



Survive and Thrive

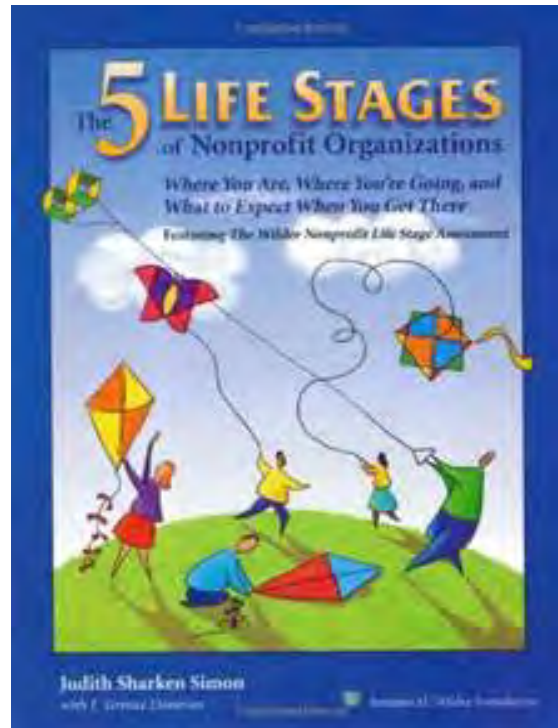
Presented by :
Kathy Alm, CEO
PATH Intl.



Surviving and Thriving Requires:

- Assessing your organization
- Thoughtful planning/
Focusing on a manageable number of priorities
- The Right People on the Bus
- Sustainable funding
- Communication
- Recognizing the role of the Exec. Dir, its impact and avoiding burnout.

Why start “S & T” with the Five Life Stages?





“Like people and plants,
organizations have a life cycle”

John W. Gardner

- The 5 Life Stages – Where You Are,
Where You’re Going, and What to Expect
When You Get There

Stage One: Imagine and Inspire

Can this dream
be realized?



Stage Two: Found and Frame

How are
we going
to pull this
off???



Stage Three: Ground and Grow

How can we build this to be a viable business?



Stage Four: Produce and Sustain

How can the momentum be sustained?



Stage Five: Review and Renew

What do we need to redesign?



Sustainability or Decline and Dissolution



What the Literature Says About Organizational Life Paths





Assessing your Organization: Seven Focus Areas

- Board/Governance
- Program
 - Horses & Equip
 - Riders
 - Volunteers
- Staff leadership
- Finance/Funding
- Admin. Systems
- Staffing
- Marketing
- Let's add Facilities

Where do you want/need to grow?

Assess your organization



Review Scores





Organizations have a natural evolution

- No right or wrong place to be
- Important to know where you are; to know that you are NORMAL

What needs to happen to move from one stage to the next?

- Transition ideas – in your key arenas





Thoughtful planning

- Strategic Planning Process
- Set priorities
- Get buy-in
- Stay focused



Strategic Planning Process

Purpose

Conducted in 3 phases



Step One: Get Organized



Step Two: Take Stock



Step Three: Get Direction



Critical Issues Approach



Scenario Approach



Step Four: Refine and Adopt the Plan



Step Five: Implement the Plan

Focus on a manageable number of
priorities





Quote:

- “If you don’t know what you’re doing, don’t do it all at once”.

Unknown

Identifying goals



Getting the Right People on the Bus



Sustainable Funding/Resources





Resource Allocation



Fundraising/Resource Building



Finding the right person for the identified need

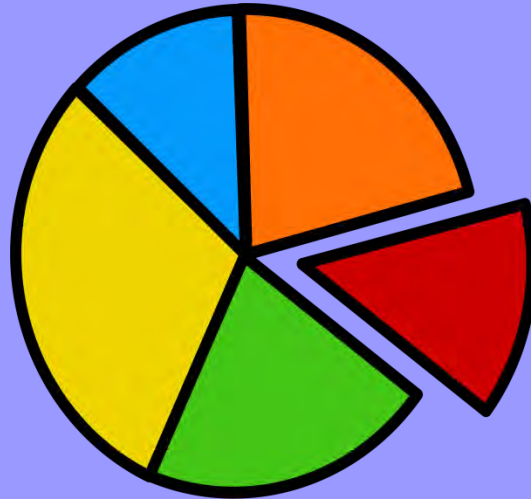




Brainstorm Activity

- Get into groups of 4
- Share stories of successful relationship building
- Look at your identified goals, what resources do you need?
- Who do you have relationships with where there might be a match?
- What do they need? What are they interested in?

