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Phased-Based Strategy

West Virginia Nonprofit Association

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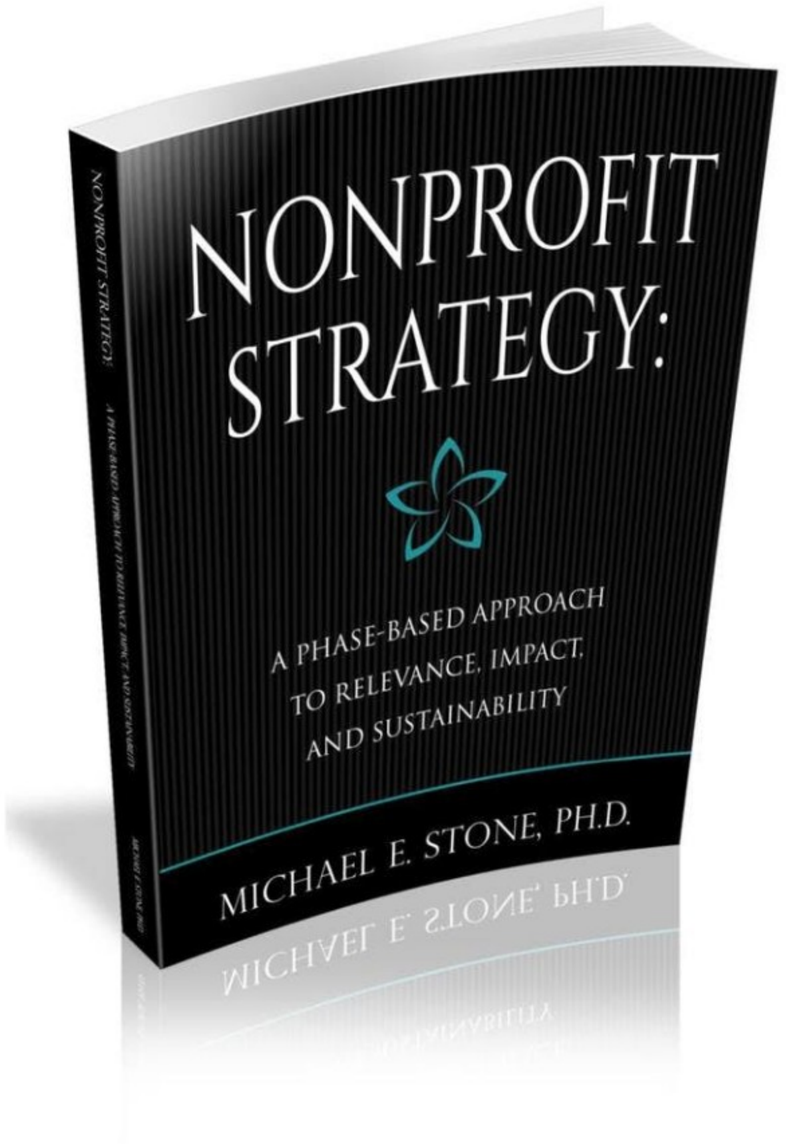
NONPROFIT STRATEGY:
A PHASE-BASED APPROACH TO RELEVANCE, IMPACT, AND SUSTAINABILITY
MICHAEL E. STONE, PH.D.

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Agenda

- The Nature of Nonprofit Strategy
- Nonprofit Lifecycles
- Phase-Based Approach to Strategy

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Part I:

The Nature of Nonprofit Strategy

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The Strategy End-Game

Relevance: Are we addressing a high priority need?

Impact: Are me making a discernable difference?

Sustainability: Are we able to support our work?

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Strategic Positioning

Program: What we do, for whom, to what end.

Market: How we relate to others in our domain.

Resource: How we will support our work.

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Part II:

The Lifecycle Stages Framework

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Why does it matter?

Capacity Counts

Your mission, vision, values & programs deserve a strong foundation to thrive.

My organization's table is...

