Developing Effective Business Strategies to Foster Community Change for the Long Haul

WEBINAR WEDNESDAY

with

Stephanie Strutner, MPH, CPSII

cadca.org
Learning Objectives

1. Recognize that effective and sustainable coalitions operate like a business
2. Explore best practices for coalition businesses
3. Analyze current coalition position and identify a plan for improvement
"I want you to find a bold and innovative way to do everything exactly the same way it's been done for 25 years!"
Strong Nonprofits

Effective management
Strategically deployed resources
Accountability techniques
Internal controls
Assemble the right leaders
Help gain:
  Market respect
  Donor confidence
  Public support
Poll

Which best describes you?
Coalition staff
Coalition volunteer
Business professional
Purpose

1. Why does your coalition exist?
Coalition Purpose

Address social burden
Sustain efforts to ensure effectiveness for the long haul
Purpose

2. What is your coalition selling?
Coalition Positioning

1. Benchmark/Market research (identify the coalition’s niche)
2. Create infrastructure that supports growth
3. Tell your coalition’s story
4. Brand your image
5. Be accountable
Identify the Niche

3. What do you aim to do?
4. What is your competition?
Create Infrastructure

1. Policies & Procedures
2. Bylaws
3. Written job descriptions (staff and volunteers)
4. Organizational chart
5. Accounting system
6. Mission statement
7. Logic model
8. Evaluation plan
9. Strategic plan
10. State charter/501c3 OR clear MOU with fiscal agent
Infrastructure Support

Need templates or resources?

1-800-54-CADCA x 240
Activity 1

Enterprise Planning
To reduce youth substance abuse in Anderson County

Establish partnership with County government

Collaborate with community partners to implement effective intervention strategies

Provide training for board members

Staff Development
Leadership Training
Financial Management Training

Fund Dev.

Org. Dev.

Service Delivery

Client Dev.

Currently Doing

Need to Do

Need to Do

Currently Doing

Ally of the Year
Red Ribbon Rivalry
Demolition Derby

Civic org presentations
Chamber memberships
Community involvement

Reach out to Oak Ridge industrial community

Establish sustainable medication incineration plan

RBS Training
DFW Training
Rx disposal/lock boxes
DEBRIEF
Tell your Story

What is your bait?
What is your story?
Everyone TELLS it; Everyone SELLS it!
Coalition Activity

Create your coalition’s elevator speech

1. Hook
2. Facts
3. Value-added point-of-view
4. Recommendation
5. Second order effects (help people see around the corner)
6. Bait
Example

1. **Hook**: Did you know underage drinking is a significant problem in our community?
2. **Facts**: 43% of our high school students report using alcohol in the past 30 days and retail compliance is only 49%.
3. **Value-added point-of-view**: Research indicates that reducing underage drinking not only saves lives and reduces negative consequences, but also helps improve academic performance and wellness.
4. **Recommendation**: By working with parents and businesses to increase compliance with underage drinking laws and decrease access to alcohol, as a community, we can reduce underage drinking.
5. **Second order effects**: (help people see around the corner) We will also affect risky sexual behavior, alcohol-related crashes, academic performance and student wellness.
6. **Bait**: (what’s in it for me?) By partnering with our coalition, your business can get positive recognition for responsible practices and we will give you free resources.
Brand the Image

What are current perceptions of the coalition?
Activity 3

1. What is your competition?
2. What is your coalition’s social mention?
   socialmention.com
Be Accountable

Financial reporting/monitoring
Programmatic reporting/monitoring
Separation of duties
Be Accountable

Financial reporting/monitoring
  Working from an established budget
  Interpreting Profit & Loss Statements
Profit & Loss Statement

Includes revenues and expenses
Allows grant-funded agencies to keep track of funds expended and funds available
Provides comprehensive report for board/stakeholders
## Prevention Expenditures

### Prevention County Coalition

Profit & Loss by Class

October 2013 through September 2014

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<tr>
<th>Cash Basis</th>
<th>DFC Grant</th>
<th>General Fund</th>
<th>SPF Grant</th>
<th>State of Flux Grant</th>
<th>STOP Act Grant</th>
<th>TOTAL</th>
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Be Accountable

Financial reporting/monitoring

Programmatic reporting/monitoring
  Comprehensive evaluation
  Reporting to funders
  Reporting to stakeholders
Activity 5

1. To whom are you accountable?
   What do they care about?

2. For what are you accountable?
   Who is watching?
Turn the Table

Do you donate to a charity?
  Why?
  What do they do that makes you want to support them?
  How do they solicit your help?
Turn the Table 2

How can you make that applicable to your coalition?

