REORGANIZATION PLANNING & IMPLEMENTATION

Overview:
So, is your nonprofit organization ready for the future? Are you having a difficult time recruiting or retaining great Board members? Are your programs designed to effectively address today's issues or are they still based upon thinking from 10-15 years ago? Are you struggling to define a successful fund-development strategy? Or, worse yet, does your Mission, your nonprofit's focus, seem lifeless? More specifically, do any of these topics fit your nonprofit:

- Lack of a clear and doable business plan for the future; no clear sense of direction
- Lack of Board engagement and leadership
- Uncertain or ineffective Executive Director leadership
- Lack of clear and proper financial management tools
- Inability to properly manage multiple government funding streams
- Inability to generate unrestricted funds to ensure adequate operational functioning
- Poor program quality
- Improper and/or ineffective staff management
- A tendency to take on new programs that do not correlate to agency mission simply to generate additional funding

If the issues above are part of your organizations' reality, then it is probably time to take a hard look at your nonprofit: time to consider reorganizing your efforts.

Specifics:
JRCo tackles *Reorganization* in two phases: *Planning & Implementation*. An organization can contract with us to simply do the *Planning* or we can contract for both *Planning & Implementation.*

Phase I Planning: the planning stage has three key elements:

1. ***Organization Audit:*** a thorough review of all aspects of your organization
2. ***Strategic Plan:*** developing an 18-24 month framework through which your organization can refocus its mission and activities
3. ***Reorganization Implementation Plan***: a very precise document outlining the roles and responsibilities of Board & Staff relate to implementing the Strategic Plan

Organization Audit will include an exploration of these five core organization elements:

1. Financial assessment
2. Program assessment
3. Board of Directors/Governance assessment
4. Organizational structure assessment
5. Community positioning

1. *Financial assessment:*
   - Cash flow analysis
   - Review of current budget, past 2 years' budgets, current funding streams: to include funder relations, contract time-lines, etc.
   - Financial strengths/weaknesses of organization as a whole and per department,
   - Review of current fund development strategies
2. *Program assessment:*
   - Currently funded programs: to include outcomes
   - Review of community needs vs. current programs
   - Review of national best practices vs. current programs
3. *Board/Governance assessment:*
   - Executive Committee, other committees
   - Board recruitment protocols
   - Review of last strategic planning process
4. *Organizational structure assessment*
   - Management Team format (if any)
   - Flow chart: to include Distribution of labor
   - Personnel assessment: to include review of personnel files, job descriptions, annual performance reviews and employee workplans
5. *Community Positioning:*
   - Review of current marketing efforts,
   - Feedback on organization from selected community stakeholders
   - what is your product and/or products,
   - who are your competitors; who are your natural partners,
   - how much demand is there for your product; is the demand growing, static, shrinking, who uses your product,
   - what is the service delivery area for your product,
   - who pays for your product (the user and/or third party payors - foundations, UW, etc.,
   - why should my product and/or products remain in the community,
   - if your organization didn't exist, where would the customers go,

Business and/or Strategic Planning will include:

- Review of Mission
- Review of Organization Audit findings
- Review of Community Stakeholder feedback
- Board & Senior Staff Planning Sessions

Reorganization Implementation Plan will include:

- Clear Goals & Objectives to be accomplished
- 18-24 month Action Plan with specific activities the Board & Staff will accomplish

Phase II Implementation:
Implement the Reorganization Plan. This is a very challenging stage that requires multiple levels of communication, both internally to the Board and Staff, and, externally to the community and funders. Generally, this Phase can impact your staffing levels, programs, Executive Leadership and Board structure.

It is not uncommon for the Reorganization Implementation phase to occur at the time of an ED transition. In the interim ED/CEO section of the JRCo website, we discuss this transition time in more detail.

Fees:
The fee for *Reorganization Planning and/or Implementation* can vary widely depending upon multiple factors: size of nonprofit, range of projected issues, Board engagement, and Executive Leadership. The fee and activities will be determined in partnership with JRCo and the nonprofit leadership.

Contact:
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Selected Endorsements for *Reorganization Planning & Implementation:*

As both a professor in business and a Fellow of the American Psychological Association, I rank John at the top of his profession and would hire him again for any non-profit reorganization work.

James Campbell Quick, *College of Business, University of Texas at Arlington*

Aside from being one of the most pleasant individuals I have had the privilege to work for, John is also one of the most organized and analytical managers I have met in the last 20 years. His ability to "see the big picture" and affect the direction of an entire organization by making subtle and precise changes amazes me. John manages to organize/re-organize while making sure that the “spirit and culture" of the business he works with remain intact. *Thorsten Buescher*, *EVP IT Outsourcing, InfoTech (New York City)*

In 2010, I began working as a Teaching Artist for Dancing Classrooms. In my first year of teaching the program, our USVI site was running into some serious trouble due to a lack of sufficient funding and leadership. In the summer of 2011, John was an integral part of rescuing our site from closing, and became my mentor in assisting me to re-establish Dancing Classrooms as a successful non-profit organization in our community. *Katie Zaytoun*, *Executive Director, Dancing Classrooms Virgin Islands*

As the interim ED, John did a tremendous job of modernizing, streamlining, and reshaping Dancing Classrooms. Under his guidance, DC can now much more effectively and efficiently performs its day-to-day activities, expand its reach nationally and globally. From corporate governance to employment issues to fundraising and marketing, John spearheaded significant improvements and reinvigorated the company. Through a combination of rigorous attention to detail, improved reporting structure, transparency, communications and cost-cutting, John transformed the organization, but in a way that was sensitive to the history and artistic development of the program.

Rachel B. Coan, *Partner, Locke Lord LLP (New York City)*

When assessing the needs of our organization, John Ross made listening one of his top priorities -- not only to members of senior management, but also to middle management and their direct reports. He is an excellent meeting facilitator, adept at keeping people on topic, identifying the heart of the matter, and suggesting action steps for problem resolution. He does all of this and more with an economy of words, calling little attention to himself. Any organization would benefit from his guidance.

Alee Reed, Senior Educational Liaison, Dancing Classrooms New York City

John is the consummate professional. He is a visionary who follows through to make significant and valuable organizational change.

Jane Brooks, Co-Executive Director, Arts in Schools Collaborative, Philadelphia

During a difficult time of transition, John was able to establish new systems, maintain personnel focus, and create a balanced environment in which people flourished. He is an excellent manager, a stabilizing force, and a fair/honest human being.

Yvonne Marceau, *Artistic Director/Fund development, Dancing Classrooms New York City*