

# Added Value

Timely Info from Karen Eber Davis Consulting

Summer 2003

*To move toward a shared vision, you will want to be intentional about your planning*

## Thinking About Your Organization's Future?

Whether things slow down for you in summer or not, slower months whenever they come can be a good time to think about your organization's future. To move toward a shared vision, you will want to be intentional about your planning. In the next two pages, we provide you with some questions to consider as you plan-to-plan formally.

*What planning does the organization need?  
What do you hope to accomplish with it?*

To determine the content of your formal planning consider the following questions: Do we know where we are going? What areas are uncertain? Did our vision recently shift; do areas of it seem vague? Did meeting a recent expansion goal leave us needing a new destination? Do we possess a common road map? Can we get away with planning for part of the organization or does the organization as a whole need to be the focus?

Ask exploratory questions like these at staff meetings, with donors, at board meeting and during your own scheduled quiet time. (If you haven't got any quiet time, take this opportunity to make a date with yourself now.)

While you work with these questions, seek also to uncover a little of the organization's planning history. This information will be useful to gain a sense of your planning culture. Does the group like to plan for a far-off distant future? How do they make decisions? Do they follow through? One facilitator shared that after several planning sessions, a board member took him aside and explained that the group was now developing the *same* plan they created, but hadn't followed, several years ago.

Therefore, part of your work will be to explore if your organization needs to plan or if, instead, it needs to work on challenges that the organization hasn't been quite ready to face yet, such as staff replacements or other difficult experiences. In this case, your most helpful work will probably not be formal planning but follow through.

*What are the top one or two priorities for your next formal planning process?*

Very few, if any, organization can explore all the options or possible strategies that might be held in its future. Of all your options, what are the top

## Karen Eber Davis Consulting . . .

helps people turn good ideas into exceptional, funded ventures. Since 1994, the firm has helped more than 100 organizations including social service, education, religious, arts, environmental government and healthcare institutions.

The logo for Karen Eber Davis Consulting, featuring the word "Ked" in a stylized, cursive font with a small star above the letter "d".

Continued from page one

priorities? Which option will create the most impact on the rest of the organization? The more plans needed, the more time it will take. You will find it better to create one clear, excellent plan for a key area, than many fuzzy plans for half a dozen less important efforts.

### ***Some practical matters —***

This spring *Added Value* undertook a survey of 44 nonprofits throughout the United States to catch a quick glimpse of their formal planning process. All of our respondents had been involved in this planning, and recently, too. Almost half were currently involved in a formal process and most of the rest participated in some form of planning last year.

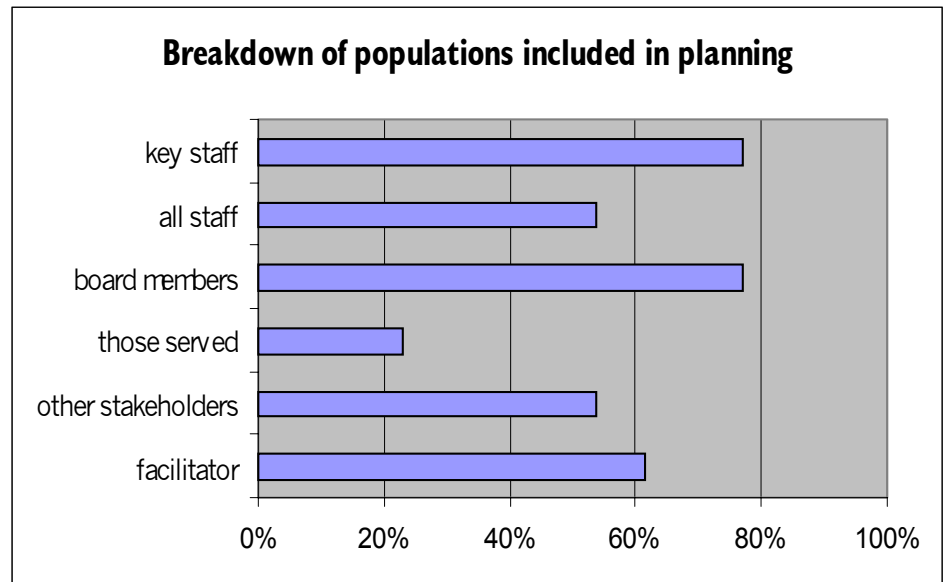
#### ***Who do we include in the process?***

Almost all the organizations included key staff and board members (77 percent each), other stakeholders (69 percent) and an outside facilitator (62 percent). A smaller number included those whom the organization served (23 percent).

Planning experts see this as a matter of balance--wider inclusion offers the group more ideas and a larger number of potential committed individuals. Larger groups also take more time. You will spend more hours with logistics like making copies and adding email names plus helping each person to know and trust other planning team members. Of course, the more people, the more time you will want to invest to gather each individual's input.

#### ***How long will the planning process take?***

Executive Directors varied in their



answers to this question. Just over half reported that the process took longer than six months. One group completed planning in less than a month. Two groups spent between one and three months, and three organizations spent four to six months planning. As expected, those nonprofits with larger budgets (and therefore generally more complex programs) spent more time planning.

