Nonprofit Roadmap to Success

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Mission, Vision, Values

Why are they important?

Which comes first?
Food for Thought

Your beliefs become your thoughts. Your thoughts become your words. Your words become your actions. Your actions become your habits. Your habits become your values. Your values become your destiny.

-- Mahatma Ghandi
Organizational Values

http://www.youtube.com/watch?v=g6WHAfWqX3s
Core Values

• Govern personal relationships
• Guide business processes
• Clarify who we are
• Articulate what we stand for
• Help explain why we do business the way we do
• Guide us on how to teach
• Inform us on how to reward
• Guide us in making decisions
• Underpin the whole organization
• Require no external justification
• Essential tenets
Sample Core Values

Protect the quality of the environment

Ensure equal access to resources

Encourage innovation/creativity

Practice sustainable development
Sample Core Values

• Diversity  
• Efficiency  
• Giving back  
• Transparency  
• Integrity  
• Leadership  
• Passion
How to determine core values

- What are your 3 greatest accomplishments and why
- What are your 3 greatest moments of efficiency
- In the group, are there common themes?
How to determine core values

• What have been your 3 greatest failures?
• What have been your 3 greatest moments of inefficiency?
• In the group, are there common themes?
How to determine core values

1. Write 2-3 sentences of advice you would give to the group based on these commonalities.
2. Distill these sentences into a few words
3. Test the value (these words). Think of a situation where following your core value hurts you rather than helps you.
4. If it hurts you, don’t use it.
What is a mission statement?

Who is responsible for its content?
Sample Mission Statements

Disney: To make people happy.

Ben & Jerry’s Ice Cream: To make, distribute and sell the finest quality all natural ice cream and euphoric concoctions with a continued commitment to incorporating wholesome, natural ingredients and promoting business practices that respect the Earth and the Environment.
Sample Mission Statements

The Elephant Sanctuary:

A Natural-Habitat Refuge Where Sick, Old and Needy Elephants Can Once Again Walk the Earth in Peace and Dignity.
Mission Statement Defined

A mission statement helps everyone understand the organization’s purpose.

How is a company’s mission distinguished from its purpose, as stated in its articles of incorporation?
Mission vs. Purpose

The company’s purpose is framed in its articles of incorporation and, if a nonprofit, must be tied to *charitable, scientific, or educational work*.

For nonprofits, the mission statement will also generally be tied to a societal need.
Mission Statements

• Define the company’s reason for existence
• Are the why behind goals and objectives in planning documents
• Provide focus and consistency
• Build shared insight among all levels of people
• Communicate organizational intentions
• Gain employee participation, insights, and commitment to quality and service
• Provide a clear and objective framework for decision-making
• Identify the market and stakeholders and what your company can do for them.
Who should be involved

- After the articles and bylaws, the core values, and then the mission statement should be prepared.
- In order to effective, must include stakeholders in their preparation.
Why involve stakeholders?

• If done well – it REALLY improves investment by the community when they are involved in the planning.
• Many more ideas from different perspectives support innovation and applicability
Determining Stakeholders

- Pick an organization
- List everyone who is a stakeholder of that organization
- Decide who you want to involve
Writing Mission Statements

• Can range from a statement of what the organization stands for to very systematic – who-what-when-where

• More commonly used for organizational communication than vision or values

• Must be Short-Clear-Captivating (capturing the heart of what you are trying to do)
Writing Mission Statements

Method A:

1. Describe what your organization does
2. Describe how you do it (by incorporating your core values)
3. Add why you do it and include your core competencies (determined through a SWOT analysis).
Writing Mission Statements

Method B:
Our purpose, desire, intent is to create/develop/foster/nurture/build/provide . . .

Mix and Match tables of 6-8
“3 minutes” to brainstorm
“3 minutes” to get up, go around and test ideas
“5 minutes” to summarize
Volunteers present on flip chart paper
Tables redraft with all ideas – chunking into ideas
Vote
Writing team writes, then tests
• Must pass the “mother” test. If your mother doesn’t understand it, start over!
• You don’t need to reinvent the wheel, but your mission must inspire you.
• Must be a living document. If it isn’t current, you may want to revisit your mission statement.
What is a vision statement?
Vision Statement Defined

A compelling, vivid picture of what the organizational target will look like in the future (if the organization achieves its purpose).
Importance of Vision Statements

• Brief explanation of your organization’s future

• Take a look at your mission statement and think 5-10 years from now, what have you accomplished

• It’s all about dreaming and thinking big.

