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Rollins College

Experience Excellence

VALUE VS. MISSIONS BASED STRATEGIC PLANNING *AN ALTERNATIVE APPROACH*

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Edyth Bush Institute for Philanthropy & Nonprofit Leadership

ABOUT ME



- Leads custom programs, serving the southeast region
- Instructor with primary expertise in nonprofit startups, board governance and strategic planning
- Co-director of the Nonprofit / MBA Board Program
- Eight years of executive leadership experience



AND the Philanthropy & Nonprofit Leadership Center

Decades *OF* Partnership

Since the Foundation's inception, we have allocated resources toward the education and advancement of the non-profit community.

The organization became known as the **Edyth Bush Charitable Foundation Non-Profit Advisory Service** with offices on the second floor of the Edyth Bush Charitable Foundation offices on Welbourne Avenue in Winter Park.

The organization spun off as an independent non-profit.



The Philanthropy & Nonprofit Leadership Center was rededicated as:



1970

1980

1990

2000

2010

David R. Roberts and H. Clifford Lee, the first two presidents of the Edyth Bush Charitable Foundation provided reference materials and mentoring to members of the non-profit sectors on the best ways to access funds from corporations, individuals and foundations.

Roberts and Lee hosted seminars and invited outside speakers, such as various Foundation leaders, consultants and professors from Rollins College, to provide local non-profits with management education and training.

Leadership wanted to attach the CNPM to a larger institution. Rollins College Crummer Graduate School of Business was found to be the perfect fit and the **Philanthropy & Nonprofit Leadership Center** was established.

*FUNDAMENTAL VALUES ARE BUILT ON STRONG
FOUNDATIONS. **YOU** BECOME GREAT WHEN
THESE VALUES TAKE ROOT AND FLOURISH*

COMPASSION

INNOVATION

INTEGRITY

RACIAL EQUITY

SOCIAL JUSTICE

TRUSTED RELATIONSHIPS

AMBASSADORS TO THE COMMUNITY

“The Board of Directors play a critical role in creating an organization that prioritizes, supports and invests in diversity, inclusion and equity.”

~ BoardSource

LEARNING OBJECTIVES

- I. Global Pandemic Impact on the nonprofit sector
- II. Consider your value proposition
- III. Strategic planning model reflecting organizational values
 - I. Edyth Bush Institute reasons for success





