

Strategic and Operational Planning

Tim Deutch, Senior Performance Consultant
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Our goal... Help organizations examine and adjust their business models and create the alignment and approaches that help them better fulfill their missions.

Our philosophy... We recognize that non-profits are challenged to run like a business and yet honor the varied interests of priority stakeholders and leaders. We believe that to evolve and grow, our clients must be willing to chart new direction and adapt their operating paradigms and practices to ensure success.

Our focus... We emphasize a unique balance of vision, strategy, and pragmatic execution. We know non-profits must 'fix the plane and fly it at the same time', so the intended outcome of our work is to equip our clients to understand and articulate their evolved direction and to know and embrace the requirements of successful execution. For this reason we steward both the strategic creative process and the initial operating plan so that clients can get started immediately.



Core Competencies and Services

Knowledge and Experience: Grounded in 30 years of active non-profit leadership, we understand the often complex stakeholder dynamics and the requirements of creating change within them.

Process Development: A single process does not work for all. We are skilled at understanding core issues, and creating a process that ensures the buy-in of key stakeholders, informed decision making, and timely follow-up to ensure strong execution.

Innovation: We boldly urge organizations to address the paradigms that keep them from growing, and help them manage risk as they make challenging decisions.

Artful Facilitation: Our retreat, committee, and one-on-one engagement keep the process moving and commitment growing. Our approach ensures all voices are heard and consensus formed toward meaningful change.

Communication: We provide formal reports of strategic development and operational imperatives to ensure all are aware of progress and potential implications, and a final plan document at the conclusion that contains 1st year execution benchmarks and requirements.

Now Scheduling for 2022 AND 2023?

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“ We hired Tim to help with our strategic planning, starting with an initial step with our Leadership Team to discuss high-level strategic and paradigm shifts, and then as a guide to our strategic planning process and Committee. Tim’s approach reminds us that a 3rd-party thinker and guide can be essential to evolving. He knows our work yet his experience with many different non-profits makes him a highly credible resource and partner. Personally, he asks the tough questions of us when needed and yet keeps the trust of leaders through challenging conversations. He helps you establish common ground among staff and volunteer leaders, and to identify and manage the implications and stakeholder concerns natural to evolving organizations. We look forward to keeping Tim close to us as we evolve.”

DREW LANGLOH
President & CEO of United Way of
Central Alabama

Enhancing Human Performance to Drive
Business Results™



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Addressing Commonly Asked Questions

What is Our approach?

We understand that every organization has unique circumstances and constituencies, so we do not advocate a single stock approach to the strategic planning process. Our engagement generally consists of the following five phases:

Assess

- Fully understand the client situation and objectives
- Interview varied stakeholders to affirm interests
- Interview staff to assess operational state-of-being

Design

- Determine the best process for your situation
- Ensure environmental scan is in place
- Ensure heavy stakeholder input throughout

Implement

- Balance facilitated insights with operational implications
- Communicate progress to all stakeholders
- Address challenges and barriers to buy-in

Finalize

- Obtain Board approval and confirm stakeholder buy-in
- Design high-level or detailed operational imperatives
- Begin operational phase

Execute

- Establish 1st year deliverables plan; multi-year plan available, if desired
- Provide training and reinforcement of skills needed to succeed
- Provide on and off-site check-in's with all relevant stakeholders

Is it better to enlist a local or outside organization?


This is an important question and your supporters and co-workers will have varied opinions. There are many factors that go into this decision and at times we have encouraged organizations to use a local facilitator after understanding their needs and situation. In order to make the best decision, organizations should first answer the following as best you can.

- To what degree is our vision for our future different than today's?
- What level of change is needed to attain this vision?
- What type of expertise do we need most at this time?
- What will ensure a trusted and credible process and result?

When is the time to think these questions through?
If you are reading this document, the time is now!

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 *United Way of the Southern Tier has engaged the services of the Strategic Enhancement Group in areas of utmost importance to the success of our mission, including the implementation of our completed strategic plan. If subject matter expertise is what you're looking for Strategic Enhancement Group delivers."*

STEPHEN M. HUGHES

President & CEO of United Way of the Southern Tier

15 years of Strategic & Operational Guidance: United Way Sampling

Major Markets: Birmingham, Boston, Chicago, Memphis, Vancouver

Mid Markets: South Hampton Roads VA, Grand Rapids MI, Halifax Nova Scotia

Small Markets: Corning NY, Lane County OR, Fort Wayne IN, Sudbury Ontario, Linn/Benton/Lincoln Counties OR

15 years of Interpersonal and Leadership Skill Development: United Way Sampling

Major Markets: Seattle, Los Angeles, Atlanta, Boston, Chicago, Memphis, Toronto, San Antonio, Jacksonville FL

Mid Markets: South Hampton Roads VA, Grand Rapids MI, Peel Region Ontario, Hamilton Ontario, Spokane WA

Small Markets: Lane County OR, Huntsville AL



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