

# Re-Organizing the Organization

How do you know when it is time... and what do you do?

---

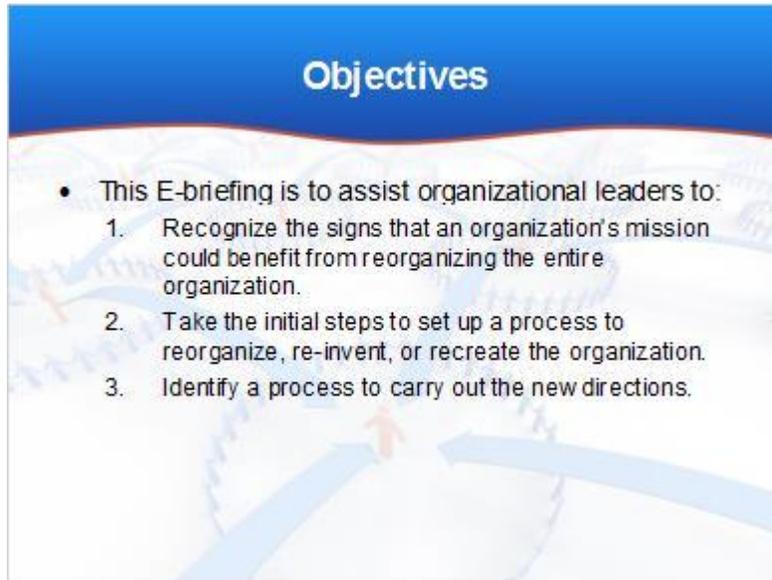
## 1.1 Re-Organizing the Organization



### Notes:

Welcome to Re-organizing the Organization. How do you know when it's time, and what do you do?

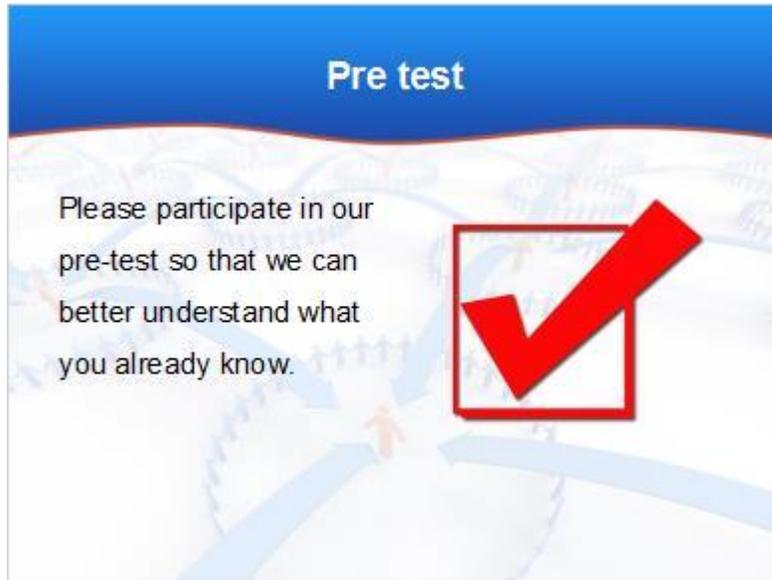
## 1.2 Objectives



### Notes:

This is an e-briefing. It's a brief presentation introducing you to a topic and offering a limited view, a snapshot per se, of possible strategies and approaches, we hope that will spark your interest, introduce you to a new idea, or provide you with a base of information that can be used to learn more on your own. It is not to be considered an in-depth training with a step-by-step how-to to get it done. If after viewing the presentation, you would like more in-depth information or guidance, please feel free to contact the Café TA Center so that we can discuss your needs and tailor our response to what might help you best. So the objectives of this e-briefing is to assist organizational leaders to recognize the signs that an organization's mission could benefit from reorganizing the entire organization, to take initial steps to set up a process to reorganize, reinvent, or recreate the organization, and to identify a process to carry out the new directions.

### 1.3 Pre test intro



#### Notes:

First, we would appreciate it if you would participate in our pretest, so that we can better understand what you already know. If you will click on the following slide, it will guide you through this process.

### 1.4 Pre Test

Please fill out the form and click "Submit" then return to this document.

[Click this link to take the Pre-Test now.](#)

## 1.5 An Organization...



**An Organization...**

Is not about:

- Money
- Staff
- Numbers
- Offices
- Grants
- Contracts

The slide features a blue header with the title 'An Organization...'. Below the header, a circular inset shows a golden stick figure standing on a bar chart with three bars of increasing height. To the right of this inset is a white box with a blue border containing the text 'Is not about:' followed by a bulleted list of six items: Money, Staff, Numbers, Offices, Grants, and Contracts. The background of the slide is a light blue grid with faint architectural drawings.

