



How Can We Be Strategic When We Are So Busy Firefighting?



**Six practical and easy-to-implement
boosters to bring more strategic
thinking to your organization in
these times**

plus a bonus booster just because



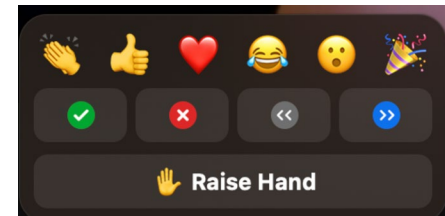
Moment of Truth



Engaging Today



- **Please enter any questions in the Q&A tab.**
- Share any comments you have along the way using Chat..
- Click on **Reactions** to raise your hand, give a Thumbs Up, say Yes or No, or other reactions
- Answer several **Polls** to share information





**What Do You Consider
Strategic Activities?
*Enter some ideas in the chat.***

Examples of Strategic Work

- **Exploring mission, vision, and values**
- **Dialogue about what we might stop, start, or continue**
- **Naming and addressing conflicts**
- **Asking questions that challenge white elephants**
- **Discussing decision-making**
- **Providing open, constructive feedback**
- **Exploring innovative ideas or projects**
- **Participating in strategic planning**



We Need Strategy, But...

- **85 percent of executive leadership teams** spend less than one hour per month discussing strategy
- 50 percent of leadership teams spend no time at all.
- On average, **95 percent of employees don't understand their organization's strategy.**
- 90 percent of businesses fail to meet strategic targets.



Harvard Business Review, <https://hbr.org/2005/10/the-office-of-strategy-management>



POLL 1



Avoiding Strategy Leads To...

Phantom Workload

The unintentional work created when people either take expedient but ineffective short cuts or avoid taking on essential, difficult tasks

Marilyn Paul & David Peter Stroh
<https://thesystemsthinker.com/managing-your-time-as-a-leader/>



And...

Planning looks different post-pandemic.

No more Post-Its and flip charts in a hotel function room. It's now about:

- Virtual/hybrid engagement options
- Shorter planning sessions
- Phased approaches
- More operational focus to respond to COVID
- Leveraging existing meetings





Strategic Thinking Booster #1

Challenge Your Time Horizon



POLL 2



Typical Time Horizons

Front-Line Staff: Today, maybe tomorrow

Director/Manager: The next 1-2 weeks

Sr. Manager: This month/quarter

C-Suite: The next 6-12 months

CEO: The next 3-5 years

Board: Varies! Many focus on the previous 30 days—with some periods of thinking 1-5 years out



How Do I Challenge the Familiar Time Horizon?

- Set aside time to future-think each week. Let your google/outlook calendar schedule Focus Time for you
- Look at meeting agendas – what time horizon are items focused on?
- Consciously work on coaching staff on how to elevate their thinking – design this into 1:1 meetings
- Look at your to-do list. How might you integrate least 2-3 items that are longer term than you might normally tackle?





Strategic Thinking Booster #2

**Build the
meta view
into your
day-to-day**



Bring meta view into the day-to-day

- Build micro infusions of strategy into already scheduled meetings.
- Help staff move out of the weeds into the trees and leaves
- Design your discussions to include a look from the meta-view, “What is the view of this from 30,000 feet?”
- Engage staff in strategic planning or strategic discussions



How to make staff meetings more compelling

- What matters most to you right now?
- What are you most concerned about right now or hopeful for?
- What does it look like to come up for air?
- What are you proud of?
- What is our role in _____?
- Thinking six months out, what do we need to be doing/thinking about today?





Strategic Thinking Booster #3

Just Say No.





The essence of
strategy is choosing
what **not to do**.

