

Integrated Strategy for Creating a (more)
Successful and Sustainable Program
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COSA Annual Conference
September 17, 2008
Estes Park, CO



Overview

Purpose

- To introduce a proven approach to help open space programs be more potent, indispensable, and sustainable.

Outcomes

At the end of this session, participants will be able to:

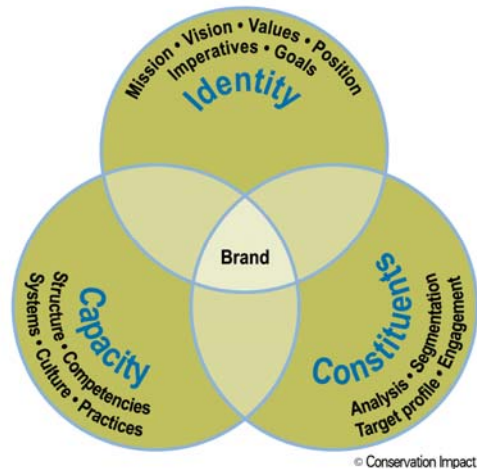
- Apply an integrated strategy to create a more sustainable program
- Position the program / organization for visibility and influence
- Create a more loyal, engaged constituency
- More build and leverage brand for a stronger, healthier, more sustainable effort.

Agenda

- Introductions and Overview
- Frameworks and Definitions
- Identity: From Strategic Planning to Strategic Positioning
- Constituents: From Marketing to Constituent-Centered
- Capacity: From Development to Alignment
- Delivering on the Promise of the Brand
- Creating a Sustainable Program
- Summary and Closing Remarks

Frameworks and Definitions

Integrated Strategy for Sustainability



Definitions

Integrated Strategy: Aligns identity, constituency, and capacity to concentrate all organizational resources to create a more successful and sustainable organization or program and build brand equity.

Positioning: A systematic, analytical process to defining the organization's place and niche within its sphere of influence, or potential sphere.

Outreach strategies: The groups of activities to reach and engage the core constituency. Strategies include programming, services, direct contact, events, and earned media. Outreach strategies are more than an organization's message or communications plan.

Brand: The endearing and enduring characteristics of an organization – the organization's essence. It is what makes an organization distinct and distinguishable. Brand is everything an organization does, not just what it says, and thus is linked to an organization's reputation and integrity.

Sustainability: Having the human, financial, technological, and organizational resources to provide services to meet needs and attain results towards mission on an *ongoing basis*. Sustainability requires the organizational / programmatic infrastructure to carry out core functions *independent of individuals or one-time opportunities*.

Creating a Sustainable Program / Organization

Identity

From Strategic Planning to Strategic Positioning



Strategic: calculated and deliberate decisions based on internal, external, and market context and current and future trends and conditions; organization-wide, cutting across all programs and divisions.

Strategic Planning

The Plan

- Mission, vision, values
- Imperatives
- Goals
- Objectives

The Process

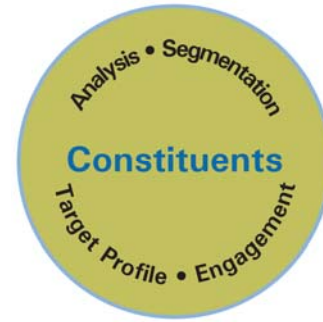
- Situation analysis
- Strategic decisions
- Direction setting
- Implications

Strategic Positioning – critical in becoming indispensable

- Become a “must have” not a “nice to have”
- Understanding, defining, and occupying a distinct niche and “owning” that niche to provide competitive advantage
- Leverage value and assets to create distinction in a sphere of influence
- Defines opportunities, gaps, and competitive advantage
- Defines the program’s footprint or sphere of influence
- Provides opportunity to go to next level

Constituents

From Marketing to Constituent-Centered



Marketing

A process of defining and analyzing the market to provide products/ services/ offerings and to design outreach strategies to best resonate with the market.

Marketing Plan Outline

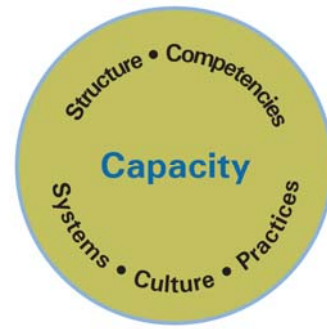
- 1) Introduction
 - a. Organization description
 - b. Marketing goal
 - c. Scope and methodology
- 2) Analysis
 - a. External context and institutional landscape
 - b. Competitive analysis
 - c. Market / constituent segments
 - d. Target markets criteria and selection
 - e. Target market profiles
- 3) Offerings
 - a. Position, brand, image
 - b. Program/ product/ service
- 4) Communication strategies
 - a. Message
 - b. Medium – print and electronic
 - c. Graphic standards
- 5) Outreach strategies
 - a. Direct contact and relationship building
 - b. Advertising, earned media, web presence
 - c. Public relations
- 6) Partnerships
 - a. Strategic alliances
 - b. Councils and coalitions
 - c. Stakeholders
- 7) Organization Implications
- 8) Implementation Plan
- 9) Budget