### Notes:

Excellent and welcome back. You know an organization is not about money, staff, numbers of people that it serves, how many offices you have, or how many grants you have, or contracts.

## 1.6 It is About the Mission



**It is About the Mission**

- Legal reason for organizational existence
- Drives the organization's daily functions
- Stands behind each outcome
- Is not negotiable unless it is officially changed

"A good mission statement is the credo, the beliefs, of the organization's leaders. It defines why it all matters to all stakeholders within the organization."

Article Source: <http://EzineArticles.com/3519589>

The slide has a blue header with the title 'It is About the Mission'. Below the header, on the left side, is a bulleted list of four points. To the right of this list is a blue rounded rectangle containing a quote in white text. Below the quote is a small line of text providing the article source. The background is a light blue grid with faint architectural drawings.

**Notes:**

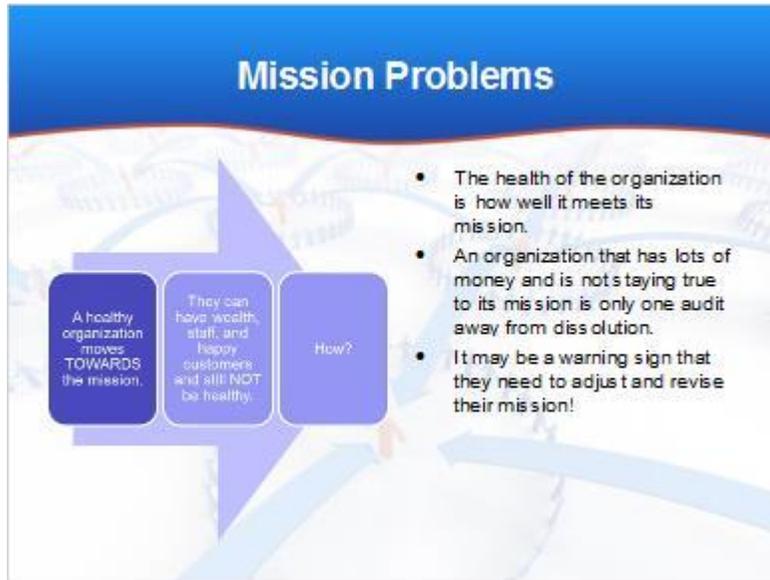
It's about the mission. The mission is the legal reason for organizational existence. It drives the organization's daily functions, and it stands behind every single outcome. It is not negotiable, unless it's officially changed according to your by-laws. A good mission statement is the credo, the beliefs of the organization's leaders. It defines why it all matters to the stakeholders within the organization.

**1.7 The Mission is the Measurement**

**Notes:**

So the mission is the measurement. Progress towards the mission in related outcomes is the essential measurement. Success is not necessarily measured by organizational growth, population satisfaction, money in the bank, or the numbers of staff that you have. While all of these can improve mission outcomes, they do not always indicate a healthy organization.

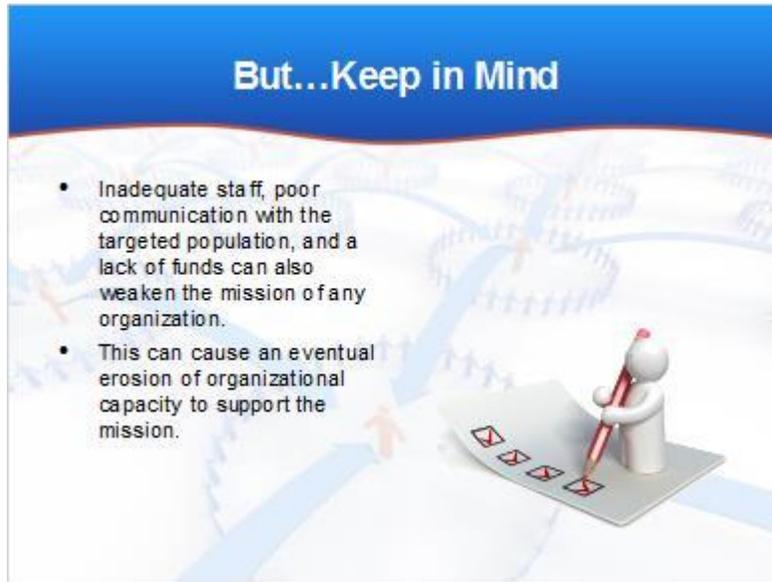
## 1.8 Mission Problems



### Notes:

There can be problems with the mission. A healthy organization moves toward the mission. They can have wealth, staff, and happy customers, and still not be healthy. How? The health of the organization is how well it meets its mission. An organization that has lots of money, and is not staying true to its mission is only one audit away from disillusion. It may be a warning sign that they need to adjust and revise their mission, now.

