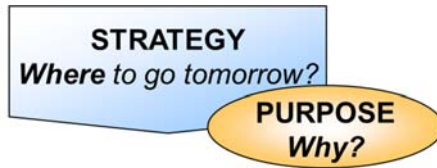




# Sustainable Strategy Program Great to Go



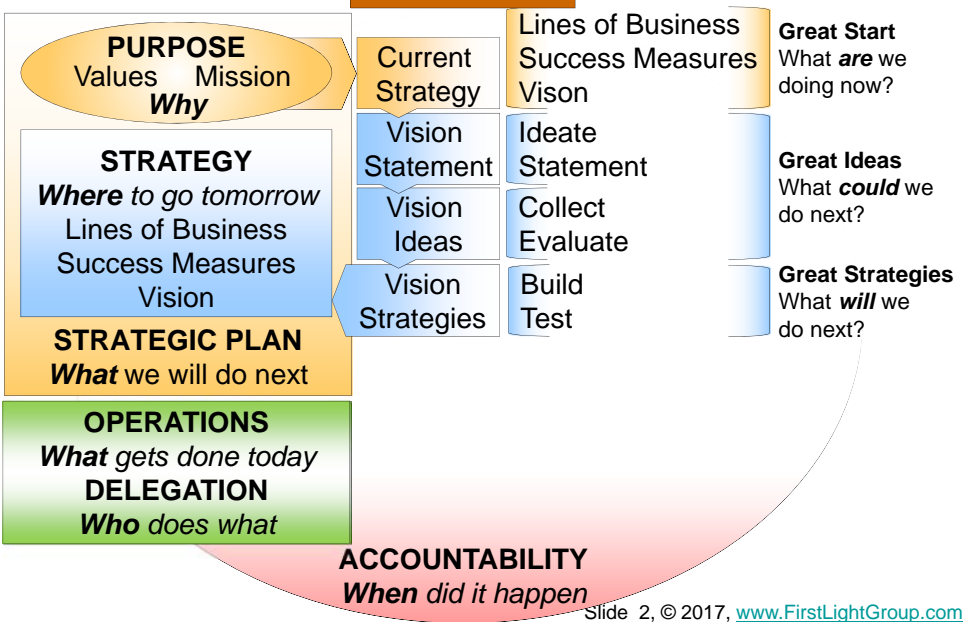
## WELCOME

Announcements/Q&A

**STRATEGY**  
*Where to go tomorrow?*

**PURPOSE**  
*Why?*

## SSP MODEL



### OPERATIONS

*What gets done today*

An integrated approach

### Goals

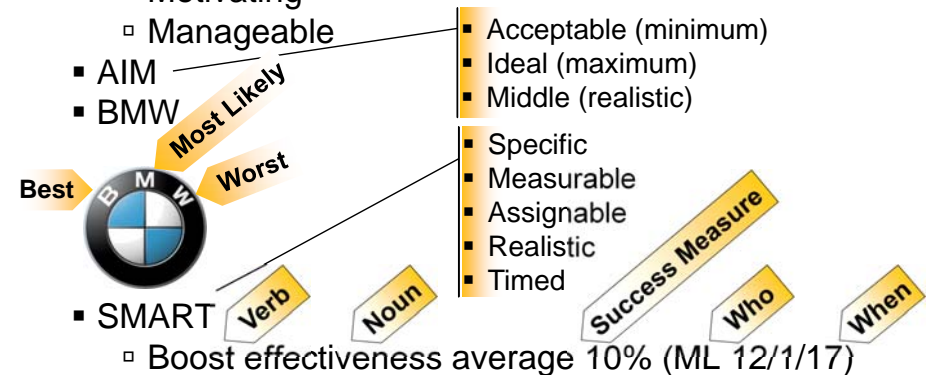
- Conventional approach
  - Everything to be done by everyone
  - Job duties, on-goings,
  - The 95% of time already allocated
- A different way
  - Focus on the consequential
  - What can be done *if anything at all* with the remaining 5%

