

A detailed black and white engraving of William Shakespeare's face and upper torso. He is depicted with a receding hairline, a full beard, and a prominent ruff collar. The engraving is set against a dark, textured background and is partially framed by a white curved border on the right side.

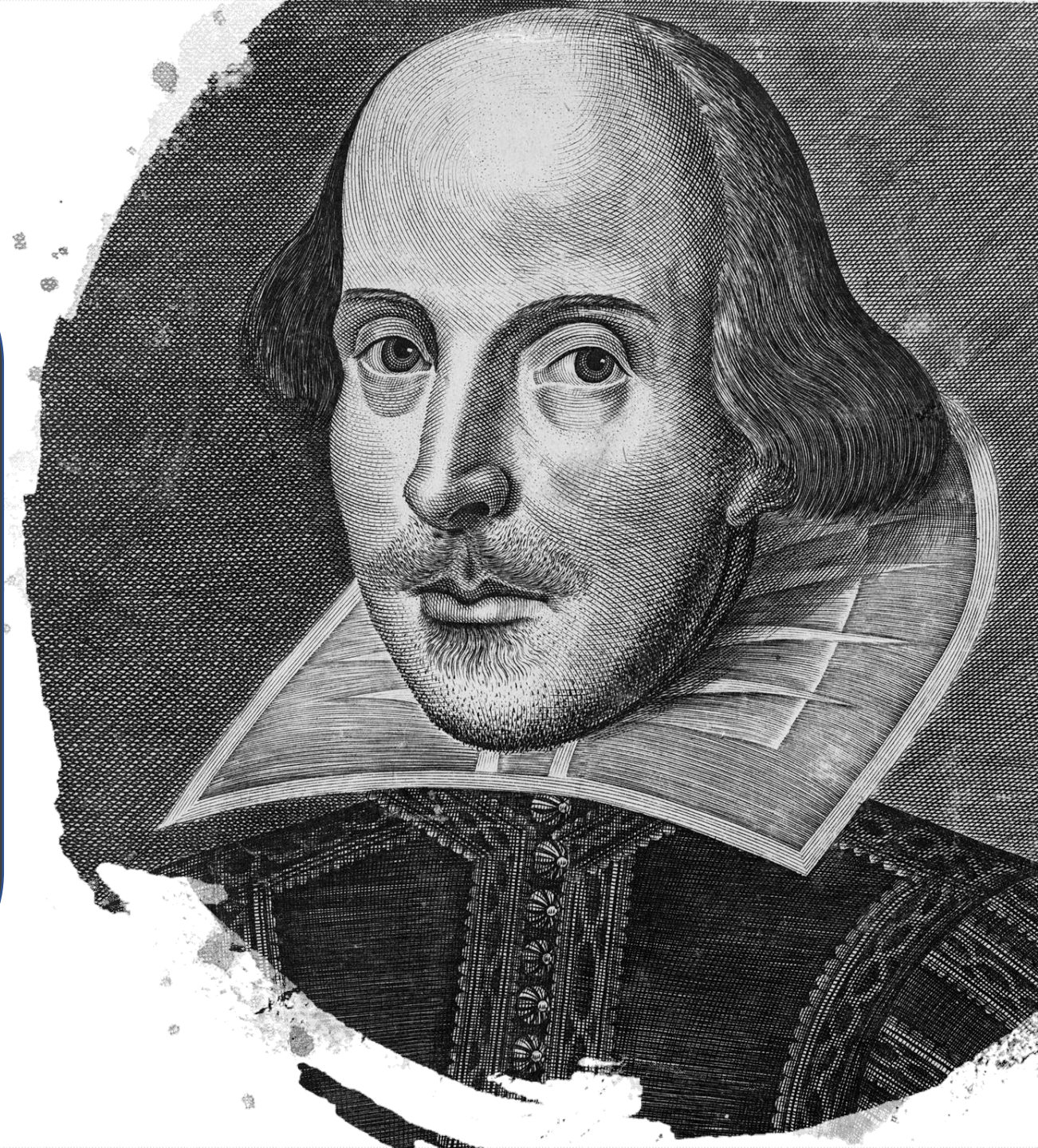
*O Strategy,
Strategy,
wherefore art
thou Strategy?*

Lyn Corbett, University of San Diego

William Shakespeare

Introduce Yourself

1. Name
2. Organization
3. Your Strategic Challenge



LEARNING OBJECTIVES

Understand the need for strategy even outside of the formal strategic planning process

2. Identify tools and practices of good strategy and learn how to implement them in your organization
3. Be introduced to an alternative approach to the traditional strategic planning process





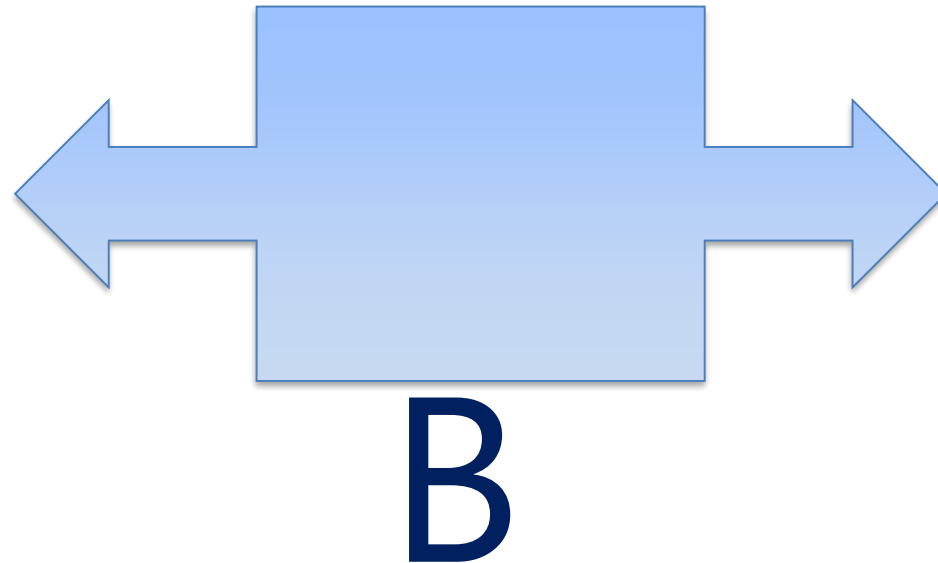
STRATEGY:

Strategy is a coordinated set of actions aimed at creating and sustaining a competitive advantage in carrying out the nonprofit mission.

