

New & Renew

New Initiatives, New Facilities, Renewed Engagement

When we venture into unfamiliar territory we encounter pitfalls and opportunities that we may not be prepared to recognize. In this issue you will find 37 ideas that could save you money, trouble and credibility.

Tips for New Initiatives

Nonprofit staffs and boards are mission-driven. It can be tempting, when encountering a compelling issue related to your cause, to take on a new program or service, demographic, geographic area, or approach (e.g., research, education, advocacy, direct service). How can you make the right decision in any given situation? Here are some questions to ask:

1. **Does it really fit within your mission?** “Mission creep” is a common problem among nonprofits. The new initiative may be very appealing, but does it further your core mission or diffuse your attention, energy and resources at the expense of more mission-critical activities? A clear mission statement (see [Critical Issues #7: On Mission](#)) and a well-articulated brand identity (see [CI#9: Brand Identity for Nonprofits](#)) should offer some guidance. Beyond that, a well-developed and structured organizational strategy will provide the best support for good decisions (see [CI #1: Why Plan?](#), [CI #5: The Structure of Planning](#), [CI #11: The Case for Integrated Planning](#) and [CI #17: Fear & Loathing of Strategic Planning](#)).
2. **Has your board brought their experience to bear on a rigorous review of the initiative?** An experienced board, well versed in the operations, aspirations, and capabilities of the organization, can be enormously valuable in this role. (See [CI #4: On Boards](#) [CI#4: On Boards](#)) If you don't see your board as being up to that task, it is time to develop the understanding of current board members and/or develop the identification, recruitment, and orientation of new members. (see blog post)
3. **Do you have a well-developed business plan?** It has been noted that “nonprofit” is a tax status, not a business model. If you have determined that there is an unmet need that you are in the best position to address, can you get the financial support required to provide the program or service? If so, the next step is to develop the details of how you propose to do that—business strategy, operations, structure. (See [CI #12: Business Planning](#))
4. **If substantial resources are required** for the new initiative, you may be well advised to **construct a financial model** ([CI #6: Financial Modeling](#)) to orchestrate and fine-tune the relationships between streams of revenue and expense.
5. If you will need new expertise to develop, launch or operate the new initiative, **do you have the capability** (on board or staff, or through an independent consultant) **to define, acquire and oversee this new area of expertise?** ([CI#10: Mind Your RFPs & Qs](#)).
6. Both to facilitate success and to appeal to funders, you'll need to **establish quantitative milestones** to reach as the initiative unfolds. The initial focus will likely have to be on outputs, but these should translate, as quickly as possible, to outcomes. (See [CI#8: The Measure of Success](#))
7. New initiatives change the dynamic of the existing organization, and may require further modifications of how you operate. **Make sure that you are prepared to manage that change** ([CI #14: Managing Change](#)).

Nine Essentials for Facility Planning

If you need to build a new facility, or renovate an existing one, early preparation can make the difference between glorious success and disastrous failure. What, precisely do you need? How will you make the case for it? How much will it cost? How can you avoid having to go back to the board for a budget increase?

Here are nine ways to reduce your costs, your risks and your stress, while enhancing the project. Many of these actions are not things that you'd know to consider if you don't build regularly; some will very likely be overlooked even if you have a full-time facilities department:

1. **Make sure your strategic, program and business planning are current.** Facilities are long-term investments. Before deciding whether and how to proceed, you should make sure you've done your best thinking about needs, resources and alternatives.
2. **Articulate the requirements in a detailed architectural program.** Enormous benefits can be derived from describing a prospective facility in great detail very early in the process, in a document known as an architectural program. The architectural programs we create for clients run from 50 pages for a very simple building to over 100 for a complex one. In developing the program you will be

faced with a broad range of decisions that you hadn't thought about, and you'll be able to think them through and develop consensus as needed, without urgent time pressure. If you wait until design is under way, you risk delay, unanticipated and hence hasty decisions, extra costs for change orders, and maybe even a design that does not fit your real needs.

