

Welcome

Revitalize Your Strategic Priorities

April 5, 2023

UW-GB Nonprofit Conference



Tonya L. Dederling, CFRE Founder & CEO

Today is the launch of Vigeo, Nonprofit advising & coaching!

Formerly TL Dederling & Associates, LLC

40+ years in for profit and nonprofit leadership

3 Team Members - ***Local and committed to helping organizations THRIVE!***

- Strategic and Succession Planning
- Capital Campaigns
- Executive Coaching
- Development Plans
- Governance/Board of Directors Training
- Wealth Screening & Prospect Research - **NEW**
- Grant Writing Services

Clients in all of NE Wisconsin, Madison





Liz Rice Janzen Sr. Consultant

45+ years in for profit and nonprofit leadership

- **Strategic and Succession Planning**
- **Capital Campaigns**
- **Coaching at all levels**
- **Development Plans**
- **Board of Directors Training**
- **Wealth Screening & Prospect Research - *NEW***
- **Grant Writing Services**



Amber Daug
Founder & CEO



Revitalize Your Strategic Priorities

What's this all about?

- Practical insights on how to re-establish your strategic priorities
- Nontraditional approach
- Hands on & engaging – plenty of open discussion
- **THRIVE** model
- Nonprofit leader story
- 4 Actions to take – you'll start today!



This select this session?

Are you ready to...

- Take a breath
- Pause
- Reflect
- Refresh your strategic priorities?

