Welcome to the Webinar

We will begin at 10:00am (PT)

A recording will be available after the webinar. Your line will be muted to cut down on background interference so please use the chat box to share your name, your organization, your location and any questions you have for our featured speakers.
Navigating Fund Development Strategies during Transition

Wednesday, February 17, 2016

This project was supported by Grant No. 2011-TA-AX-K066, awarded by the Office on Violence Against Women, U.S. Department of Justice. The opinions, findings, conclusions, and recommendations expressed in this publication/program/exhibition are those of the author(s) and do not necessarily reflect the views of the Department of Justice, Office on Violence Against Women.
Presenters

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Chief Executive Officer,
Break the Cycle

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Executive Director,
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Objectives

As a result of this webinar, participants will be better able to:

1. Identify major organizational transitions and the stages of processing such a significant change.

2. Develop funding and leadership strategies for coping with and preparing for major transitions.
Poll question #1

What type of organization are you representing?

a. DV service provider/advocacy
b. Legal advocacy
c. SA service provider/advocacy
d. Community-based organization
e. Other: please state
The Transition Curve

**Change**

**Transitions**

**Neutral Zone**

- Frustrated
- Productivity reduced
- Support overwhelmed
- Priorities set
- Contributions recognized
- Commitments recognized
- Support meet with individuals
- Products proactive
- Explore options participative
- Involved clear focus & plan
- Team focused

**Letting Go**

- Listen
- Reinforce suggestions
- Acknowledge
- Encourage
- Support
- Provide information
- Specify activities
- Focus on priorities
- Follow-up

**Endings**

- Give space
- Give information
- Clarify role
- Allow time

**Beginnings**

- Look forward
- Mission established
- Norms established
- Commit to the new

**Attitude Shift**
Causes of Major Transition

1. People (leadership change)

2. Funding (major loss or gain)

3. Changes in Philosophy (mission, vision, values)
Poll question #2

Have you ever experienced a major organizational transition at your current or previous place of employment?

a. Yes
b. No
c. I don’t know
People

1. Executive Director/leader transition

2. Board of Directors

3. Key staff with community relationships
Funding

1. Government grants
2. Foundation/Corporate priority change
3. Individual donor relationships
Change in Philosophy

1. Mission “creep”

2. Leadership change brings a different philosophy to the organization

3. New strategic plan, new focus
Pitfalls Along the Way

1. Loss of organizational values or focus on mission
2. Chasing money
3. Lack of attention to details
4. Burnout—staff, board, volunteers
A real story: Center for Survivors (Columbus, NE)

Tara Korthals, Executive Director
Action Steps

Assessment:

- Listen—to staff, volunteers, funders, partners
- Rebuild—relationships with community and partner organizations
  - Is your organization still relevant to the community?
  - What is the internal culture?
  - What needs to stop?
  - What do you need to do more of?
Action Steps

Informed implementation:

• Make decisions
  - Stop partnerships that aren’t working.
  - Build new ones.
  - Implement changes to operations, streamline and assess for value and mission

• Create new opportunities
  - Challenge grants
  - Prioritizing signature work
  - Engage new leaders
Action Steps

Leadership

• Transparency
• Taking your ego out of things
• Build partnerships on self-interest and mission
• Know your staff and their strengths
• Nurture ownership among staff
Telling Your Own Story

How to make your transition story “fundable”

• Be honest with the process
• Show your vision
• Show the changes…and what is left to change
Proactive “Prevention”

• Succession planning
• Institutionalize your organization’s core values
• Screen board members that embrace the organization’s core values
• Funding diversification
Questions and Answers

Please take a moment to take a short survey regarding today’s webinar and future webinars.

https://www.surveymonkey.com/r/NavigatingTransition