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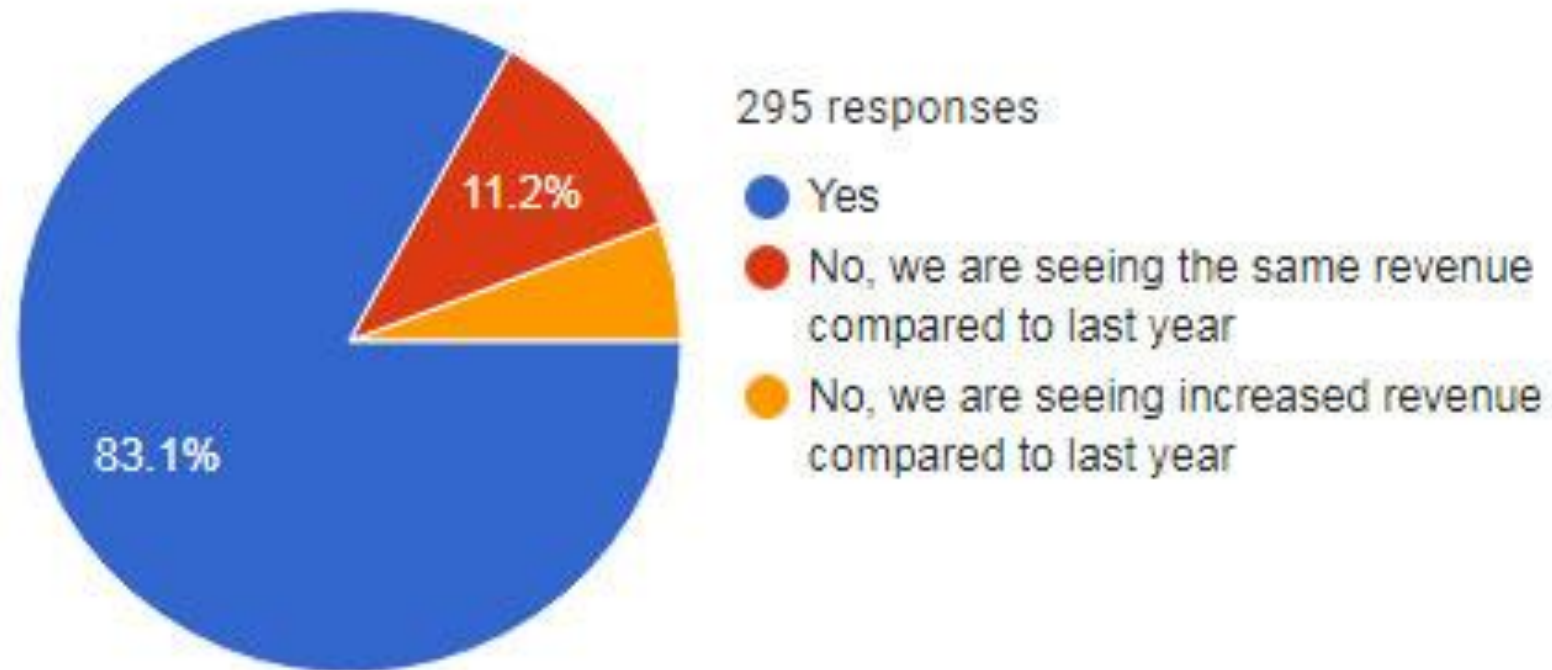
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GLOBAL PANDEMIC IMPACT ON THE NONPROFIT SECTOR

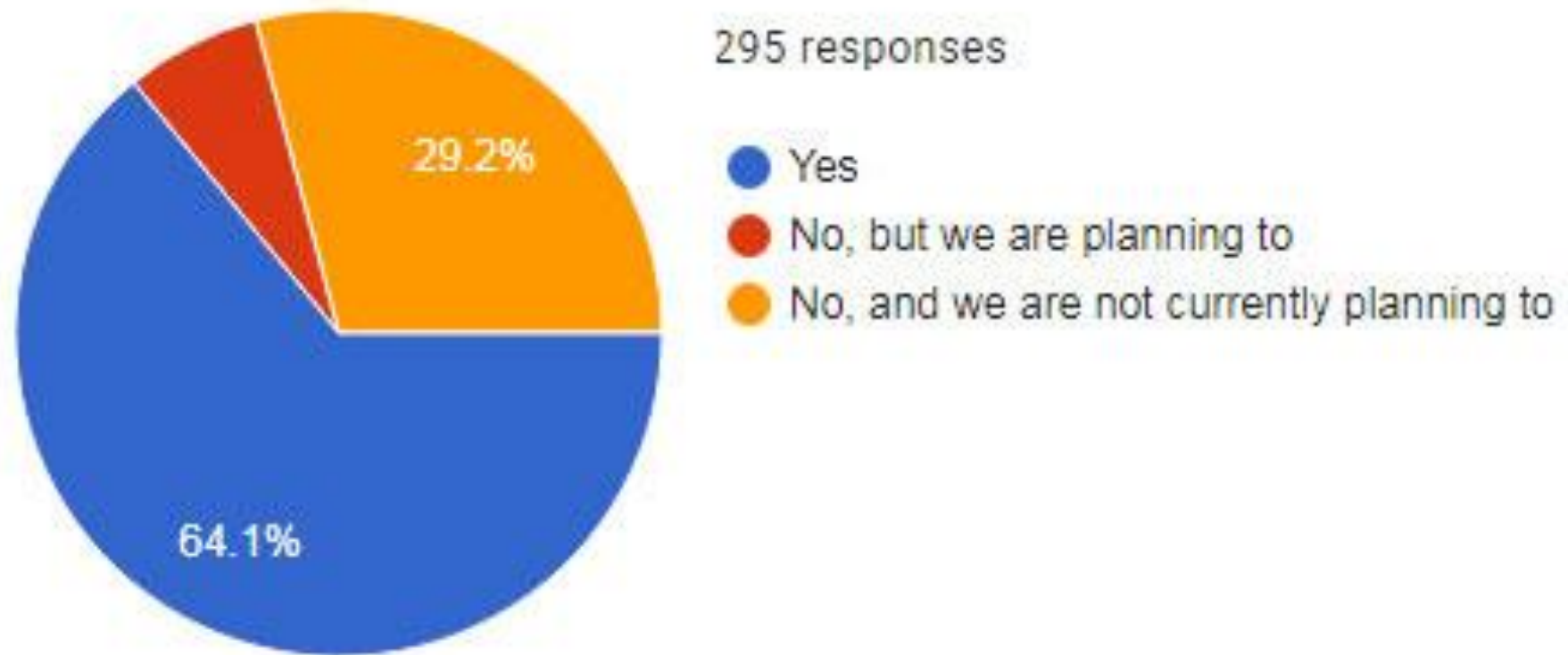
FINANCE...

