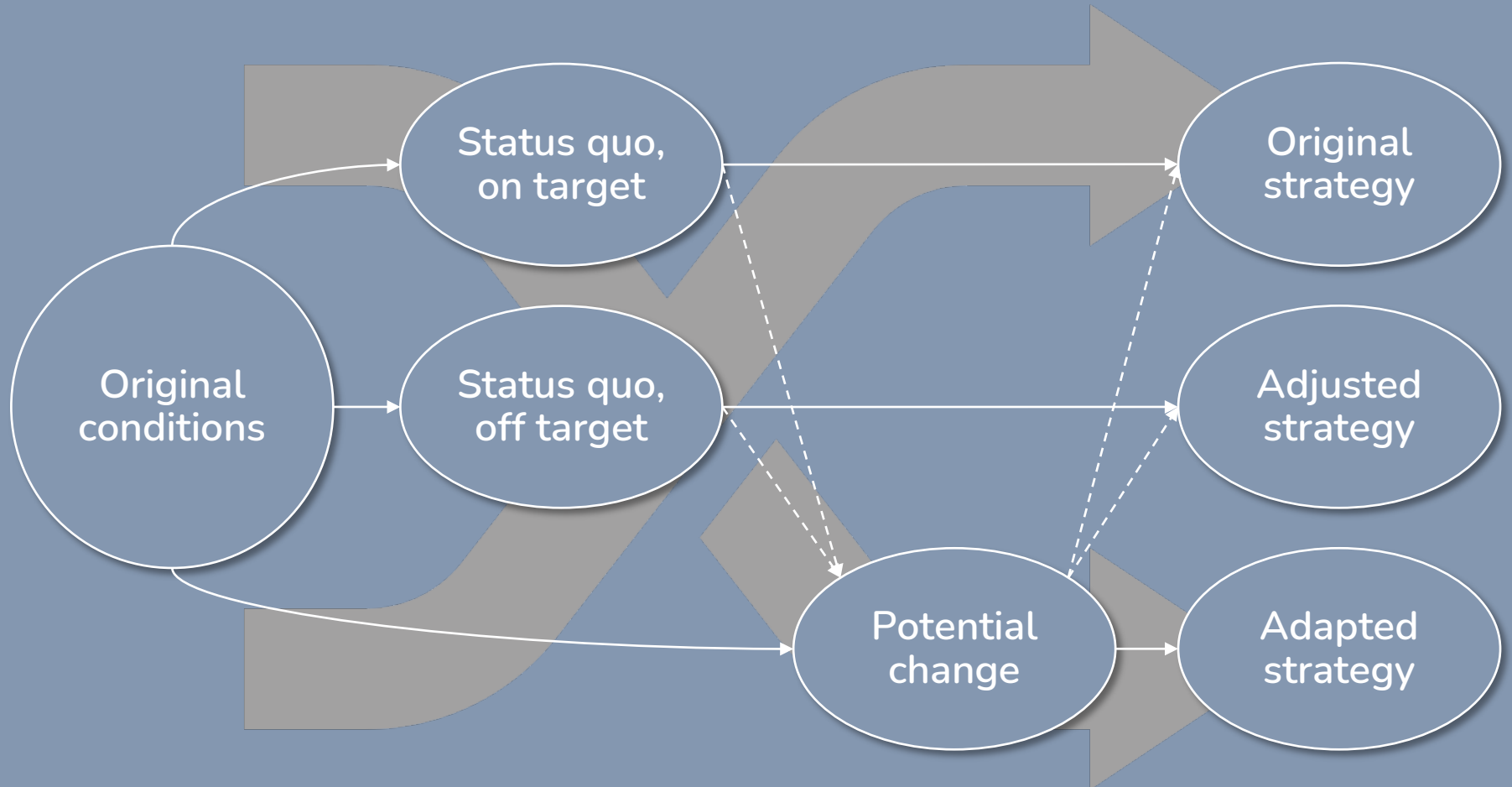
Environment

Change happens... we need to be ready



Environment

“What if...?”





Strategy Building Blocks

Getting Started

Investment

Get a guide (not a “facilitator”)

Plays a part on the team

Someone who shares the mission

Stays objective

A partner who is impartial and not emotionally invested

Asks the “dumb questions”

A consultant who asks what you didn't think of

Remember it's a journey, not a meeting

Self Control

What can you do on your own?

You!

There are several things you can do

Engaging

Four things to get started

Commit

Make the decision to fully engage in strategy

Form a team

Decide who's going to lead the charge

Scan the market

Find out who does what you do, who can help you, etc.

Get a guide

Find someone who can help you get and stay engaged

The background of the slide is a grayscale photograph of a meeting room. Several people are visible, mostly from the back, looking at large sheets of paper or whiteboards that are pinned to the wall. The papers contain various diagrams, charts, and handwritten notes, suggesting a collaborative work environment. The lighting is soft, and the overall tone is professional and focused.

Strategy Building Blocks

Questions and Discussion

Information

To learn more, contact Snowflake

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