Sustainable fundraising



Event Fundraising

- Pros



Event Fundraising

- Cons



Event Fundraising



Individual Fundraising Pros



Individual Fundraising

Cons



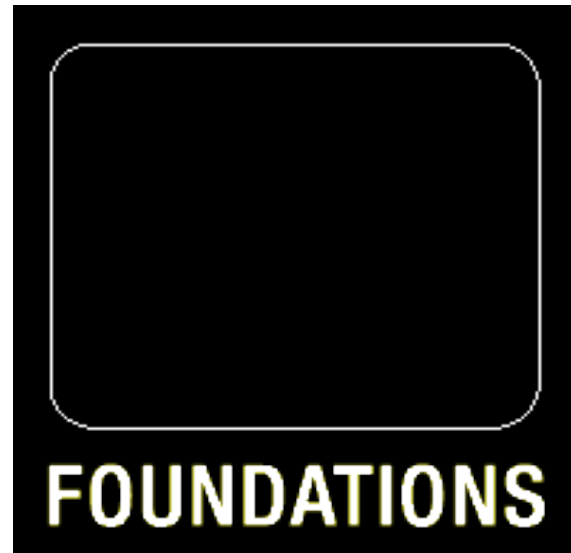
Individual Fundraising

- Meets the needs of:



Foundation Support

Pros:



Foundation Support

Cons:



Foundation Support

Meets needs of:



FOUNDATION
CENTER

Knowledge to build on.

Corporate Support

Pros



Corporate Support

- Cons



Corporate Support

Meets needs of:





US Giving Statistics

Americans gave an estimated \$358.38 billion to charity in 2014 a significant increase.

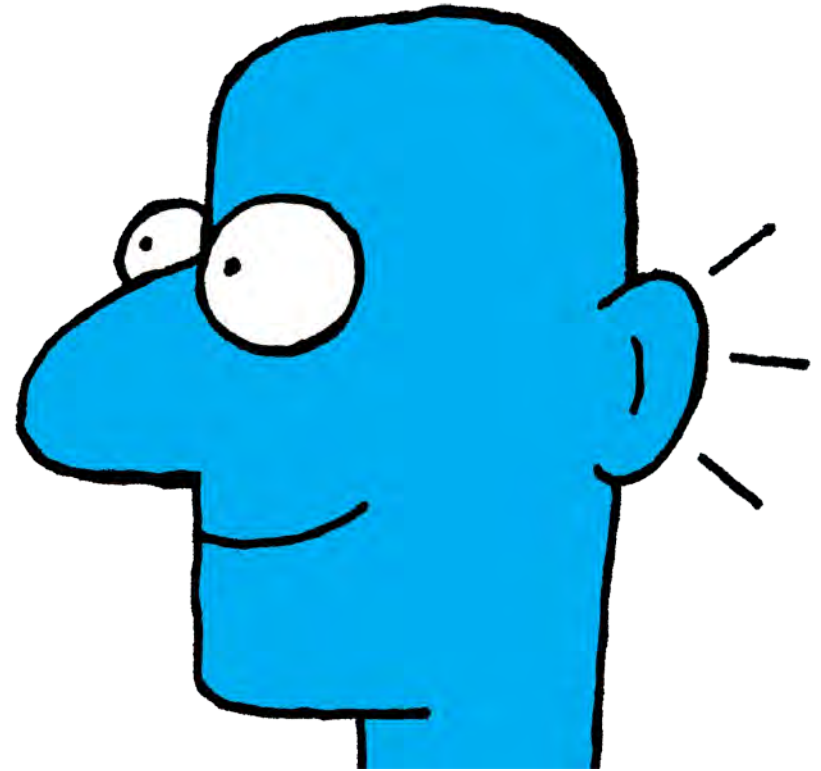
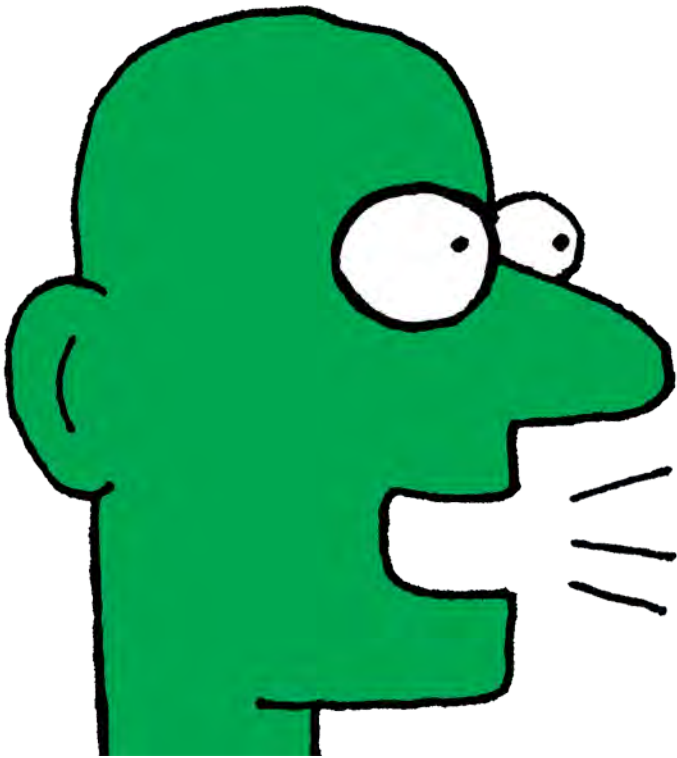
- 72% Individuals
- 8% Bequests
- 15% Foundations
- 5% Corporations