—Michael Porter



POLL 3



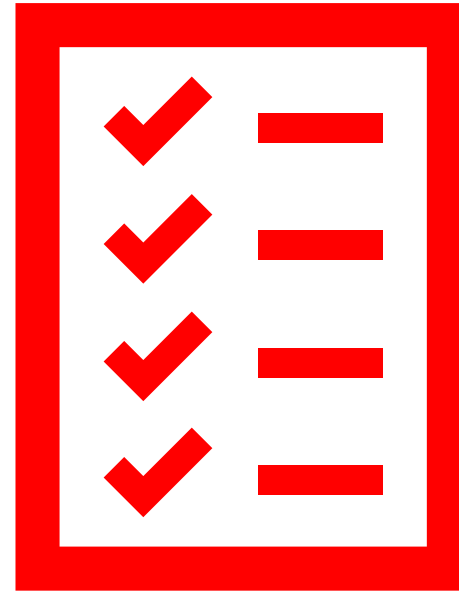


Simple exercise to try

**What do I/we need
to say Yes to?**



**What do we need to
say No to?**



Strategic Thinking Booster #4

**Develop a
Strategy Screen**



THE NONPROFIT STRATEGY REVOLUTION

SECOND EDITION

Real-Time Strategic Planning
in a Rapid-Response World

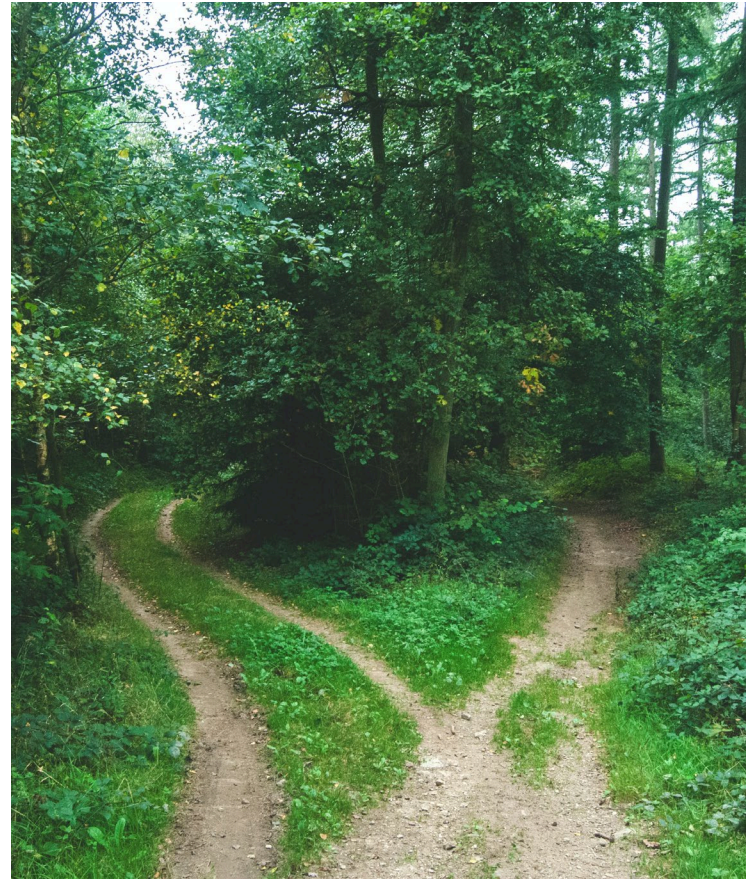
DAVID LA PIANA
WITH **MELISSA MENDES CAMPOS**



What Is a Strategy Screen?

A set of criteria that help us determine whether a new strategy or initiative aligns with who we are as an organization.

By using these criteria to guide our dialogues and decision-making, we will ensure that future strategies and initiatives align with our strategic plan.



Sample Strategy Screen

How does the new strategy or initiative:

- Align with our mission, values, and vision?
- Assure financial viability and long-term sustainability?
- Promote us as a charitable organization?
- Meet a critical need without duplicating community resources?
- Assure it is inclusive, serving all people?
- Promote partnerships and collaborations that are mutually beneficial and that demonstrate impact?
- Meet or exceed best practices and industry standards?

Not a checklist—but a guide to structure dialogue.





