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Building on Success Cohort Learning Session 8: **Celebrating Our Success!**

September 23, 2021

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Welcome to the Final BOS Cohort Learning Session: Celebrating Our Success!

- Updates HFPG
- Using Zoom
- Adding Your Organization's Name
- Tonight's Session

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Agenda Overview

1. Implementing Your Essential Strategic Plan: Developing an Action Plan
2. Capacity Building – Where Have We Been? Where Are We Going?
3. Resources for Small Nonprofit Organizations
4. Celebrating Our Continued Success

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Poll: Where are we with strategic planning?

Our Essential strategic plan is:

- a) In draft form.
- b) Complete, but not yet approved by our board.
- c) Finalized and approved by our board.
- d) Other.

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Implementing Your Strategic Plan

Implement Your Strategic Plan

- Link strategic plan to other plans
- Identify accountabilities for key results
- Seek regular status updates



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Strategic Plan vs. Action Plan

Strategic Plan

Answers the what
and why

Action Plan

Clarifies the how,
who, and when

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An Action Plan...

Describes the way your organization will meet its goals and objectives through detailed action steps that describe how and when these steps will be taken.



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Components of an Action Plan

Action Steps - What key activities need to be completed in order to achieve your strategic goals and objectives?

Accountabilities - Who is responsible for completing the activity?

Timeline – When does the action (activity) need to begin and end?

Resources Needed - What investments (people, equipment, time, finances) will be need?

Success Metrics - How will you gauge progress ? What is the anticipated key deliverable?

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Welcome, Inc. Strategic Plan 2021-2024

MISSION Whom we serve and why	VISION Who we aspire to be	VALUES What we never compromise
Helping refugees and immigrants create new lives to reach their goals.	Welcome, Inc. is the flagship refugee and immigrant service organization in the Twin Cities	<ul style="list-style-type: none"> Hospitality Embracing all cultures, all people Going beyond the expected to the extraordinary Servant leadership (supporting our partners to achieve their goals)
STRATEGIC GOAL #1: Lead public policy agenda		SUCCESS METRICS GOAL #1
Obj 1 Chair citywide effort to target one or two policy initiatives		<ul style="list-style-type: none"> Evidence of at least one policy initiative being pursued by multiple plays in cities At least two board members active on new public policy committee Internal procedures drafted & approved by board
Obj 2 Engage board members in leading policy agenda		
Obj 3 Draft internal procedures for adopting and implementing public policy efforts		
STRATEGIC GOAL #2: With partners, increase affordable housing in selected neighborhoods in Minneapolis/St. Paul		SUCCESS METRICS GOAL #2
Obj 1 Host affordable housing task force (housing specialists, developers, nonprofits, etc.)		<ul style="list-style-type: none"> Action plan developed by affordable housing task force by end of 2018 Action plan has targets for number/types of units and/or additional solutions Action plan supported by Twin Cities' leaders
Obj 2 Research successful efforts in similar cities		
Obj 3 Engage stakeholders to contribute knowledge and resources		
Obj 4 Create action plan for implementation over next 3-5 years		
STRATEGIC GOAL #3: Ensure that capacity is aligned with strategies		SUCCESS METRICS GOAL #3
Obj 1 Increase unrestricted funding from individual donors		<ul style="list-style-type: none"> Individual donations increase by 5% per year for each year of the plan Board is comprised of people who represent ethnic, racial, and gender diversity reflective of our community Staff and volunteer plan developed by February 2019
Obj 2 Increase diversity of board and board committees		
Obj 3 Identify staffing and volunteer needs to achieve strategy		

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Welcome, Inc. 90 – Day Action Plan					
Goal 1 <u>Lead Public Policy Agenda</u>					
Objectives	Action Steps	Accountability	Timeline	Resources Needed	Success Metrics
#1 Chair citywide effort to target one or two policy initiatives	<ul style="list-style-type: none"> Reach out to key collaborators & partners 	Board Public Policy Chair & board committee	10/1/21 – 11/15/21	Compile list Call/email/meet	Committee formed with support from city leaders and key partners; Policy initiative identified
	<ul style="list-style-type: none"> Meet with mayor 	Board Chair Executive Director	By 11/15/21	Not applicable	
	<ul style="list-style-type: none"> Draft policy initiative 	Board Public Policy Committee	By 12/31/21	Point person to draft policy	
#2 Engage board members in leading policy agenda					

