



ROI of Strategic Action Planning: Preparing Teams to Dramatically Increase Impact and Revenue

From the Experts
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HIGOL helps nonprofit leaders increase revenue and community impact by 50% in 12 months.



Organizations Who've Placed Their Trust in Us







Preview of Our Journey Together

1. Discover the keys to successful strategic planning that lay the foundation for innovation, increased community impact and outstanding fundraising results.
2. Explore how collaborative leadership supports systems change ensuring diverse voices, equity and inclusion.
3. Gain new perspectives on how to attract and retain the right funders to support your work.



What Can You Expect?

1. Questions are welcome as they come up. If we are going to touch on your question later, we may ask you to hold it.
2. Active participation from us and you.
3. Two amazing case studies to learn from.



Data and Insights

1. 67% - 90% of Strategic Plans fail.
2. 74% of leaders don't have faith their plans will succeed. Source: Inc. Magazine
3. 43% of nonprofit organizations developed new services & partnerships in 2021/22 to meet the shifting needs of their communities. Source: 501c3 Services
4. The nonprofit sector is losing key employees at an alarming rate - **19%** per year vs **12%** for the overall labor market. The #1 reason given is burnout.
5. **30%** of current nonprofit employees surveyed report being burned out and **20%** report they are in danger of burning out. Sources: Opportunity Knocks and the Society for Human Resource Management.



What is the data telling us?

- We are in rapidly changing political, social and economic environments.
- Nonprofits are rapidly pivoting business models.
- Getting teams on board with coherent relevant strategic initiatives and out of *fire-fighting and/or operating in silos* mode is critical.
- Burnout is rampant. Re-hiring is expensive and hard.
- If you are not working to create a sustainable organization in this environment
 - staff will find other jobs,
 - communities will be served in mediocre ways,
 - hundreds of thousands to millions of dollars will be left on the table.



How Organizations Are TRYING to Solve This Problem

But its not working!

Treating interactions with stakeholder as transactions, primarily focused on revenue.

Doing a 'Strategic Plan' only because a funder requires it.

Hoping the team and board will eventually 'get it'.

Not using an equity lens as you evaluate your opportunities and challenges.

Doing things the same old way in the face of massive change, because 'that's how we've always done it'.



Operating in the status quo will show up in not being able to retain staff and not raising the resources you need.

How much have you spent on strategic planning efforts that did not significantly increase your impact and revenue?

Organizations are spending often tens of thousands of dollars on processes that are missing key ingredients.





What Results are the Status Quo Delivering?

- Failed plans that never get implemented. They sit on a shelf or website.
- Planning processes that don't uncover the data and information necessary to land on the strategic goals that will give you real momentum.
- Long standing social inequities and problems are not being solved. Cycles keep repeating themselves.
- High staff turnover and burnout.
- You can't raise the revenue you need to support the community impact your organization is capable of achieving.



In the end...

- Organizations become obsolete.
- New organizations take their place.





The Missing Links

That work...

Prioritize the voices of internal and external stakeholders, especially those you serve.

Create a shared vision for the future.

Educate the team and board. Help them see where they fit in the vision (or don't).

Build an organizational culture using an equity lens that can support this work.

Focus more time on execution than planning. Build-in feedback loops for continuous feedback.

Measure results. Learn and pivot.

Continuously communicate your vision, progress & next needs across stakeholders.



Future Perfect

Fully engaged creative staff.

Fully engaged donors, volunteers, and community partners.

High levels of trust, consistent follow up and follow through with built-in feedback loops.

Continuous learning and evaluation.

Funders and donors are providing multi-year unrestricted funding.





Let's talk about how to get there.



Strategy 1: Engaging the Right People

- Get a 360-degree view on what is your current state.
- You are too close to it to see it clearly.
- Have a third trusted party talk to your stakeholders and get genuine feedback about your work.
- Stakeholders will see opportunities you do not.
- They will show you challenges you only had an inkling for.





What Does This Require from you?

- Courage
- Being open to accepting others' truth and hear the unexpected.
- Willingness to forge deeper bonds.
- Trusting a partner to help you collect this critical information.



Strategy 1: Engaging the Right People

- What the Food Shuttle learned
- The Good, The Bad, The Transformational



**INTER-FAITH
FOOD
SHUTTLE**



Strategy 2: Develop a Shared Vision & Values for the Future



What is a Vision?

- It is a view of the future you want to create.
- It is not a business plan.
- It is not a to-do list.
- It can be relatively short-term or it can be over lifetimes (these are often the most powerful.)