3. **Use the architectural program to develop a firm project budget.** A detailed architectural program provides a reliable basis for accurate budgeting of the project, so your board can know the full financial implications before incurring the costs of hiring an architect. And you won't have to come back to them later for more money.
4. **Project and evaluate the full impact of the new facility on the operating budget.** New buildings bring various kinds of new costs. To avoid nasty surprises later, it is important to identify them from the start and factor them into decision making.
5. **Make sure that there is the appropriate expertise on staff to maintain control of the project.** Someone must direct the project (focusing on fiduciary and programmatic decision making, and communications) and someone must manage it (working with and overseeing the contractor or construction manager, and evaluating requests for payment). Given the quite different skill sets required, these roles normally require two different people, though for smaller projects neither may need to be a full time job.
6. **Establish unambiguous decision-making processes for the project.** You will need to establish clear decision-making and communications protocols to avoid added costs, stress, and delays.
7. **Develop a contract that fully protects the client's interests.** Most often nonprofits use a standard contract developed by the American Institute of Architects. Unless it is heavily edited by an attorney experienced in construction, this contract will add significant costs and risks to your project. Handled properly, a customized and well-negotiated contract better serves the interests of both the nonprofit and the architect.
8. **Follow a thorough and methodical process in selecting an architect and negotiating contract details.** A well-crafted process will result in a more suitable fit between the architect and client, a more successful design process, and a better building.
9. **Get the right help.** Don't assume that because you have an architect, developer or construction manager on your

board, or a former contractor on staff, that you can get the most out of the above advice without outside help. Most organizations spend tens or hundreds of thousands of dollars more than they need to—on a *small* project—by going it on their own.

These steps will enable an organization to evaluate the feasibility of a project before committing to major expenses, and avoid pitfalls that could damage the finances not only of the project, but of the organization as a whole.

For more information on the facility planning process, see [Critical Issues 13: Before you Hire an Architect](#), or contact us to discuss how Synthesis Partnership can help with any of the above suggestions.

Renew Enthusiasm

Corporations may not be people, but nonprofits fundamentally are. Everyone involved with your organization cares about your cause. But are you engaging them and focusing their time and talents as effectively as you possibly can? (Answer: No one does.) Here are some things you can do to enhance the satisfaction, morale and devotion of your stakeholders by increasing their effectiveness in furthering your mission.

Inspire

Everything starts with mission. Is your mission statement simple, memorable and inspirational? (If you have any doubts about your statement or its importance, read [Critical Issues #7: On Mission](#))

- You can capture the interest of prospective donors and volunteers (including board members) with your mission statement, and pre-dispose them to invest in the organization.
- If your mission statement sticks in the minds of your stakeholders, it can shape the way they think and speak about the organization, enhancing their own efforts and the likelihood that they will be effective ambassadors to others.
- By building a brand identity around your mission statement—see [CI#9: Brand Identity for Nonprofits](#)—you can project the inspirational effect of your mission further through programs, staff attitudes, communications and facilities.

Inform and Engage

If you can move all stakeholders into just a little more engagement with your organization—from wherever they are—you will get an enormous cumulative boost.

- Nonprofit boards have been characterized as “ineffective groups of effective people.” Make sure that board members have full opportunity to contribute their strengths to the organization, through clarity (orientation and a board manual), structure (effectively designed and implemented committees and meetings), and an explicit annual commitment (individual service plan). See [CI#4: On Boards](#).
- Make use of the insights and the front-line experience of your staff by assuring that two-way communications are open and active with them. Empower them with ample opportunities to drive improvements, and to feel that the organization is theirs.
- Communicate with all stakeholders regularly about issues that are important to them, without barraging them with so much information that they tune out. Monitor their email open and click rates and other indices to assure that they are receptive, and adjust as necessary.
- Entice the least engaged stakeholders into marginally more engagement through regular surveys designed to be two-way communication on selected issues. It works. See [CI #2: The Secret Life of Surveys](#).