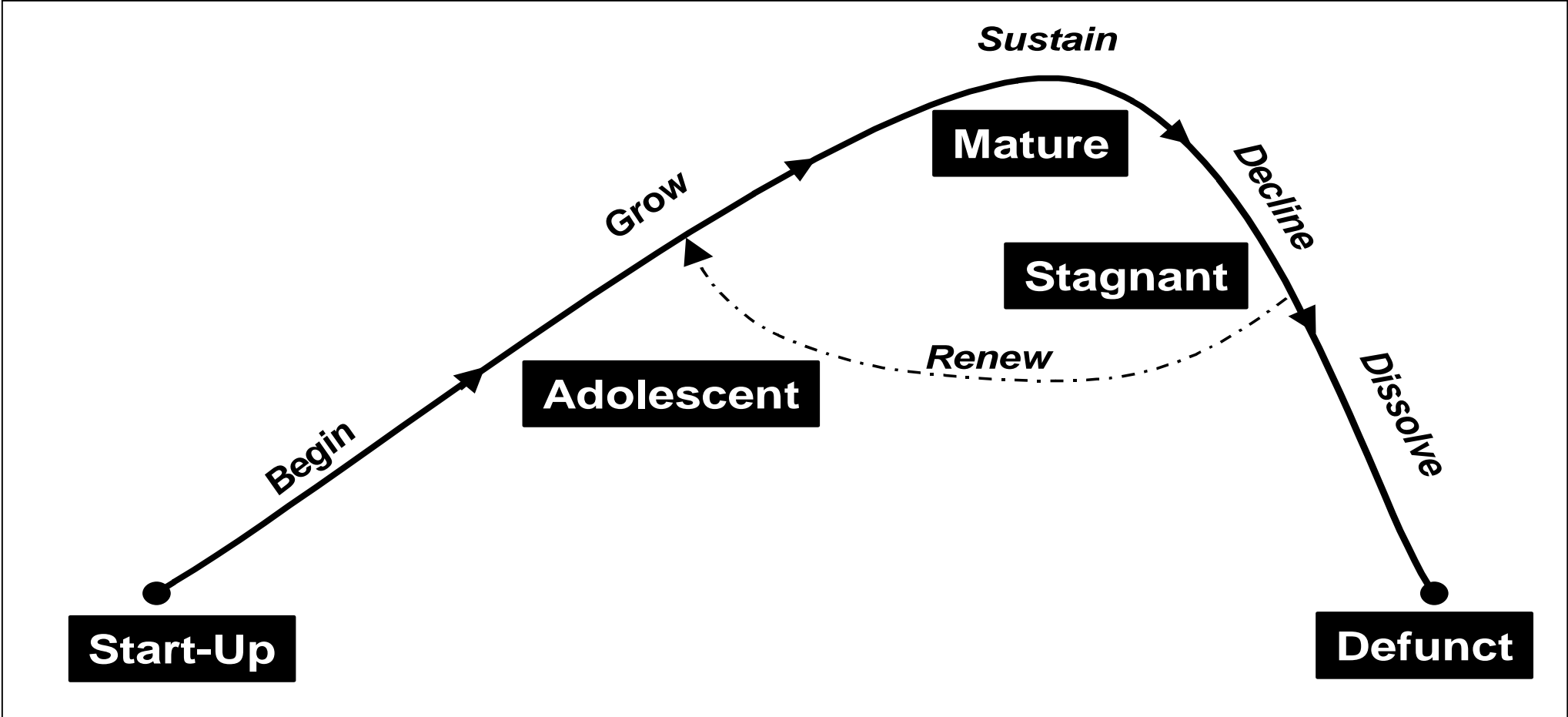
-David La Piana

The Nonprofit Strategy Revolution

THE BASIC STRATEGY MODEL



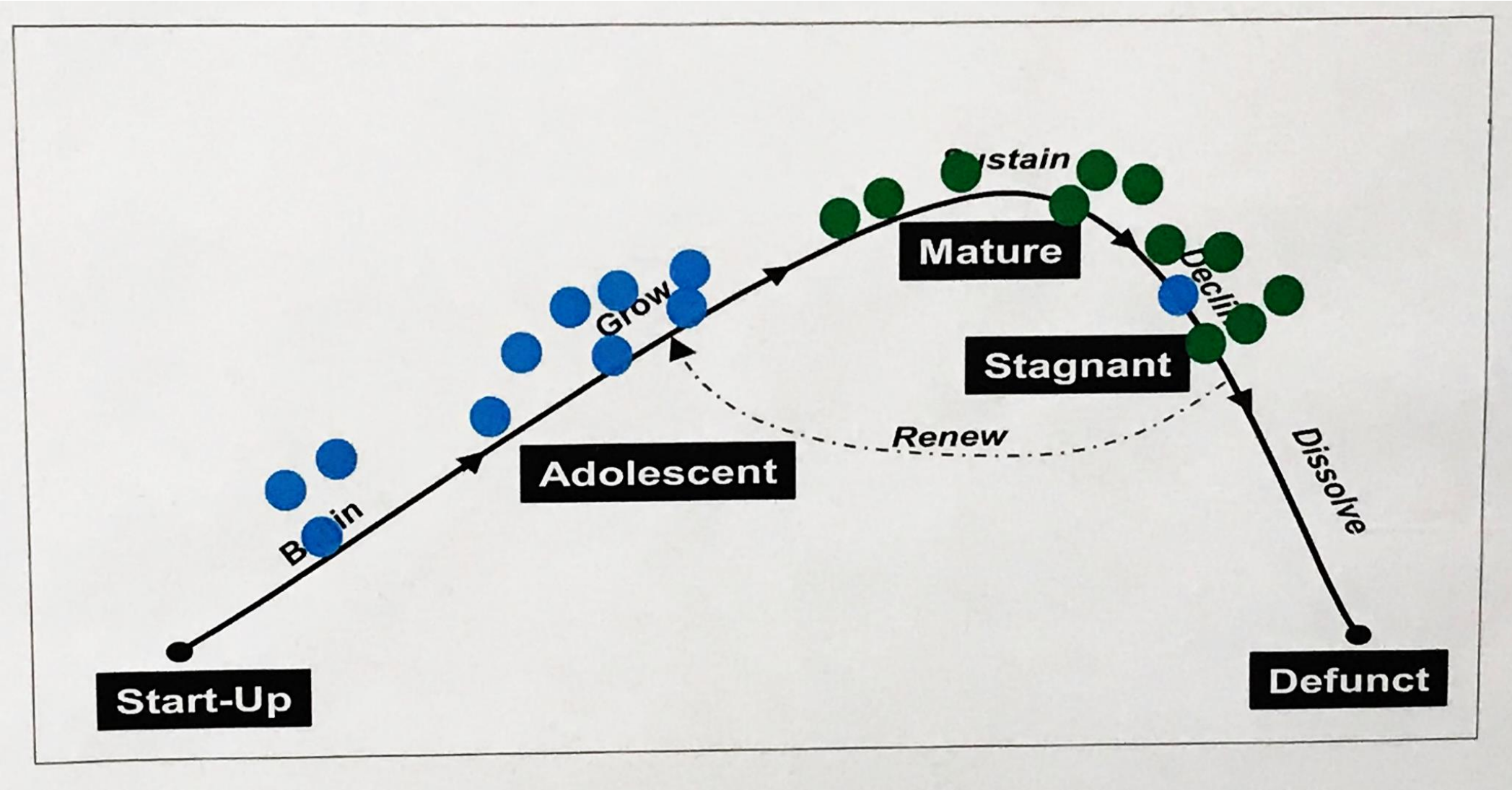
ORGANIZATIONAL LIFECYCLES AND BOARD LEADERSHIP



“Even if you are on the right track, you’ll get run over if you just sit there.”

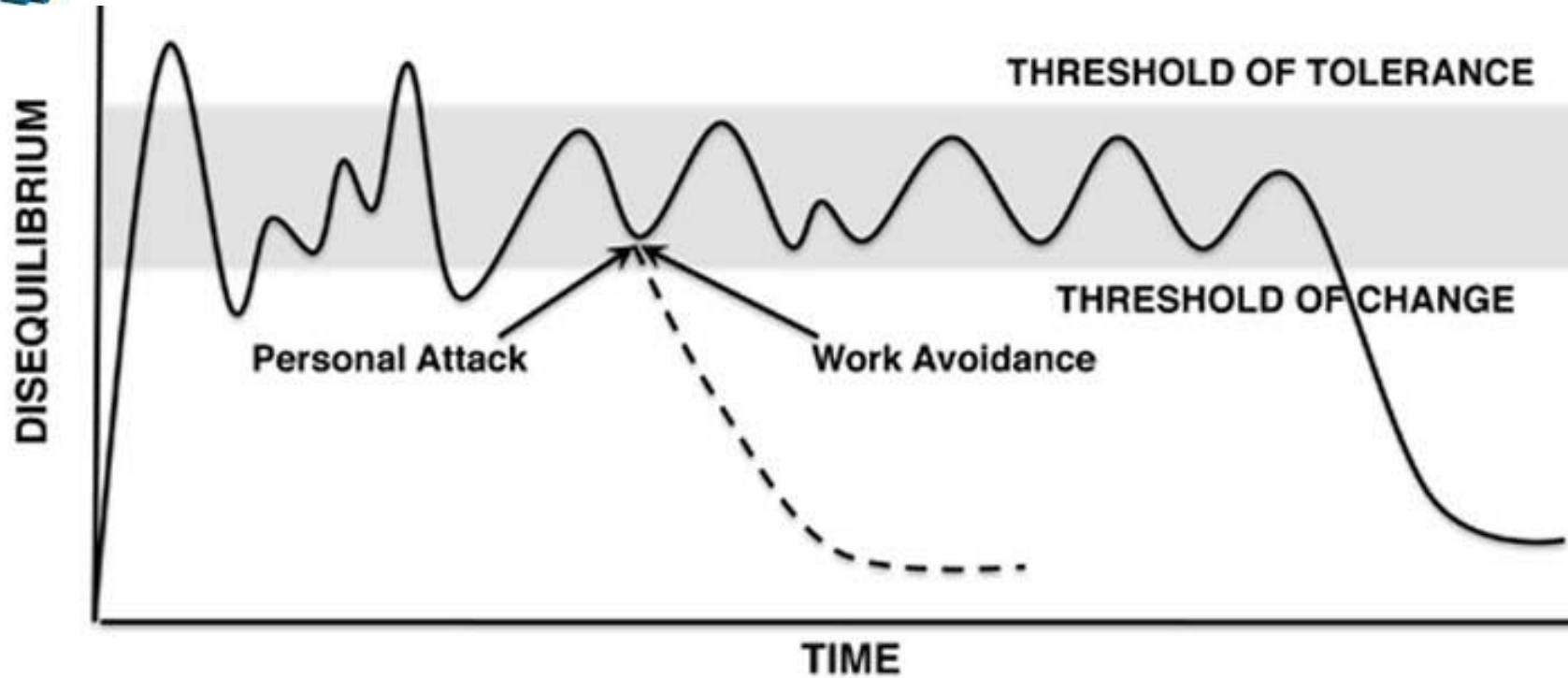
Will Rogers (1879 – 1946), American actor and comedian