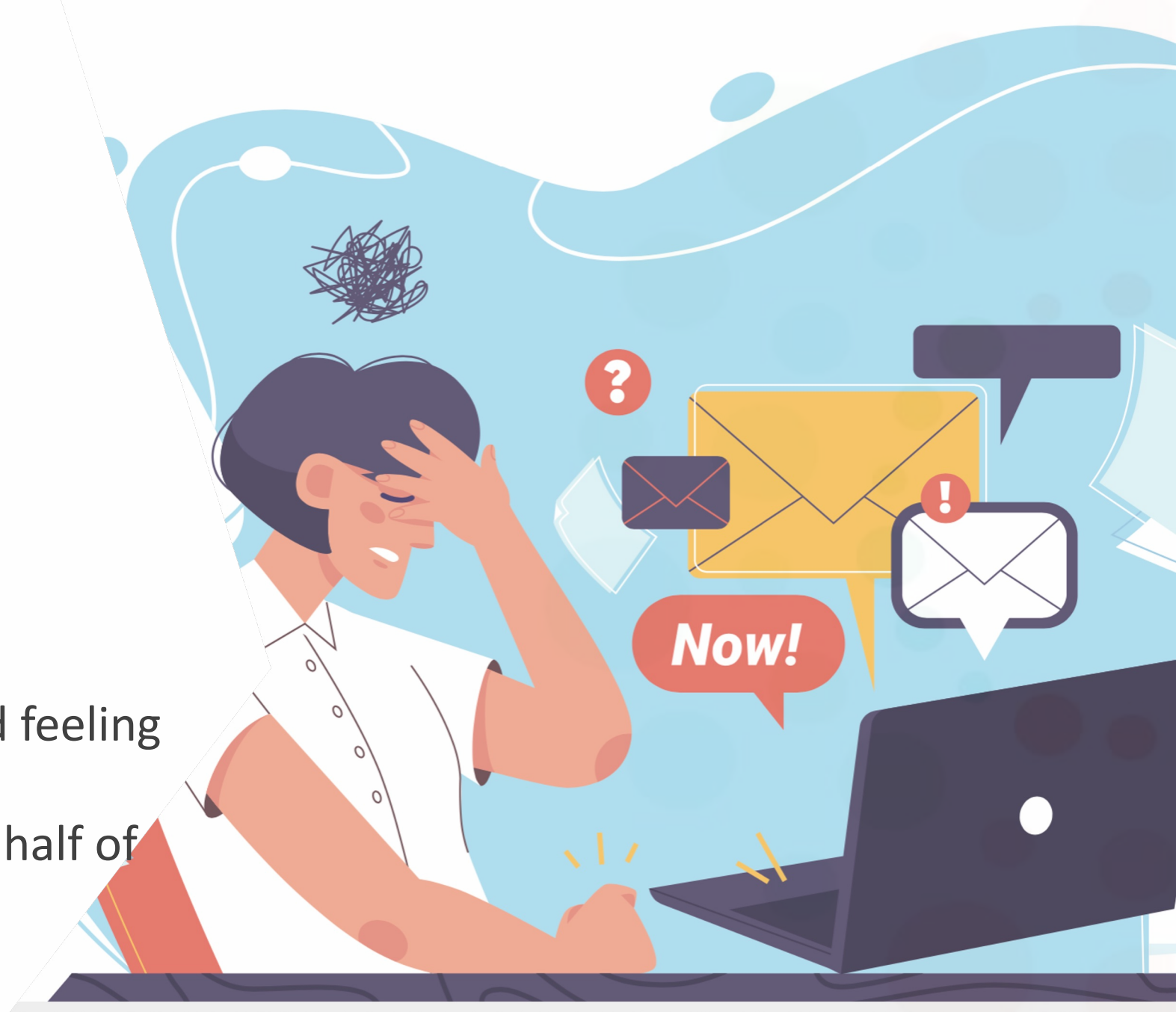
Nonprofit Sector High Burnout Rate

19% Voluntary Turnover

12% Overall Labor Market

60% Nonprofit leaders reported feeling
'used up'

Burnout is affecting more than half of
nonprofit employees



Sources:

Building Movement: The Leadership in Leaving, 2013

DDI World: Global Leadership Forecast, 2021

Opportunity Knocks: Engaging the Nonprofit Workforce: Mission, Management, and Emotion, 2011

Freepik

Clarity! Loving Life. Balanced.



A photograph of a sunset over the ocean. The sky is a warm orange-yellow, and the sun is visible on the horizon. The water is dark blue with white-capped waves in the foreground. A dark rectangular box is centered over the image, containing the quote in white text. Another smaller dark box is at the bottom center containing the author's name. A small logo is at the bottom center of the image.

Take a deep breath.
It calms the mind.

Regina Brett



Grand Teton Mountains

Wyoming

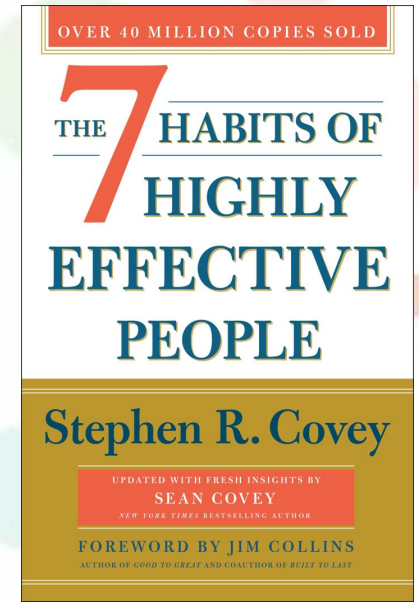






7 Habits of Highly Effective People

1. Be Proactive – *you are in charge*
2. **Begin with the end in mind – *have a plan!***
3. Put First Things First – *work first, then play*
4. Think Win-Win – *everyone can win*
5. Seek first to understand then to be understood – *listen before you talk*
6. Synergize – *together is better*
7. Sharpen the Saw – *balance feels best*



Source: Steven Covey – 7 Habits of Highly Effective Leaders

WHY?

Why are you here?

Pair up with the person next to you

- What specifically do you want to gain from this session?
- Do you currently have a strategic plan?
- What challenges are you facing in your NP that you'd like to solve?
- Are you ready to get started in the process to reset and refocus your strategic priorities?

5 minutes to discuss with another person



Open Discussion

Revitalize Your Strategic Priorities

What does this mean?

And what are the 4 actions steps?

“ Strategy is about being **different**.
It means deliberately **choosing a
different set of activities** to
deliver a unique mix of value.

Michael Porter
What is Strategy?

”