Strategic Thinking Booster #5

**Inspire your
board and
committees**



AGENDA

[Board Meeting]

Date | time [Date | time] | *Meeting called by* [Name]

Board members

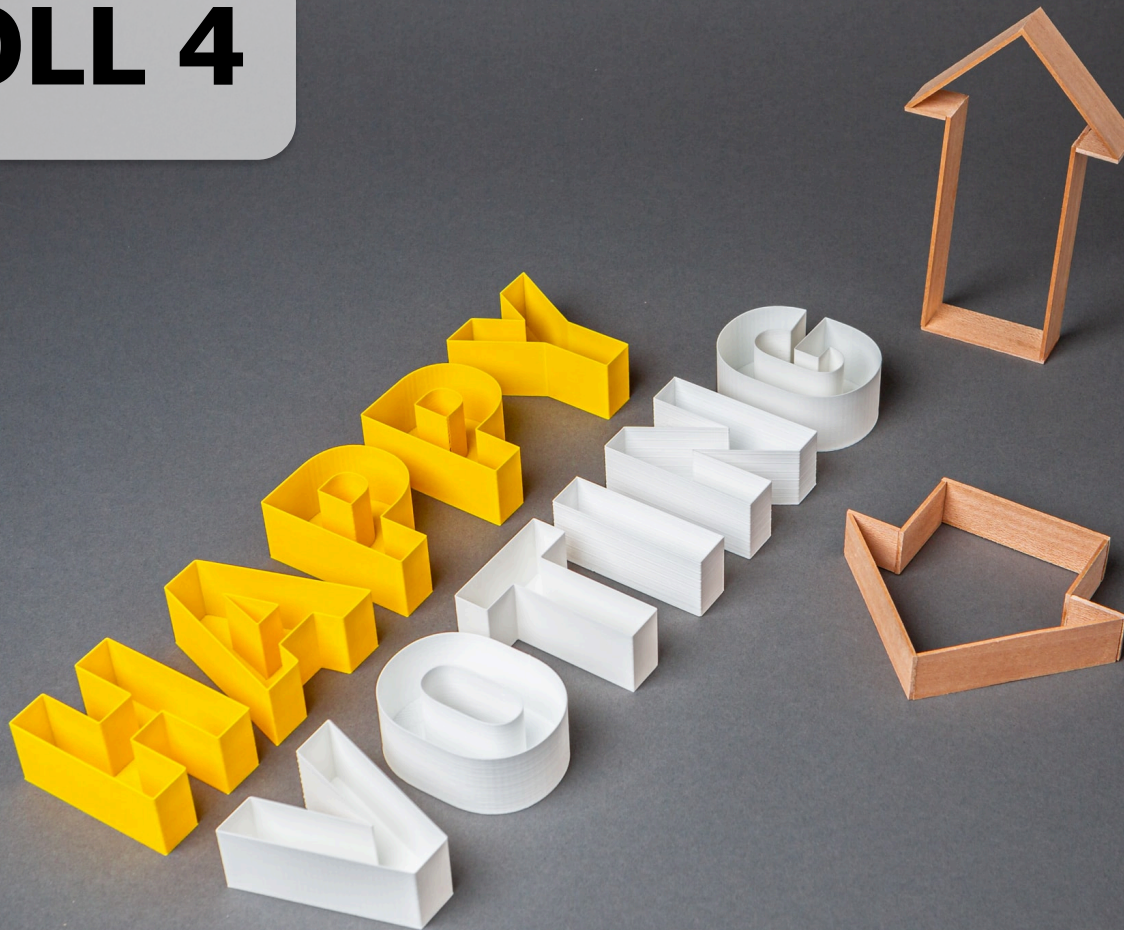
[Name, Title] | [Name, Title] | [Name, Title] | [Name, Title] | [Name, Title] | [Name, Title] | [Name, Title]