ORGANIZATIONAL LIFECYCLES AND BOARD LEADERSHIP





Adaptive Learning



Source: Heifetz & Linsky: Leadership on the Line, 2002

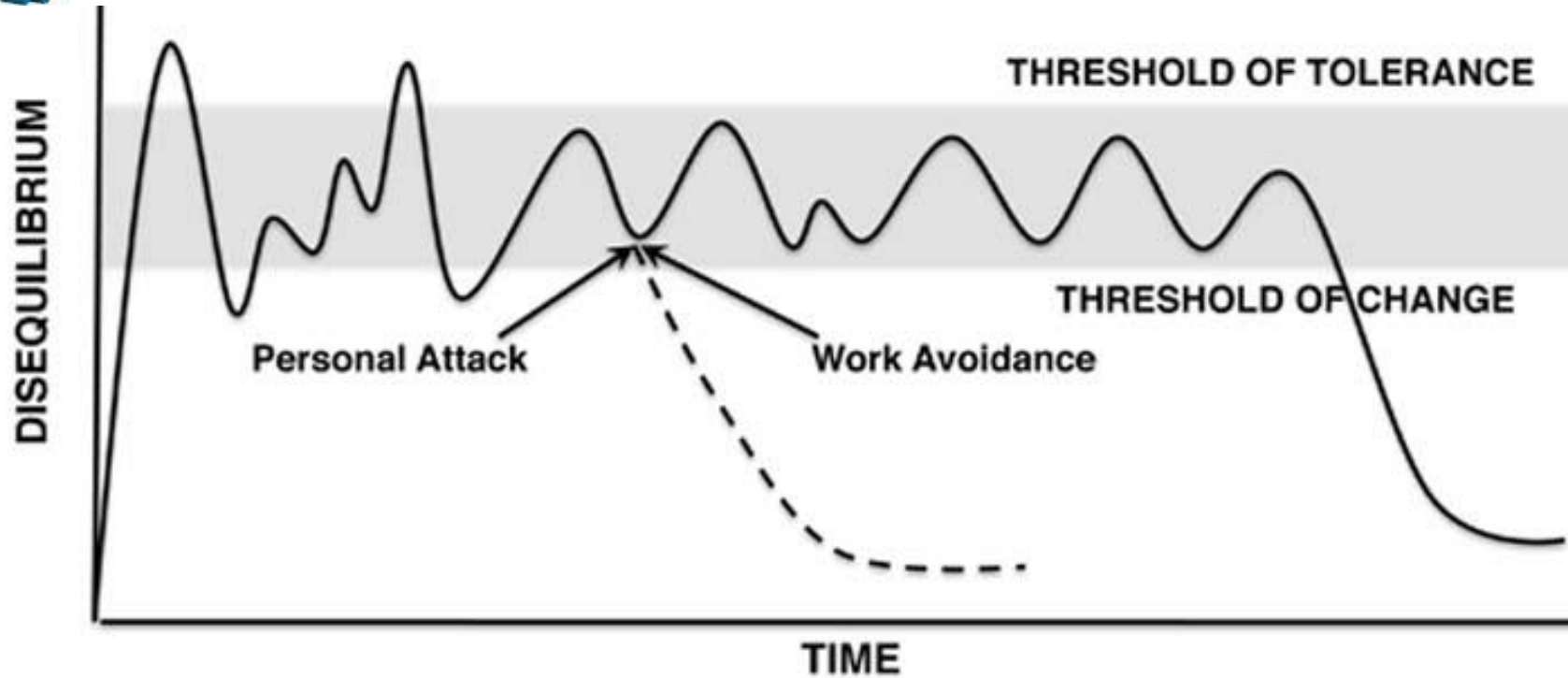


Culture of Inquiry Checklist

- Questions are welcomed
- Differing viewpoints are encouraged
- Unwritten rules are explained
- Timely information exchanges
- Open communication
- Actively seek different viewpoints
- Tolerate ambiguity
- Brainstorm silently and openly
- Consult outsiders
- Search widely for information



Adaptive Learning



Source: Heifetz & Linsky: Leadership on the Line, 2002



90 Day Micro Strategy Model

BANDA
Rincones
de mi
Tierra
DE REPRESENTANTES

MICRO STRATEGY

LIST WHAT YOU WANT (OUTCOMES):

.....
.....
.....
.....

Y/N

Y/N

CORE
VALUES

LIST EVERYTHING YOU HAVE

LIST EVERYTHING YOU WILL DO

ASSETS

.....
.....
.....
.....
.....
.....
.....

.....
.....
.....
.....
.....

ACTIONS

.....
.....
.....
.....
.....
.....
.....

By: __/__/__

What you want:

Y/N

Y/N

OUTCOMES

Core Values

Everything you have:

Everything you will do:

A
S
S
E
T
S

A
C
T
I
O
N
S

By: __/__/__

What you want:

Y/N

Y/N

OUTCOMES

Core Values

Everything you have:

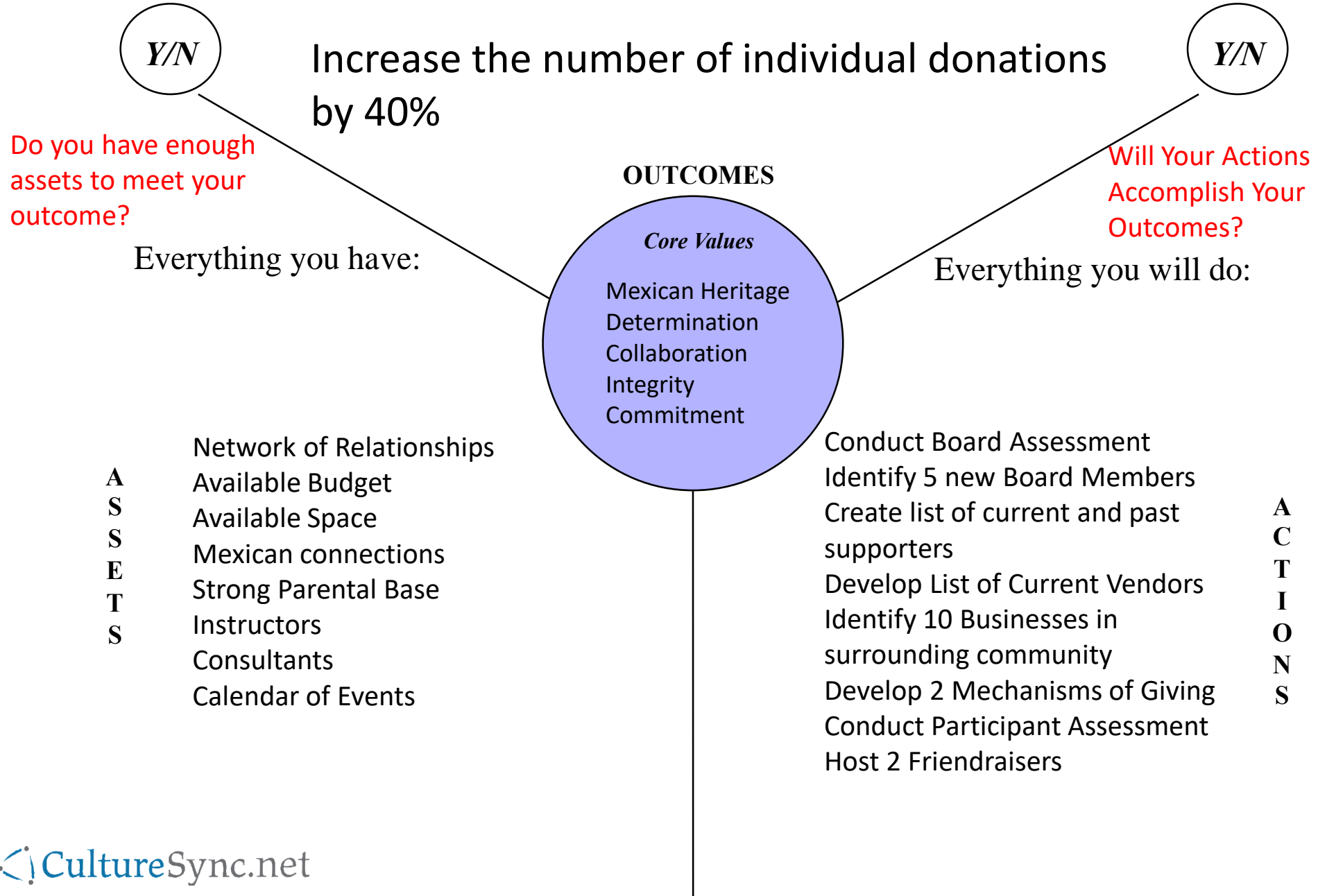
Everything you will do:

A
S
S
E
T
S

A
C
T
I
O
N
S

By: 6 / 12 / 13

What you want:



By: ___/___/___

What you want:

Y/N

Y/N

OUTCOMES

Core Values

Everything you have:

Everything you will do:

A
S
S
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S

A
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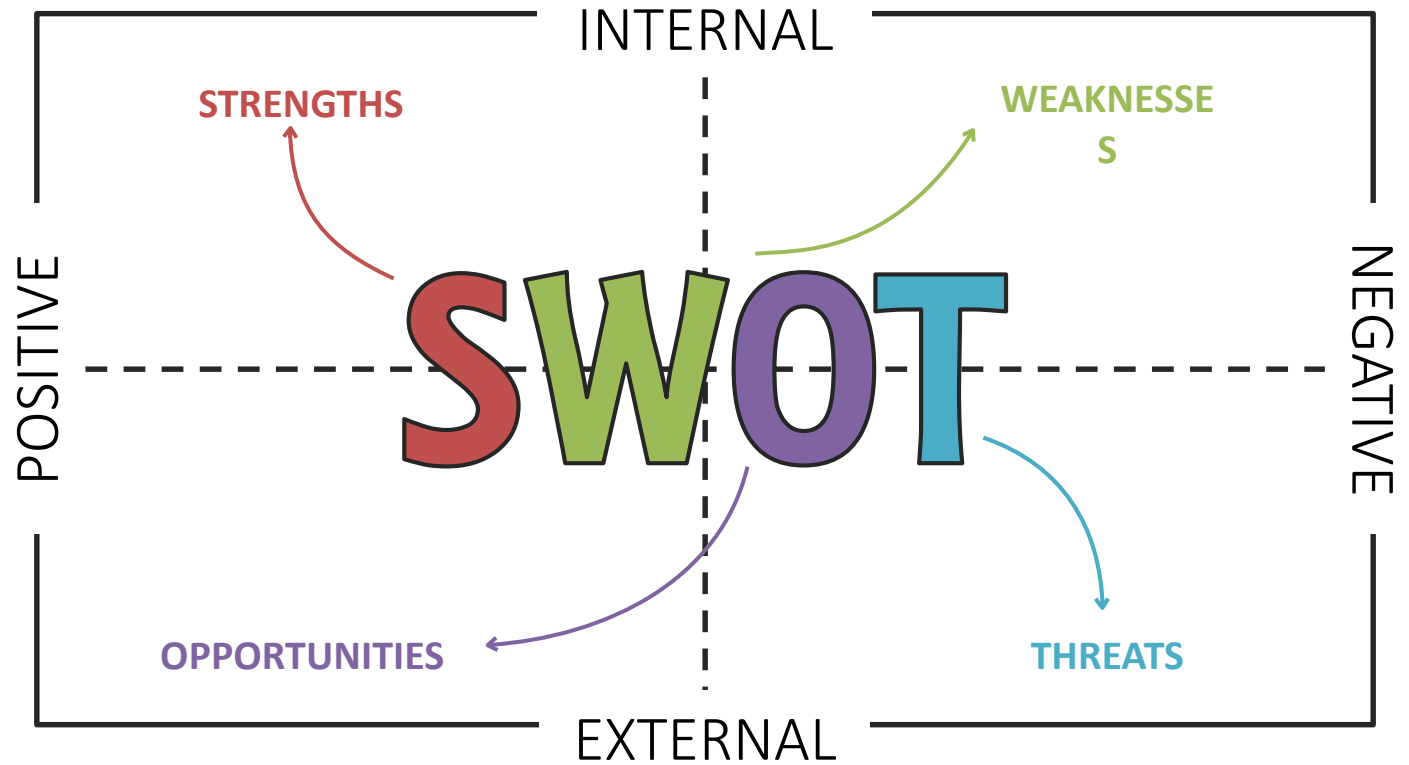
Strategic Planning



Strategic planning focuses on establishing your organizational direction, setting priorities and identifying obstacles and opportunities that may limit or enable your to carry out its mission.

SWOT Analysis

A SWOT analysis is a process used to scan the internal and external environments in which your organization operates. **SWOT** stands for **S**trengths **W**eaknesses **O**pportunities **T**hreats. Use this diagram to conduct a SWOT analysis.



Strengths

- | | |
|---|--|
| <ul style="list-style-type: none">• Advantages of proposition?• Capabilities?
Competitive advantages?
USP's (unique selling points)?• Resources, Assets, People?• Experience, knowledge, data?• Financial reserves, likely returns?• Marketing - reach, distribution, awareness?• Innovative aspects? | <ul style="list-style-type: none">• Location and geographical?• Price, value, quality?• Accreditations, qualifications, certifications?• Processes, systems, IT, communications?• Cultural, attitudinal, behavioral?• Management , succession?• Philosophy and values? |
|---|--|

Weaknesses

<p>Disadvantages of proposition?</p> <p>Gaps in capabilities?</p> <p>Lack of competitive strength?</p> <p>Reputation, presence and reach?</p> <p>Financials?</p> <p>Own known vulnerabilities?</p> <p>Timescales, deadlines and pressures?</p> <p>Cashflow, start-up cash-drain?</p>	<p>Continuity, supply chain robustness?</p> <p>Effects on core activities, distraction?</p> <p>Reliability of data, plan predictability?</p> <p>Morale, commitment, leadership?</p> <p>Accreditations, etc?</p> <p>Processes and systems, etc?</p> <p>Management cover, succession?</p>
--	---

Opportunities

Market developments?
Competitors' vulnerabilities?
Industry or lifestyle trends?
Technology development and innovation?
Global influences?
New markets, vertical, horizontal?
Niche target markets?
Geographical, export, import?

New USP's (Unique Selling Points)?
Tactics: e.g. surprise, major contracts?
Business and product development?
Information and research?
Partnerships, agencies, distribution?
Volumes, production, economies?
Seasonal, weather, fashion influences?

Threats

<p>Political effects?</p> <p>Legislative effects?</p> <p>Environmental effects?</p> <p>IT developments?</p> <p>Competitor intentions - various?</p> <p>Market demand?</p> <p>New technologies, services, ideas?</p>	<p>Vital contracts and partners?</p> <p>Sustaining internal capabilities?</p> <p>Obstacles faced?</p> <p>Insurmountable weaknesses?</p> <p>Loss of key staff?</p> <p>Sustainable financial backing?</p> <p>Economy - home, abroad?</p> <p>Seasonality, weather effects?</p>
---	---

SOAR- Strengths, Opportunities, Aspirations and Results

Strengths

What can we build on?

Opportunities

What are our stakeholders asking for?

Aspirations

What do we care deeply about?

Results

How do we know we are succeeding?

PEST Analysis





Political

- ecological/environmental
- current legislation
- future legislation
- international legislation
- regulatory bodies and processes
- government policies
- government term and change
- trading policies
- funding, grants and initiatives
- home market pressure- groups
- international pressure- groups
- wars and conflicts

Economical

- home economy
- economy trends
- overseas economies
- general taxation
- taxation specific to product/services
- seasonality issues
- market/trade cycles
- specific industry factors
- market routes trends
- distribution trends
- customer/end-user drivers



SOCIAL

- lifestyle trends
- demographics
- consumer attitudes and opinions
- media views
- law changes affecting social factors
- brand, company, technology image
- consumer buying patterns
- fashion and role models
- major events and influences
- buying access and trends
- ethnic/religious factors
- advertising and publicity
- ethical issues

Technological

- competing technology development
- research funding
- associated/dependent technologies
- replacement technology/solutions
- maturity of technology
- manufacturing maturity and capacity
- information and communications
- consumer buying mechanisms/technology
- technology legislation
- innovation potential
- technology access, licensing, patents
- intellectual property issues
- global communications

