



# Navigating Disruption: A Workshop for Nonprofit Leaders

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ROCKLAND  
TRUST

BANK

Where Each Relationship Matters®

# MARKET TRENDS



Technology Advancements



Business Models Evolving



Competition



Mergers & Affiliations



Talent Acquisition & Costs



Regulations & Funding Changes



Retirement of Executive Leaders



# STRATEGIC PLANNING

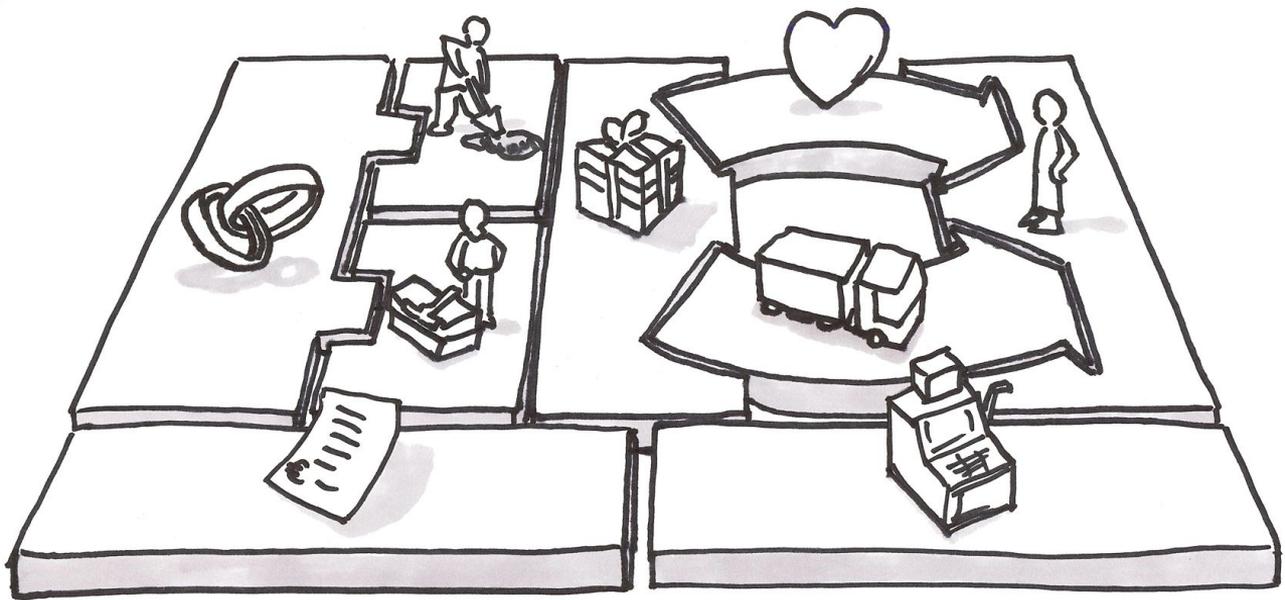
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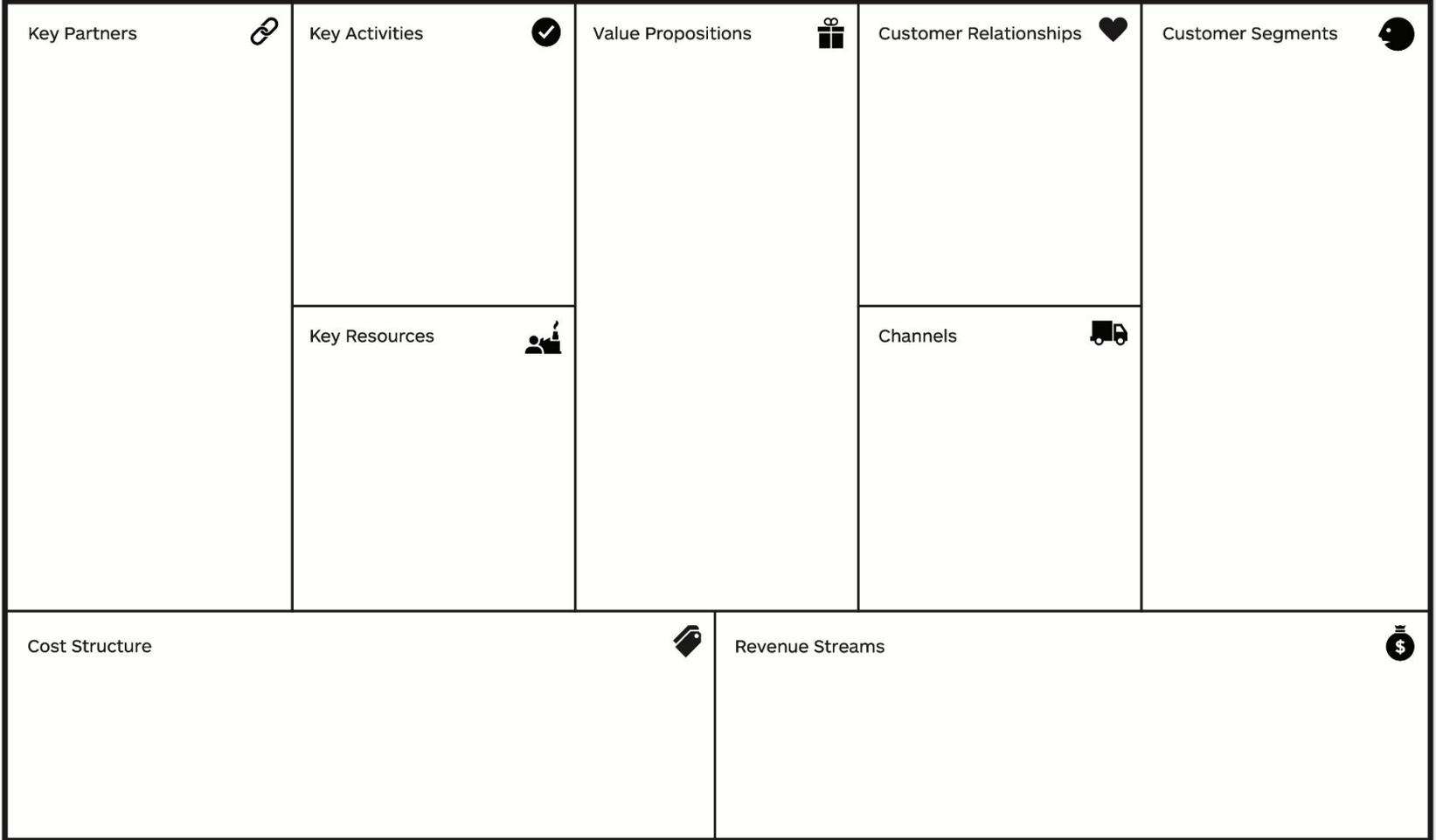