Time	Item	Owner
[Time]	Welcome	[Owner]
[Time]	Old business and approval of last meeting's minutes	[Owner]
[Time]	Vote on new Secretary	[Owner]
[Time]	Discuss parent openings on advisory committees - any response from newsletter?	[Owner]
[Time]	Vote on proposed Budget	[Owner]
[Time]	Principal's Report	[Owner]
[Time]	Break	[Owner]
[Time]	New Business	[Owner]
	A. Recap of Back to School Night – Erik Andersen	
	B. Parent Education Programs – Rachel Valdez, school counselor	
	C. Teacher grants application process – Laura Giussani, Oakdale Schools Foundation	
[Time]	Committee Reports	[Owner]
	A. Membership, Angela	
	B. Volunteers, Erik	
	C. Newsletter, Dean	
	D. Computer Support, Terry	
[Time]	Announcements	[Owner]
[Time]	Adjournment	[Owner]





POLL 4



Inspire your board and committees

- Nix the “Save As” Agenda
- Use timed agendas and look at how much time you spend focusing on the past versus the future
- Build in orientation/education opportunities – choose a topic!
- Build in strategic/generative dialogue questions – what is one meaningful “meta view” question you might pose that leads to meaningful dialogue?
- Use small group work or other tools to gather information (Google Jamboard or Mentimeter, etc. if online)



Timeline of Strategic Topics

	JULY	AUG	SEPT	OCT	NOV	DEC
Board Topics	July 30: Financial Sustainability Discussion What are our 3- and 5-year goals around sustainability?	Aug. 31: Define Youth Impact What has changed about youth development today?	Sept 28: Our work in DEI What is the board's role in equity/ access?	Oct. 26: Review and approval of our DEI statement	Nov. 15: Building a Culture of Philanthropy and Community Connections Askers, Ambassadors, and Advocates	Dec. 14: Launch Strategic Planning: Orientation and What Would Make for an Extraordinary Process



Inspire your committees

While you fight fires, your board or committees should be assessing safety measures, strengthening policies, designing fire-prevention systems

- Do you have committee commissions/charters for each committee?
- Do they discuss their chart of work once a year for the coming year?
- Do you have too many committees for your organization to reasonably handle?
- Do you have too many committees focused on operational and not strategic topics?



Examples of Strategic or Generative Questions

Open-ended, high stakes, often ambiguous topics that may take several meetings of discussion

- What does strengthening relationships look like in a post-COVID world?
- What is the future of youth development?
- What is our organization's position on systemic racism and equity?
- How might we alleviate barriers and create greater access to our programs?
- What is the next step in our board's evolution?
- Who is not here? Who has not spoken?



Chatstorm



Where do you or your organization need to infuse some new, creative strategic energy?

What might that look like?





Strategic Thinking Booster #6

Care for the
humans
in the system.



POLL 5



How Can We Show Care?



- **Don't** get down to business; take time to connect.
- Check in on key people.
- Remember that leadership is everything – leaders impact the effectiveness of strategy execution.



How Can We Show Care?



Remember, caring for humans is the most strategic work we can do right now.

And it all starts with self-care.





Strategic Thinking **BONUS Booster #7**

Helping
Others Cross
the Edge



Helping Others Cross an Edge



Helping Others Cross an Edge

What is HERE?

**What is the THERE
we are wanting to
get to?**



Helping Others Cross an Edge

- **Wait for a lifequake—and get thrown over**
- **Smaller circumstances can bring you there**
- **Dream your way across—be strategic!**
- **Challenge someone else across (be a good coach/mentor)**
- **Go 1st and then invite others over, loving them across the edge**
- **Walk side-by-side across with them**
- **Expect some zig-zagging**



Seven Strategic Boosters



1. Challenge your time horizon
2. Build the meta view into your day-to-day
3. Say no (strategically)
4. Develop a strategy screen
5. Inspire your board and committees
6. Care for the humans in the system
7. Help others cross the edge



QUESTIONS?