Strat-e-gy

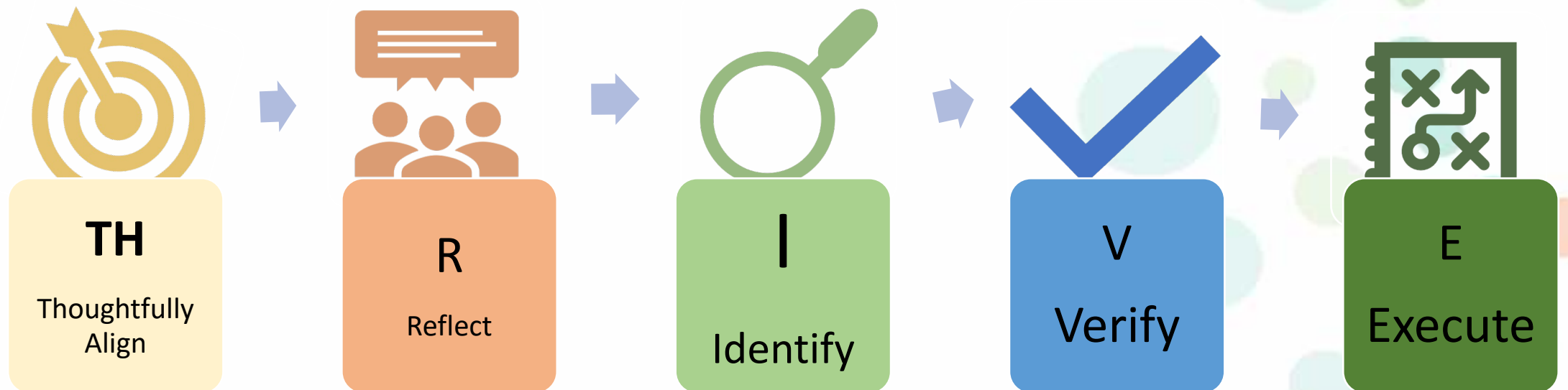
“

- A plan of action or policy designed to achieve a major or overall aim
- A plan of actions that fit together to reach a clear destination
- A long-range plan for achieving something or reaching a goal
- Involves setting goals and priorities, determining actions to achieve the goals, and mobilizing resources to execute the action
- A plan or method put in place to achieve a goal or result

”

THRIVE Planning System

For Nonprofit Planning and Execution





TH

Thoughtfully Align

6 Things to do if you are overwhelmed

1. Put on your favorite play list
2. Stop telling yourself you are overwhelmed
3. Call your most energetic and optimistic friend
4. Stream a workout online and move your body
5. **Take out a piece of paper and Brain Dump**
6. Get you a** out of the chair and get some fresh air

Mel Robbins

NY Times best selling author

Topmost respected expert on change in the world
Podcast Host on topics we all need to hear





R

Reflect



I

Identify

Organizational Effectiveness Model

Created by Tonya L. Dederling, CFRE





V

Verify

A Statement of Intended Impact

“Where are you going?”

- What is the issue or problem we are trying to address?
- If we went away, who would it matter to and why?
- Who are the primary direct beneficiaries of our organization?
- What is the geographic region of our impact?
- What does success look like and how can it be measured?

A statement of intended impact will answer these questions.



E

Execute

“ If you are proactive, you focus on preparing. If you are reactive, you end up focusing on repairing.”

John Maxwell

”

Let's get started!



THRIVE Planning Model

In Groups of 3:

Answer TH, R, I

Questions on the back of the THRIVE Model handout

5 minutes discuss in group of three

THRIVE Planning Model Open Discussion



4 Actions You can Take

Action #1

Make the Commitment

Schedule Uninterrupted Time Out of The Office
PAUSE - REFLECT



“I spent an entire day out of the office and was amazed how much I got accomplished. It was a game changer for me to get started in this process.”

-Amber



Action #2

Seek Anonymous Input

Staff, board members, key stakeholder

Keep it simple!

PAUSE - REFLECT



R

Reflect

“Everyone had a voice to share openly and honestly.”

-Amber



Action #3

Schedule Off Site Meeting

Staff, board members, key stakeholder

Keep it simple!

REFRESH



I

Identify



V

Verify

“It was the first time our entire team was together in the same room – ever. It was very well received, and the team response was very positive. We all felt motivated and ready to move forward together.”

-Amber



Today 5:33 PM

Today's meeting was amazing. I
feel so empowered and
motivated!!!!

Action #4

Fit it into Your Day

Post strategic priorities, report and communicate regularly, 1:1's with key leaders

REFRESH

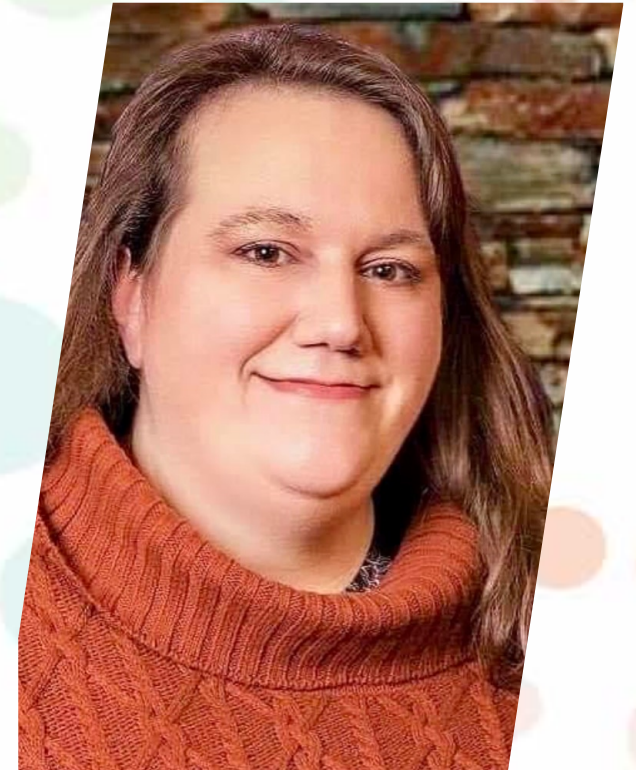


E

Execute

“Setting recurring committee meetings has been set for the year and it’s an amazing feeling. It’s provided focus, clarity, and a peace of mind”.

