Nonprofit Execs Talk About Strategic Assessment

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Session Hashtag: #17NTCassessment
Session Evaluation: http://nten.org/17ntc-evals/

Session Materials & Additional Resources
- Slide Deck

http://www.slideshare.net/MarkLJonesCAE/association-execs-talk-strategic-assessments

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Collaborative Notes

Strategic assessment about evaluating your processes and business roles. Looking at culture, effectiveness and efficiency.

"Stop putting bandaids on things and fix them!"
"Silo destroyer!"

Things to think about as org and tech change rapidly
Evaluating processes, business rules, systems, things in place in the org

- Pain in the posterior: "There's got to be a better way"
- Chills: Do you get the willies just thinking about your data? Duplicate records, incomplete profiles. Data you can't trust.
- Dry, cracked lips: Do you feel you're constantly talk, talk, talking about improvements and the needs of your organization, but your Board doesn't seem to hear?
- Muscle stiffness: "We've always done it that way"
- Insomnia: Tackling decisions about your AMS keep you up at night?

Broken systems, 3 pieces of tech that don't talk to each other
Workarounds created
People got used to working with the bandaids

"Silo destroyer"
Silos exist because of a failure to see the whole
Silos exist because nobody is looking at the whole.
Culture issue: When you have bad processes built into a system, the people who enable those bad processes become the culture driver within the org. In fact they're the only ones who can get something done

People who enable the bad processes drive the culture.
Need someone on the inside to tear things down.

Need to think how we can evolve with technology, how can we employ new technologies to do things better.
Keeping pace with technology - are we thinking what we *could* do with technology.
Assessment makes you face the reality that you've been shielding yourself from. Like a 360 evaluation. And uncomfortable but so helpful information. So worth it.

Staff anxious about looking at systems: If we remove the bandaids everything is gonna bleed out. People are afraid of removing the bandaids, and bleeding out and everything going to hell.

Examples of failures to keep up with technology
Everyone aligned with mission. No one asking how we can do this better
"We've always done it this way, therefore we need a new machine to help us do it this way"
"If we spend X amount, it will make up value in 8 months in staff time saved"

So content with where we were and not looking at what we needed
360 assessment like dress shopping, sometimes you see something you don't wanna see

Staff became guarded, "don't disrupt what I'm doing"

Check comes in, what's its path? 14 times touched it along the way. FOURTEEN
Had to have an external push to make changes

Consultant comes in, Director excuses herself
Team was so ready to talk, to have someone listen
They are so invested, they want to help the member

Prep work: document how long certain things take

Here's the benefit you got out of this, quantified monetarily
Senior leadership part of process. They needed to hear the pain points, how bad affecting team

Editing rights to key central database, only one person had it
Every change had to go through one unrelated person
People were just ok with that

Need to deal with potential Ignorant and apathetic staff (I don't know and I don't care)

For those working in the trenches, we need to be proscriptive in looking at problems and not just descriptive of problem.

Get collaborative and see what new technology offer out of the box (to avoid costly configurations)

To what degree are people working around the existing systems?
How are staff expectations going to change?

What would you say to someone who says we can't spend the time on that?
"You can't afford NOT to!"
Staff Morale and institutional wellness

Stop everything for a day (ordered from top management), have face to face and develop strategy

Internalize the lived experience of staff, put in format that change agents and decision makers can understand

Go back to staff at multiple points and ask if the consultants got it right. Often assessment collects staff information then presented at a senior level which then takes on a life of its own. Keep ground-truthing with staff involved throughout process.

Most of this is about people and process, not technology

6 Signs your Organization Needs a Check Up:
      1.You don't have time to work on your strategic goals.
      2.You're frustrated with your computer system.
      3. Department silos keep you from getting it done.
      4.You need to streamline processes.

5. You want to change staff culture.
6. You think a third party opinion will make a difference.

RESOURCES

Forbes: The Silo Mentality: How To Break Down The Barriers (oct 2, 2013)

https://www.forbes.com/sites/brentgleeson/2013/10/02/the-silo-mentality-how-to-break-down-the-barriers/#73eabd298c7e

Harvard business review: Smart Collaboration: Breaking Down Silos (Oct 19, 2016)

https://hbr.org/webinar/2016/09/smart-collaboration-breaking-down-silos

Tweets from @steveheye
My favorite thoughts
- we aren't getting things done, so let's just work harder & longer! Yep, that will fix it. not.
- our staff have been here a long time ="institutional knowledge"... Otherwise known as, "we are set in in our ways."
- we've always done it that way & now we need a better system to keep doing it the same way. not.

Reasons to do an assessment
- how do you move from being band-aid applier to silo destroyer? A strategic assessment may help.
- often staff want to make real change but are so buried in what they do that they just can't change
- we're getting by & things are fine, why change? That is actually the easiest time to improve, rather than after a crisis
- we don't like assessments, just like we don't like looking in a mirror.
- we all think we want an assessment, but we fear or don't want to face the results or make the hard changes

During an assessment
- a HUGE outcome of assessments is the conversation that happens during Discovery. Let's make our org GREAT AGAIN!
- your staff wants to be heard & provide strategic input. An assessment gives them that chance.
- a solid strategic assessment can take 2 weeks, 8 hours a day, to give each dept-staff time to talk=an investment
- scale the time/scope of a strategic assessment to match your org size, culture, needs, etc. Not one size fits all
- during an assessment, you will find things that you didn't even know your org or staff

does.
- an assessment is only as good as the changes & actions you take based on it.
- staff can't think past what they do today. just saying think outside the box doesn't help. Lead them with questions.
- Avoid having managers in room while staff provide their insight in an assessment, it will be more direct & honest

After the assessment
- if your system doesn't work the way you want, ask yourself should I change how I work?
- assessment is done, review results w/team. What is important to change, can be changed & celebrate what you change
- create a budget for change based on the assessment & set aside time to make the changes or just don't bother
- NOT everything from an assessment has to go through your board, just make the operational changes needed.
- Peeling back the layers of the onion to see how bad we actually smell... Reasons to do strategic assessment
- helps to take the time to have staff review the assessment report to verify it is what they meant.

Find all of the 2017 NTC collaborative notes here: http://bit.ly/17ntcnotes