How DBD Supports Non-Profits



- Capital Campaigns
- Annual Giving Coaching
- Endowment Program Development
- Grant Writing
- Strategic Planning
- Financial Services
- Collaboration Development
- Board Development
- Case Development/Communications
- Executive Coaching
- Interim Leadership Staffing
- Staff Culture & Organizational Development



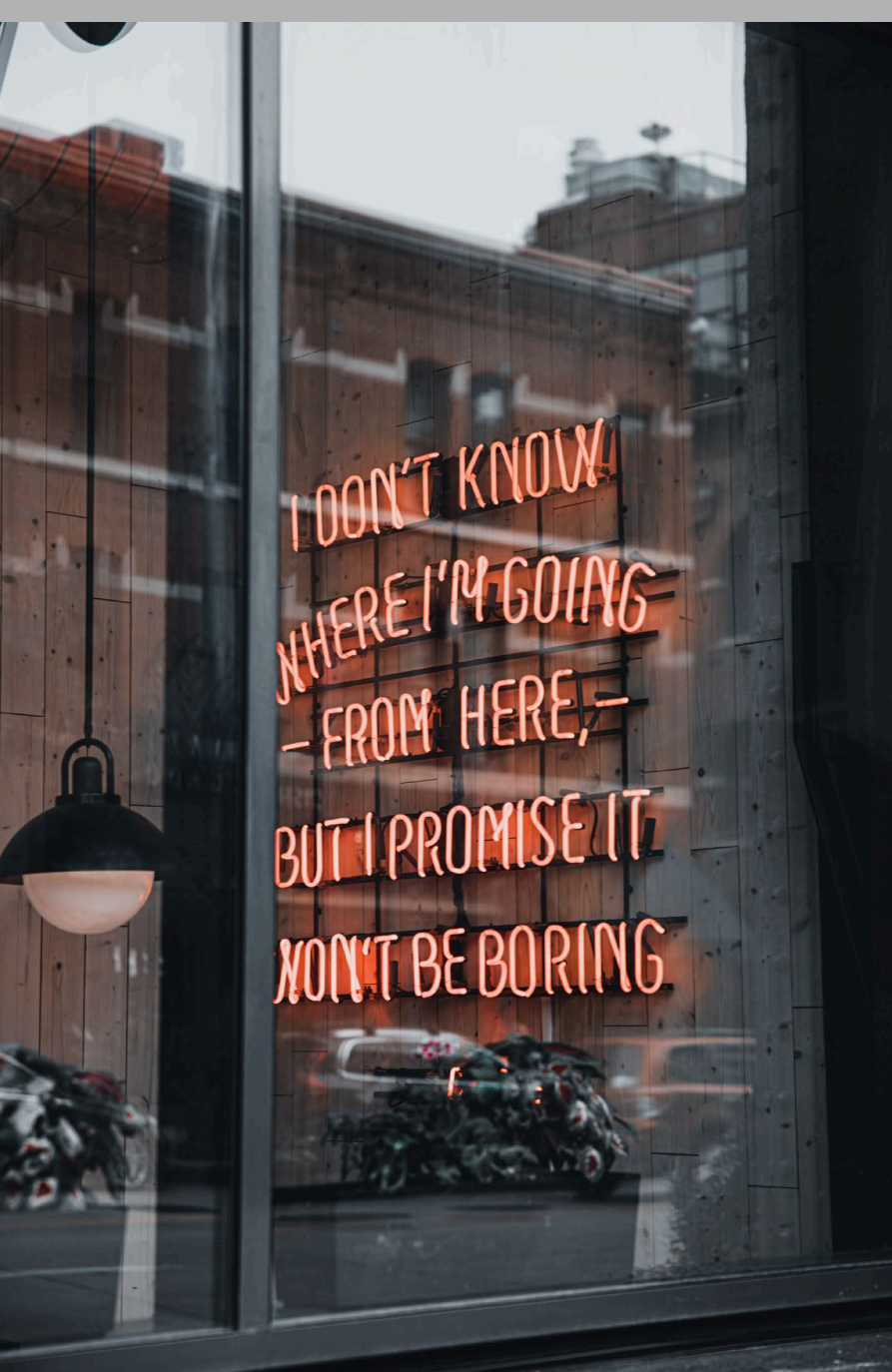


TRANSFORMING
LIVES THROUGH
JUSTICE



**With the unpredictable future
in store...how can we
confidently lead without the
constantly being-in-fear mode?**





**It's not about
making the
right
decisions...**


**it's about
making
decisions
right.**



POLL 6





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Thank you!

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