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6

Strong & sturdy to support our programs & mission

8

Maybe a there's a sugar packet under a leg or two

0

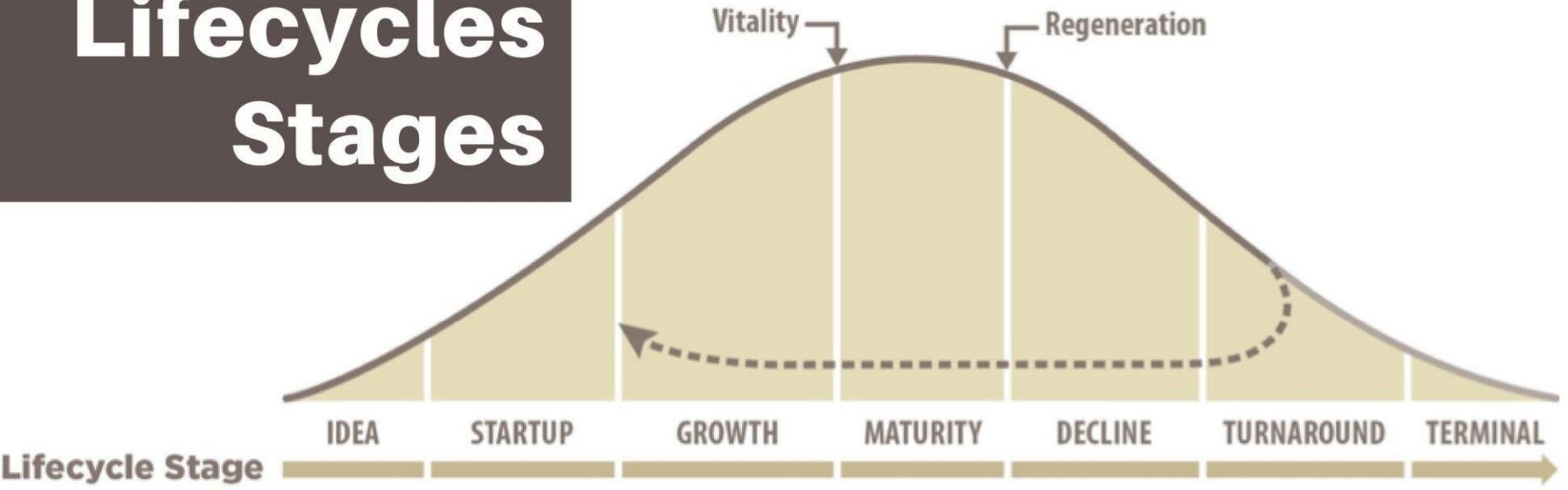
Our table is about to tip over from the wobbly legs

0

What legs?! We have a picnic blanket.

14

Nonprofit Lifecycles Stages



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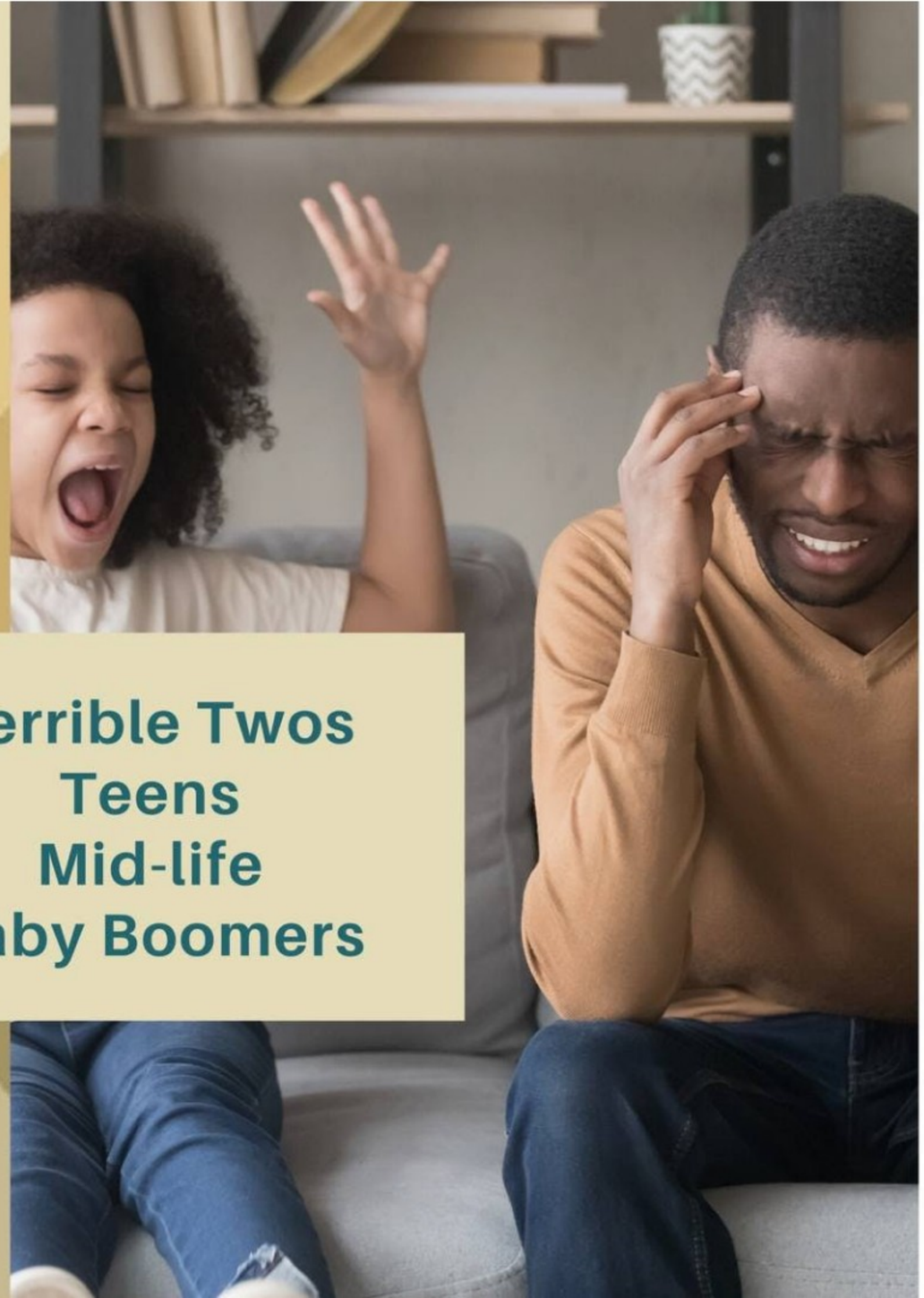

