Strategic Planning: Search for Common Ground

2012 California Hospital Volunteer Leadership Conference

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Our focus today ...

- What’s strategic planning? What is in it for you & our organization to do it?
- What’s the process? What different approaches might you take?
- Challenges & tips for addressing them
- Resources, templates & other assistance
- What else?
Strategic

- Looking broadly, with a wide-angle lens @ the environment to see what’s goin’ on!
- Looking long-term, projecting forward into the future to anticipate what will be happening & what you will do -- typically in 3 - 5 yrs.
- Strategic planning is a dynamic process to help your volunteer organization do a better job … by creating commitment among your stakeholders to priorities & goals that align w/your vision and this in a healthcare environment that is transforming
Why bother?

- What’s in it for your voluntary organization to take this on?
- What’s in it for your health system?
- What’s in it for the patients & community?
- What’s the cost for not doing it?
The Basic Process

- Where are you now? What’s going on?
- What do you want to do? What is your *inspiring* picture of success?
- More specifically … Where are you headed? What is your destination?
- How are you going to get there & what is your route?
- What are the steps to get there?
- What resources do you need?
- *And oh, by the way …* who’s doing it?
- How long will it take? When will you arrive?
In other words …

1. Identify your purpose or mission
2. Take stock of where you are now
3. Identify your vision & areas of focus
4. Look widely & into the future -- S.W.O.T.?
5. Define priority areas & goals within each
6. Create measurable objectives with due date
7. Add action steps, resources required, person responsible
8. Implement
High-level S.W.O.T. Analysis

**Strengths (internal)**
- Image/reputation
- Legacy
- Volunteer passion & commitment
- Diverse membership, especially among youth
- Growth
- Creativity
- Innovation
- Teamwork
- Youth participation (20% membership)
- Hospital staff support of Auxiliary

**Weaknesses (internal)**
- Communication between Auxiliary Chairs
- Challenge of creating meaningful volunteer jobs
- People’s resistance to change
- Aging membership
- Retention of volunteers
- Challenge developing leadership
- Continuity of leadership/Succession planning
- Leadership “recycling”
- Inconsistent training
- Internal marketing (uneven internal support)
S.W.O.T. Analysis (cont.)

**Opportunities (external)**
- Ability/demand to expand services
- Ability/capacity to support hospital outreach
- New CEO
- Ability to link diversity of Auxiliary w/same gps in community to grow Auxiliary
- Potential for fundraising
- Expand “reach” to community through social networking
- Resources in business community

**Threats (external)**
- New CEO’s goals
- Diminished visibility of Auxiliary
- Communication btwn volunteers & hospital staff
- Demographic diversity
- Health Reform Act impacting $ from hospital, admin. asst.
- Alternative volunteer opportunities in the community
Recruitment

1. Recruit a diverse group of volunteers (age, ethnicity/culture, languages, skill sets)
2. Identify & address barriers to recruitment
3. Meet the hospital’s service area needs for volunteers
4. Match volunteer roles with volunteers’ ideal or preferred roles!
Recruit a Diverse Group of Volunteers

Objective 1: Create data profile (age, ethnicity, language, skill sets, date joined auxiliary, etc.) for volunteers by 7.12

Objective 2: Develop 5-yr plan for recruitment with targets for age, ethnicity by 10.12

Objective 3: Using 5-yr plan as a reference, initiate recruitment of additional Chinese community members Q1, 2013

Objective 4: Using 5-yr plan as a reference, initiate recruitment of So. Asian community members by Q3, 2013

Objective 5: Starting Q1 2014, expand # of youth volunteers 20% by the end of Q3, 2015

Objective 6: Partner with local businesses to enlist volunteers with business skills to support auxiliary by Q4, 2015
Goal: Assure the fiscal strength & stability of the Auxiliary …

**Strategies**
- Develop a clear picture of short & long-term revenue & spending needs for mission success
- Increase individual giving support

**Objectives**
- Create a model including revenue by funding source & expenses to update annual & 5-year projections
- Create annual fundraising/marketing plan to include annual fundraising goals starting in 2012
- Institute ongoing cultivation & solicitation programs for major donors, involving the President & members of the Board in 2012
Another format …