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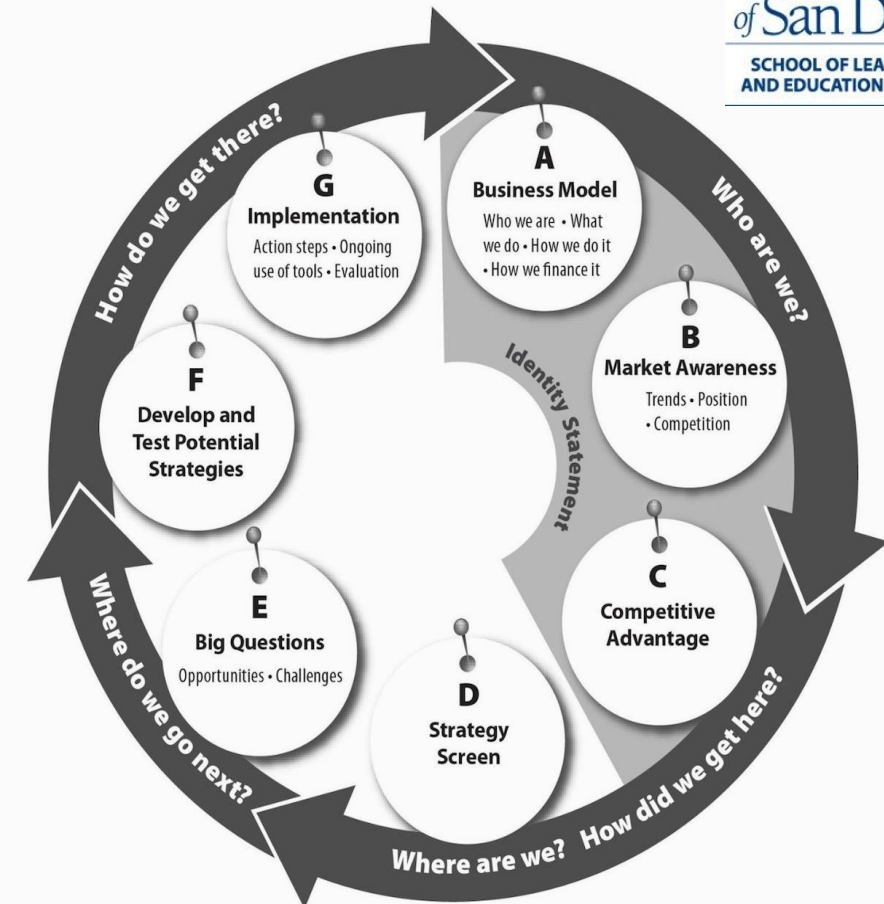
THE NONPROFIT STRATEGY REVOLUTION

Real-Time Strategic Planning
in a Rapid-Response World

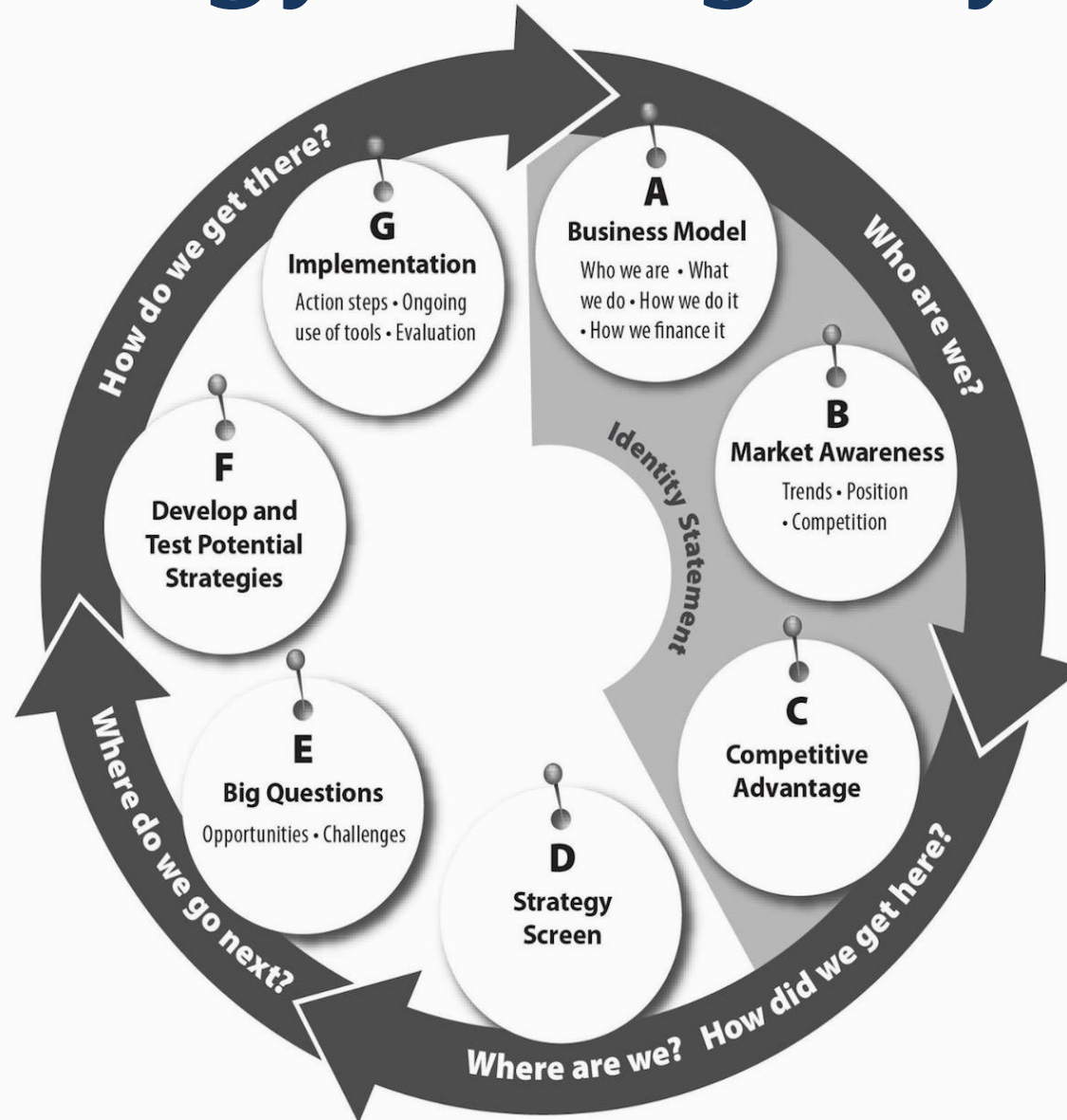
DAVID LA PIANA

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Strategy Change Cycle



What is Strategy Built Upon?

A Sound Business Model = being clear about

Who we are (our mission/vision)

What we do (our program)

How we do it (our structure and operations)