Terrible Twos
Teens
Mid-life
Baby Boomers

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Personal Lifecycle Descriptors

"A stage is a developmental period when characteristic patterns of behavior are evidenced & certain capacities become established."

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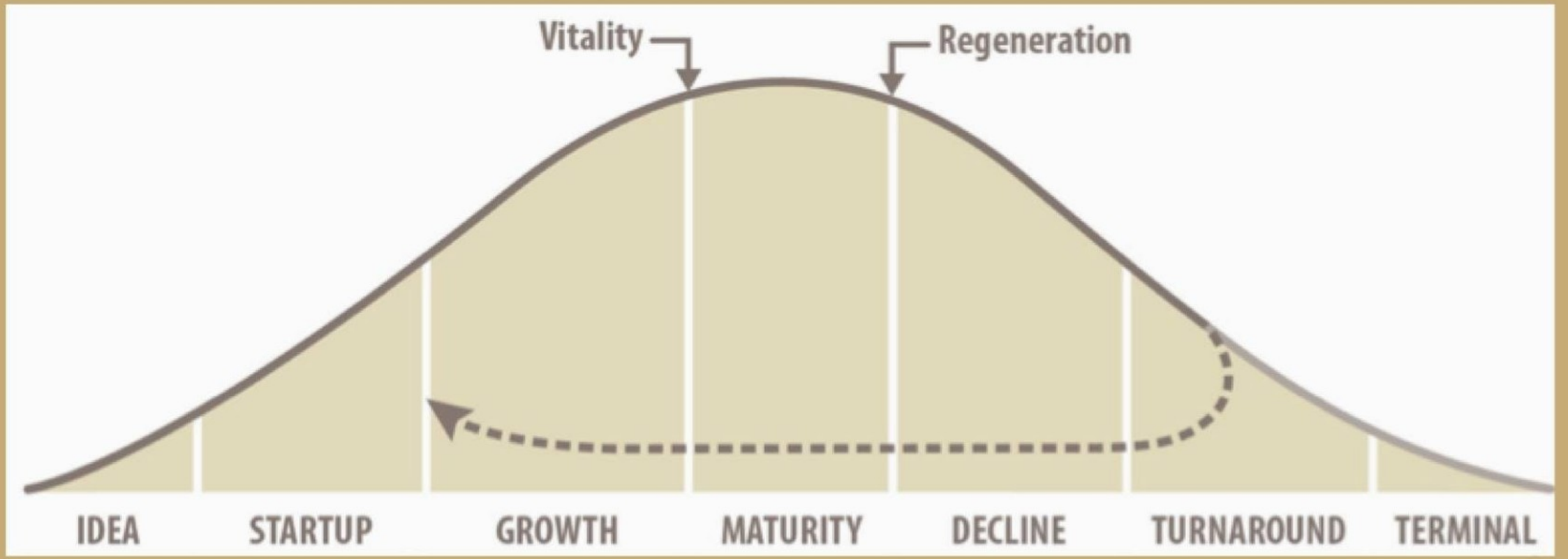
Lifecycles Overview



