



How The Latitude Group Helped
FAMILY SERVICE OF THE PIEDMONT
Bring Its Strategic Plan To Life

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An Up-Close Look

How The Lattitude Group Helped a Leading Nonprofit Bring its Strategic Plan to Life

Family Service of the Piedmont is the largest private nonprofit agency in Guilford County – serving children and families through a broad range of support services, advocacy and education. With a staff of 110, multiple programs and an annual budget of \$5.7 million, the organization faces many of the same challenges as a growing business. The organization uses strategic planning as a roadmap for decision-making and as a way to engage diverse constituents in support of its mission.

The Challenge

Family Service of the Piedmont is frequently singled out as an organization others want to emulate. It is one of the largest and most successful nonprofits in the region, with programs to serve a broad range of needs – from domestic violence shelters and children’s advocacy services to consumer credit counseling.

But the breadth of the organization can be a challenge. How do you unite a diverse community of constituents behind a shared direction and unifying set of goals?

Though there was a longstanding commitment to strategic planning in the organization, executives and board members knew it was becoming more vital as the organization grew. They wanted to transform their plan into a living and breathing document that would guide the organization and inform its day-to-day decisions – turning strategy into action.

The Solution

Family Service of the Piedmont turned to The Lattitude Group to take its strategic planning to a new level. Debbie Palat took the lead and worked closely with the nonprofit and its Board of Directors to develop a roadmap that would guide their work over the next five years.

One focal point for her efforts was making certain the organization’s many stakeholders were clearly identified and had a chance to be heard. Focus group sessions were held with funders, clients, politicians and even other nonprofits that collaborate with Family Service of the Piedmont.

Palat also made certain to include all levels of Family Service of the Piedmont staffers in the strategic thinking and planning process – building a shared sense of ownership.

“The staff was involved from Day One to help us analyze the strengths, weaknesses, opportunities and threats for each of our programs and to come up with a list of hot issues we needed to address,” said Elizabeth Finch, then head of a Strategic Planning Oversight Committee for the nonprofit’s Board of Directors.

To further the planning process, interest groups were formed around each area of work – pairing members of the staff with members of the Board of Directors based on their expertise and interests. The teams worked together over a six-month period to take planning to an even deeper level.

“Every department was represented,” Finch said. “It was an invaluable process and gave those of us on the board a way to really get to know the individuals running the organization in a way we never had before. I really loved it, and it served as a great foundation for me when I later became Board Chair.”

Not only were individuals throughout the agency involved in planning, they also were involved in creating the plan itself.

“Debbie stressed the importance of us actually writing the plan instead of her doing it for us and handing us a finished product,” said Tom Campbell, president and CEO of Family Service of the Piedmont. “It was a great way at the onset to promote ownership and accountability.”

After the final plan was approved by the board and by the organization’s stakeholders, the focus turned to implementation. To ensure continuity, Palat asked the same board members and staffers who worked together during the planning process to spearhead work in each respective goal area – bringing in additional team members as needed.

“Debbie kept us focused on accountability,” Campbell said. “Each quarter we reviewed what we had accomplished over the previous three months. We talked about where we were, where we were headed and issues we had encountered along the way.”

A simple “red, yellow, green” dashboard provided a quick snapshot of progress. Green represented areas on track, while yellow indicated where the team was lagging behind the plan goal. Red was used to flag significant roadblocks needing immediate attention. “Debbie was instrumental in keeping the process moving and keeping communication alive among all the different groups involved,” Finch said.

The Results

1. Alignment behind clearly defined goals

The strategic planning process helped the nonprofit to zero in on objectives in five critical goal categories that span the breadth of the organization:

- Assure financial stability and funding development.
- Develop branding and marketing.
- Enhance staff, human resources and communication
- Strategically grow programs
- Identify and serve emerging populations (with an initial focus on Hispanic/Latino populations)

“Despite the fact that we have many divisions and programs, Debbie was able to bring us together around goal categories that were a concern for all of us,” Finch said.