# BUSINESS MODEL DEFINED

A business model describes the rationale of how an organization creates and delivers value



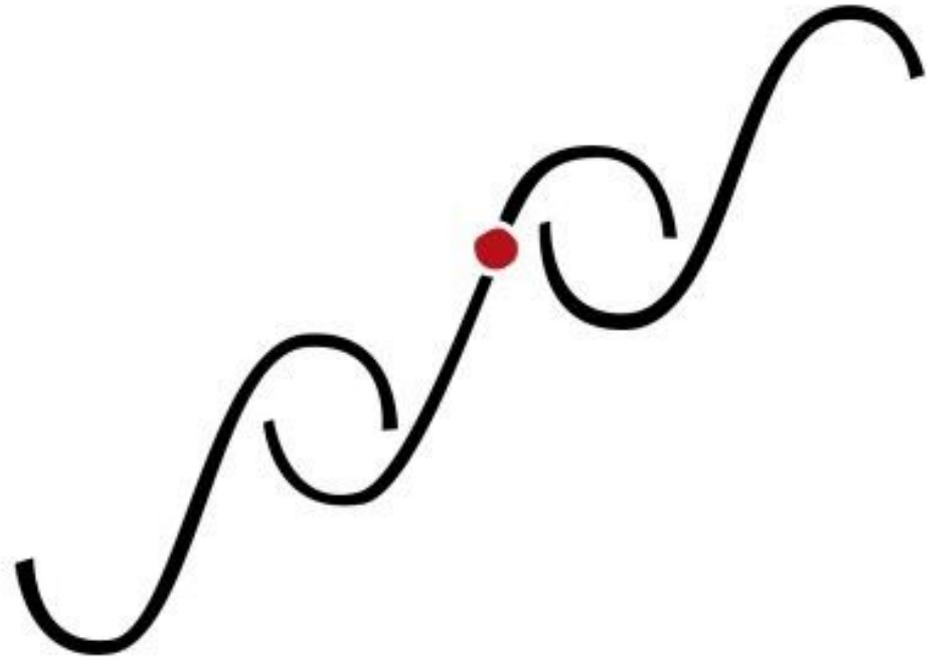






# REINVENTING YOURSELF

- Birth
- Growth
- Maturity
- Decline



# ORG DESIGN & PERFORMANCE

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# GOOD TO GREAT



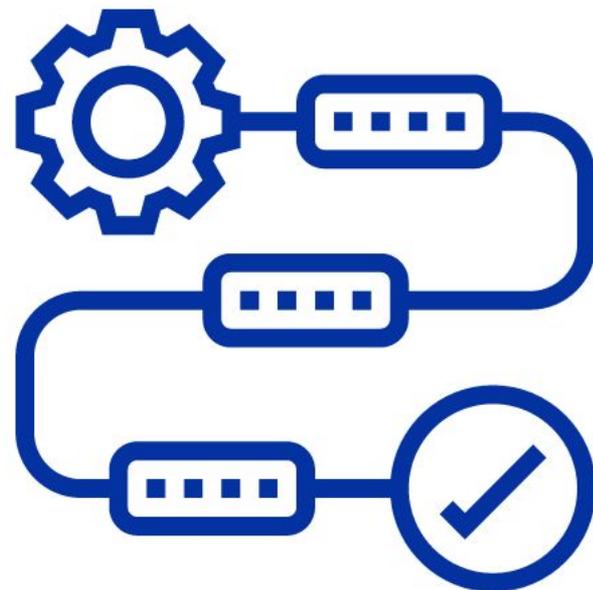
“Get the right people on the bus, the wrong people off the bus, and the right people in the right seats.”

