



10 Steps to Excellence

Moving Your Organization from Mission to Action

Follow these planning steps to be sure you're prepared for the changing world.

BY DAVID K. MARTIN

According to Dr. Kenneth Blanchard, coauthor of *The One Minute Manager* and other management books, you need four elements to achieve excellence in today's competitive environment:

1. Goal Setting
2. Commitment
3. Feedback
4. Organizational Support

You can assure these four ingredients in your organization if you follow these steps:

1. Decide which Results Matter Most.

Some nonprofits try to do too many things, focusing on need instead of capacity. Others do what they've always done, whether a need still exists or not. Still others do not have enough human and financial resources to accomplish what they're trying to do.

The solution is to identify the results that matter most. You, your board, and your staff members must all think carefully about your organization's mission. By focusing on mission, you will be able to say "yes" to some things and "no" to others while fulfilling your basic purpose.

2. Create a Vision for the Future.

As you and your staff and board ponder the future, ask yourselves: "Where will we be in three to five years if we continue doing just what we are doing today?" To achieve your ongoing purpose, you need to identify the means to achieve mission and the core functions required to sustain the organization. You must also identify and create a compelling image of the future.

A clear, unifying vision can be a powerful force for change and achievement. Such an organizational vision should be broad enough to stimulate thinking

Brainstorming Tips

Brainstorming is a vital part of planning. Follow these brainstorming steps:

1. Visualize what you need.
2. Question your assumptions.
3. Assess your obstacles.
4. Plan backward. Start with your desired end product, and figure out what tactics will get you there.

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and provide opportunity for innovation and growth. Yet it should be narrow enough to provide both direction and action.

3. Ask Everyone to Help Plan.

Once everyone in your organization has your mission and vision clearly in mind, the next step is to create a strategic plan. This plan is your tool for translating your mission into results.

In an environment of accelerating change, managing change is both a challenge and an opportunity. Planning is not intended to eliminate risks: Risks are essential to progress. Instead, planning helps you take the right risks at the right time. It also minimizes crises by helping staff anticipate change and prepare their responses.

In many nonprofits, planning is done by a few people at the top of the organization. However, planning ought to involve anyone who has responsibility for achieving the organization's goals.

Staff members who have information, experience, and vision should be encouraged to contribute to the planning process. The more involved staff members are in creating a plan, the more committed they will be to achieving it.

Such planning not only creates a sense of ownership among participants; it also improves communication and clarifies each person's responsibilities. It builds confidence and helps dissolve people's fears about the future.

4. Study Your Environment.

An important part of planning is to monitor your environment. The best way to do so is to use a SWOT (strengths, weaknesses, opportunities, and threats) analysis. Ask yourselves:

- What are our organization's major strengths?
- What are our major weaknesses?
- What opportunities can we take advantage of?
- What threats do we face?

Ask as many staff and board members as possible to help brainstorm and discuss answers to these questions. (See "Brainstorming Tips" to the left.) Results will give you a good idea of your organization's internal and external worlds. It's crucial to attend to both.

5. Set Goals.

Goals define your organization's desired future and the direction it will take. They also help you evaluate your progress. If you don't set goals, you'll never know if you achieve excellence because you've never defined it.

6. Develop Objectives.

To undergird each goal, create specific objectives. These objectives should describe exactly how you plan to reach each goal.

Good objectives are understandable, realistic, and attainable. They are also measurable: You can easily tell when you have met them.

7. Prepare Action Steps.

Next, develop action steps to achieve each of your objectives. Your action plan should include enough detail to answer the following questions:

- What steps must we take within the next three months to meet our objectives?
- What actions must we take within the next year to meet our objectives?
- Who will do what by when?
- Who will be responsible for overseeing the plan as a whole?

Once you have action steps in place, be sure everyone in the organization is behind them. All board and staff members must dedicate themselves to the agreed-on steps.

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8. Identify Resources.

After you have chosen goals, objectives, and action steps, decide what resources you need to achieve them. Ask yourselves the following questions:

- Can our current board, paid staff, and volunteers perform all the necessary steps? Or will we need to hire new staff, recruit new volunteers, or add to our board?
- Do we have enough money in our budget? Or do we need to raise extra funds to reach our objectives?
- Are our goals compatible with a foundation or other funder? If so, can we write and obtain a grant within our scheduled time frame?
- Can we barter with corporations or other nonprofits for some of the resources we need? Can we obtain in-kind services to fulfill some of our needs?

If you don't have enough resources, you will need to prepare a fundraising plan (see "Selected References"). Remember, you have spent a great deal of time deciding what results matter most to your organization. Thus, it's crucial to find the resources to achieve those priority results. Otherwise, you are abdicating your mission, and your organization has no reason to exist.

Another Case of Self-Fulfilling Prophecy

Change will be much easier to implement if you act on the premise that:

- People have the capacity for growth.
- People have the desire to grow and to use their capabilities to accomplish things.
- People want the organization to be successful.
- People want a part in making the decisions that affect them.
- Individual and organizational goals can be compatible.

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9. Evaluate Results.

As soon as you have enough resources, start working on your action steps. If possible, build evaluation into each step so that you will know if you're moving in the right direction.

Evaluating results takes effort, but it's the only way to measure your success. Gather feedback often from all your major players. Use surveys, focus groups, periodic discussions, reports, conferences, and other assessment devices to be sure you're on the right track. (See Lauer in "Selected References.")

10. Continue the Planning Process.

If you follow the steps outlined here, you will be planning strategically. Such planning is the best way to move your organization from mission to action.

Every nonprofit organization intends to produce results. Only by following these steps, however, can you be sure you carry out your most important outcomes.

Enthusiasm and commitment alone won't guarantee success in today's nonprofit environment: You must chart a course and stick to it. And you must continually assess, revise, and fine-tune your plans to keep in touch with a changing world. ■

Selected References

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These publications are available through the Society for Nonprofit Organizations' Resource Center. For ordering information, see the Society's *Resource Center Catalog*, included in this issue, or contact the Society at 6314 Odana Road, Suite 1, Madison, Wisconsin 53719 (800-424-7367).

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