Resources:

- [Vision is Greater than Sight](#)
- [Creating A Company Vision](#)
- [2023: The Year of Vision](#)



Strategy 2: Develop a Shared Vision & Values for the Future

- Vision requires responsibility and vulnerability;
- Vision requires you to be bold, authentic, and, most of all, focused.
- Not everyone will agree with you or want to be a part of it;

Vision Example: A doctor envisions telling a patient and family they have Alzheimer's disease, and they respond like it is a knee replacement.

Give donors what they deserve (and really want!): Vision. Leadership. Solutions.



Strategy 3: Setting Strategic Goals & Developing Action Plans

Ask the question: Given all we know, what is needed now to make a dent toward our vision?

The Process: How can you come to see this together?

Hint: Answers are often arise in the assessment of your current state (Strategy 1).

Limit this to 3 to 5 strategic goals.

You can't focus on all things or you will accomplish nothing!





Strategy 3: Setting Strategic Goals & Developing Action Plans

If possible, involve the whole team in developing action plans!

They are the implementors.

They will not implement if they are not bought in.

Warning: Subtle sabotage....



Strategy 3: Setting Strategic Goals – Lessons Learned





Strategy 3: Setting Strategic Goals – Lessons Learned



Overarching Vision: A hunger-free community

FIVE-YEAR OBJECTIVES

(FOR FISCAL YEARS ENDING JUNE 30, 2022 – JUNE 30, 2026)

1. Become recognized as a regional leader of transformative, community centered programs.
2. Expand the coordination of community resources and strategic partnerships.
3. Direct funding and resources for strategic short-term and long-term organizational sustainability.

FIVE-YEAR STRATEGIES

(FOR FISCAL YEARS ENDING JUNE 30, 2022 – JUNE 30, 2026)

1. Identify, develop, strengthen, and invest in programs having measurable impact.
2. Build a collaborative and empowering culture where all constituents play a strategic, mission-driven role.
3. Lead in advocating for social justice solutions connected to hunger and food insecurity.
4. Educate the community on the factors contributing to hunger and the Food Shuttle's role in addressing those needs.
5. Steward existing and cultivate new funding and other resources.



Strategy 3: Setting Strategic Goals

Unifying Overarching Vision: Double the Pace of Conservation: Conserving 25,000 acres by 2025



Public Benefit #1: Safeguarding Clean Water

Priority lands in the Neuse River and Upper Cape Fear/Jordan Lake watersheds will be identified and permanently protected through increased funding and financing mechanisms.

Action Plan includes: TLC has permanently, protected, and maintained 25,000 acres of land in key watershed areas by 2025.

Public Benefit #2: Supporting Local Farms and Food

TLC's land conservation will support increased opportunities for sustainable food production and protection of historic farm communities.

Action Plan:

TLC Develops and shares replicable models to create and support a sustainable local food system that benefits both the environment and local economies by 2025.

TLC protects 3000 new acres of farmland by 2025.

TLC implements a buy, conserve, and sell model for working lands.



Strategy 3: Setting Strategic Goals



Unifying Overarching Vision: Double the Pace of Conservation conserving 25,000 acres by 2025

Public Benefit #3: Protecting Wildlife Habitats

Important natural areas and their wildlife are protected, connected, and buffered.

Action Plan: TLC conserves 75% of all unprotected National Heritage Sites identified by the National Heritage Program by 2025.

Public Benefit #4: Connecting People with Nature

TLC's preserves and protected lands are creating opportunities for people to deepen their connection to the natural world.

Action Plan: Very specific metrics.



Strategy 4: Roll Out & Execution

- Here is where the real work begins.
- Many ways to do it.
- Intentional Educate Internal and External Stakeholders
- Help them see their role in the plan.





Strategy 4: Roll Out and Execution

- Many Conversations...
- Staff Members
- Board Members
- Volunteers
- Donors
- Community Partners



