The Challenge: How to grow from 8 to 18?

- A 6y old nonprofit planning for the big leap to permanent space, a 50% increase in service offerings and doubling its staff
- 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 it

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

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
  - 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
- Intervention extended over 14 months, to maintain momentum.

Results

- Created an internal understanding of process-based work, with the tools and mechanisms that support them
- 6 months after intervention, improved fundraising and marketing, 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