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Lifecycles Overview

IDEA STAGE

Perceived need sparks idea/vision of what could be

STARTUP STAGE

Energy & passion are at their highest, systems generally lag

GROWTH STAGE

Demand exceeds capacity & infrastructure

MATURITY STAGE

Provide steady, relevant & vital services with solid foundation

DECLINE STAGE

Status-quo decision making based on internal factors

TURNAROUND STAGE

Taking action at a critical juncture; “never again” attitude

DECLINE STAGE

Lost its reason, energy or will to exist

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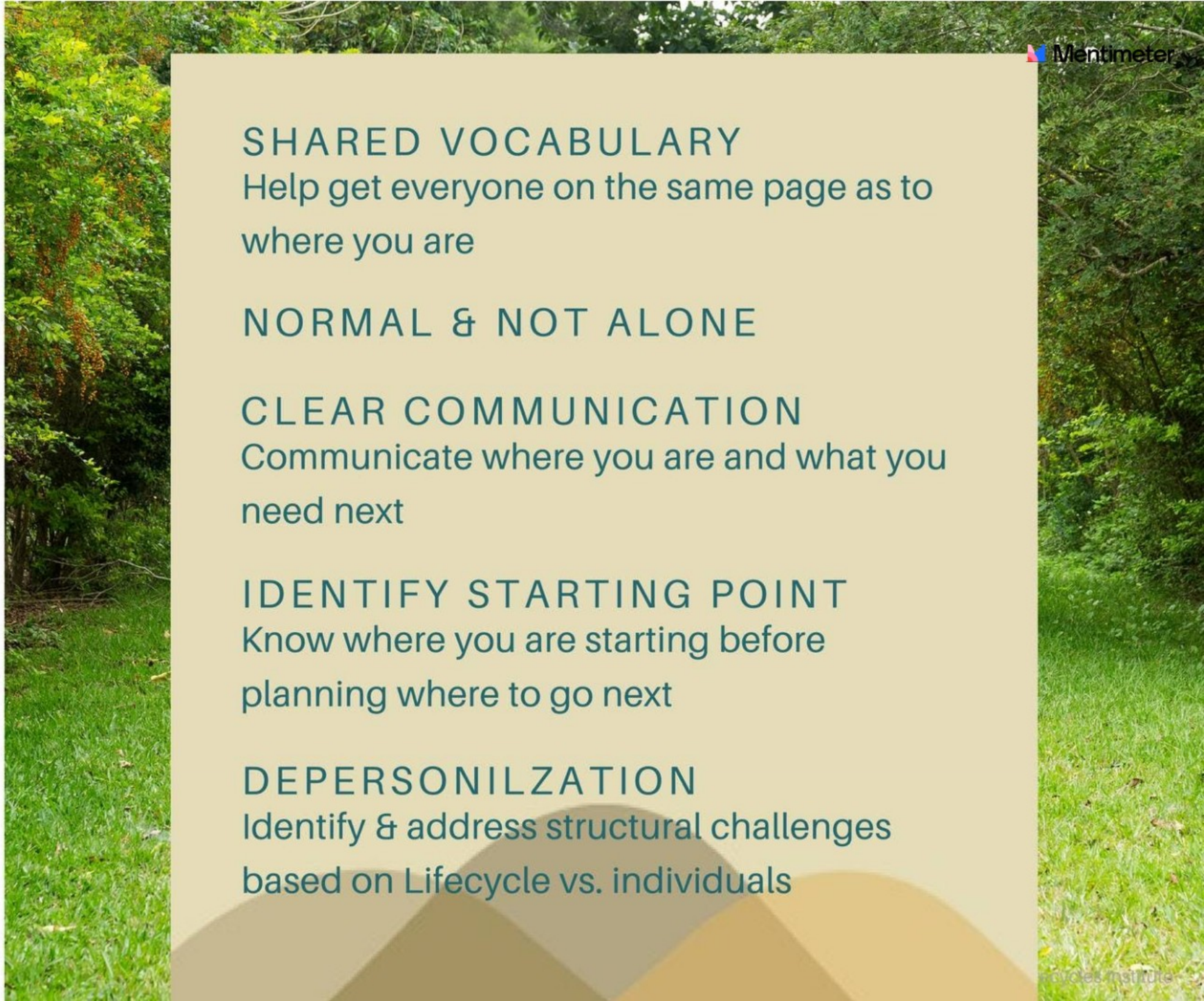
Benefits of Lifecycles Thinking