<table>
<thead>
<tr>
<th>Goals</th>
<th>Year 1</th>
<th>Year 3</th>
<th>Year 5</th>
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<tbody>
<tr>
<td>Recruitment</td>
<td>- Create &amp; implement 1-yr &amp; 5-yr recruitment plans</td>
<td>- Recruit 375 volunteer applicants by 6.14</td>
<td>- Recruit 400 volunteer applicants by 6.16</td>
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<td></td>
<td>- Recruit 350 volunteer applicants by 6.12</td>
<td>- Implement system for interactive online volunteer application through AMH website</td>
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<td>- Demographically profile volunteers annually</td>
<td>- Complete implementation of computerized volunteer applicant system</td>
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<td></td>
<td>- Research online volunteer application system through AMH website</td>
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<td>- Research computerized volunteer applicant tracking system</td>
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From Bold Vision to Pragmatic 5-Year Plan – Recruitment

**Recruitment Vision**
- Make volunteering @ El Camino Hospital Auxiliary the “primo” volunteer opportunity in the Silicon Valley
- Create *thrilling* volunteer opportunities that attract top notch volunteers
- Recruit volunteers from a variety of age groups, cultures & language backgrounds – especially those which meet the needs of El Camino Hospital’s patients
- Identify barriers to recruitment & successfully address them
- Increase # volunteers to meet hospital service requests for evenings & week-ends
- Increase # of volunteers 35 – 55 yrs. old
- Expand the # & variety of recruitment strategies
- Recruit volunteers from local businesses providing business expertise the auxiliary for routine needs & special projects
- Expand the youth volunteer program, doubling in size from 200 to 400

**Goals:**
Recruit diverse group of volunteers (age, ethnicity/culture, languages, skill sets)
Identify & address barriers to recruitment
Meet service area needs for volunteers
Match volunteer roles w/volunteers’ ideal or preferred roles!

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<tr>
<th>Goals</th>
<th>Objectives</th>
<th>Action Steps/Due Date</th>
<th>Year</th>
<th>Lead</th>
<th>Resources</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Recruit diverse gp of volunteers (age, ethnicity/culture, languages, skill sets)</td>
<td>- Create data profile for all volunteers (age, ethnicity/culture, languages, skill sets) by July 2012</td>
<td>- Create/expand recruitment committee/5.12&lt;br&gt;- Create database doc/5.12&lt;br&gt;- Enter data on record/5.12&lt;br&gt;- Survey volunteers for data/5.12&lt;br&gt;- Enter additional data/6.12</td>
<td>2012</td>
<td>Linda? Chuck?</td>
<td>Recruitment Committee; Marketing Dept.; assistance w/data Mgmt (Darren?); Aux. Admin. Asst.</td>
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<td>- Develop 5-yr plan for recruitment w/targets for age, ethnicity, etc. by Oct. 2012 (include strategies &amp; budget)</td>
<td>2012</td>
<td>Linda? Judy?</td>
<td>Recruitment Committee; Service Area Chairs + Mgrs; Anne K.; Wendy G.</td>
</tr>
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Tips

- It will be a road with curves, blind spots & surprises
- Tailor the process to you & your organization
- Identify your strengths & use them to your advantage
- Identify potential collaborators
- Be mindful of the organization within which you work -- culture, your partners’ challenges
- Get a sponsor!
- Set yourselves up for success with small wins early on
- Make it interesting. Make it FUN!
- *(Remember why you are doing it)*
Challenges

- Thinking strategically
- Implementing a long-term plan … continuity & complexity
- Changing leadership: loss of continuity, history, relationships
- “You don’t know what you don’t know: inexperience with strategic planning
- Adding more to a “full plate”
- Competition for people’s volunteer time & $
- Getting & keeping the “buy-in” from volunteers & partners
- Securing budget & other resources to implement the plan
Resources

- Network within CAHHS, with other nonprofits
  Talk with them! Ask for a copy of their plan.

- Printed resources:
  - Strategic Planning for Nonprofit Organizations: A Practical Guide & Workbook, Michael Allison & Jude Kaye (Consulting Group, Support Center for Nonprofit Management)
  - Strategic Management for Voluntary Nonprofit Organizations, Roger Courtney
  - From the Top Down: The Executive Role in Volunteer Program Success, Susan J. Ellis (Appendix B)
Resources (cont.)

- **Associations/Websites:**
  - Energ!ze Inc., [www.energizeinc.com](http://www.energizeinc.com) (Susan J. Ellis)
    - Especially for leaders of volunteers
  - Asso. for Research on Nonprofit Organizations & Voluntary Action (ARNOVA), [www.arnova.org](http://www.arnova.org)
    - An international membership organization dedicated to fostering through research an understanding of the nonprofit sector, philanthropy and volunteerism
  - Corporation for National & Community Service [www.nationalservice.gov](http://www.nationalservice.gov)
    - Federal agency that helps your organization implement those projects or ideas that require special funding or assistance
  - Work with a consultant! :-)

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