-Amber



5 Common Themes or “BUCKETS”



- Revenue
- People
- Operations
- Board of Directors/Governance
- Programs



Amber Daug Founder & CEO

"With the strategy refresh process, I feel personally refreshed, and am starting to feel my burnout slowly vanish."



One Page Strategy Overview

*Just one example of many ways it can be drafted
– keep it simple!*



Strategic Priorities 2023-2025



Mission Statement

To provide people in need with dignified access to good food, along with opportunities to grow, cook, share, and advocate for it.

Vision Statement

Food should be treated as a basic right and central to health—where everyone has the means, knowledge, and voice to access good food with dignity.

Values

Dignity, Community, Participation, Guest-Centered, Health, Collaboration, Evaluation, Equity.

Key Learnings Discussion

Questions?



Summary of our time together

- Why this session – *to open the opportunity for dialogue with you!*
- Nonprofit stats - *keep your balance!*
- Took a breath – *we all needed it!*
- Why YOU chose this session – *what's on your mind?*
- THRIVE Planning Session – *keeping it simple!*
- Mel Robbins – *she is a gift – check her out!*

Summary of our time together

- 4 actions YOU can take without a huge time commitment
 1. *Make the Commitment*
 2. *Seek Anonymous Feedback*
 3. *Schedule Off Site Meeting - foster TEAM*
 4. *Fit it in Your Day – operationalize the new plan and reporting*
- 5 Common Themes that surface
- Organizational Effectiveness Model
- Amber's story

Are you ready to...

- Take a breath
- Pause
- Reflect
- Reset, or refresh, your strategic priorities?

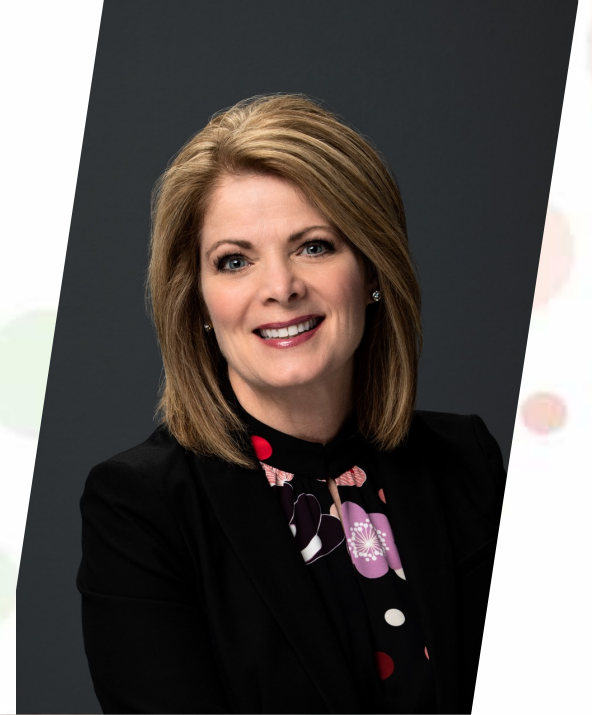






Thank You!

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3:00 – 3:15 PM BREAK

3:15 – 4:15 PM Panel Discussion: Creating a Positive Workplace
through Leadership and Culture
Moderator, Lora Warner

Michael Alexander, Chancellor, UW-Green Bay

Melissa Borowitz, CEO & Owner, The Utech Group

Jeffrey Hahn, Principal, Real World Strategies

*Denise Wittstock, MNpS, Chief Executive Officer, Big Brothers Big Sisters WI
Shoreline, Inc.*

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Tonya L. Dederling, CFRE

Vigeo Nonprofit advising & coaching
Founder & CEO

- 40+ Years Leadership Experience – Nonprofit and for profit
- 20 Years Nonprofit, 16 Years as Executive Director/CEO
- Certifications
 - CFRE – Certified Fund Raising Executive
 - Certified TTI DiSC Behavioral Trainer
 - Certified TTI Motivators & Drivers Trainer
 - AHP Madison Institute; Capital Campaigns, Operations, Planned Giving
- Formal Training and Experience
 - Governance & Board of Directors Training and Development, Recruitment
 - Fundraising; Capital Campaigns, Major Gifts, Annual Giving, Events, Planned Giving, Donor Centric Writing
 - Project Management; Software conversions, Program Development, leadership, Sales, Business Writing
- Awards
 - Outstanding Fundraising Professional, AFP NE WI 2015
 - Sister May Walter Boyle Excellence in Philanthropy Award, Ascension, 2014
- Leadership Fox Cities, 2012-2013