SHARED VOCABULARY

Help get everyone on the same page as to where you are

NORMAL & NOT ALONE

CLEAR COMMUNICATION

Communicate where you are and what you need next

IDENTIFY STARTING POINT

Know where you are starting before planning where to go next

DEPERSONILZATION

Identify & address structural challenges based on Lifecycle vs. individuals

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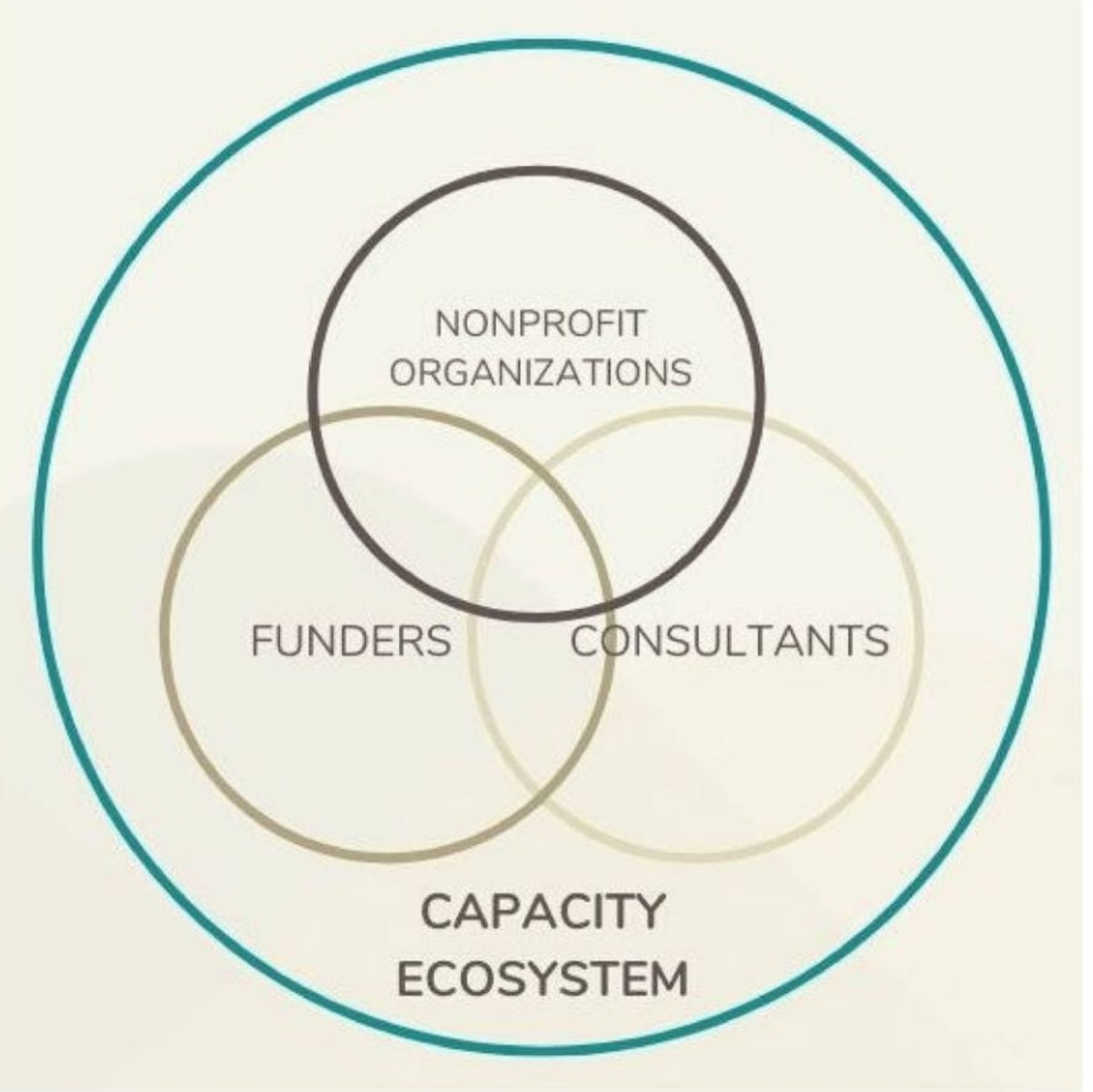
NONPROFIT LIFECYCLES INSTITUTE

We envision a world where vibrant nonprofits thrive in harmony with the communities they serve.

Our mission is to cultivate a healthy, dynamic, and collaborative capacity ecosystem.



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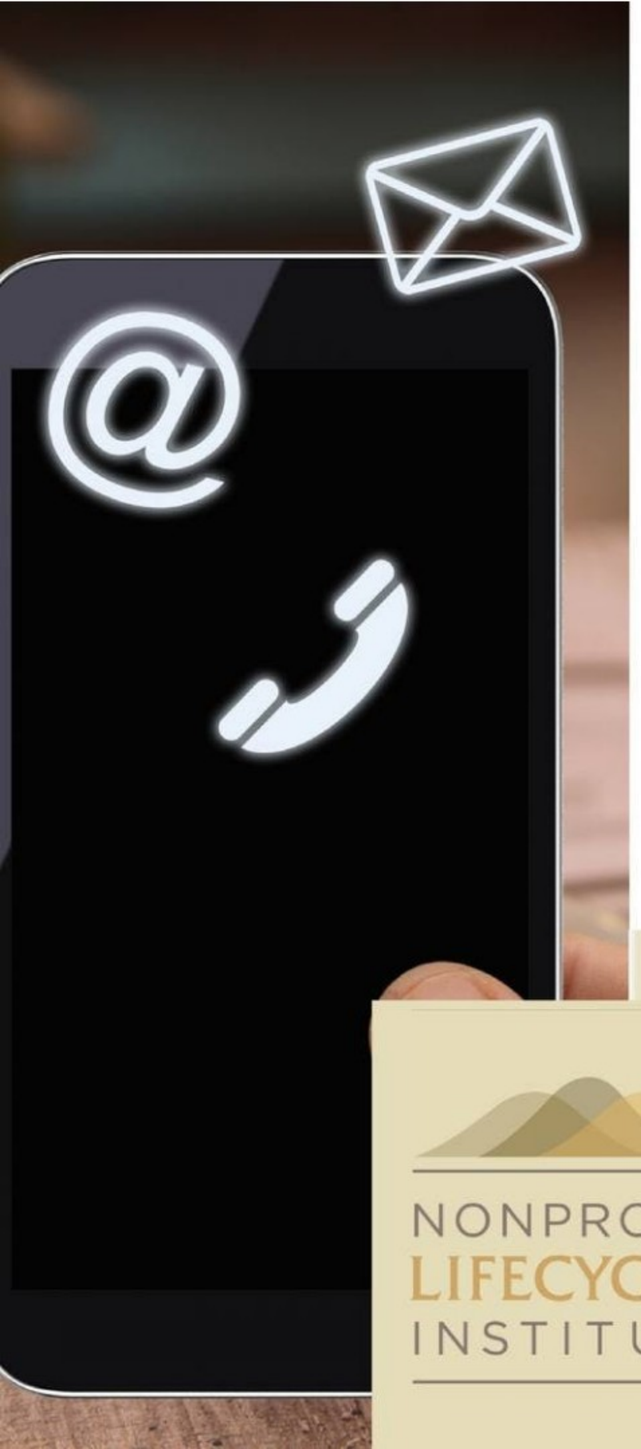

