

ESCCO

Volunteer Management Consultants to Nonprofits



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Challenges nonprofits face (besides money)

- Boards not fully engaged
- Wallowing
- Not seeing themselves as having competitors
- Inertia of the past
- Trying to do too much
- No clear priority for action

Many nonprofits have tried “Strategic Planning”

But, the impact on the organizations of these efforts have frequently been difficult to see.

- Critical action steps are not identified
- The same activities continue on “as usual”
- The report goes “on the shelf”

Something new is needed

Introducing *ESCCO's*

**ORGANIZATIONAL
FOCUS
WORKSHOP[©]**



Troy Zeigler

ESCCO Consultant

Troy has worked with organization's boards and executives on executive assessment, governance and strategic planning. His career spans work with over 800 public, private and nonprofit clients. He currently serves on the faculty of Regis University's Masters of Nonprofit Management program.

Organizational Focus Workshop

A structured, facilitated exercise designed to assist a nonprofit organization

- Identify
 - Core competitors, clients and services
 - Competitive differential advantage
 - Strengths, Weaknesses, Opportunities & Threats
- Prioritize the most critical issues they face
- Develop an action plan to address them

Typically three ***ESCCO*** volunteer consultants

They will conduct interviews, lead the discussion, capture the key items for ranking.

Based upon the ranking results, they will develop an Action Plan outline and assist the client in fleshing-out its detail with an understanding of the capabilities of the organization

- Specific tasks
- Specific responsibilities
- Specific time-lines

1. Understanding the organization's situation
2. Market Position Workshop (Day 1 1 – 2 hours)
3. SWOT Workshop (Day 1 2 – 3 hours)
4. Ranking survey (Take home assignment)
5. Action plan development (Day 2 2 - 3 hours)
 - May require additional follow-up

Client background information (electronically)

- Client's current mission statement
- Client's current vision statement
- Client's financial information for the past two years
- Recent trend in number of clients served
- Recent trend in funding
- Email addresses for all workshop participants.

Individually interview Executive Director & Chair

(Interview guide questions)

1. What is your organization's mission?
2. How long have you been associated with the organization?
3. Why did you choose to become associated with this organization?
4. Are you involved with other non-profits? If so, which ones?
5. What is the history of the organization and where do you see it today?
6. What, in your view, are the MOST valuable programs of the organization?
7. What, in your view, are the LEAST valuable programs of the organization?
8. How would you describe the overall health of the organization?
9. What is the current funding status and future funding projections?
10. Where do you see the organization in 3 to 5 years?
11. What are you hoping this exercise will accomplish for your organization?

Day 1 Should be held off-site

Should include all (if possible) board and key staff

- Best if held during the week (avoid burning member's weekends)
- Typically from 9:00am – 3:00pm (members can work around)

Client responsible for refreshments and lunch

Horseshoe arrangement that can accommodate all participants and a projector

Review current mission statement

Test to see if everyone is “onboard”

Review current “cost to serve”, service trends and funding challenges.

Introduce market positioning concepts

ESCCO *Applying Market Positioning Concepts*

Identifying

Core Customers or clients

Core Products or services

Core Competitors

Competitive differential advantage

How will you know if you have been successful

What is your “ideal” future state

Capture and include everyone’s perspective

Introduction to Market Positioning

for: **Chick-fil-a**

04/04/12

Version: 1

Customers (who are they designing their offering to serve)

Competitive Differential Advantage

Core (specific, identifiable customer needs they are designed meet)

Compelling reasons clients should choose your program

Products (specific products to meet needs of core customers)

How will they know if they have been successful

Core (these products are their reason to exist)

What are the measures & how will you compare to peers

Competitors (those targeting core customers with suitable substitutes)

What is their "ideal" future state

Core (competitors focused on your core customers and offering suitable substitutes)

<p>Core (specific, identifiable customer needs they are designed meet)</p>	<p>Compelling reasons clients should choose your program</p>
<p>Core (these products are their reason to exist)</p>	<p>What are the measures & how will you compare to peers</p>
<p>Core (competitors focused on your core customers and offering suitable substitutes)</p>	<p>What is their "ideal" future state</p>

Organization's Strengths

Organization's Weaknesses

Organization's Opportunities

Organization's Threats

Capture and include everyone's perspective

1. Strengths	2. Weaknesses
Very Efficient Organization	Lack of Funding
Dedicated Staff	Diminishing Donor Base
Great Volunteers	Overdependence on Executive Director
Reputation Good with Clients	Overworked Staff
Good Relationship wit Vendors/Partners	Underpaid Staff
Strong Executive Director	Shortage of Volunteers--Quantity/Quality
Organization of 'Longevity	Lack of Vision
Low Turnover of Staff	Lack of Mission
Quality Services	Lack of Focus
Loyal Funders	Age of Building
Willing to Change/Adapt	Poor Use of Space
Facility Location/Size	Deferred Building Maintenance
Recognized by State Agencies	Lack of Community Recognition/Image
	Lack of Executive Transition Plan
	Donor Management System
	Volunteer Management System

