

Creating a Sustainable Organization

Sample Training Workbook



Overview

Purpose

- The purpose of the session is to help organizations be more potent, indispensable, and sustainable.

Outcomes

At the end of this session, participants will be able to:

- Apply an integrated strategy to create a more sustainable organization
- Position the organization for visibility and influence
- Create a more loyal, engaged constituency
- More fully develop capacity for a stronger, healthier, more sustainable effort.

Agenda

- Introductions and Overview
- Identity: From Strategic Planning to Strategic Positioning
- Constituents: From Marketing to Constituent-Centered
- Capacity: From Organizational Development to Alignment
- Your Brand
- The Sustainability Plan
- Summary and Closing Remarks

Sustainable Organizations

Sustainability

Having the human, financial, technological, and organizational resources to provide services to meet needs and attain results towards mission on an *ongoing basis*.

Sustainability requires the organizational / programmatic infrastructure to carry out core functions *independent of individuals or one-time opportunities*.

At a community / social change level, sustainability implies behaviors that are integrated, ingrained, and indispensable across the socio-ecological model (from individual, to community, to policy).

Sustainability Plan

A sustainability plan is analogous to a business plan in the private sector. The plan defines the necessary strategies, staffing, financial resources, structure, management, and marketing to ensure the successful future of an enterprise (i.e. program, business, or organization).

A sustainability plan is a tool to define a comprehensive, deliberate, thoughtful approach to creating a sustainable entity. A good plan will serve as a blueprint that guides strategic, operational, and development decisions towards some predetermined result.

The plan is also a tool to translate public-good programs into a language understood by the private sector, policy makers, and decision makers. It can be used to attract interest, commitment, and investment.

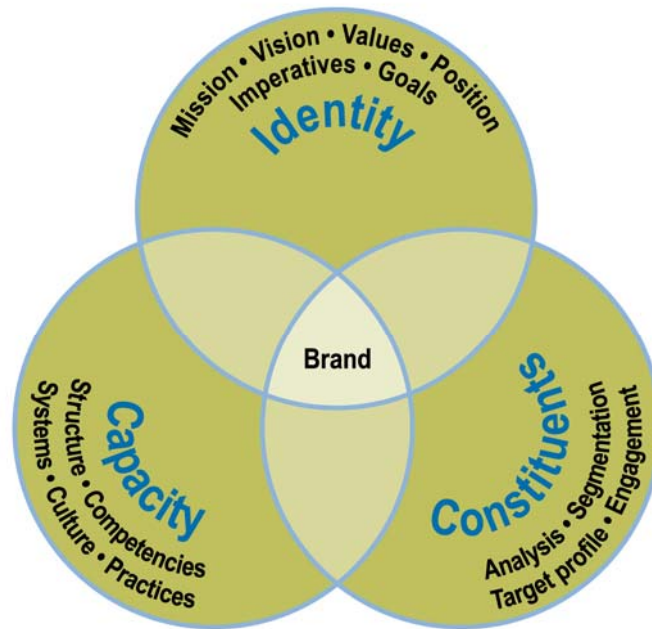
The planning process also serves as a feasibility analysis. In some cases, the plan will demonstrate that in fact the enterprise *cannot* be feasible or sustainable given certain conditions.

Assumption?

Is a program dependent on grant funds sustainable?

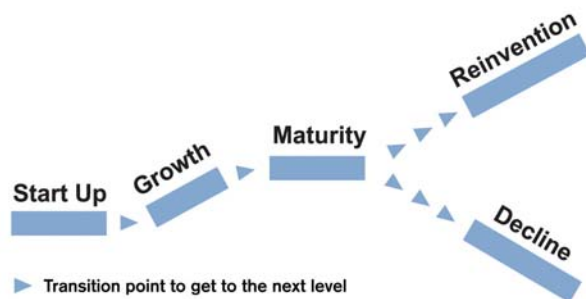
Frameworks and Definitions

Integrated Strategy



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The Next Level



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Definitions

Constituent-centered: Aligning all aspects of an organization around an understanding of the core constituent to create loyal, engaged, long-term relationships. A constituent-centered organization sees the world through the eyes of their constituent.

Core constituents: Those people who are necessary to the success of your organization. They are the people that you serve, or that are necessary in order for you to meet strategic goals in programs, marketing, and fundraising. They are an integral component, without which the organization would have little meaning. The core is your target market – those who care or potentially care enough about the organization or cause to take significant, meaningful action on its behalf.

Integrated strategy: Aligns identity, constituency, and capacity to concentrate all organizational resources to create a more successful and sustainable organization and build brand equity.

Positioning: A systematic, analytical process to defining the organization's place and niche within its sphere of influence.

Outreach strategies: The groups of activities to reach and engage the core constituency. Strategies include programming, services, direct contact, events, and earned media. Outreach strategies are more than an organization's message or communications plan.

Brand: The endearing and enduring characteristics of an organization – the organization's essence. It is what makes an organization distinct and distinguishable. It is often referred to as the emotional or visceral response that is evoked by the organization (or product). Brand is everything an organization does, not just what it says, and thus is linked to an organization's reputation and integrity.