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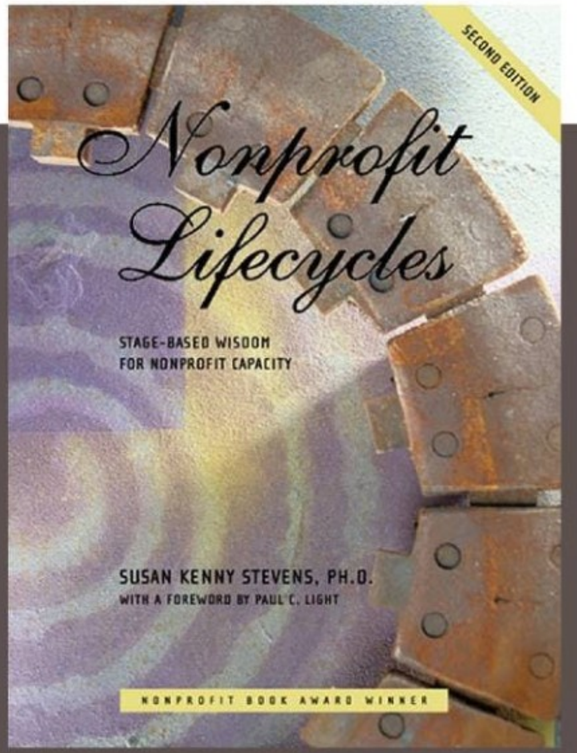

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Part III:

Phase-Based Approach to Strategy

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Strategic
Positioning
MISSION
PROGRAMS
MANAGEMENT
GOVERNANCE
BUSINESS MODEL
ADMINISTRATIVE SYSTEMS

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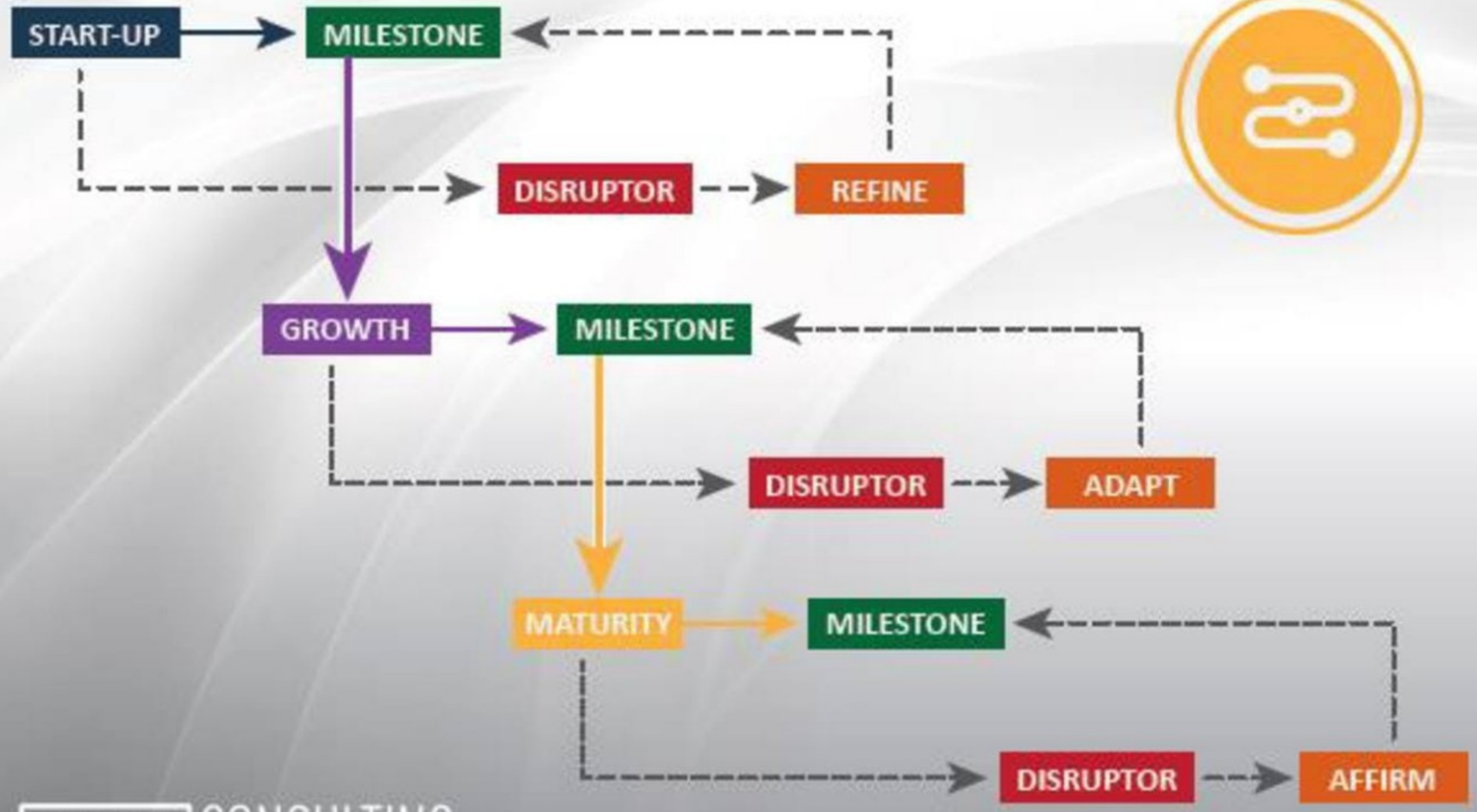
STRATEGY THROUGH THE LIFECYCLE STAGES