Has your organization suffered financially due to the pandemic/economic shutdown?



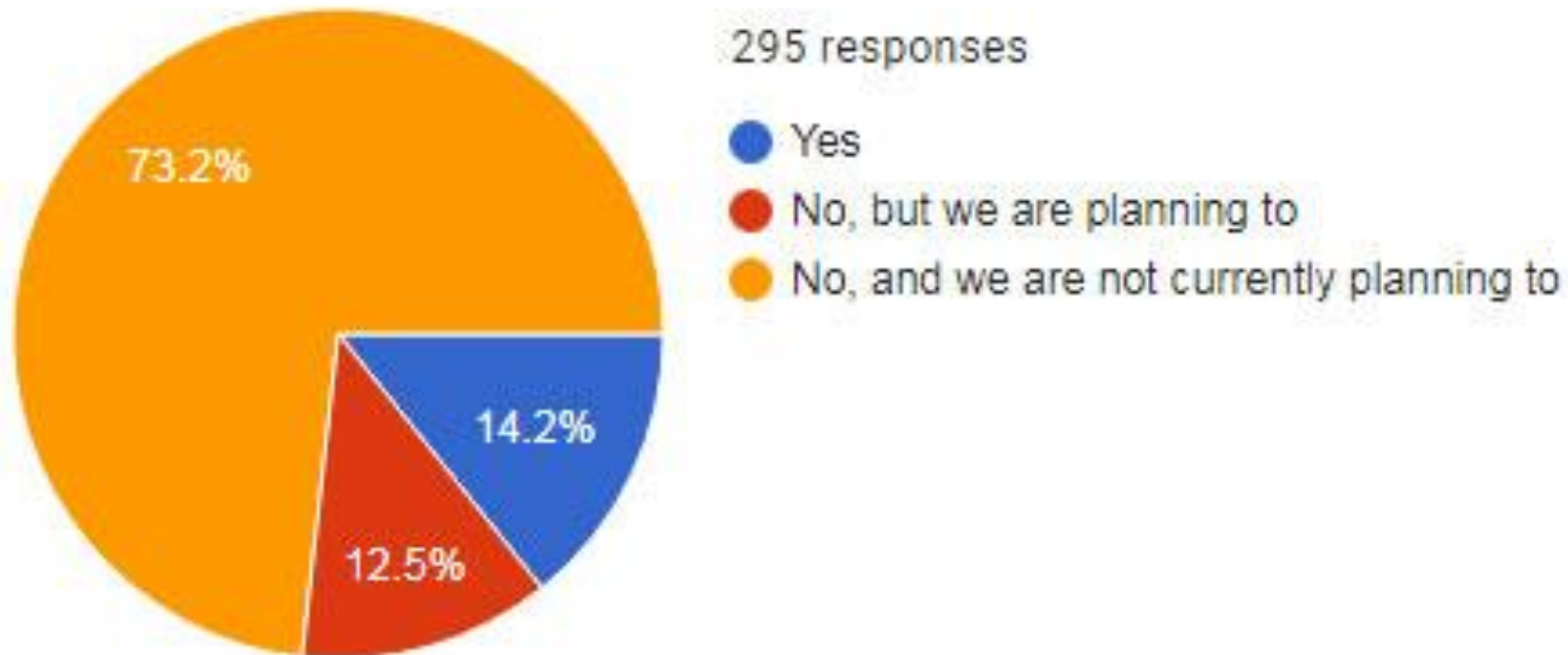
PROGRAMS...

