

## CASE 20: THE PLAN, BOSS, THE PLAN

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### The Story

The Directors of a not-for-profit organization dedicated to meeting the needs of the poor and needy in a large metropolitan recently aired the following complaints at a Board meeting:

- Our Christmas campaign last year didn't bring in enough proceeds to cover the expenses of the folks we are trying to serve;
- Our volunteers don't know what to do or how to do it most of the time, resulting in old time volunteers (and some Board members) dropping out in frustration;
- The accommodation for the organization is unsafe, insecure and inadequate to the needs for clothing and food distribution;
- We are not involving local businesses enough in our fund-raising and program activities;
- We have no sense of what the priority is and everything we do from year to year appears to come along as a surprise, as if we didn't know that we have recurring goals to accomplish.

### The Intervention

This is a clear case for planning the business of the organization, with the help of a paid or volunteer facilitator. There appears to be a mistaken idea in some sectors that not-for-profit organizations don't operate like businesses and therefore can't or shouldn't be planned for. Sometimes, even spiritual values intervene in the form of "God will provide". However, no organization can thrive without a sense of organization, structure and discipline: and these features are provided by an effective Business Plan that:

- Confirms the mission and core competency of the organization to ensure clarity of service function;
- Establishes a vision for the future of the organization, so that it can bring change to itself and to those it serves;
- Identifies the roles of stakeholders, ensures a meaningful role for them and obtains their collective and individual commitment to playing those roles;
- Establishes the annual cycle of recurring events and mixes in change activity to bring about continuous improvement;
- Establishes measures of success for the organization, to provide a baseline for change.

The not-for-profit organization is not a business like any other; however it can learn from business-like processes in order to be effective and increase its range of influence.