Sustainability: Having the human, financial, technological, and organizational resources to provide services to meet needs and attain results towards mission on an *ongoing basis*. Sustainability requires the organizational / programmatic infrastructure to carry out core functions *independent of individuals or one-time opportunities*.

Identity: From Strategic Planning to Strategic Positioning

Strategic Planning

Strategic: calculated and deliberate decisions based on internal, external, and market context and current and future trends and conditions; organization-wide, cutting across all programs and divisions.

- The Plan
 - Mission, vision, values
 - Imperatives
 - Goals
 - Objectives
- The Process
 - Situation analysis
 - Strategic decisions
 - Direction setting
 - Implications



Strategic Positioning – Critical in Becoming Indispensable

- Become a “must have” not a “nice to have”
- Understanding, defining, and occupying a distinct niche and “owning” that niche to provide competitive advantage
- Leverage value and assets to create distinction in a sphere of influence
- Defines opportunities, gaps, and competitive advantage
- Defines the program’s footprint or sphere of influence
- Provides opportunity to go to next level



Positioning quite literally defines the tables at which you sit

Process

- Analysis
 - Organization's assets and value
 - Community need and gaps
 - Competitive advantage
- Position alternatives
- Organizational implications
- Strategic decisions
- Re-positioning and alignment

Worksheet I: Identity

- What difference do you want to make – i.e. the impact you want to have?

- What is the two to three sentence description of the organization?

- What is your strategic focus? Can you list the 3 or 4 core goals / outcomes?

- What are the measurable results of your activities and what data do you have to demonstrate results? (Achievements)

- What position does the organization occupy? What is your distinctive niche?

- What would an indispensable, integrated organization look like?

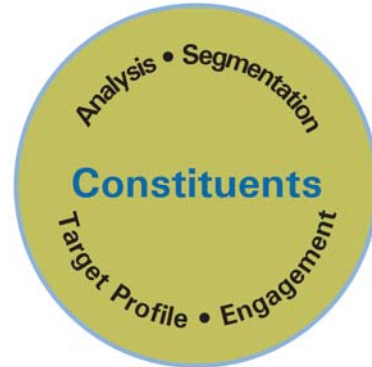
- What is the single, consistent message?

Constituents: From Marketing to Constituent-Centered

Marketing

A process of defining and analyzing the market to provide products/ services/ offerings and to design outreach strategies to best resonate with the market.

- Process
 - Market analysis
 - Segmentation
 - Target markets
 - Product/ services/ offerings
 - Outreach
 - Public relations
 - Partnerships



Traditional segmentation	Psychographic segmentation (How do people relate to your cause)

Constituent-Centered

- Marketing *connotes* understanding the audience so we can get them to do something we want
- From “what we want them to be” to “who they are” and how they relate to the product or service
- Constituent-centered fully integrates constituents into everything you do and...sees the world through the eyes of the constituent
- Creating meaningful, two-way relationships, long term, sincere (care about the other)
- Moves from awareness, to action, to engagement, to loyal, long-term commitment
- Everyone becomes a “constituent relationship manager”

	Organization-centric	Constituent-centric
Goal	Activity focus: What do we do	Constituent focus: What does our constituent need (within parameters of mission)?
Methods	Best practices	Client-centered, community-centered
Position	Relative to other programs, grants	Relative to your audience
Offerings	By activity, grant directed	People and community driven
Outreach	The program, we, I messages; us and other	Community, your, you messages; us
Committees	Coalitions and engaged few “the choir”	Deliberate players at the table
Processes	Functions distinct from marketing, outreach, communication	Functions integrated with marketing, outreach, communication

Worksheet II: Constituents

- Describe your community relative to your program.

- Who are your core constituents and why? (Note: does this consider audiences outside the traditional conservation setting?)

- Describe your core constituent's values, attitudes, lifestyles, and behaviors relative to the organization?

- How do you reach and engage core constituents to lead to long-term engagement and support? (Programs and outreach strategies)

- What do you do for your constituents on a regular ongoing basis?

- Who are your publics (as compared to the core constituents) and how do you maintain positive community relationships?

- What are your 2 or 3 key strategic partnerships? What do you bring to the partnership and what do you expect in return? What do you do to make the partnership a viable, long term, mutually beneficial one?

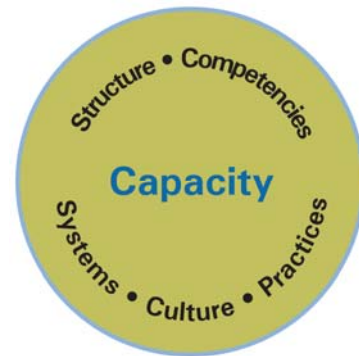
Capacity: From Organizational Development to Organizational Alignment

Capacity: the human, financial, technological, and organizational resources to provide services to meet needs and attain results towards mission.

Organizational Development

A multi-disciplinary, systems approach to enhance and improve individual and organizational performance and effectiveness. About change and growth.