How we finance it

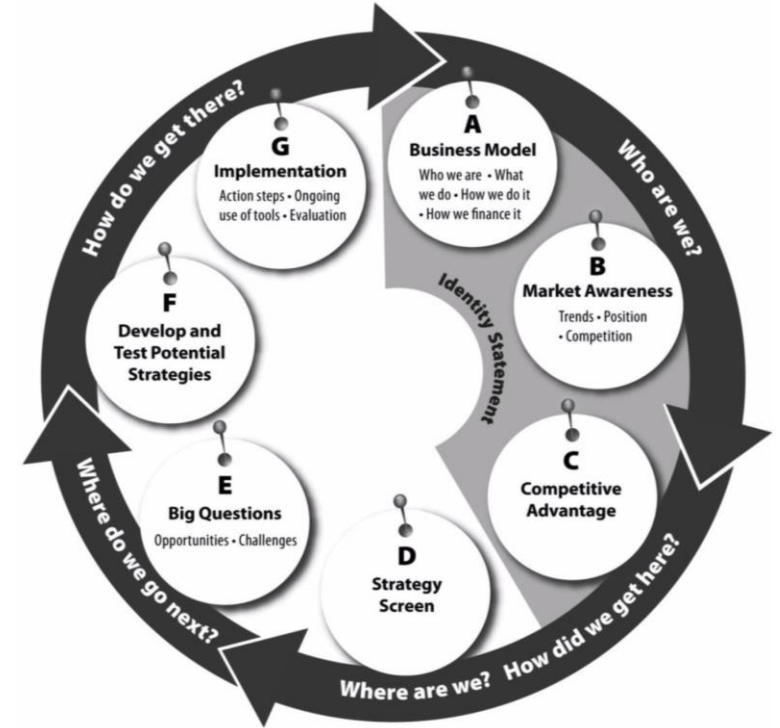
Market Awareness = knowing

What the market is

Where we are in the market

How we got there

Where we want to go next



© La Piana Consulting, 2008

Competitive Advantage = the ability to produce social value

Types of competitive advantage

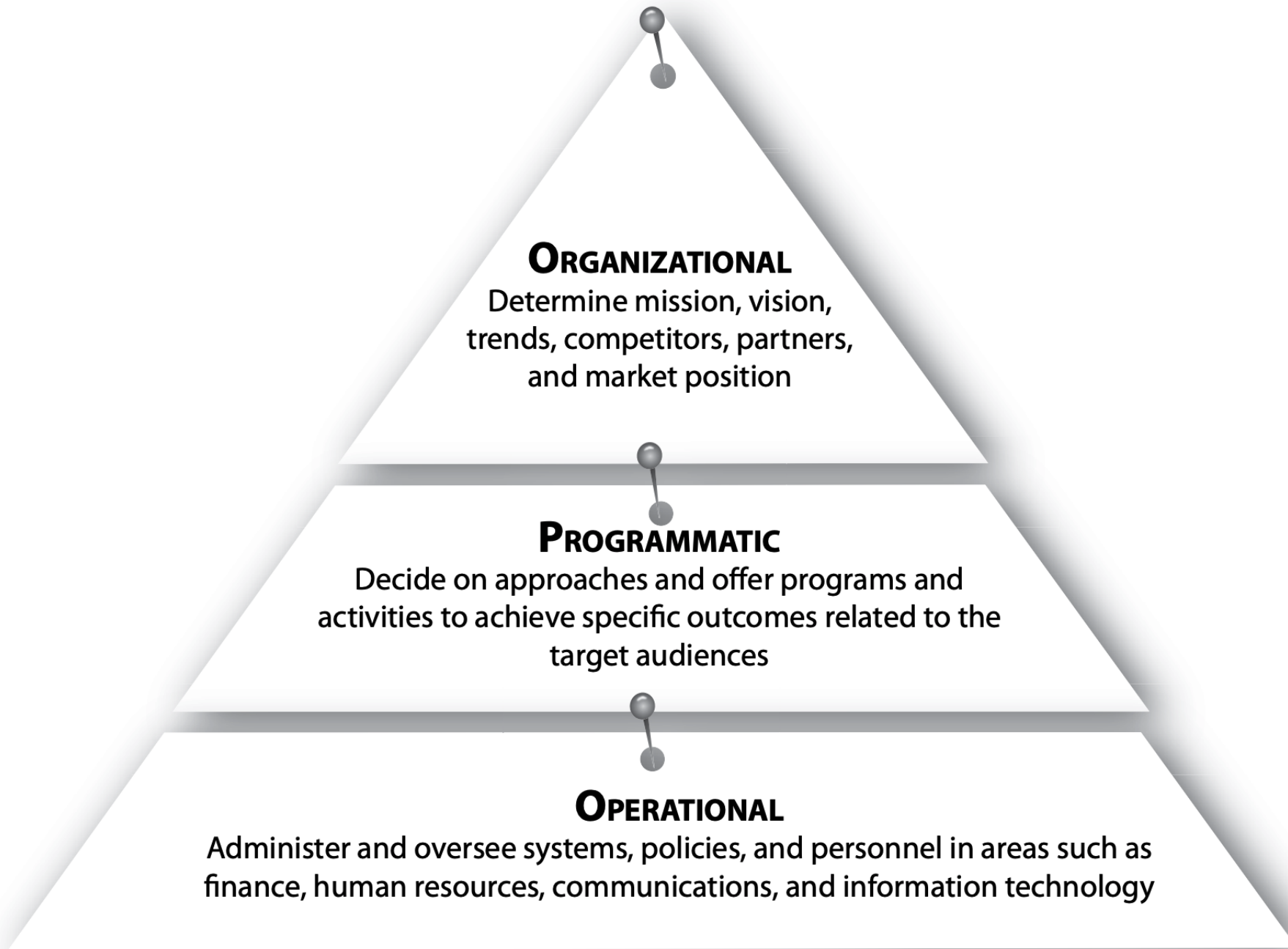
Asset advantages

- Better program design leading to better outcomes
- Unique attributes of programs or services such as linguistic or cultural capacity
- An accessible location or network of locations
- An attractive or specialized building or property that enhances program delivery
- A robust, diversified funding base that provides flexibility and stability
- Great name recognition and reputation among funders and constituents
- Powerful partnerships
- A well-connected board of directors

Execution advantages

- Lower costs to funders or customers
- Greater efficiency in delivering programs or services per dollar spent
- Better accountability and public reporting
- Faster delivery of programs or services (e.g., no waiting for service)
- Sound marketing and communications that raise visibility and awareness





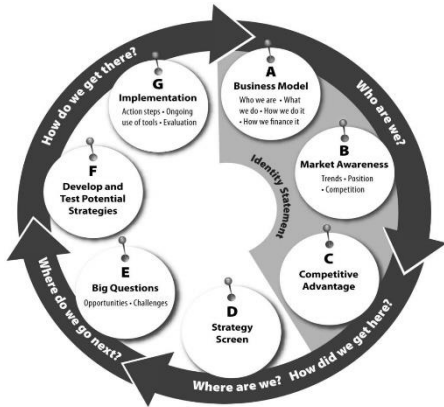
MISSION:
 [Write the organization's mission here]

IMPACT: What is the impact we want to have?

CURRENT GEOGRAPHIC AREA	
Includes	Does Not Include

CURRENT CUSTOMERS	
Serve	Do Not Serve

CURRENT PROGRAMS / SERVICES	
Offer	Do Not Offer

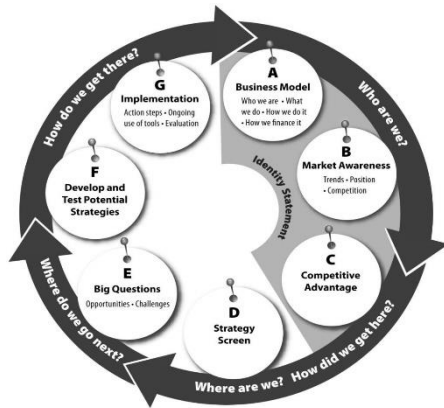


CURRENT PROGRAMS / SERVICES	
Offer	Do Not Offer

CURRENT FUNDING	
Includes	Does Not Include

RESOURCE COMPETITORS

CURRENT & FUTURE TRENDS

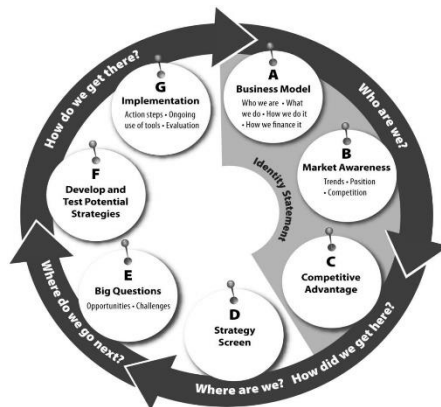


The Nonprofit Strategy Revolution – David La Piana

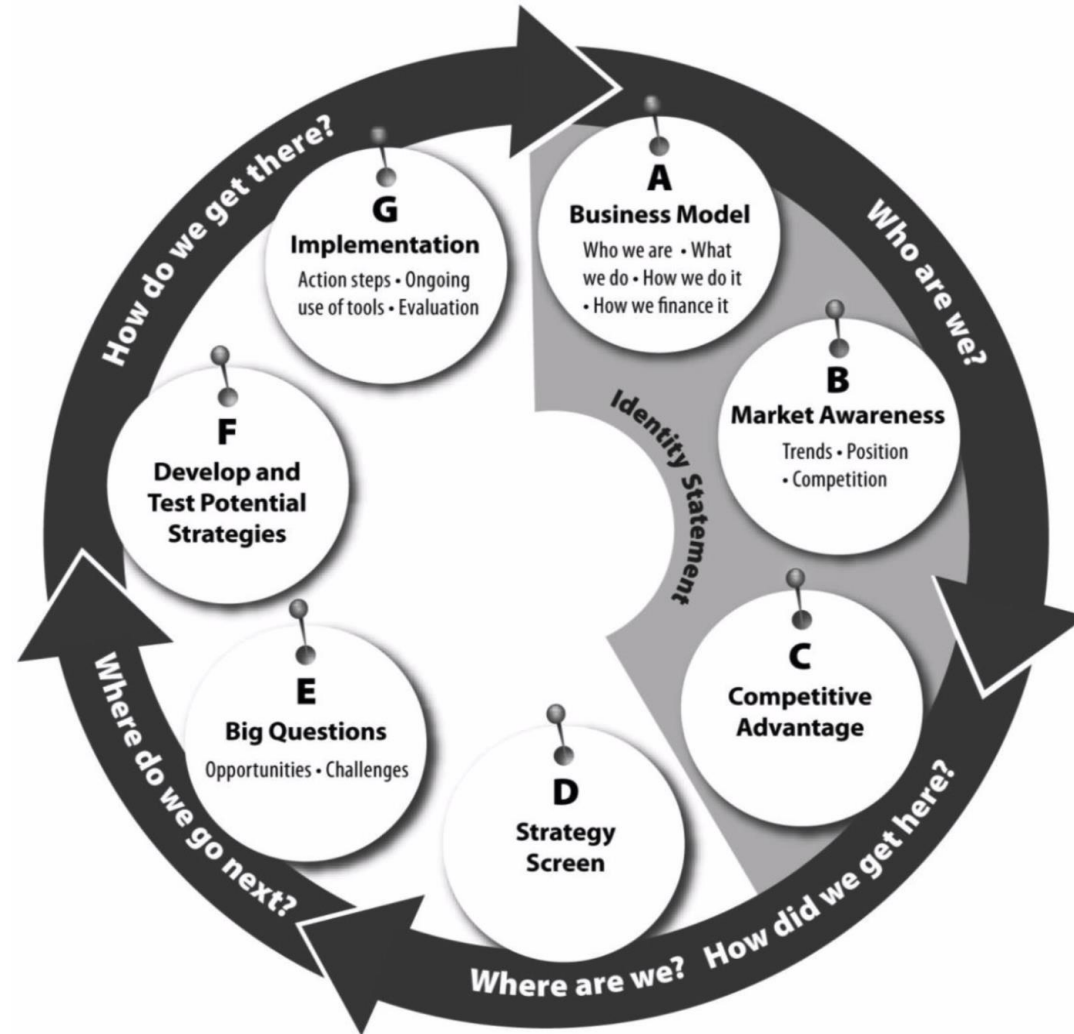


IDENTITY STATEMENT

We advance our mission of	
... and seek to (impact we strive for)	
by serving (customers/clients)	
in (geographic area)	
through (main types of programs/services)	
and emphasizing our competitive advantage(s) of	
We are sustainable by	
Our current Big Question is	