• Process of creating a vision statement builds teams, provides a common path to achievement.
Sample Vision Statements

A personal computer in every home running Microsoft software.

To be the company that best understands the product, service, and self-fulfillment needs of women – globally.
Ducks Unlimited: Our Mission

Ducks Unlimited conserves, restores, and manages wetlands and associated habitats for North America's waterfowl. These habitats also benefit other wildlife and people.
Ducks Unlimited: Our Vision

Waterfowl conservation is facing important challenges as wetlands and other habitats are being degraded and destroyed across the continent. Ducks Unlimited has a vision to reverse this trend.

The vision of Ducks Unlimited is wetlands sufficient to fill the skies with waterfowl today, tomorrow and forever.
DU will achieve our vision through diverse public and private partnerships to address the full range of factors that continue to erode waterfowl habitat across North America.
Ducks Unlimited Core Values

• Waterfowl and Wetlands
We conserve North America's waterfowl and wetlands.

• Ethics
We act to uphold the reputation of DU, treating people and wildlife with respect.

• Science-Based Decisions
We evaluate our programs to guide us and ensure credibility.

• Team DU
We work together as volunteers and staff.

• Waterfowling
We value and enjoy the sport and heritage of hunting.

• Collaboration, Not Confrontation
We partner with those who share common goals and values.

• Wise Investments
We commit at least 80 percent of our resources to our conservation mission. Last year, 86 percent was successfully committed to conservation.

• Passion & Commitment
We celebrate the culture of DU as we serve our members.
DU Statement on Firearms

The potential for new firearms regulations or legislation is a complicated and divisive issue, and while there are no simple answers to the problem of reducing violence in our country, DU will continue to remain steadfast and focused on our mission of wetlands and waterfowl conservation, and in our support for hunters and a continued strong waterfowling tradition.

Ducks Unlimited was founded by hunter-conservationists 76 years ago, and conservation remains our mission. DU is first and foremost an organization dedicated to conserving wetlands for waterfowl, and the majority of our members are hunters. DU strongly supports the right to bear arms and believes that with that right comes a responsibility to use firearms lawfully and safely. The ownership and use of firearms is intertwined with wildlife management and conservation in North America, and we strongly support hunting. Without hunters and recreational shooters and their financial contributions through hunting licenses and excise taxes on sporting arms, national conservation funding would be decimated. We will continue to hold ourselves to the highest standards of gun safety, hunting ethics, and responsible firearms ownership and use.
How do mission, vision, and values impact your organization’s strategic planning efforts?
Agenda

• What is planning and why do it?
• Using program logic to guide planning
• Moving from Mission to Action
How we are taught to plan
What does good planning do for the organization?
(adapted from Carter McNamara)

Planning serves a variety of purposes in organization, it helps to:

- Define the purpose
- Establish realistic goals and objectives
- Communicate those goals and objectives
- Develop a sense of ownership of the plan
- Use organization’s resources effectively
- Focus on organization’s priorities
- Helps frame evaluation
- Build a consensus around the organization’s direction
Moving Forward: Start with the End in Mind

Successful planning means thinking with the end result in mind.

Success
Logic Models

- A logical picture of what the program is doing and what it expects to happen as a result of the work
Every day logic model – Family Vacation

**INPUTS**

- Family
- Budget
- Car
- Camping Equipment

**OUTPUTS**

- Drive to state park
- Set up camp
- Cook, play, talk, laugh, hike

**OUTCOMES**

Family members learn about each other; family bonds; family has a good time
Logical chain of connections showing what the program is to accomplish

INPUTS

Program investments

OUTPUTS

Activities

Participation

OUTCOMES

Short

Medium

Long-term

What we invest

What we do

Who we reach

What results
Fully detailed logic model

Inputs
- Priorities
  - Consider: Mission, Vision, Values, Mandates, Resources, Local dynamics, Collaborators, Competitors
  - Intended outcomes

Outputs
- Activities
- Participation

Outcomes - Impact
- Short Term
- Medium Term
- Long Term

What we do
- Conduct workshops, meetings
- Deliver services
- Develop products, curriculum, resources
- Train
- Provide counseling
- Assess
- Facilitate
- Partner
- Work with media

Who we reach
- Participants
- Clients
- Agencies
- Decision-makers
- Customers
- Satisfaction