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BOS Team Exercise: Developing A 90-Day Action Plan

Task 1: As a team, identify one strategic priority that you want to implement or begin implementing in the next 90 days (October 1 – December 31, 2021)

Task 2: Create your action plan using the Action Plan Template

1. Using the template, list your top strategic goal and the objective(s) you will work on.
2. For each objective answer the following and record on the template:
 - ✓ **Action Steps** - What key activities need to be completed in order to achieve your strategic goals and objectives?
 - ✓ **Accountabilities** - Who is responsible for completing the activity?
 - ✓ **Timeline** - When does the action (activity) need to begin and end?
 - ✓ **Resources Needed** - What investments (people, equipment, time, finances) will be need?
 - ✓ **Success Metrics** - How will you gauge progress? What is the anticipated key deliverable?

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Large Group Debrief

- What goal/objective will your team work on over the next 90 days?
- For your selected goal/objective, tell us about the:
 - ✓ How? – Action Steps
 - ✓ Who? - Accountabilities
 - ✓ When? – Timeline
- What did your team find most challenging about beginning your 90-day action plan, if anything?

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Final thoughts for successful implementation of your strategic plan

- Use a written action plan to translate your strategic goals into doable and achievable steps
- Monitor and report on progress regularly at board meetings
- Make time to discuss an aspect of your plan at every board meeting
- Remember – change is continuous. Strategies and actions need to reflect that – Keep your strategic and action plans current

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Capacity Building in Nonprofit Organizations

**What IS capacity building?
How did we approach it?**

At the start, each organization identified some initial challenges and established goals for our work together

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How Did we Build Capacity? *Every organization faced unique challenges!*

- Financial Management
- Operating in Uncertain Times
- Fund Development
- Board Governance
- Strategic Thinking and Planning
- Building an Inclusive Board
- And more....

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We Identified or Re-evaluated Desired Outcomes

- Although we all faced unique constraints in the face of the pandemic, perhaps you learned to be more effective by:
 - Meeting new, maybe unexpected community needs
 - Learning Zoom technology; communicating virtually
 - Re-thinking your organization's mission or vision
 - Diversifying your Board
 - Improving your organizational efficiency
 - Changing, expanding, or narrowing your client base
 - Seeking new resources and funding opportunities
 - Reaching out to create new partnerships or affiliations

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What Did We learn as a Cohort?

- Meeting remotely, we managed to become a strong, supportive cohort!
- Every organization shared their difficulties
- Together, we broadened our perspectives
- Many began to build a more inclusive board
- We worked through a strategic planning process
- And tonight: We learn to use our Strategic Plan – and translate goals into action.

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Reflection

“ALL THAT YOU TOUCH, YOU CHANGE. ALL THAT YOU CHANGE CHANGES YOU. THE ONLY LASTING TRUTH IS CHANGE.” - OCTAVIA BUTLER

Reflect on:

- ✓ What’s changed for you and/or your organization?
- ✓ What results have you achieved?

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Resources for Small Nonprofits

- HFPG Small Agency Program
 - Hartford Public Library Workshops
 - Discovery Sessions
 - Small Agency Grants
- HFPG Website – Current open grants, Donor Advised, Giving Circles
- Nonprofit Support Program
 - Nonprofit Workshops
 - Catchafire
 - New England Consultant Directory



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BOS Graduation



Celebrating Our Success
Congratulations!



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One positive word that describes your BOS experience

(put your word in chat)

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Next Steps

- Please complete the online feedback survey
- Check the BOS weblink for additional resources - <https://www.hfpgnonprofitsupportprogram.org/what-we-offer/workshops/building-on-success>
- Complete your organization's final organizational assessment with your consultant by September 30, 2021
- Continue to apply the knowledge you've gained through participation in the Building on Success Program
- Foster a culture of organizational learning within your organization
- Take advantage of the many resources available to nonprofits in our region

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