3. Opportunities	4. Threats
Expansion of Services	Making Payroll
Carry Story to Churches	Building Payment
Carry Story to Community	Loss of Key Personnel
Review Contingency Plans	Threat of Shutdown
Equity in Facility	Loss of Food Bank
Underutilized Building	Loss of Walmart Relationship
Rent Portion of Building	Change with Relationship with the Bank
More Active Participation by Board	Loss of Key Donors
Expand Urban Cowboy Event	Economic Downturn
Better Understand Donor Base	Loss of Other Partners
Define Mission/Vision	
Create Strong Stories	
Greater Collaboration with Partners	
Recruit Volunteers/Multi-lingual	
Volunteer Management System	
IT Structure Update	
Expand Food Service	
Expand Events	
Expand Thrift Store	
Expand Benefit Services	
Legal Aid Services	
Board Improvement	
Develop a Planned Giving Program	

For each of the areas, the different individual perspectives are captured

- They are structured into an electronic survey
- Survey is sent the next day (while it is fresh)
- Every participant is surveyed

Each respondent ranks the different perspectives

- Can have only one #1
- Each respondent's ranks are weighted equally

Individual rankings are consolidated into a composite rank for each item

Sample Survey Item

Organizational Focus - Urban Mission

Market Positioning Rankings -- Core clients

***1. Who are your Core clients. -- These are the clients you are designing your offering of services to satisfy.**

----- Please rank the items shown below that were identified in the workshop. -----

Find the item you feel is most important and using the drop down menu, select it as number 1. (This item will automatically move to the top of the list.) Select the item you feel is second most important and using the drop down menu, select it as number 2. (This item will automatically move to second position in the list.)

Continue ranking as far down the list as you believe is relevant. (You are strongly encouraged to rank at least the top five.) Then select N/A for the remaining items.

<input type="text" value="v"/> Description 1	<input type="checkbox"/> N/A
<input type="text" value="v"/> Description 2	<input type="checkbox"/> N/A
<input type="text" value="v"/> Description 3	<input type="checkbox"/> N/A
<input type="text" value="v"/> Description 4	<input type="checkbox"/> N/A

Prev

Next

Day 2

Should include key board and staff

- This is a hands on work session
- Plan on 3 hours
 - May reach a point of limited productivity after 2 hours
 - May require a follow-up session to complete

Horseshoe arrangement that can accommodate all participants and a projector

Results from survey

- Ranking summary
- Verbatim of open-end questions

ESCCO team will use

- Ranking results
- Knowledge gleaned from the workshop
- Background info & analysis

Identify the three most critical issues that must be addressed in order of importance

For each of the critical issues the **ESCCO** team will lead an open discussion to identify

- Action Steps required
- Resources needed (internal & external)
- Who is responsible
- Time-line
- Desired results

Focus is on things that can be accomplished within 6 months

Issue # 1		A Concise, Focused Story Supported with Meaningful Data for Each Major Program		
Target Outcome:		Trifold Document and Presentation Script for Each Major Program		04/04/12 Version: 1
Action Steps What specifically needs to be done?	Resources Needed What is needed to complete this step (skills, people, money, etc.)?	Responsibility Who will do it?	Deadline When?	Results What is the outcome?
Develop fully allocated program costs for each major program		Bart	60 days	
Use Program Cost Template	ESCCO assistance	Peggy		
Develop program output measures that can be used to determine unit cost				
Number of households served-Food	ESCCO assistance			Unit - cost & Vol Hrs.
Number of children served-SPARKS				Unit - cost & Vol Hrs.
Number of children served-School				Unit - cost & Vol Hrs.
Number of children served-gifts				Unit - cost & Vol Hrs.
Compare Cost & Impact				What does \$X buy
vs. other operators in market				
vs. other operators in other market				
What is impact on community?				
Develop estimate of "need" for programs				
Food	DHS & SNAP data			
Education				
Events				
Develop script for each program				5 min presentation
Food	creative writer			
Education				
Events				
Design tri-fold for each program				Attractive 1 page brochure
	Graphic designer			
	Creative writer			
Presentation for total organization				Agreed Mission Statement
Develop crisp meaningful mission statement				Integrated presentation
Develop PowerPoint presentation				

Issue # 2		Build a Sustaining Donor Base		
Target Outcome:		Short-term generate \$xxxxk of new revenue		04/04/12
				Version: 1
Action Steps	Resources Needed	Responsibility	Deadline	Results
What specifically needs to be done?	What is needed to complete this step (skills, people, money, etc.)?	Who will do it?	When?	What is the outcome?
Decide on a donor management system				
Assign internal "ownership"				
Develop coding and data structure				
Clean existing data before upload				
Begin entering "new" data				
Integrate with accounting				
Develop a process for scheduling and following-up on church outreach				
Establish and maintain a target list of churches				
Assign ownership of scheduling				
Identify and assign presenters				
Establish follow-up procedures				
Develop a standard site visit protocol				
Standard script				
Capture of contact info				
Ask for support				
Develop Annual Fundraising Plan	(see ESCCO Template)			Integrated Fundraising Campaign
Board participation in CNP training				
Food Bank Role & Support				
Develop potential donor list				
Volunteers & their friends				
Visitors to UM				
Corporate sponsors				
School contacts				
Identify needed spheres of influence				
Key organizational memberships				
Focus for board recruitment				

ED & Board committed to the process

- Scheduling is always a challenge

Time to complete approximately 30 days

Cost of the program \$2,500

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