### Making goals

#### Good Goals

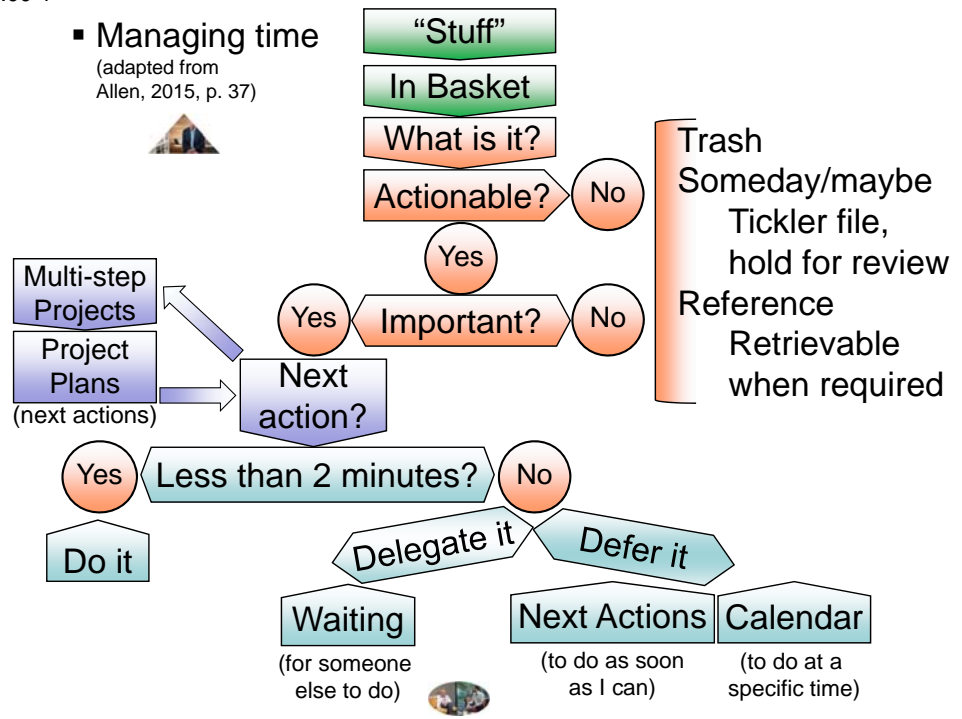
(Light after Hellriegel & Slocum)

- Measurable
- Motivating
- Manageable
- AIM
- BMW
- Acceptable (minimum)
- Ideal (maximum)
- Middle (realistic)

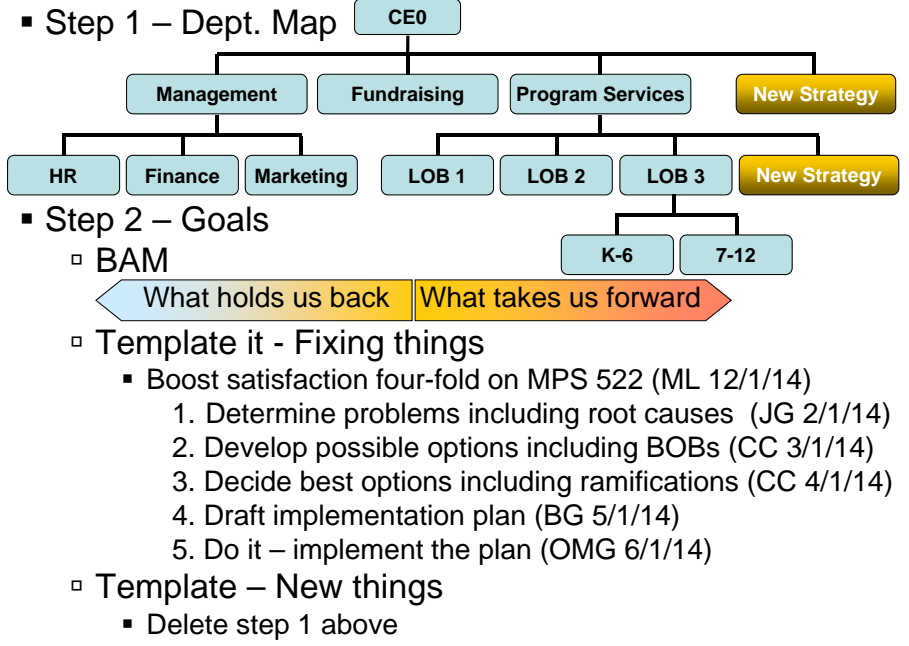


Managing time

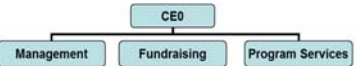
(adapted from Allen, 2015, p. 37)