-Jim Collins, Good to Great

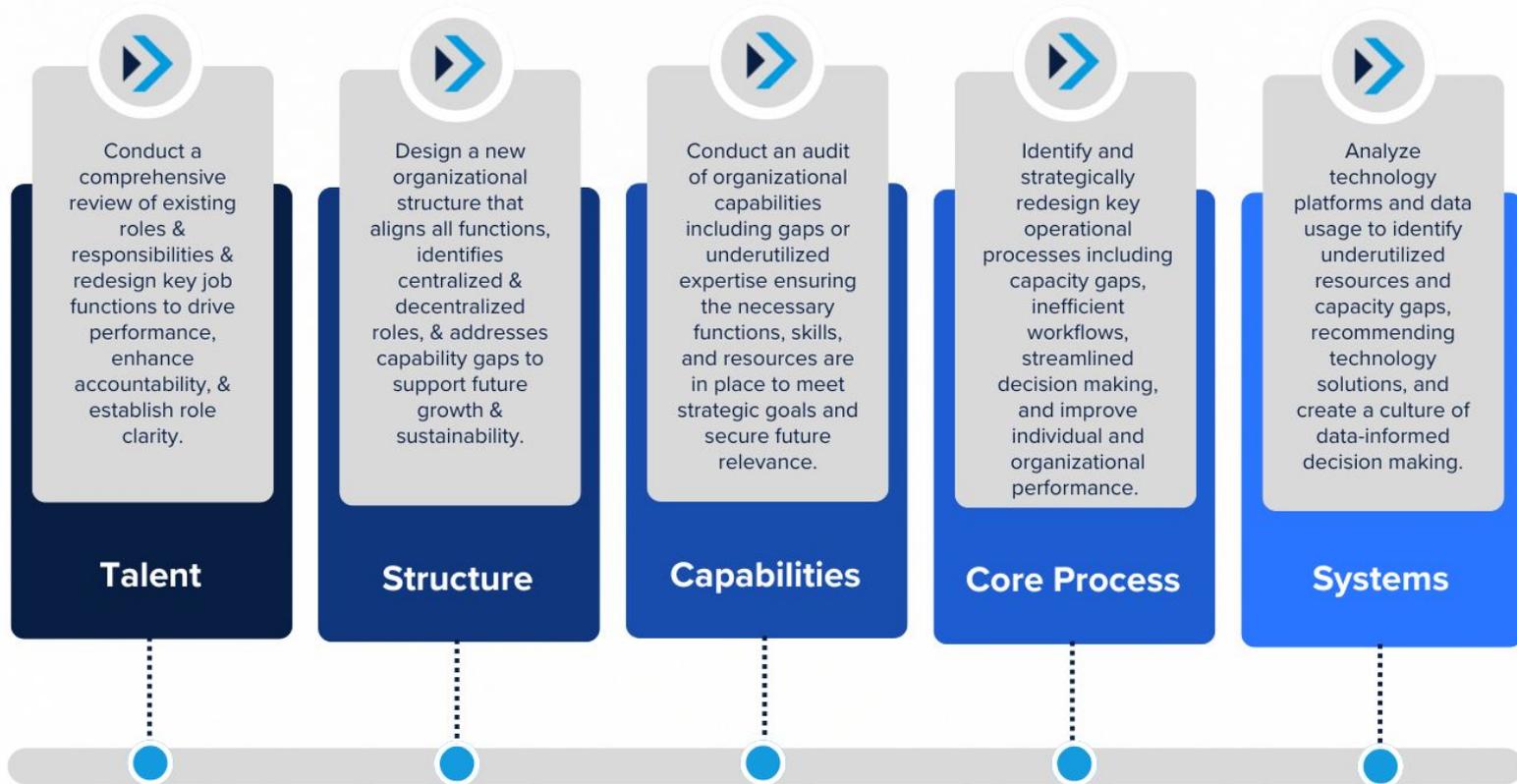


# REASONS FOR ORG DESIGN

- Workforce Reduction
- Mergers & Affiliations
- Rapid Growth & Capacity Building



# ORG DESIGN: 5 PILLARS





# ALLOCATING TIME & SPACE

Organization

Department

Team

Employee

ON



# TALENT CHALLENGES

- Evolving Capabilities
- Scarcity of Talent in the Marketplace
- Increasing Cost of Talent
- Competition for Talent
- Job Readiness
- Performance Management
- Cultural Alignment





# TALENT DEVELOPMENT



## Training

- Job Readiness
- Technical Expertise
- Autonomy



## Developing

- Performance
- Depth of Capability
- Goal Setting

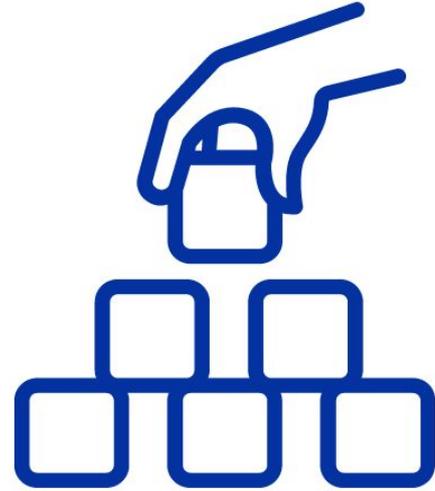


## Upskilling

- Leadership
- Mentorship
- Assessing

# GOAL: CULTURE OF PERFORMANCE

- Measure of Performance
- Track Performance
- Design Rewards & Recognition
- Coach to Performance
- Develop Deeper Skills



