

## **THE CHALLENGE: HOW TO GROW FROM 8 TO 18?**

- A six-year nonprofit planning effort for the big leap to permanent space, a 50% increase in service offerings and doubling its staff were in the works.
- Existing funding and business model worked but did not support the future goals.
- Detailed plans needed to assess future hiring for new roles, consistent processes and systems required to move from a person-based to a role-based organization—and a financial plan that can fund all.

## **THE TECHNIQUE: AGILE, PRAGMATIC AND RIGHT-SIZED GOAL-SETTING**

- Baseline current successes and challenges to capture as-is state.
- Use workshops to define and develop processes that build a foundation of repeatable language, actions, accountability, and role-based expectations.
- Define a set of building blocks to be completed in 18-24 months that lead the organization to its goal of permanent space: board engagement, fundraising plans, sequential staffing add-ins, communications, and technology investment, etc.
- Engage technology thoughtfully and configure selected tools to grow.

## **THE INTERVENTION**

- Conducted interviews and environmental assessment to baseline current and develop data on options for achieving future targets. Defined approach and got buy-in and approval.
- Defined four focus areas, partnering with a different leader for each area, to engage whole organization:
  - Each focus area both implemented changes as well as projected future targets with steps to achieve them as well as measures to ensure success is monitored; and
  - Assigned each leader targets and timeline. Partnered with them to ensure progress and needed information was available.
- Focused on areas of external marketing, internal and technical communications, plan for future staffing needs, and a financial baseline to build upon.
- Extended the intervention more than 14 months to maintain momentum.

## **THE RESULTS**

- Created an internal understanding of process-based work with the tools and mechanisms that support them.
- Improved fundraising and marketing six months after intervention using a unified voice and common language. These materials have doubled in use into recruiting and hiring staff. Clearer goals creating increased sense of momentum behind fundraising.
- Improved internal communications using both technical tools and internal accountability guidelines. Data sharing improved and burden-of-work reduced through the creation of centralized, shareable data.
- Improved donor targeting through clearer capture plans (fundraising financial plans) and clearly framed organizational growth targets.