INTER-FAITH
**FOOD
SHUTTLE**



Re-Imagining the Way We Work

Inter-Faith Food Shuttle Evolution

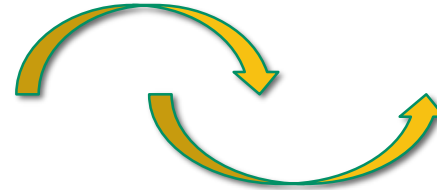
Strategic Plan

The Two Loops Model

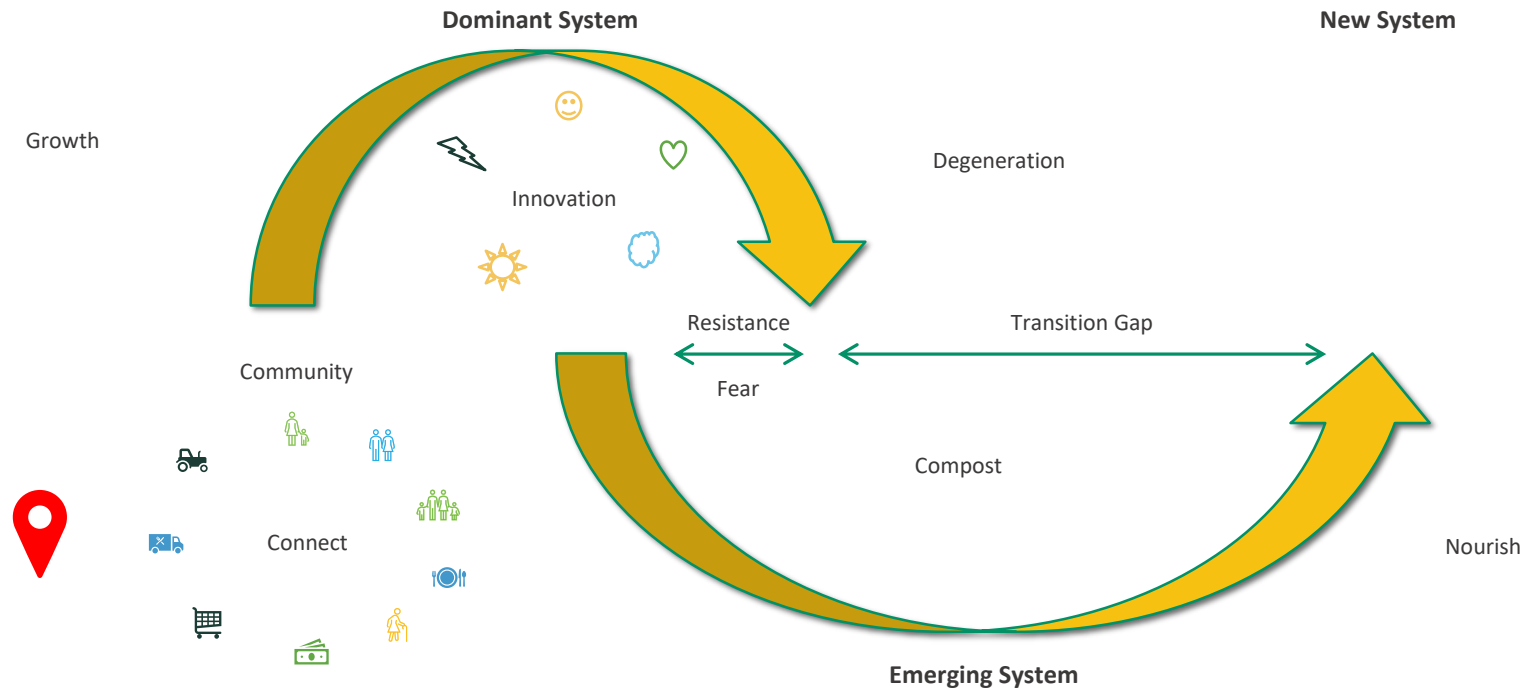
Old mission statement:
We pioneer innovative, transformative solutions to end hunger in our community.

Our Vision is a Hunger Free Community

Your impact
Your community
Your solution to ending hunger



We **FEED** our neighbors, **TEACH** self-sufficiency, **GROW** healthy foods, and **CULTIVATE** innovative approaches to end hunger.





Innovation!

Re-imagining a system is to re-imagine how we think

Asking ourselves the tough questions.

- Are we sacrificing Efficiency for Effectiveness?
- How does this impact the “triple bottom line”, i.e., social, economic, and environmental?
- Is it transactional or transformative, and is it inclusive?
- What input do our neighbors have in the solutions?
- How do we become more resilient, so fear does not interfere in the right solutions?

Who can best answer these questions?

Neighbors!

- Clients
- Donors
- Partners
- Food Shuttle



Sustainable Food Systems Framework

Moving the client from the center and making them a part of the solution creates the opportunity for everyone to live healthier lives.





Strategy 5: Measure & Continuous Improvement

For both organizations, they are seeing upward movement in both impact and revenue.

Triangle Land Conservancy:

From 2018 to 2022 revenue grew from \$5 million to \$16 million (300%)

In June 2002 they conserved 22,737 acres of land. See [annual report](#) for much more detail on impact.