What the short term results are
- Learning
- Awareness
- Knowledge
- Attitudes
- Skills
- Opinions
- Aspirations
- Motivations

What the medium term results are
- Action
- Behavior
- Practice
- Decision-making
- Policies
- Social Action

What the ultimate impact(s) is
- Conditions
- Social
- Economic
- Civic
- Environmental

Assumptions

External Factors

Evaluation
Focus - Collect Data - Analyze and Interpret - Report
DEFINING THE GOAL: GETTING ON THE SAME PATH
Considering Potential Goals

• Should come from the long term outcomes in your logic model
• Any ideas missing?
• Don’t get bogged down in detail.
• Consensus is not necessary yet.
Elements to Consider

- Community Assessment
- Internal and External Factors
- Assets and Barriers
- Mission, Vision, Values
- Assumptions

Goals
Your Plan: Writing Goals for Your Program

Imagine ___ years from now….

• What do you hope is different in your community? (Your Outcomes)
• How will you know it has changed?

Goals

Success

NC Cooperative Extension  Empowering People • Providing Solutions
Writing SMART Goals

- Specific
- Measureable
- Attainable
- Relevant
- Time-Framed
Making Changes that Matter

Do You Know Your ABCs?

Short term
Attitudes, Knowledge and Skills

Medium term
Behavior

Long term
Conditions

Overall Goals
Conditions are the overarching changes you hope to see as a result of your efforts.

Changes in conditions take the longest to achieve.

Typically 5 years or more
Examples of Long Term Changes to Conditions

• Within a given community or population:
  – Reducing unemployment rate
  – Reducing poverty rate
  – Improving high school graduation rate
  – Expanding number of profitable entrepreneurs
  – Increasing number of jobs paying good, livable wages
Behaviors are concrete actions that individuals or groups take. These require doing something. Typically 1-2 years
Your Plan:
Go back to the **condition** you identified.

What **behaviors** need to change to reach that condition?

**Who** needs to make those changes?
Attitudes, Knowledge and Skills

Attitudes, knowledge and skills are elements individuals or groups can learn or develop in a rather short time. Typically within the first 6-12 months.
Your Plan

In order to get to the behaviors you want to change, what attitudes, skills or knowledge need to change?
SELECTING STRATEGIES
Strategies: What We Do

Our Nonprofit

Does Things

To/for/with People

ABCs

- Workshops
- Counseling
- Technical Assist.
- Materials

- Clients
- Stakeholders
- Partners
- Businesses
Strategies: Key Questions

Which ones will:

• Come closest to producing the desired outcomes (ABCs)?
• Appeal most to your target audience?
• Make the best uses of resources and assets?
• Help overcome key barriers?
Connecting the Pieces

Strategy → Attitudes, Knowledge, and Skills → Behavior → Conditions → Success

Should Tell a Logical Story

NC Cooperative Extension Empowering People • Providing Solutions
Your Plan: Checking the Story

• Does your strategy match your ABCs?

• A logical story should move from your strategy, through your ABCs, to the success you anticipate.
Inputs: The Engine

Individuals, organizations and resources you will need to implement your strategy
Your Plan: Inputs

• Identify your inputs:
  ▪ What organizations are contributing?
  ▪ What individuals are contributing?

• Are there missing pieces? If so, who can help with these?
PLANNING FOR ACTION
Developing a Plan of Action

Four Key Elements:

• **Specific steps** to be carried out

• **Person** who will take leadership for each step

• **Realistic timetable** for completion of each step

• **Regular checkpoints** to ensure progress & address barriers
How to be strategic and flexible

Strategically planned structure

Flexibility to innovate and adapt
What were the elements of an organization with a clear, flexible, and adaptive plan?
The Art of the Question in Leadership and Change

- What’s the biggest problem here?
- Why the same problems keep recurring?
- What can we fix easily?
- What can we do better next time?
- What possibilities exist that we have not yet considered?
- What’s the smallest change that could make the biggest impact?
- What would create a win win?
Best Way to Build High Engagement and Enthusiasm?

- Magnify and learn from moment of highest engagement & enthusiasm?
Leading rapid, positive change in organizations
(Bushe, 2007, p. 7)

- Make sure everyone KNOWS where they/we want to go
- All levels don’t need permission to act
- Willingness to and support for taking voluntary, visible action
- Leaders track innovation and progress and fan flames of innovation and initiative
Supporting literature

• http://www.uwex.edu/ces/pdande/evaluation/evallogicmodel.html