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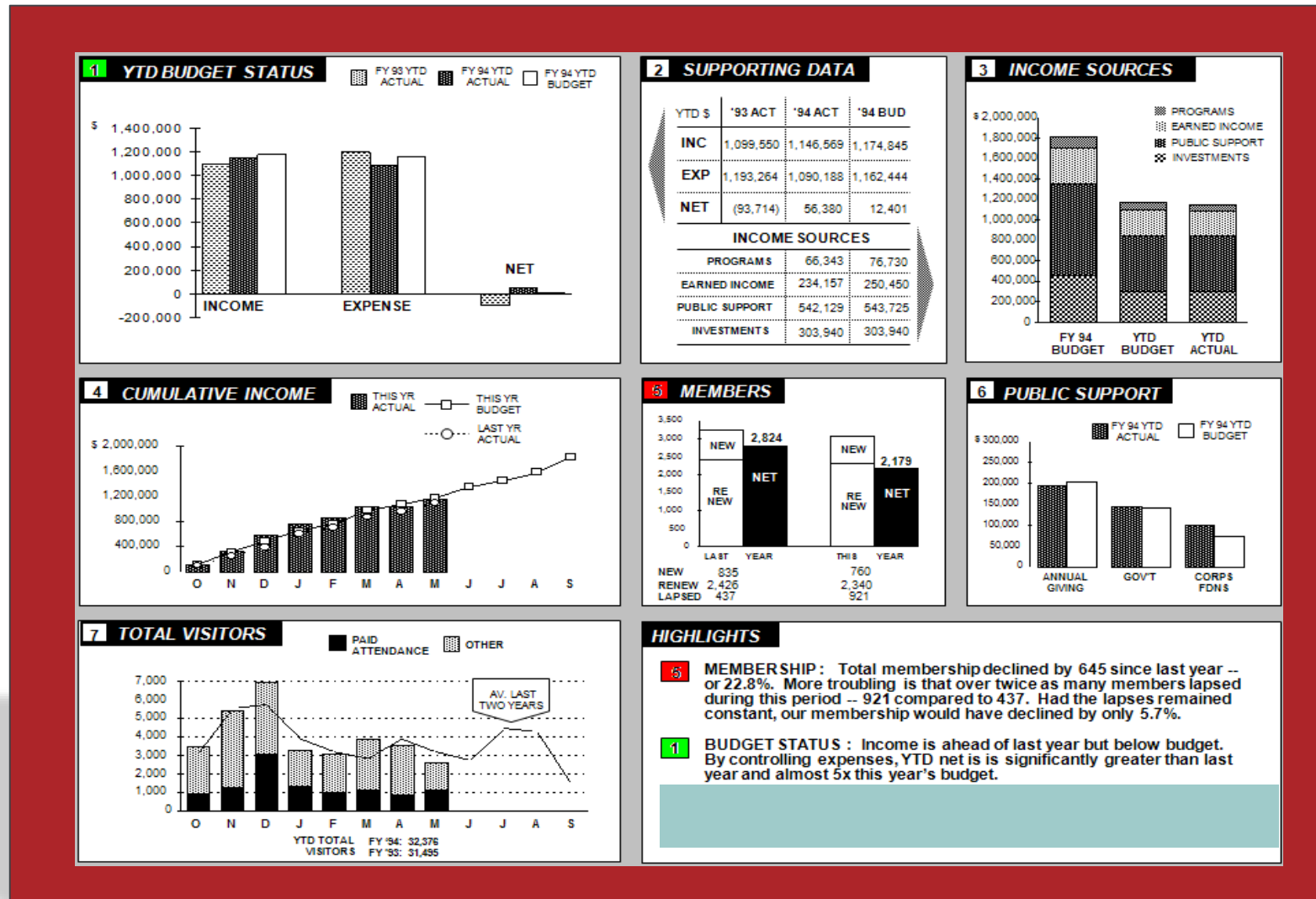
Real-Time Strategic Planning
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How do we Monitor Progress?



Dashboards

Destroyers of Strategy



Shortage of time



Vanishing culture of inquiry



Avoidance of risk taking



Lack of involvement of board in strategy



Lack of vision and focus on the future



Habit of holding on to old ways



“Give me six hours to chop
down a tree and I will
spend the first four
sharpening the axe”

-Abraham Lincoln

Thank You!

Leadership is Intentional



Lyn Corbett

Lyncorbett@sandiego.edu

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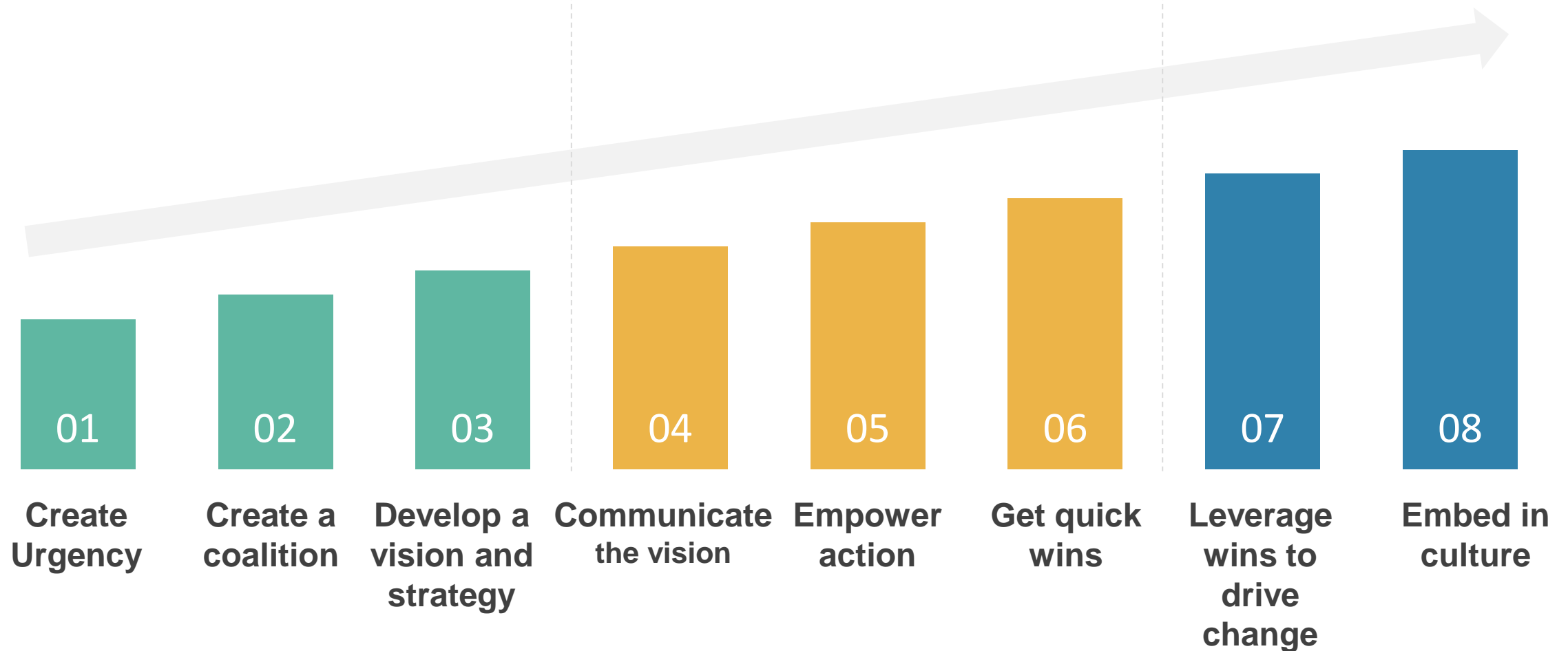
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8 Step Kotter Model of Change