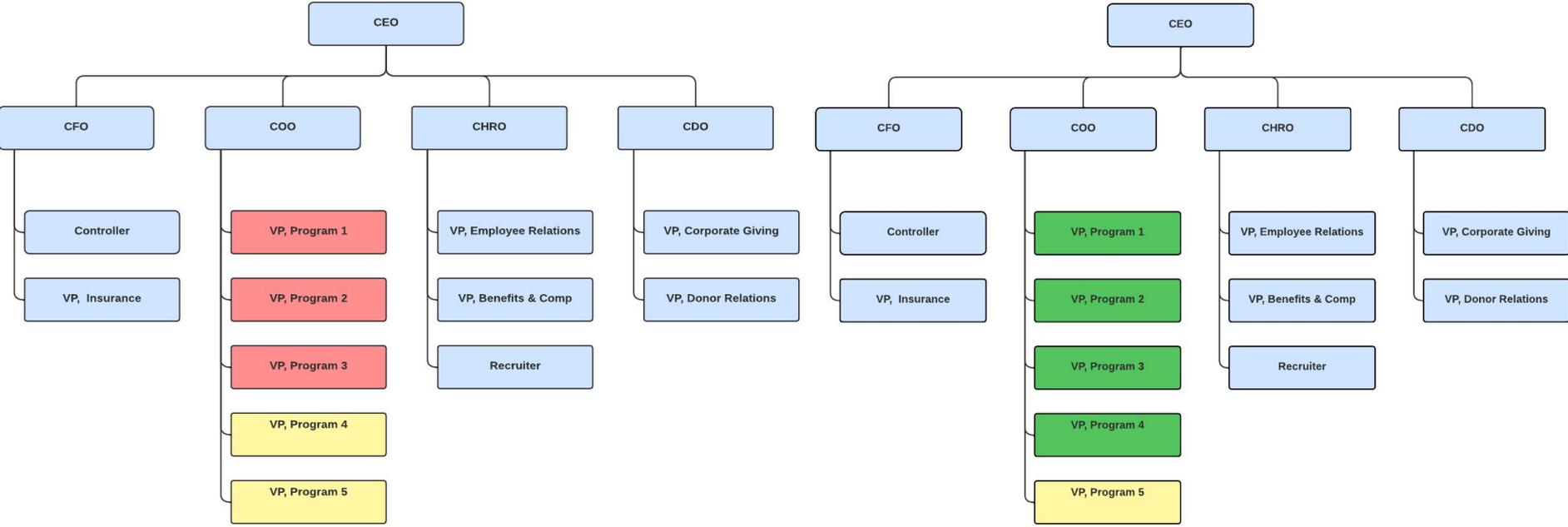
GOAL: CULTURE OF PERFORMANCE

PERFORMANCE

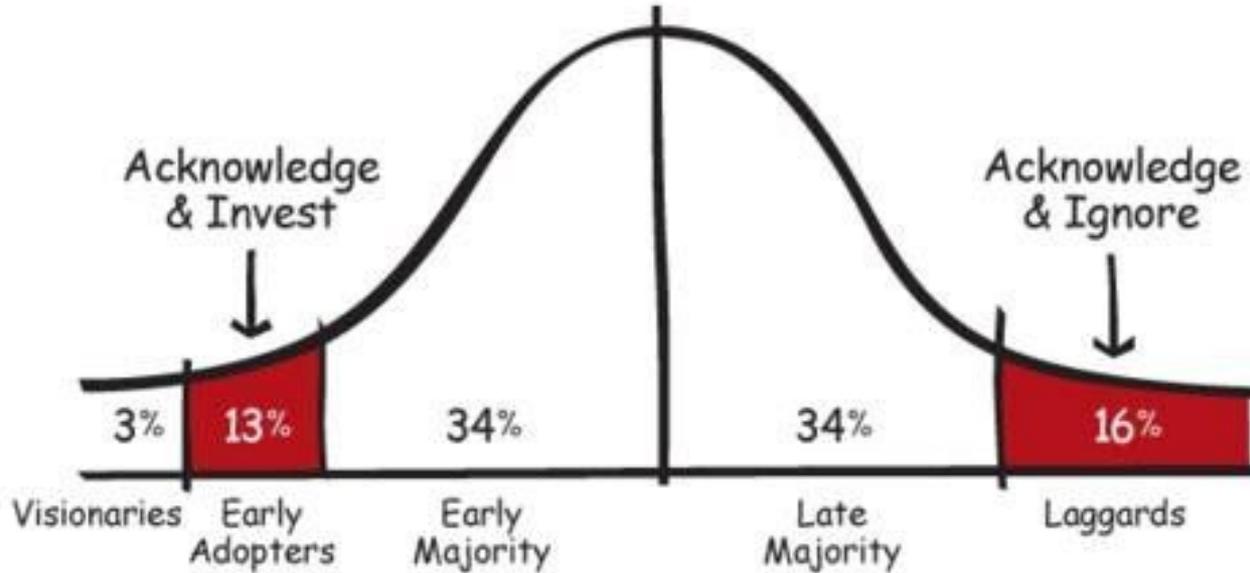
is the basis of  
morale



# RED, YELLOW, & GREEN PERFORMANCE



# SETTING EXPECTATIONS



# ORG DESIGN & PERFORMANCE GOALS

- Improved Individual Performance
- Increased Accountability
- Efficiency of Work
- Reduction in Duplication
- Busy vs. Productive
- Positive Culture Impacts