Constituent Centered

- Marketing connotes understanding the audience so we can get them to do something we want
- From “what we want them to be” to “who they are” and how they relate to the product or service
- Constituent centered fully integrates constituents into everything you do and...sees the world through the eyes of the constituent
- Creating meaningful, two-way relationships, long term, sincere (care about the other)
- Moves from awareness, to action, to engagement, to loyal, long-term commitment
- Everyone becomes a “constituent relationship manager”

Capacity

From Development to Alignment



Capacity: *The human, financial, technological, and organizational resources to provide services to meet needs and attain results towards mission.*

Organizational Development: *A multi-disciplinary, systems approach to enhance and improve individual and organizational performance and effectiveness. About change and growth.*

Process

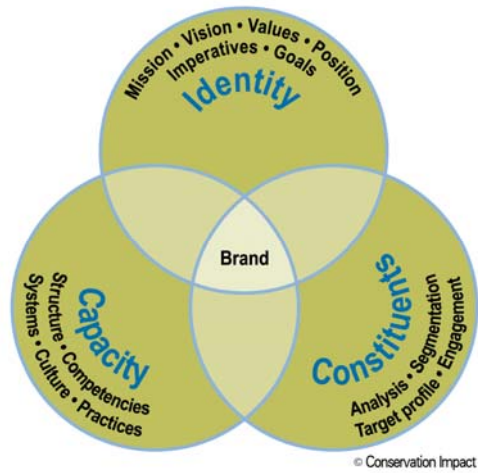
- Analysis
- Critical issues
- Structure, staffing, culture
- Leadership and governance

Alignment: *Organizational alignment develops the organization to align with strategic position and core constituents.*

Process: Creating capacity

- Analysis
- Defining the business model
- Redefining assets
- Organizational alignment
- Institutional standards, policies, and practices
- Institutional “memory”

Brand



- Emerges from having a clear and consistent identity; an engaged and loyal constituency; and capacity that is aligned to accomplish goals.
- Brand emerges from being focused on who you are, who you serve, and how you create value.

Creating a Sustainable Program: Worksheet

Identity

- What difference do you want to make – i.e. the impact you want to have?
- What is the two to three sentence organization/ program description?
- What is your strategic focus? Can you list the three or four core goals / outcomes?
- What are the measurable results of your activities?
- What position does the organization / program occupy? What is your distinctive niche?
- What would an indispensable, integrated organization/ program look like?
- What is the single, consistent message?

Constituents

- Describe your community relative to your organization/ program.
- Who are your core constituents and why?
- Describe your core constituent's values, attitudes, lifestyles, and behaviors relative to the program.
- How do you reach and engage core constituents to lead to long-term engagement and support? (Programs and outreach strategies)
- What do you do for your constituents on a regular ongoing basis?
- Who are your publics (as compared to the core constituents) and how do you maintain positive community relationships?
- What are your two or three key strategic partnerships? What do you do to make the partnership a viable, long term, mutually beneficial one?

Capacity

- What are the core functions (groups of activities) and supporting functions necessary to achieve strategic goals?
- What is the staff composition and structure that is most appropriate to support the work of the organization?
- What does each individual who sits on your committee, advisory group, or coalition bring to the table and why are they there?
- How do your systems facilitate the accomplishment of goals and support the positive culture of the organization?

Brand

- What is the essence of the program?
- How is the brand communicated in everything you do?

The Sustainability Plan

1. Introduction
2. Situation Analysis
 - a. Context, trends, issues
 - b. Current and future influencing forces
 - c. Institutional landscape
3. Identity
 - a. Mission, vision, values
 - b. Impacts, imperatives, and strategic goals
 - c. Core focus and strategic issues
4. Constituents
 - a. Segments: How the constituent relates to the organization
 - b. Core constituents: Demographics and psychographics profile
 - c. Publics and stakeholders
 - d. Offerings: Programs, products, services, issues, or campaigns
 - e. Outreach strategies: Direct contact, media, public relations
 - f. Communication: Message and standards
 - g. Strategic alliances / partnerships
5. Organizational Alignment
 - a. Structure: Roles, responsibilities, authority, and accountability
 - b. Competencies and functions: Skills, surplus, and gaps
 - c. Systems: Information management and protocols
 - d. Culture: Collective attitudes and values
 - e. Coalitions and committees: Purpose, responsibility, accountability
6. Revenue Model
 - a. Funding needs
 - b. Sources and uses
7. Transition and Implementation
 - a. Transition issues
 - b. Action plan

Conservation Impact is dedicated to helping organizations achieve results towards environmental conservation, resource sustainability, and public and community health.

We provide comprehensive organizational development consulting to nonprofit organizations and public agencies.

The company specializes in strategic planning, marketing, and organization development. We use an integrated strategies approach that looks at organizational identity, capacity, and constituents. We help our clients go to their next level of development.

Founded in 1996, Conservation Impact has worked on more than six hundred projects with four hundred organizations nationwide and internationally. The Conservation Impact staff bring significant expertise in nonprofit management, marketing, and organizational development with degrees in biology, ecology, environmental conservation, and public administration.

Conservation Impact's sister company, Nonprofit Impact, focuses on organizations and agencies dedicated to improving the health and well being of individuals and communities and those working to create a more civil, just, and equitable society.

For more information, please call us at 303.223.4886 or visit us online at www.conservationimpact.com or www.nonprofitimpact.com.

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