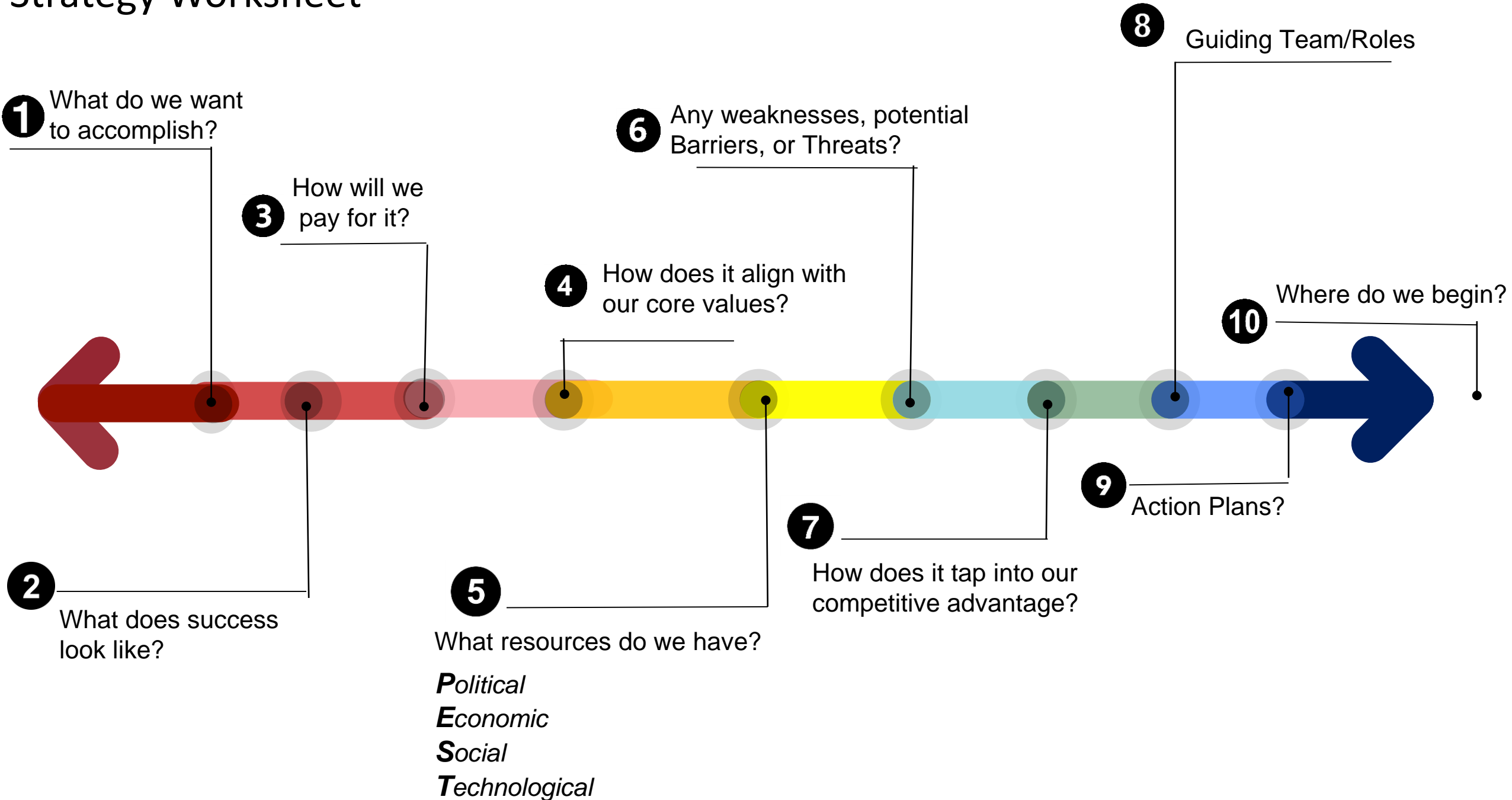
Creating a Climate
for Change

Engaging & Enabling
the Whole Organization

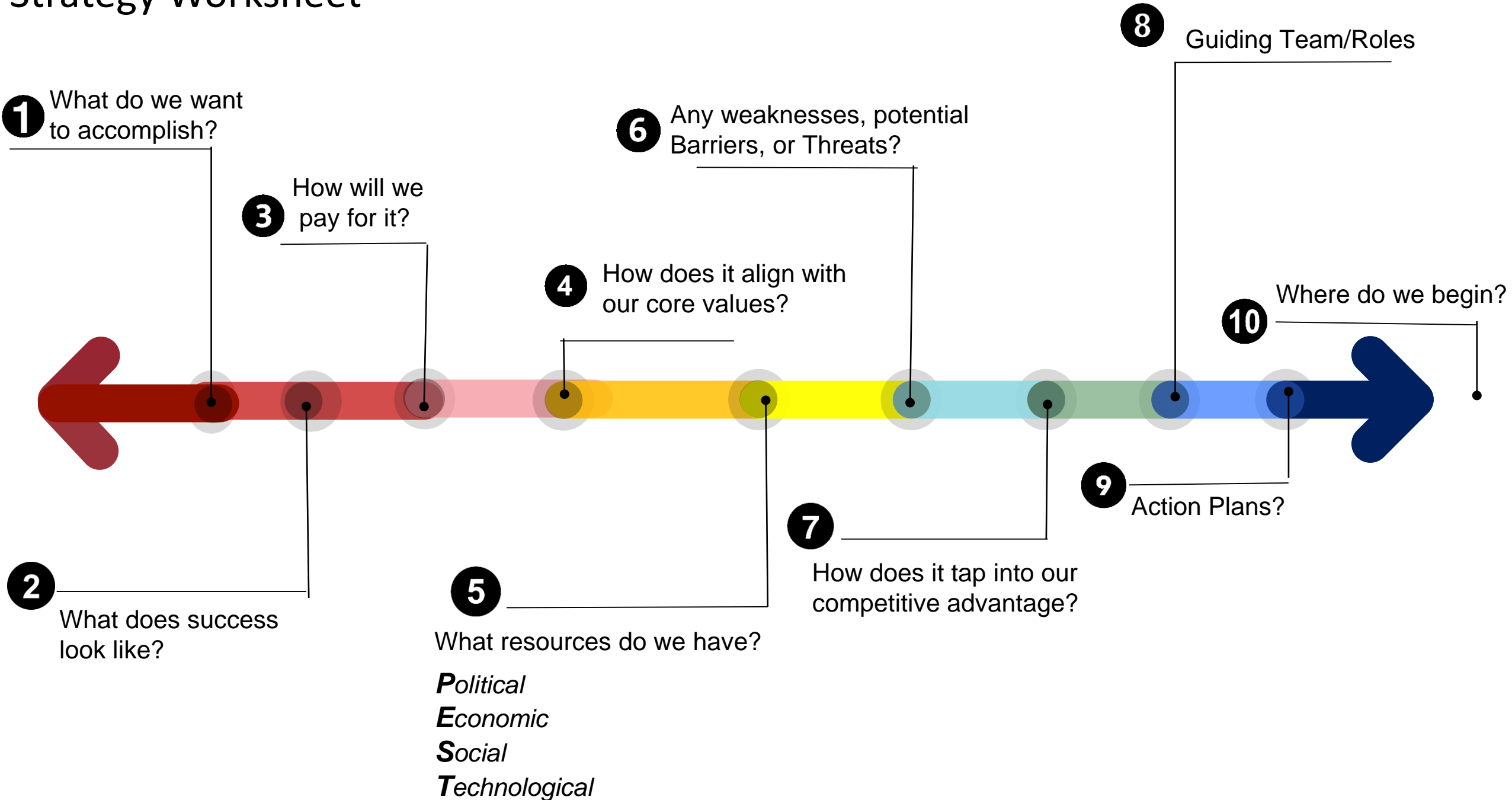
Implementing and
Sustaining Change



Strategy Worksheet



Strategy Worksheet



CORE VALUES

truth	persistence	resources
efficiency	sincerity	dependability
initiative	fun	trust
environmentalism	relationships	excellence
power	wisdom	teamwork
control	flexibility	service
courage	perspective	profitability
competition	commitment	freedom
excitement	recognition	friendship
creativity	learning	influence
happiness	honesty	justice
honor	originality	quality
innovation	candor	hard work
obedience	prosperity	responsiveness
financial	growth	respect
fulfillment	community	support
integrity	order	strength
peace	spirituality	self-control
loyalty	adventure	cleverness
clarity	cooperation	success
security	humor	stewardship
love	collaboration	support
determination	fairness	purposefulness

By: ___/___/___

What you want:

Y/N

Y/N

OUTCOMES

Core Values

Everything you have:

Everything you will do:

A
S
S
E
T
S

A
C
T
I
O
N
S