How to do it



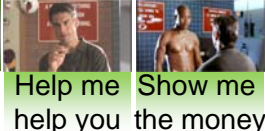
Budget



	YTD	Budget	Forecast	Variance
	FYE 12/31	FYE 12/31	FYE 12/31	Column 3-2
<b>PROFIT &amp; LOSS STATEMENT</b>				
<b>REVENUE</b>				
Earned	32,000	60,000	90,000	30,000
Contributed	60,000	112,000	115,000	3,000
<b>TOTAL REVENUE</b>	<b>92,000</b>	<b>172,000</b>	<b>205,000</b>	<b>33,000</b>
<b>EXPENSES</b>				
Program services	27,000	52,750	78,852	26,102
Management and general	9,500	19,250	27,500	8,250
Fundraising	52,000	100,000	105,750	5,750
<b>TOTAL EXPENSES</b>	<b>88,500</b>	<b>172,000</b>	<b>212,102</b>	<b>40,102</b>
<b>EXCESS OR (DEFICIT)</b>	<b>3,500</b>	<b>0</b>	<b>(7,102)</b>	<b>(7,102)</b>
<b>BALANCE SHEET</b>				
<b>ASSETS</b>	<b>266,297</b>	<b>266,297</b>	<b>356,297</b>	<b>90,000</b>
<b>LIABILITIES</b>	<b>1,690</b>	<b>1,690</b>	<b>1,690</b>	<b>0</b>
<b>NET ASSETS</b>				
Unrestricted	264,607	264,607	354,607	90,000
Temporarily Restricted	0	0	90,000	90,000
Permanently Restricted	0	0	0	0
<b>NET ASSETS</b>	<b>264,607</b>	<b>264,607</b>	<b>444,607</b>	<b>180,000</b>
<b>TOTAL LIABILITIES &amp; NET ASSETS</b>	<b>266,297</b>	<b>266,297</b>	<b>356,297</b>	<b>180,000</b>



DELEGATION Who does what

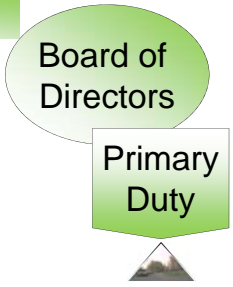


Board members and staff expect chief executives to take responsibility for success and failure. (Herman and Heimovics, 1991, p. xii)

To the executive director who asks "What good is the board?" comes the answer that he or she alone is largely responsible. (M. Light, 2001. p. 145)

Executive Director Duties

1. Deliver Results Now "What gets done today?"
  2. Enable the board
    - a. Facilitate interaction
    - b. Show consideration
    - c. Envision change
    - d. Provide useful information
    - e. Initiate structure
    - f. Encourage success
- (Herman & Heimovics, 2005)



## Another Way: Business Planning An episodic approach

- Why bother (Brinckerhoff, 2000)
  - Forces an objective, critical, less-emotional look
  - Creates an operating tool
  - Communicates the ideas
- Cleveland Community Wealth Collaborative



- [SBA](#)
- Business Plan Pro

## LEADING CHANGE

### Context Matters

- “Leadership is contextual. What works in one era, setting, or organization simply doesn’t apply to any other.”

(Kellerman, 2001, p. 15)



### Change resisted:

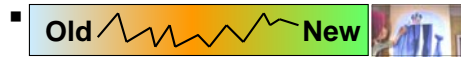
Top 5 of 33 reasons (O'Toole, 1995)

- Homeostasis: Resistance to change is healthy
- Stare decisis: Burden of proof is on the change agent
- Inertia: Hard to alter course of a large body in motion
- Fallacy of the exception: Yes, but we're different
- Minority rules: Smaller the group, greater the fight