- Process
 - Analysis
 - Critical issues
 - Structure, staffing, culture
 - Leadership and governance



Alignment

Organizational alignment develops the organization to align with strategic position and core constituents.

- Process
 - Analysis
 - Impact and goals
 - Core constituents
 - Functions necessary to achieve goals and resonate with constituents
 - “Next level” imperatives
 - Leverage assets and functional integration
 - Re-design, development
 - Systems, standards, policies, and practices
 - Institutional “memory”
 - Staffing
 - Governance / partners
 - Leadership and culture

Organizational Components

Component	Definition	Includes
Practices	The fundamental description and purpose and how the organization conducts its work.	Defined by mission, vision, and values. Carried out through goals, methods, and strategies.
Structure	The fundamental “shape” of an organization, where functions are placed, reporting relationships, and lines of communication.	Most commonly defined by the organization chart. The centralization and de-centralization of functions, integration and coordination, authority, responsibility and accountability.
Competence	The ability and resources available to carry out core functions. In nonprofits, competence lies in staff and with voluntary leadership (the board) and volunteers.	Includes organization’s real and perceived skills, abilities, and aptitudes. Generally defined by staffing patterns - having the right number of people with the right skills - available to do the right work. Includes issues of professional development, employee and volunteer satisfaction and safety and succession.
Systems	Those tangible and intangible, formal and informal systems or procedures that facilitate practices and ensure consistency, accountability, historical integrity, and organization sustainability.	Includes management information systems (financial, contacts, human resources, etc) and how those systems are integrated. Also includes evaluation and performance appraisal systems and processes, project approval processes or resource allocation processes, workflow and decision making.
Culture	The style, feel, tone, collective attitude, or personality that permeates an organization. Shaped by the written and unwritten rules of behavior, leadership style, history, and assumptions that are passed between employees.	Includes the policies, rules, and patterns of behavior and adaptation, rituals and assumptions. Demonstrated by language, style, and habits.

Worksheet III: Capacity

- What are the core functions (groups of activities) necessary to achieve strategic goals? What are the supporting functions?

- What is the staff composition and structure that is most appropriate to support the work of the organization?

- What does each individual who sits on your board, committee, advisory group, or coalition bring to the table and why are they there?

- What is the explicit and “contractual” role, responsibility, and accountability of external committees, advisory groups, or coalitions?

- How do your systems facilitate the accomplishment of goals and support the positive culture of the organization?

- How are all systems and roles integrated to promote identity and reach core constituents?

Delivering on the Promise of Brand

Brand

- Emerges from being who you are – consistent and constancy of purpose and direction
- Your distinct “personality”
- The essence emerges
- A strong brand, position, and image gives you power to reach people, to help people make choices, and to achieve strategic goals

Worksheet IV: Brand

What is the essence of the organization?
(What is at the heart of identity, constituents, and capacity?)

How is the brand communicated in everything you do?

How do you monitor for brand promotion to ensure constancy and consistency?

Sustainability Plan Outline

1. Introduction
2. Situation Analysis
 - a. Context, trends, issues
 - b. Current and future influencing forces
 - c. Institutional landscape
3. Identity
 - a. Mission, vision, values
 - b. Impacts, imperatives, and strategic goals
 - c. Core focus and strategic issues
4. Constituents
 - a. Segments: How the constituent relates to the cause
 - b. Core constituents: Demographics and psychographics profile
 - c. Publics and stakeholders
 - d. Offerings: Programs, products, services, issues, or campaigns
 - e. Outreach strategies: Marketing, public relations
5. Strategic alliances/ partnerships
6. Organizational Alignment
 - a. Structure: Roles, responsibilities, authority, and accountability
 - b. Competencies and functions: Skills, surplus and gaps
 - c. Systems: Information management and protocols
 - d. Culture: Collective attitudes and values
 - e. Coalitions and committees: Purpose, responsibility, accountability
7. Revenue Model
 - a. Funding needs
 - b. Sources
 - c. Projections
 - d. Policies and management
8. Transition and Implementation
 - a. Transition issues
 - b. Action plan

Conservation Impact is dedicated to helping organizations achieve results towards environmental conservation, resource sustainability, and public and community health. We provide comprehensive organizational development consulting to nonprofit organizations and public agencies.

Founded in 1996, Conservation Impact has worked on more than 765 projects with nearly 500 organizations nationwide and internationally. The company specializes in strategic planning and positioning, marketing, and organization analysis and development. We use an Integrated Strategy approach that looks at organizational identity, capacity, and constituents. We help our clients go to their next level of development.

The Conservation Impact staff bring significant expertise in nonprofit management, marketing, and conservation planning with degrees in biology, ecology, environmental conservation, nonprofit management, and public administration.

Conservation Impact's sister company, Nonprofit Impact, focuses on organizations and agencies dedicated to improving the health and well being of individuals and communities and those working to create a more civil, just, and equitable society.

For more information about the companies, our team, or our work, please call us at 303.223.4886 or visit us online at www.conservationimpact.com or www.nonprofitimpact.com.

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