

Building a Strong Organization Goals and Strategies Options Document

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Background: When an organization lists the goals it wants to consider pursuing, Build a Strong Organization should be on the list. Most every non-profit and business will select this goal as a priority, because without having the resources it needs, the organization will not be able to achieve its other goals and objectives. This strategic options document will provide a starting point for the board of directors and staff to consider its options for advancing this goal. Please let me know what options I have left off or changes in wording you think would be an improvement. Thank you. KW

Goal: Build a strong organization that can accomplish its mission.

Strategies, Sub-strategies and Tactics

A. The organization recruits, trains and maintains an effective Board of Directors.

1. Develop a written "job description" for board members.
 - a. How much of their time is expected.
 - b. How much money are they expected to raise or give.
 - c. Will they serve on a committee?
 - d. How many years will they serve - minimum and maximum.
 - e. Evaluate board member performance on an annual basis.
2. Use a Nominating Committee or similar process to identify, recruit, interview and ultimately select the best among possible board member candidates.
 - a. Consider board members of other non-profits.
 - b. Review major donors to the organization for candidates.
 - c. Consider committee members and other volunteers.
 - d. Check membership list for who might be important members of foundations or businesses.
 - e. Think through the questions you want to ask the potential board members before the interview.
 - f. Check references for potential board members. Don't just go with their image or what they say. Ask for references and check them. Ask people board members know who know the candidate.
3. Train board members.
 - a. Provide new board members with an orientation to the organization including a review of the existing strategic plan, organization chart, budget, and more.
 - b. Partner new board members with effective longer term members. Debrief after meetings. Be there to answer questions.

- c. Train all board members in the art of major donor fundraising. Create a board culture of raising funds and acknowledging board member success at it.
- d. Involve board members in an annual strategic planning process so that all know very well the organizations priorities.

B. The organization's membership grows each year in number and quality.

1. Existing members are retained.
 - a. An effective mail renewal program improves each year.
 - b. The organization maintains an excellent database of its membership history.
 - c. Phone calls are made to renewing and lapsed members to get them to renew and debrief them on their experience with the organization.
 - d. Reasons for lapsed membership are evaluated and changes made to the organization where necessary.
2. Mass mailings are used to recruit new members.
 - a. The organization maintains a database of lapsed members, and other potential future members who attended events, etc.
 - b. Good lists are bought or borrowed.
 - c. Powerful letters and mailing packages are developed.
 - d. Statistics are used to learn the effectiveness of different pitches.
 - e. Different techniques such as raffles are used to explore new recruitment pitches.
3. Volunteers help recruit new members.
 - a. Hold a membership drive and give prizes to the most new members.
 - b. Board members have a contest to recruit the most new members.
 - c. A membership committee is established with board members and volunteers.
 - d. Volunteers are trained to help with presentations, event tabling, speaking and other opportunities for educating the public about the issues and recruiting members for the organization.
 - e. Potential members are coded and added to the organizational database.
4. Good publicity about the organization develops its reputation and helps with its membership recruitment.
 - a. Time the release of a major report or news event with a membership drive or mailing.
 - b. Keep the organization in the news in a positive manner. Time news events so that they spread out over the year or coincide with membership drives etc.
 - c. Use editorials or good articles about the organization in membership drives and mailings.
 - d. Convince columnists to write about the organizations.
5. Ad campaigns for major causes also are used to recruit new members.
 - a. Place ads to get people to act on an issue and make a donation/become a

member of the organization.

- b. Free ads are placed in supporting business catalogs and newsletters. (e.g. fishing publications etc.)
6. The organization's newsletter and website provide the information and image the organization wants to project.

C. Develop a major donor program.

1. Train the board and other volunteers in how to find and ask potential major donors for a contribution.
2. The executive director and fundraiser create and follow through on the major donor plan.
3. Pay a professional consultant to review the membership list to identify members who could be major donors.
4. Maintain a membership/major donor database that provides excellent information about the donor that will help in future "asks".
5. Create a major donor based donation campaign for an endowment, a building or another major cause and use this campaign to expand the major donor base.
6. Evaluate the major donor program and its effectiveness on an annual basis.

D. Annual fundraising events such as auctions and recognition dinners grow in their effectiveness and financial success each year.

1. Create a volunteer committee to oversee the event and reduce staff time spent on it. If the board members and volunteers "own" the event, they will work harder for its success.
 - a. Publicly recognize and thank the volunteers who helped.
 - b. Send thank you notes to volunteers afterwards.
2. Evaluate every event after it occurs and write up recommendations on how to improve it while it is still fresh in everyone's memory.
3. Work to schedule events so that they don't conflict with similar organizations or times and events that the targeted donor base might want to go to as well.

E. An annual conference can strengthen the membership, recruit new members, and expand the donor base as well as advance projects of the organization.

1. Hold a fundraiser in conjunction with the conference.
2. Use the conference to aggressively bring in new people into the organization. Convert

these new people to members and volunteers.

3. Evaluate the conference each year to improve it.

F. The organization develops a strategic plan that all board members and staff actively support and use in their decision making.

1. The strategic plan increases foundation grant requests and success.
2. The strategic plan increases the organization's publicity and public reputation.
3. The organization's board and staff become a better team by crafting the strategic plan together.
4. Staff and committees are more accountable and the right staff and committees are hired and developed because the strategic plan is clear to the organization.

G. Corporate donations and support increase each year.

1. Sponsorship of events leads to new corporate support.
2. Ads are considered for the organization's newsletter and website.
3. A corporate giving campaign is established with board members and other members being recruited to help. Clear corporate benefits are identified and prospects prioritized.

H. Foundations grants increase in diversity and size each year.

1. Personal contacts are made with foundation staff and board members.
2. Professional help is obtained to find new foundation grant opportunities.
3. The strategic plan creates powerful grant applications.
4. The organization gains a good reputation for doing well with grants they receive and providing clear results for the investment.

I. Staff is trained to improve their skills and loyalty to the organization.

1. The budget includes training funds for staff.
2. Staff are paid to go to workshops and conferences.
3. Staff are cross-trained for different jobs.

J. Staff is evaluated annually and evaluations lead to stronger staff teams.

1. The executive director and management is trained in how to do effective staff

evaluations.

2. The board is trained in how to evaluate the executive director.
3. Staff job descriptions are accurate and their scope of work specific enough to be evaluated.

K. The right staff members are recruited.

1. Excellent interview processes are developed.
2. References are carefully checked.
3. A probationary period is required and an effective evaluation occurs before long term hiring is gained.

L. Staff is provided with a fair and competitive compensation package for their positions and experience.

1. The organization knows the salary and compensation levels for competing organizations in the region.

M. Organizational policies and procedures are in place and are effectively used.

1. An employee and volunteer handbook is up to date and is reviewed and improved on a regular basis.
2. A process is in place where new policy and procedure proposals are evaluated in a timely manner and implemented where valuable.

N. Organizational infrastructure supports staff and volunteers.

1. The computer system is efficient and meets the needs of the organization without taking up much staff time in maintenance and downtime.
2. The office is sized to meet the needs of staff and volunteers.
3. The phone system, including cell phones and voice mail meets the needs of staff and members.
4. Email and the web adequately support staff and volunteers in the work.