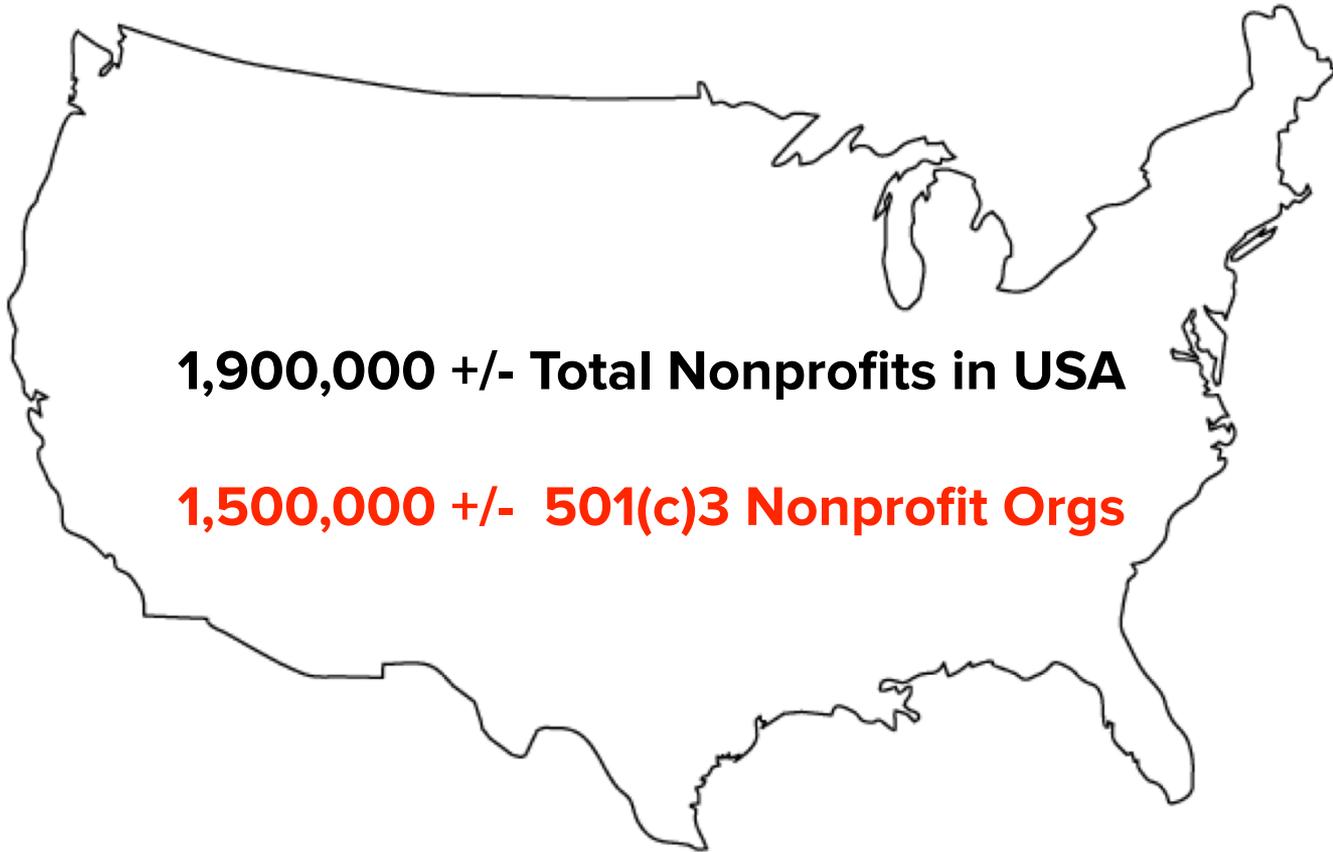
# PARTNERSHIPS

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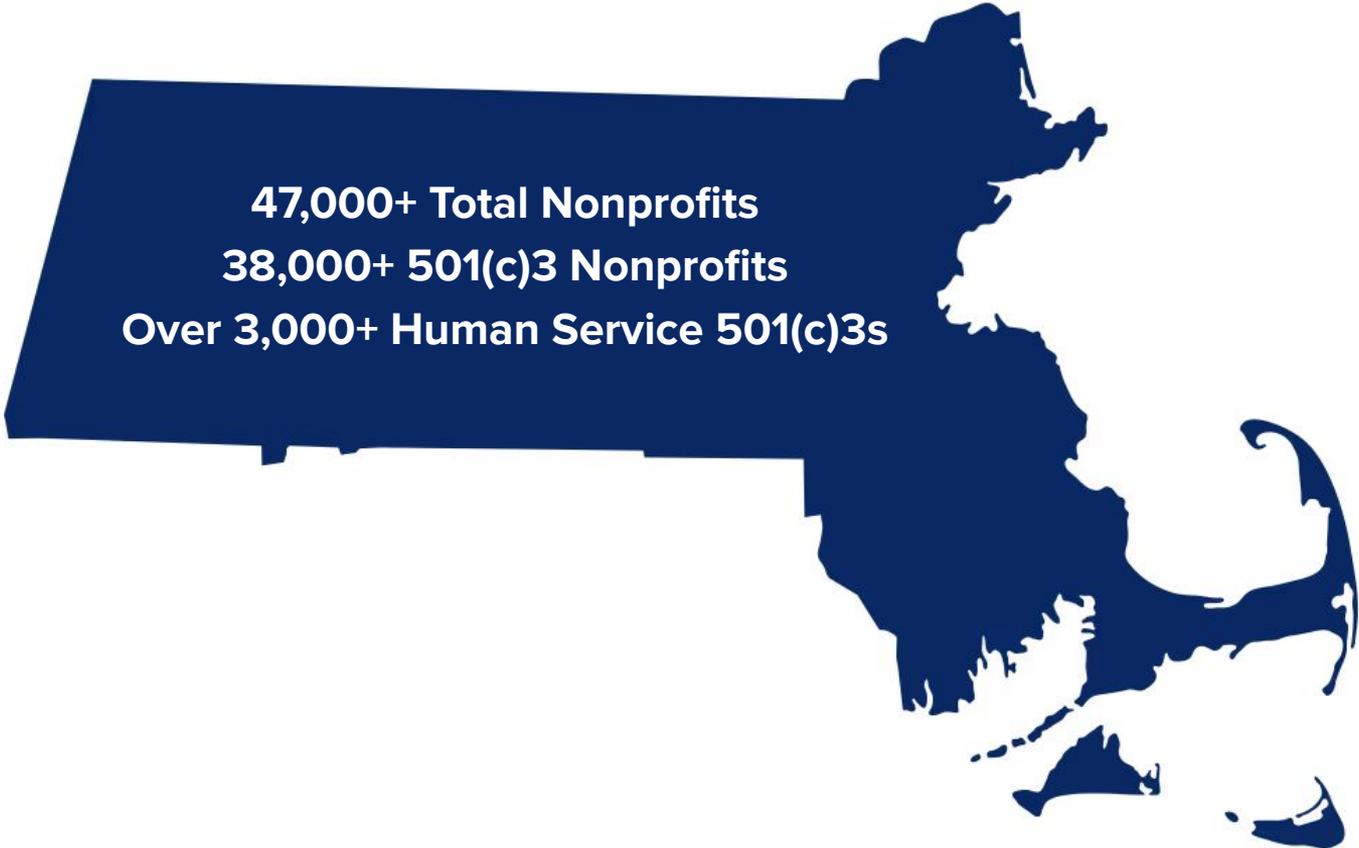


# NONPROFIT MARKET SIZE



Source: Candid

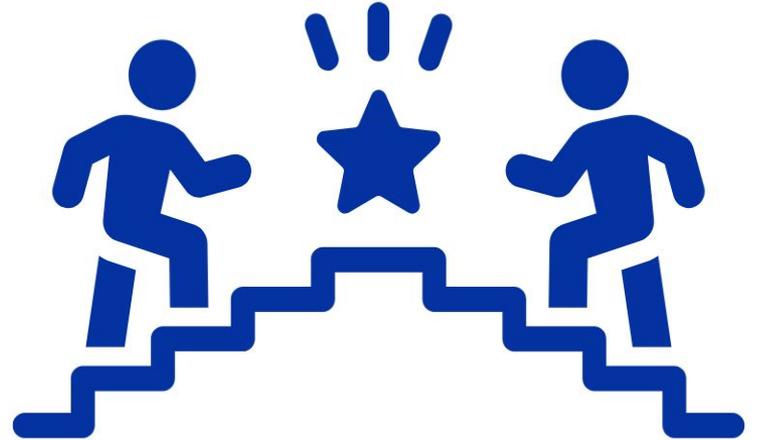
# NONPROFIT MARKET SIZE



**47,000+ Total Nonprofits**  
**38,000+ 501(c)3 Nonprofits**  
**Over 3,000+ Human Service 501(c)3s**

# STRATEGIC PARTNERSHIP RATIONALE

- Mission Continuity
- Talent Retention & Growth
- Acquiring Technology & Data Capabilities
- Revenue Diversification
- Cost Savings & Efficiencies
- Government & Funder Influence
- Expanding Programs & Geographies
- State of Financial Emergency
- Succession Planning