Food Shuttle:

From 2019 to 2022 revenue grew from \$13 Million to \$23 million (80%)

6,000 new donors during COVID with over 40% retention rate.





Strategy 5: Measure & Continuous Improvement

The Food Shuttle is experimenting with new ways to measure impact – that is outcomes.

- 90% of participants are more confident when choosing fresh produce.
- 85% are more confident in their basic cooking skills.
- 90% are buying healthier foods for their families.
- 100% feel they can help their families eat healthier.
- 19% fewer seniors feel isolated.

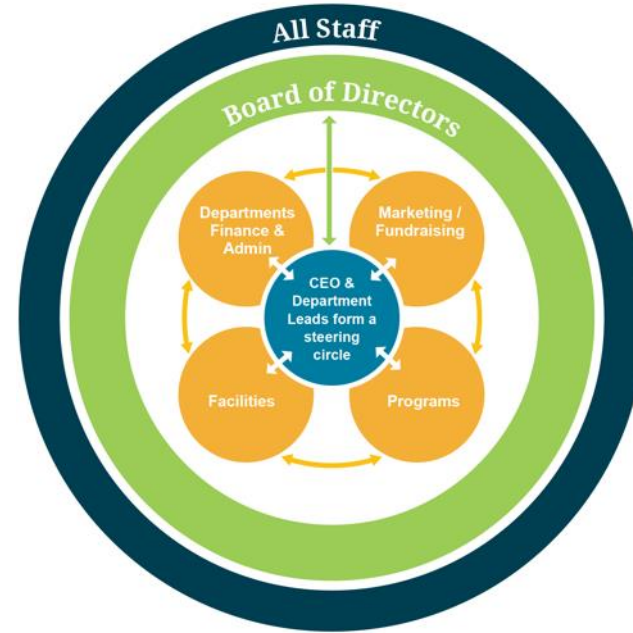


The obsolete model that is preventing far too many organizations from maximizing revenue, team effectiveness, and community impact





A New Model that empowers Frontline leaders, maximizing revenue, impact and innovation.





Eliminating Delays & Risks

We don't have the budget for this.



You cannot afford NOT to do this and create next level growth in revenue and impact.

We don't have time for this.



This changes the very way you do business, helping you become much effective, efficient and impactful.

Our Board will not go for this.



Most board members are craving meaningful engagement and most CEOs don't know how to provide that opportunity. This process gives you that platform.



In Summary

- Old ways of working are costing you everything.
- A 'we have always done it this way' mentality, creating meaningless strategic plans, ignoring real challenges....does not grow impact and revenue.
- What you are overcoming:
 - Crazy amounts of distracting overwhelming change, wars, pandemics, inflation, maybe recession.
 - Disengaged boards and teams that are burning out and leaving.
 - Rapidly changing funding environments
- The faster you move toward a fully aligned sustainable model, the faster you will raise the revenue you need to be successful.
- Missing links:
 - Deep engagement with your community, team, board and partners and a willingness to face challenges.
 - Full Alignment behind a powerful vision.
 - Your commitment and willingness to do things differently.



In Summary

The Strategies to Get There:

1. Be Brave. Engage the Right People. Be humble and learn.
2. Develop a shared vision for the future.
3. Get Clarity on a limited number of Strategic Goals over a defined period. What will move the needle?
4. Engage the team, board and partners to develop & execute action plans with meaningful goals. This allows you to leverage, leverage, leverage.
5. Measure and share what you are learning.

You can't afford not to do this. Money and time are limited only by misplaced priorities, confused mindsets and defeating patterns.



Future Perfect

Fully engaged creative staff.

Donors, volunteers, and community partners who have your back and love the work!

High levels of trust, consistent follow up and follow through with build in feedback loops.

Continuous learning and evaluation.

Funders and donors are providing multi-year unrestricted funding.





Where We Go From Here?



- Happy to share slides if you provide your contact info.
- Are there 1 or 2 or more folks from your organization who would really benefit from this info?
- We can do *a live encore presentation* for your team where they can ask real time questions.
- The QR Code will take you to a calendar link where we can schedule a quick call to arrange this.



If you are
considering a
Strategic Change
Initiative in the next
3 to 6 months...

Like

- Developing a Strategic Plan to help your org significantly increase revenue;
- Executing on a Strategic Plan with the same goal;
- Scaling quickly;
- Merging into or spinning out of an entity
- Let's talk after this session.



Thank you for coming this morning.

Teri Beckman
terib@higol.co
<https://higol.co>

Ron Pringle
ceo@foodshuttle.org
<http://foodshuttle.org>

