Survive and Thrive

Presented by:
Kathy Alm, CEO
PATH Intl.
Surviving and Thriving Requires:

- Mission and vision
- Assessing your organization
- Thoughtful planning
- Board development
- Recognizing the role of the executive director, its impact and avoiding burnout
- The right people on the bus
- Sustainable funding
- Succession planning
Mission and Vision

- What’s the difference?
- Mission: Core purpose
- Vision: Aspirational future
Why start “S & T” with the Five Life Stages?
“Like people and plants, organizations have a life cycle.”

John W. Gardner

- The 5 Life Stages – Where You Are, Where You’re Going, and What to Expect When You Get There
Stage One: Imagine and Inspire

Can this dream be realized?
Stage Two: Found and Frame

How are we going to pull this off???
Stage Three: Ground and Grow
How can we build this to be a viable business?
Stage Four: Produce and Sustain
How can the momentum be sustained?
Stage Five: Review and Renew

What do we need to redesign?
Sustainability or Decline and Dissolution
What the Literature Says About Organizational Life Paths
Assessing Your Organization: Seven Focus Areas

- Board/governance
- Program:
  - Horses & Equipment
  - Riders
  - Volunteers
- Staff leadership
- Finance/funding
- Administration systems
- Staffing
- Marketing
- Let’s add facilities
Where do you want/need to grow?

Assess your organization
Review Scores
Organizations have a natural evolution

- No right or wrong place to be
- Important to know where you are; to know that you are NORMAL
What needs to happen to move from one stage to the next?

- Transition ideas – in your key arenas
Thoughtful planning

- Strategic planning process
- Set priorities
- Get buy-in
- Stay focused
Strategic Planning Process

Purpose

Process
Identifying Goals
Focus on a manageable number of priorities.
Implementation

Accountability
Quote:

- “If you don’t know what you’re doing, don’t do it all at once.”
  Unknown

- “If you don’t know where you are going, you’ll end up someplace else.”
  Yogi Berra
Board Development

- What is the role of the board?
- Resources
  - Boardsource.org
  - United Way
  - National Council of Nonprofits
Defining Leadership

- “True leadership exists only if people follow when they have the freedom not to.”
  - Jim Collins, From Good to Great

- “Leadership is the capacity to translate vision into reality.”
  - Warren Bennis

- “Management is easy. Leadership is motivating people, turning people on, getting 110% out of a personal relationship.”
  - Colin Powell
So What Skills are needed to be a strong Leader??

- Emotional intelligence
- Vision, big picture and strategy focus
- Integrity, honesty and trust
- Coaching - builds a team
- Delegation - makes others powerful, responsible
- Confidence and centeredness
So What Skills are Needed to be a Strong Leader?? (Cont.)

- Willingness to be wrong
- Commitment
- Positive attitude
- Approachable
Role of the Executive Director
Avoiding Burnout
Getting the Right People on the Bus
Sustainable Funding/Resources
Resource Allocation
Fundraising/Resource Building
Brainstorm Activity

- Get into groups of four
- Share stories of successful relationship building.
- Look at your identified goals; what resources do you need?
- Who do you have relationships with where there might be a match?
- What do they need? In what are they interested?
Sustainable Fundraising
Event Fundraising

- Pros
Event Fundraising

- Cons
Event Fundraising
Individual Fundraising

Pros
Individual Fundraising

Cons
Individual Fundraising

- Meets the needs of:
Foundation Support

Pros
Foundation Support

Cons
Foundation Support

Meets the needs of:

Knowledge to build on.
Corporate Support

Pros
Corporate Support

- Cons
Corporate Support
Meets the needs of:
U.S. Giving Statistics

Americans gave an estimated $410.02 billion to charity in 2018, crossing the $400 billion mark for the first time.

- 70% Individuals
- 9% Bequests
- 16% Foundations
- 5% Corporations

Reference: GivingUSA.org
Succession Planning

- Managing planned leadership transitions
- Emergency leadership transitions
Emergency Leadership Transition

- Why?
- Who is responsible?
- Process
- Staff leader transition checklist
Planned Transitions: Where do you start?

- Board and senior staff commitment
- Develop transition team to lead planning
- Board discussion
Board Discussion

- Risks
- Impact
- Interim leader
- Leadership needs
- Timeline
Developing a Planned Transition

Transition Team Gets Down to Work

- Update job description
- Define interim executive key responsibilities
- Identify key spokesperson
- Determine interim leadership plan
- Define internal/external communication plan
- Determine hiring process
Developing a Planned Transition

- Keys to Success
  - Clarity
  - Written documentation
  - Expanded leader transition checklist
    - Relationships
    - Critical issues
    - Issues not written anywhere
    - Promises not written down
    - Board issues
    - Strategic plan progress summary
    - Staff issues
Founder Transition

- What is different with a founder or long-time, much beloved leader transition, whether planned or emergency?
What can go wrong?

- Lack of leadership hiring experience on the board
- Lack of understanding of organizational needs
- Poor communication
- Losing sight of the mission and/or community needs
- Inferior business model
- Founder/beloved leader
Final Exercise

- Write down your highest priority and what you will accomplish in the next month.
- Write down one person outside of your organization with whom you will build a relationship with for outside support.
- Put it in the envelope provided, address it to yourself and return to presenter.
“Contrary to popular opinion, leadership is not about deciding where other people should go. It's about finding out where they want to go and then helping them get there.”

Unknown