Has your organization cut back on program services due to the pandemic/economic shutdown?



STAFFING...

Has your organization had to layoff staff due to the pandemic/economic shutdown?



An aerial photograph of the Rollins College campus, featuring a large lake, green lawns, and several buildings with red-tiled roofs. The sky is blue with some light clouds.

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CONSIDER YOUR
VALUE PROPOSITION

‘The purpose of life is to give it away.’

~ Pablo Picasso



VALUE PROPOSITION

As society shifts - economically, socially, physically -
how will you make a difference?

Why will investors steer their dollars to you?



VALUE PROPOSITION

The core of your future!

Accountability

Adaptability

Competitiveness



VALUES ARE MISSION FOCUSED

Values keep employees, volunteers, donors, community stakeholders and more focused on the mission



VALUES STRENGTHEN IMPACT

- Consider collective impact initiatives
- Define how your work impacts:
 - education
 - populations with lower income
 - Individuals with disabilities
- Advocate for your cause



VALUES SOLVE SOCIAL PROBLEMS

Values are the basis to expand
your **IMPACT** and **REACH** to
solve social problems!



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STRATEGIC PLANNING MODEL

REFLECTING ORGANIZATIONAL VALUES

TYPICAL STRATEGIC PLANNING



AN EYE TOWARDS 2021...

- Identify your strengths and obstacles
- Prepare to grow in a new economy
- Plan to attract new attract investors



VALUES BASED STRATEGY

- Re-imagine how you drive impact
- Think short-term solutions
- Drive collaboration
- Be part of social change



SUM IT UP...GET STARTED!

- Analyze internal operation
Cash flow ~ donor development ~ programs ~ staffing
- Consider your mission and relationship to community
Values ~ impact ~ local economy ~ resources
- Plan (Strategy and Budget) for a new era with a condensed outlook
Align overall goals and operations with values
Create desired outcomes that drive impact
Accountability and speed key to success

SUM IT UP...GET STARTED!

- Consider your values relative to the post-pandemic era
- Create short(er) term goals
- Create measurements that reflect short-term success
- Engage staff, volunteers and donors

An aerial photograph of the Rollins College campus, featuring a large white church with a tall steeple, surrounded by green lawns and trees. In the background, a large lake is visible with several sailboats, and a city skyline can be seen on the horizon under a clear blue sky.

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EDYTH BUSH INSTITUTE

REASONS FOR SUCCESS

EBI CASE STUDY - MEETING OUR CUSTOMERS



CUSTOMER PROFILE



Individual Professional
Development

Organizational Capacity
Building

CUSTOMER NEED



Certificates
Workshop Journey
Management Assistance
Networking
Panel Discussions
Affinity Groups



Board Training
Strategic Plan Engagement
Fundraising Plan Engagement
Thought Leader Presentation
Customized Open Enrollment Programs