## Models

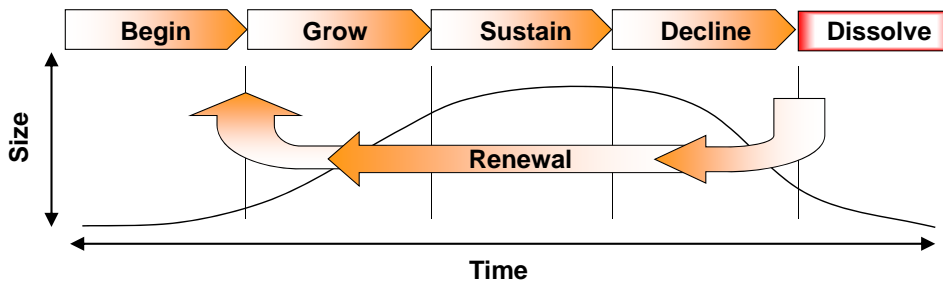
### Change that is continuous, evolving, **incremental**

(Weick & Quinn, 1999)



Small adjustments Old  
Frequent becomes  
Continuous New

- Nonprofit Lifecycle Model (Connolly, 2006)



### Change that is episodic, intermittent, **revolutionary**

(Weick & Quinn, 1999)

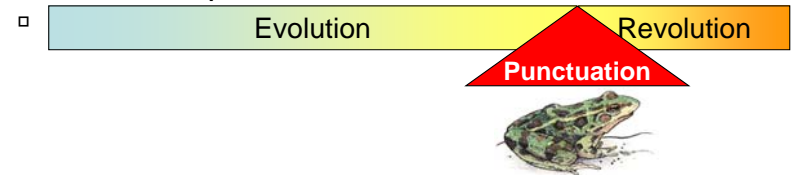


Repetitive action	New replaces old
Routine	old
Inertia	

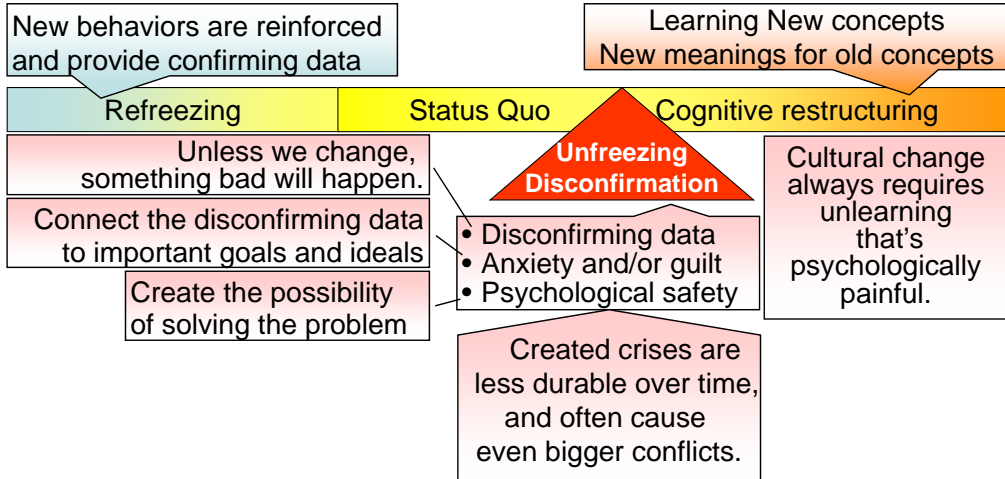
- Happiness model (After Dees, 2001)

- Change can be welcome when people are very unhappy 😞
- Change can be unwelcome when people are very happy 😊

- Punctuated Equilibrium Models (Tushman & Romanelli, 1985)



▪ Schein (2004)



The Big Four (Pfeffer & Sutton, 2006, p. 178)

**Dissatisfaction**

People must be dissatisfied w/status quo  
If no dissatisfaction, create it

**Direction**

Direction to go is very clear  
Relentlessly communicate it

- What it is
- Why it's important
- What everyone has to do
- Over and over and over

**Overconfidence**

Convey confidence to others – more accurately *overconfidence* – that the change will succeed.

- Becomes a self-fulfilling prophecy
- Punctuate with reflective self doubt
- Update as new information rolls in

**Messy Rules**

People must accept it's a *messy process*.  
Learn as you go, it won't be perfect.

Boil Me Now

Evaluations

**3 Ps of Strategy**

Passion

Practice

Persevere