Develop

Ongoing professional development for both staff and board is essential for the acquisition and maintenance of the knowledge and skills they need to support the organization.

- Whether or not you have a budget for professional development, make use of the excellent free resources on the web, starting with the three weekly free offerings of Nonprofit Webinars and its extensive archive of past presentations.
- The most effective vehicle for professional and organizational development is a strategic planning process. If the process is conceived and conducted well, it will also develop a new generation of leadership. See [CI #1: Why Plan?](#)
- Every board meeting should have some discussion at least partially directed toward professional development. See [CI#4: On Boards](#).

Evaluate

“We manage what we measure” is not just a corporate adage, it addresses individual psychology as well. To that we could add, “We do what we commit to,” and “We feel good when we are working effectively with others.” A good evaluation system sets clear expectations and facilitates not only effectiveness, but satisfaction with one’s own work and

one’s work environment. See CI #8: The Measure of Success (<http://bit.ly/SyPci08>)

Staff and staff departments, and board officers, committees, and members all need to:

- have written job descriptions regularly updated to reflect the strategic priorities of the organization.
- set annual goals based on job descriptions and coordinated with the goals and objectives of the strategic plan.
- discuss their past performance as they set goals for the next year.

For more on the board version of this process, see:

- [“The Individual Service Plan”](#)
- [“Board Self Assessment”](#)
- [“The Trustee Handbook”](#)

Refresh

Nonprofit staff and volunteers are driven by a personal commitment to the organization’s mission. And by a personal interpretation of it. This can make development of the consensus needed for change especially difficult. However, when successfully managed, needed changes can release enormous new energy from existing stakeholders and new ones. See [CI #14: Managing Change](#).

- In an organization that does advocacy, adaptation to the opportunities provided by social media will likely involve a generational shift of empowerment, and a relinquishment of some hierarchical prerogatives, but may offer vast new opportunities See one of the sidebars in [CI #14: Managing Change](#).
- In a smaller organization with unfulfilled promise, it can be more effective to develop a whole new approach to identifying, attracting and recruiting new board members, rather than trying to coax a new level of performance from existing members, who may not be ready to do more than they have been doing.
- When a new CEO is needed, especially on the retirement of a founder, it is critical to know where you stand and to have a good strategic plan to guide the redefining of the job and the courtship of the right candidate. See [“Succession”](#).

Other Critical Issues:

- CI 1: *Why Plan?* (<http://bit.ly/SyPci01>)
- CI 2: *The Secret Life of Surveys* (<http://bit.ly/SyPci02>)
- CI 4: *On Boards* (<http://bit.ly/SyPci04>)
- CI 5: *The Structure of Planning* (<http://bit.ly/SyPci05>)
- CI 6: *Financial Modeling* (<http://bit.ly/SyPci06>)
- CI 7: *On Mission* (<http://bit.ly/SyPci07>)
- CI 8: *The Measure of Success* (<http://bit.ly/SyPci08>)
- CI 9: *Brand Identity* (<http://bit.ly/SyPci09>)
- CI 10: *Mind Your RFPs & Qs* (<http://bit.ly/SyPci10>)
- CI 11: *Integrated Planning* (<http://bit.ly/SyPci11>)
- CI 12: *Business Planning* (<http://bit.ly/SyPci12>)
- CI 13: *Facility Planning* (<http://bit.ly/SyPci13>)
- CI 14: *Managing Change* (<http://bit.ly/SyPci14>)
- CI 15: *Strategic Action* (<http://bit.ly/SyPci15>)
- CI 16: *All About Collaboration* (<http://bit.ly/SyPci16>)
- CI 17: *Fear of Planning* (<http://bit.ly/SyPci17>)
- CI 18: *Tools for Planning* (<http://bit.ly/SyPci18>)

Planning for yourself?

We're happy to offer as much (or as little) advice or guidance as you need. Use our experience to assure your success.

Contact Sam Frank
to discuss the possibilities.
617 340 9991
sbf@synthesispartnership.com