- Recruitment of volunteers
- Solicitation of donations
Make the Ask

- Ask for money
- Ask for resources
- Ask for help
- Wait for the crickets
Best Practices for Building Solid Business Operations

1. Set team expectations
2. Manage without ego
3. Have a clear process
4. Create a foolproof foundation
5. Solicit feedback from your team
6. Keep operations transparent
7. Document process
8. Build for the future
9. Keep the 3 P’s in mind (Process/People/Product)
10. Make data-driven decisions
11. Choose the right people
12. Provide excellent customer service
13. Own the operation from start to finish
14. Be an effective leader
1. Set team expectations

Make sure stakeholders know of expectations
Allow them to help create expectations
Make sure they know what happens when expectations are not met
Celebrate milestones when expectations are met and exceeded
2. Manage without ego

Create a healthy and productive work environment
   Give credit where credit is due
   Recognize accomplishments

Be aware of office dynamic

Build a team around you to compliment you and your style
   Fill in gaps by hiring people who excel in that area
   Staff work like their boss/supervisor
3. Have a clear process

Identify a process that works for your office environment
   - Increase efficiency
   - Outline expectations
   - Maintain oversight
   - Identify areas of weakness
   - Celebrate accomplishments
4. Create a foolproof foundation

Create a strong business foundation

Create a strong team
  Based on your strengths/weaknesses
  Based on workability with your management style
    Staff
    Volunteers
5. Solicit feedback from your team

Engage staff like you engage coalition members
Team members may have a different perspective than you
  Ask for their feedback
  Address inefficiencies
  Identify opportunities for improvement
6. Keep operations transparent

Allow for cross-check
Break down silos
7. Document your process

Provide documentation to stakeholders on activities
Reduces reliance on ONE person
Reduces repeating the same mistake
8. Build for the future

Look ahead to forecast needs in advance
Effective businesses plan in advance and anticipate future needs
9. Keep the 3 P’s in mind

People
Customers/Stakeholders/Employees/You

Product
What do you offer?
Product/Service/Content

Process
Systems to maximize:
Productivity
Organization
Delegation
10. Make data-driven decisions

Gives you permission to say “No”
Are you busy or effective?
Should not be an afterthought
Which area should you focus on to achieve the best results?
What will you do next week to improve that?
11. Choose the right people

No person is the best at everything
Choose the right person for the right role to they do not do tasks they resent
Focus less on coaching weakness but leverage strengths and passion
12. Provide excellent customer service

How you handle volunteers and community stakeholders affects your reputation

- Political affiliations
- Reputation affects capacity
- Capacity affects growth
- Growth affects effectiveness
13. Own the operation from start to finish

Enlist people to help
Allow them to take on ownership
Be willing to let go to institutionalize the effort
14. Be an admired leader

Dr. Grady Bogue

Leadership is the conceptual and moral art form of inspiring and facilitating the actions of others in identification of shared purpose and in assessment of individual and institutional performance.

Balance of tell-and-compel and inquire-and-inspire

Leaders are willing to do what they urge others to do
What Nonprofits Can Take From Business

Forbes Magazine

Strong, well-run nonprofit organizations have adopted many best practices from business

Good management and strategically deployed resources help gain market respect, donor confidence, and public support

What Business Can Take From Nonprofits

Forbes Magazine

- Identify and serve an irresistible mission that emphasizes a higher purpose
- Cultivate passionate employees
- Keep customers/volunteers engaged and loyal
- Focus on the mission, not the money
- Treat employees like volunteers
- Treat customers like donors

Value Added

Be able to clearly articulate ROI
Contact

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