2. A powerful roadmap for decision-making

Finch says the agency’s five-year plan has become an invaluable tool for decision-making. “It’s our beacon,” she said. “Every decision on every committee is made with the plan in mind.”

Campbell concurs. “We’ve had a plan for years,” he said. “But in the past it sometimes sat on a bookshelf, with certain key staff people responsible for pieces of it. Now we have a transparent working document that involves people at all levels in our organization. Our staff has become more fully engaged and is using the plan to guide all that we do.”

The plan is also dynamic and is frequently fine-tuned as conditions change. During a mid-plan review three years into the five-year planning window, Palat helped the nonprofit reexamine its plan to see if any aspects needed to evolve. “Because functional owners were tweaking it along the way, we found there was little to be refreshed or changed,” Campbell said.

3. A process for translating intentions into actions

One important aspect of the planning process was to provide Family Service of the Piedmont with a way to turn its best intentions into real action.

One example: Campbell says the organization knew it needed to offer services to the community’s emerging Latino population. With the help of strategic planning, those intentions became an actionable goal.

“We consciously decided that we needed a Spanish-speaking person in each of our divisions and budgeted for it,” Campbell said. “In many instances we needed someone who was both bilingual AND bicultural...not just an American who spoke Spanish. We wanted individuals who would be culturally accepted when they went into the community to do outreach and who could work with individuals during the intake process. We had to be very purposeful, and that was something we learned through the planning process.”

Finch says that same intentionality is reflected in the organization's new emphasis on branding, marketing and development.

"We determined that development and marketing work hand in hand," she said. "If you are good at marketing, that leads naturally to growth in development and fundraising. So we decided we really needed to be more 'out there' with advertising, billboards and talks to civic clubs. Our plan makes that clear and even spells out the specific number of new donors we want to cultivate each year through our marketing and outreach."

4. A Template for Fiscal Sustainability

As the nonprofit evaluated its programs and services, one important common thread emerged.

"We realized that part of each goal area was making certain our programs were fiscally sustainable," Campbell said. "We knew we had to define precisely what that meant."

As an outcome of those planning discussions, there now are new fiscal guidelines that help the agency establish budget priorities and determine which new services are brought into the agency.

"The plan helped us to refocus and to make smarter decisions," Campbell said. "It made us more purposeful in our approach to programming – aligning us behind initiatives that support our mission, meet a community need and are fiscally sustainable."

To Find Out More

To discuss how The Lattitude Group can help you address *your* organizational challenges, email us at debbie@tlgrp.com, call 336.337.0796 or visit www.lattitudegroup.com.

Quotes:

"Debbie was a wonderful leader who quickly came to understand our organization and where we wanted to go," says Elizabeth Finch, former board chair of Family Service of the Piedmont. "She really brought us together and helped us focus on goal categories that represented the breadth of the organization. It was a fabulous experience."

"We had an extremely positive experience, and Debbie's facilitation was critical to helping us keep things moving, says Tom Campbell, president and CEO of Family Service of the Piedmont. "She helped us focus on accountability and ensure the planning process was forefront in our minds. Over time, we've been able to take more of the responsibility on ourselves. Debbie didn't foster dependence, but helped us to grow into our own."

“Many planning efforts fall apart because an organization doesn’t leverage the energy and momentum coming out of the planning process or have the accountability needed for implementation,” says Debbie Palat of The Lattitude Group. “Family Service of the Piedmont was process-oriented and diligent. The team totally embraced the strategic plan to guide what they do. It was integrated into the board agenda and into the day-to-day workings of the organization to inform their decisions. It was and still is a picture-perfect example of the planning process.”

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The Lattitude Group specializes in strategic business planning and leadership/management development.

Since 2002, The Lattitude Group has delivered results for more than 160 clients in 20+ industries throughout the U.S. and Canada in the for-profit and nonprofit sectors.