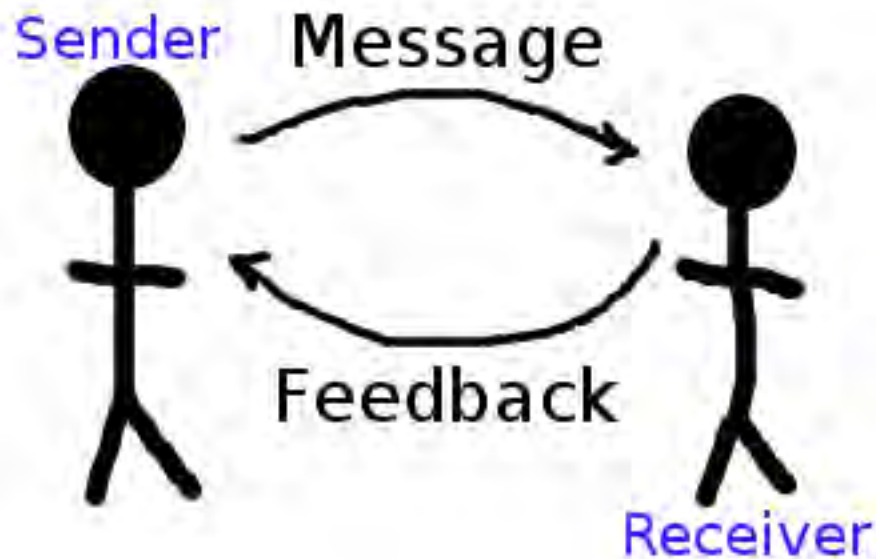
Communication

“communication is the exchange of information between individuals by means of speaking, writing, or using a common system of signs or behavior”.

Communication Exercise



Why is it important?



Communication

Internal



Communication


External





Communication Climate

- The tone of communication is vital
- Supportive Communication



Supportive vs Defensive Communication

- Descriptive vs Evaluative
- Problem Oriented vs controlling
- Spontaneous vs strategic
- Empathetic vs. Neutral
- Equal vs Superior
- Provisional vs Certain



Communication

- Don't forget to listen
- Communication is a 2-way activity
- When listening to complaints
 - Keep your cool
 - Listen with empathy
 - Take action
 - Bring to a polite close

Communication



Defining Leadership

- “True leadership exists only if people follow when they have the freedom not to.”


-Jim Collins, “From Good to Great

- “Leadership is the capacity to translate vision into reality.”

- Warren Bennis


- “Management is easy. Leadership is motivating people, turning people on, getting 110% out of a personal relationship.”

- Colin Powell



So What Skills are needed to be a strong Leader??

- Emotional Intelligence
- Vision, Big Picture and Strategy focus
- Integrity, Honesty and Trust
- Coaching-builds a team
- Delegation-makes others powerful, responsible
- Confidence and Centeredness



So What Skills are needed to be a strong Leader?? Cont.

- Willingness to be wrong
- Commitment
- Positive Attitude
- Approachable



Leadership: An Art of Possibility

“Give people the possibility to live *in* to not the expectation to live *up* to.”

“Radiate Possibilities”

-Ben and Rosamund Zander

Role of the Executive Director




Avoiding Burnout





Final Exercise

- Write down your highest priority and what you will accomplish in the next month
- Write down one person outside of your organization that you will build a relationship with for outside support
- Address it to yourself and put it in envelope provided and return to presenter.



“Contrary to popular opinion, leadership is not about deciding where other people should go. It's about finding out where they want to go and then helping them get there.”

Unknown