# PARTNERSHIP PHASES

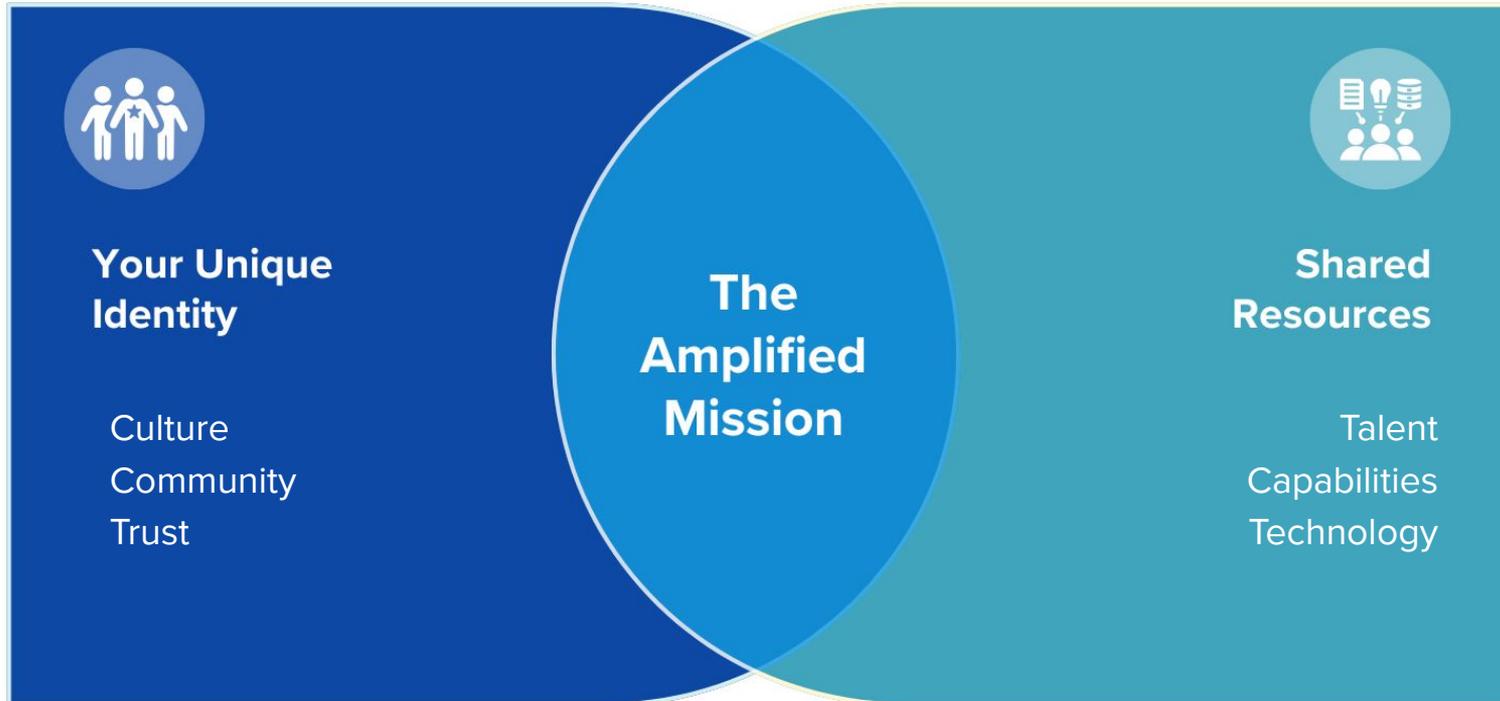
Strategic leadership and practical guidance to help navigate the early stages of planning and partnership.

Design a go-forward organizational structure that supports your strategic goals, and facilitates growth and success.



Establish a comprehensive project plan and lead discussions to build the terms of the partnership.

# STABILITY & RESILIENCE



# CURTIS STRATEGY



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## The Consulting Team



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