



THE ALFORD GROUP™

Tomorrow's New Normal:

Four elements of an action-forward
approach to planning

October 22, 2020



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- Strategic Planning
- Governance
- Data Analytics
- Leadership Development
- Interim Staffing
- Corporate Partnership Strategy

Webinar Logistics

- Recording
- Survey
- Listen-only mode
- To ask a question, please use the Q&A function at any time
- Join us on Twitter!

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Today's moderators



Alexis Cooke
Senior Consultant
The Alford Group



Jamie Phillippe, CFRE
Vice President
The Alford Group





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TODAY'S AGENDA

- Reflections and opportunities
- Planning to plan, by definition
- Four elements to strengthen your planning
- Panel discussion

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Reflections and opportunities

2020: A year of reality self-checks

- Coronavirus pandemic
- Racial equity and social justice
- Environmental/Natural disasters
- Forthcoming election



Planning to plan, by definition

Planning:

To arrange the parts of; devise or project the realization or achievement of; to have in mind; to make plans; to have a specified intention

- Crisis management
- Scenario
- Strategic



4

elements to strengthen
your planning



Be analytical

- ✓ Look forward and back
- ✓ Be honest about mission-centered work:
 - Relevancy
 - Impact
 - ROI
- ✓ Use data to inform and drive decisions and fundraising strategies
- ✓ Set measurable outcomes that are appropriate



Be timely

- ✓ Create a time-focused framework
- ✓ Set milestones that are adaptive and relative
- ✓ Seek goals that are aspirational and achievable
- ✓ Keep pace, build then maintain momentum



Be authentic

- ✓ Assess organization's current culture
- ✓ Recognize vision for organization's DEI journey
- ✓ Identify action steps and milestones for advancing DEI internally and externally relevant to your organization
- ✓ Incorporate into each element of your plan
- ✓ Create accountability measures
- ✓ Don't stop



Be inclusive

- ✓ Engage stakeholders and constituents:
 - Staff
 - Board
 - Donors/members
 - Community partners/members
 - Other key constituents
- ✓ Elevate and validate diverse voices
- ✓ Create and maintain buy-in for vision and plans



Panel Discussion:



Today's panelists



Felicia Davis
President & CEO
Chicago Foundation for Women



Darrin Goss
President and CEO
Coastal Community Foundation
of South Carolina



Rachel Krinsky
Executive Director
LifeWire



Michele Stauff, CFRE
Executive Director
Million Dollar Round Table
Foundation





Q & A

Thank You!

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