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Lifecycle Stage	Strategy Stage	Disruptor	Strategic Focus	Milestones
Start-Up	Aspiration	• Inability to attract funding • Inability to attract clientele • Inability to deliver quality service	Refine the program and resource models.	Full implementation of the program model
Growth	Adaptation	• Demand exceeds capacity • Emerging growth opportunities • Changing client needs	Identify limitations, boundaries, and priorities	Sustainable program model
Maturity*	Affirmation	• Leadership transition • Market shifts • Industry changes	Clarify the elements of the organizational core, primary strategy driver	Stable and recognized position in your domain
Turnaround	Reposition	• Erosion of client base • Decrease in net assets • Growing competition for services	Priority community or client needs	Renewed relevance

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Start-Up Phase: Mike's Bikes

- *Purpose:* Opportunities for youth during the summer
- *Program Model:* Weekly rides on trails; Weekend camping trips
- *Funding Model:* Neighborhood fundraisers

Disruptors:

- Inconsistent participation
- Unreliable bikes

Refinement:

- Monthly rides, extended to full day; no camping trips
- In-kind bike rentals

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Growth	Adaptation	• Demand exceeds capacity • Emerging growth opportunities • Changing client needs	Identify limitations, boundaries, and priorities	Sustainable program model

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Growth Phase: Dylan's Place

- *Target Population:* Children/youth with autism diagnosis
- *Priority Need:* Behavioral modification
- *Impact:* Ability to function in various settings

Disruptors:

- Youth aging into adulthood
- Wider range of behavioral disorders
- Demand for wider range of services

Adaptations:

- Priority given to original target population
- Adult services for prior clients only
- Enrichment/training on a fee-for-service basis

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Maturity*	Affirmation	• Leadership transition • Market shifts • Industry changes	Clarify the elements of the organizational core, primary strategy driver	Stable and recognized position in your domain

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Maturity Phase: The Oasis

- *Mission*: Provide emotional, spiritual, behavioral support to “troubled” youth
- *Program Model*: Residential program, on-site school, working farm; adoption services, foster parent training

Disruptors:

- Fewer residential placements
- Dissolution of affiliation with founding church denomination

Affirmation of the Core:

- Youth with the greatest need
- Focus on spiritual development, educational progress
- Importance of work

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Turnaround	Reposition	• Erosion of client base • Decrease in net assets • Growing competition for services	Priority community or client needs	Renewed relevance

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Turnaround Phase: “Everybody Reads”

- *Founding Purpose:* Close the educational achievement gap
- *Program Model:* In-school supplemental reading instruction for 3rd graders

Disruptors:

- Gradual loss of foundation, UW funding
- Lack of awareness outside of schools
- Perception of redundancy

Renewed Relevance:

- Acquisition by larger literacy organization

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Discussion: Moving Onward

- What have you learned about:
  - Your organizational capacity?
  - The utility of your current strategy?
- If you were to create your organization today, what would be different?

Discussion: What have you learned about your capacity? the utility of your current strategy?