CUSTOMER ENTRY POINTS

Affinity Groups

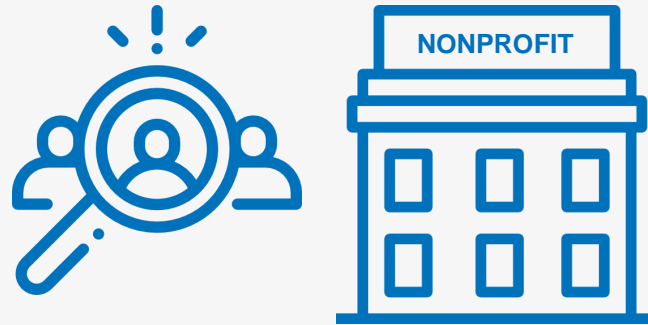
Open Enrollment Program

Only MSO in Central Florida

Memberships

Donor's Forum

Word of Mouth



Rollins College

Custom Programs

Nonprofit Consultants

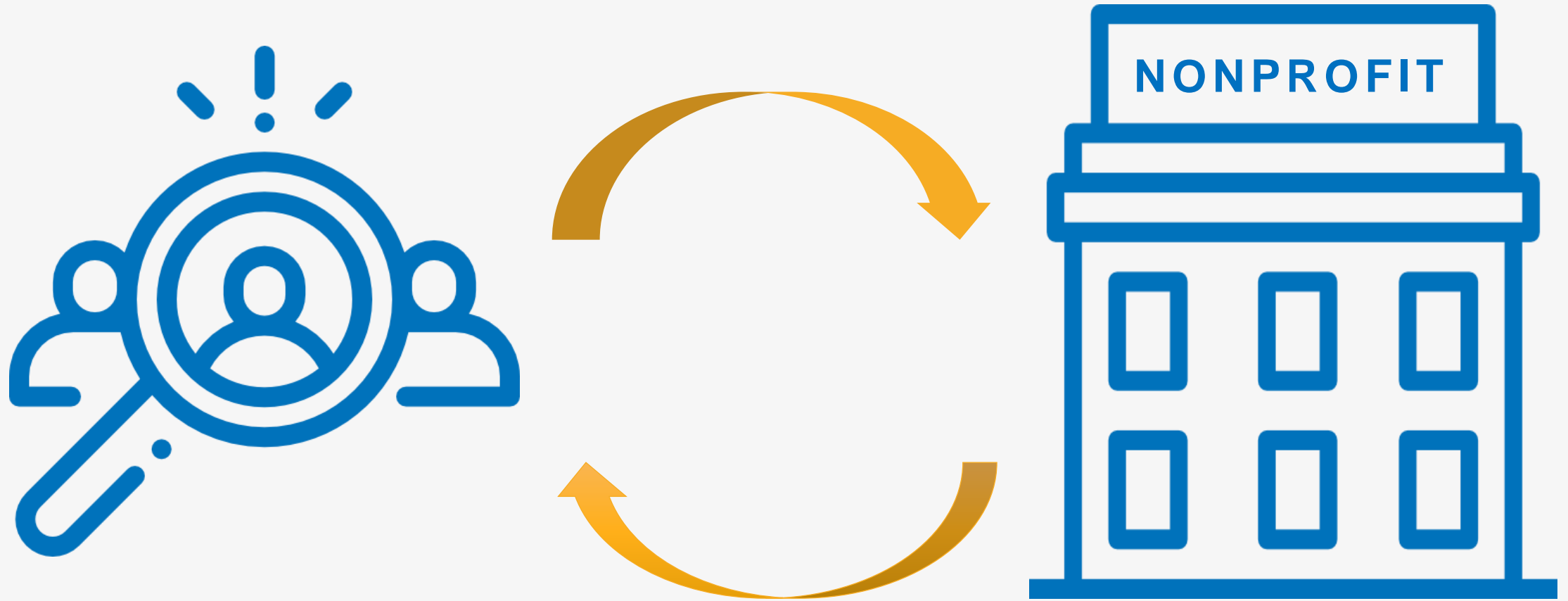
Collaborative Organizations

Web & Social Media

Community Convenings

Special Programing

INDIVIDUALS AND ORGANIZATIONS – A WIN, WIN



REASONS FOR SUCCESS

Education, Training and Management Assistance

Values based engagement promoting nonprofit excellence

Trusted Resource

Rollins College

Quality Training

Nonprofit Practitioners



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