#### ***What benefits will our organization gain from planning? What were others' best outcomes?***

Here, answers varied and responses included:

- "Focusing our attention." Pat Lord, Sr. Friendship Center, Sarasota, FL
- "Capital appeal nearing its goal—major expansion of ministry." Don Johnson, Calumet Lutheran Camp and Conference Center, West Ossipee, NH
- "New direction for funding." Luanne Panacek, Children's Board, Tampa, FL
- "Restructuring of the entire organization." David Schott, Manatee County Family YMCA, Bradenton, FL

- "Lots of buy-in to our plan—ownership is wonderful." Dory Campbell, ELCMA, Indiana, PA

#### ***What can we learn from others who have engaged in a formal planning process?***

##### ***What about any disappointments?***

More than half didn't find any disappointments (54 percent). For those who had them, drawbacks generally concerned funding or finances. For example, Linda Mansperger, with Historic Spanish Point in Osprey, FL, said her best formal planning outcome was the museum's accreditation. She was disappointed that realistic financial goals set in 2000 have not been met due to the economy. One other person wished she had included more members and associates. Finally, one person felt her organization still needed more work to distill what came from the planning process to enhance its use.

The survey, completed in spring, included 44 organizations. Replying organizations' annual budgets averaged just over 4 million dollars per year.

\*\*\*

## Looking for Good Grant Information?

If you are doing any grant planning or writing, take a peek at the July/August issue of *Advancing Philanthropy*. In the article titled, "Take Nothing for Granted" by Jacklyn P. Boice, you will find advice, some of my thinking plus other grant resources and a list of grant do's and don'ts. See:

[http://www.nsfre.org/publications/advancing\\_philanthropy](http://www.nsfre.org/publications/advancing_philanthropy).

This spring, as Ms. Boice prepared the article, I enjoyed talking to her about my experiences with the grant world. Reading the article I found myself nodding my head, "yes" and learning new information, too. For example, did you know that there are more than 56,582 active foundation in the U.S. alone and 6,381 were created last year alone?



## Updates:

### *Local Sources, More Local Sources, 2002-2003*

### Editions



*Local Sources* is an easy-to-use, in-depth grant reference for Charlotte, Manatee and Sarasota Counties, Florida. It lists deadlines, contacts, application requirements, board members and amounts funded for more than 100 grant sources.

The companion edition, *More Local Sources*, contains a list of 150 funders who do not meet the size or other criteria to be in *Local Sources*, but are of interest to many development offices.

Below are two new sources and one update since the last *Added Value* newsletter:

*Local Sources* update:

p. 118, **The Venice Foundation** has a new name. It is the Gulf Coast Community Foundation of Venice.

*More Local Sources* additions:

p. 3, **Eckerd Corporation Foundation**, 6501 Legacy Drive, Plano, TX 75024. Source: Internet.

p. 4, **Glazer Family Foundation**, 1 Buccaneer Place, Tampa, FL 33607. Source: Internet.

## To Order or Request Information

Name \_\_\_\_\_ Organization \_\_\_\_\_

Street \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Phone \_\_\_\_\_ Email \_\_\_\_\_

Please contact us regarding:  developing programs  planning or  \_\_\_\_\_

For orders, please enclose a check made out to: Karen Eber Davis Consulting for total.

Mail to P.O. Box 15464 Sarasota, FL 34277. Telephone: 941-924-4860. Prepaid only.

# \_\_\_\_\_ of copy(ies) of *Local Sources* at \$95 each. \$ \_\_\_\_\_

# \_\_\_\_\_ of copy(ies) of *More Local Sources* at \$30 each. \$ \_\_\_\_\_

# \_\_\_\_\_ of copy(ies) of *How to Run a Great Meeting* at \$6 each. \$ \_\_\_\_\_

# \_\_\_\_\_ of copy(ies) of *How to Enlist Great Help* at \$6 each. \$ \_\_\_\_\_

Handling and shipping \$ 4.50

FL orders add 7 percent sales tax or proof of exemption. \$ \_\_\_\_\_

**Total Enclosed:** \$ \_\_\_\_\_



**P. O. Box 15464**  
**Sarasota, Florida 34277**  
**941-924-4860**  
**kedconsulting@att.net**



## **Planning and grants with significant impact since 1994**

### **How Can You Add Value?**

Looking for ways to add value to your work and organization? Here are some ideas to get you started:

- Strive to learn something about your organization every day from someone you serve. Jot these items down on a list. After one month review, note any trends.
- Pick out one thing you suspect doesn't need doing. Don't do it. After a month decide if the task was worth doing at all.
- If you've been putting off a task, work on it for exactly one hour. After this give yourself permission to put it away for the day, but don't be surprised if you want to keep going.
- Thank a supporter with a personal note. Write one note every Friday before going home.
- Find and read one recent study in your field. Summarize the findings in a paragraph and place this information at the bottom of your next meeting agenda. If time allows, during the meeting ask one question about what the results mean for your mission.
- When you come across a quote you like, clip it. By placing 5-10 quotations on legal size sheets with a word processing program and posting them around a room, you can transform any space into a spot of inspiration. This can make even a borrowed meeting space friendly.

***You are not here  
merely to make  
a living. You are  
here to enable  
the world to live  
more amply,  
with greater  
vision, and with  
a finer spirit of  
hope and  
achievement.  
You are here to  
enrich the world.  
You impoverish  
yourself if you  
forget this  
errand.***

***Woodrow  
Wilson***