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We have strong capacity and have spent time this year adjusting our staff structure to ensure we can do the work to maintain relevance

We feel like this is the time for implementing changes to how we meet needs. We don't feel like we have to go right back to how it was. We can take advantage of some of the new technologies to make things even more accessible.

Our strategy has been adjusting to change and implementing technology to adjust. Working day to day.

We would have utilized our network more to supplement our value.

4

If you were to create your organization today, what would be different?

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We would utilize our network more to supplement the value we provide.

Plan better for the transition of executive director.

Train for agile work environment

Begin to raise money to replace the Start-up grant the day the grant check is deposited in the bank.

What I would not change is the vision and because it can survive the pandemic.

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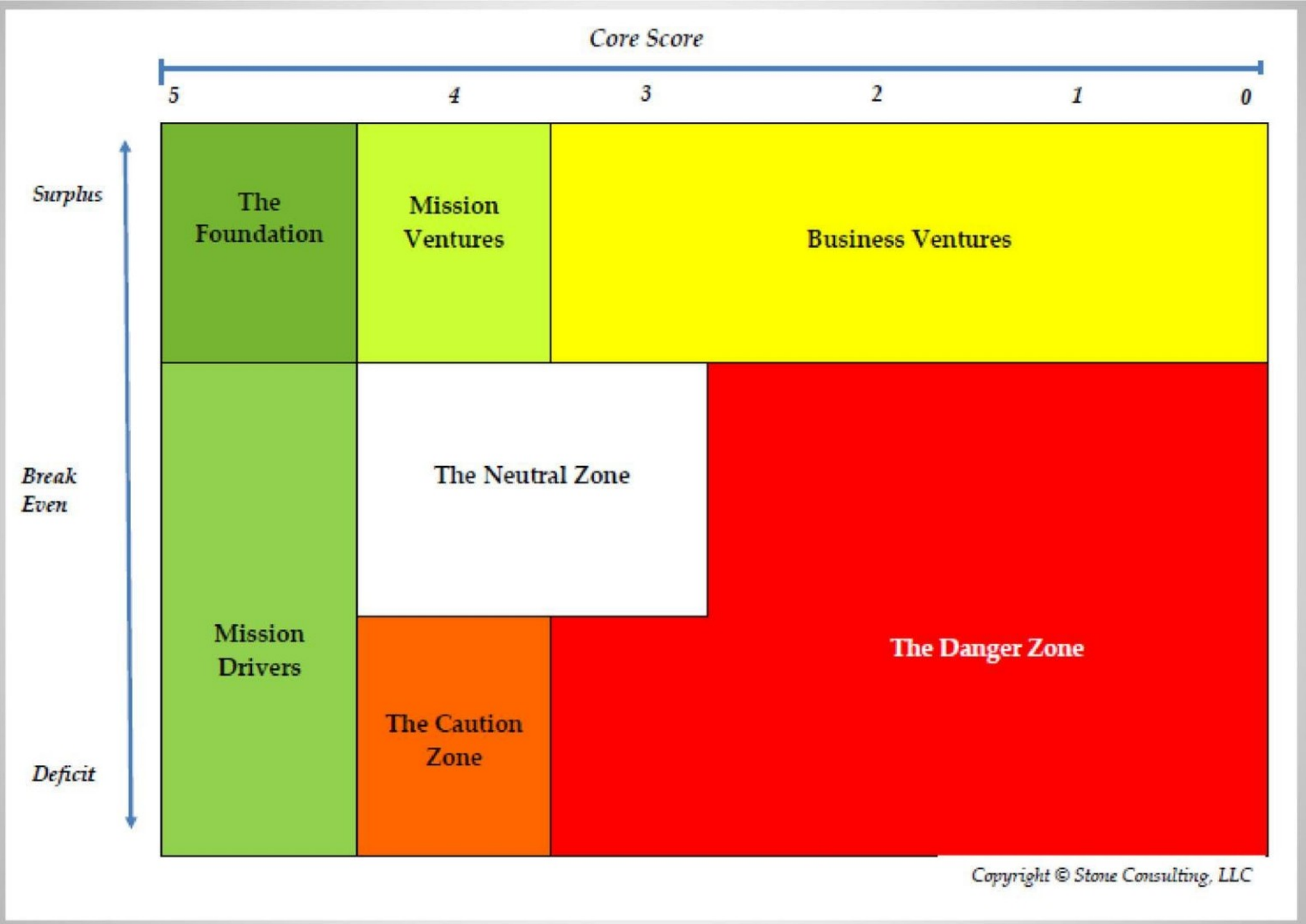
Core Score
5
4
3
2
1
0
Surplus
Break Even
Deficit
The Foundation
Mission Ventures
Business Ventures
The Neutral Zone
Mission Drivers
The Caution Zone
The Danger Zone
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Strategy Zones Tool

- Go to strategybystone.com, click on Strategy Tool Banner
- Watch the Introductory and the three supporting videos
- If interested, click “schedule a meeting”