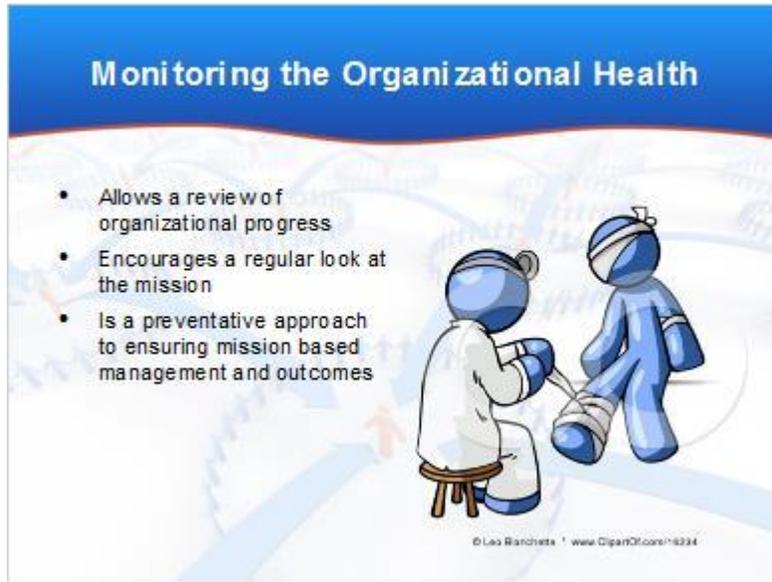
### 1.9 But...Keep in Mind



#### Notes:

But, keep in mind inadequate staff, poor communication with the target population, and a lack of funds can also weaken the mission of any organization. This can cause an eventual erosion of organizational capacity to support the mission.

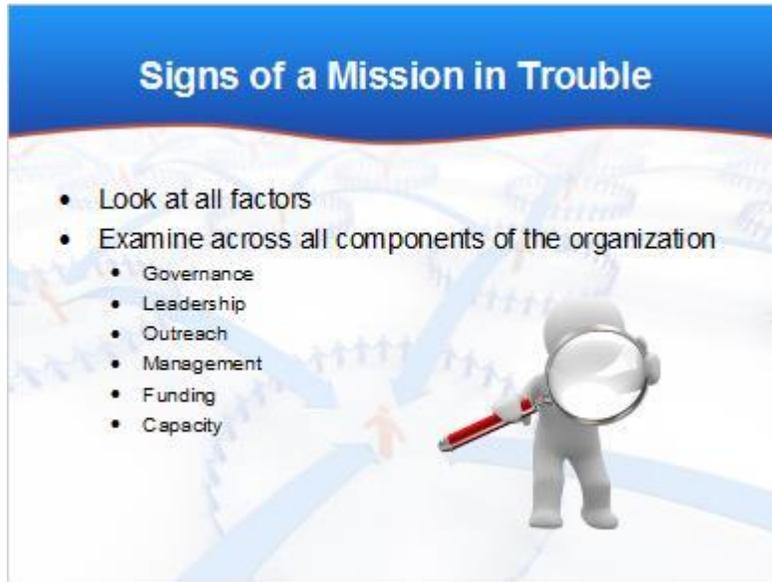
## 1.10 Monitoring the Organizational Health



### Notes:

Monitoring the organizational health will allow a review of the organizational progress. It encourages a regular look at the mission, a checkup maybe. It is preventive and an approach to insuring that the mission pace, management and outcomes are all met.

### 1.11 Signs of a Mission in Trouble



#### Notes:

So let's talk a little bit about the signs of the mission that could be in trouble. In order to find what's going on with an organization, you have to look at all of the factors. Examine across all components of the organization. You look at its governance, the leadership, outreach, how it's managed, the funding that it operates on, and what capacity it holds.

## 1.12 Impact



The slide features a blue header with the word "Impact" in white. Below the header, there is a bulleted list on the left side. To the right of the list is a photograph of a red sign with the word "Emergency" in white and a white arrow pointing to the right. The background of the slide is a light blue and white pattern of interlocking gears and arrows.

- Consider impact on the mission
- Consider impact on ability to meet obligations
  - Mission
  - Contracts
  - Budget
  - Legal

### Notes:

As you're doing that you think about the impact. Consider the impact of each and every one on the mission. Consider impact on their ability to meet their obligations such as the mission, its contracts, the budget, and any legal obligations that it may have.

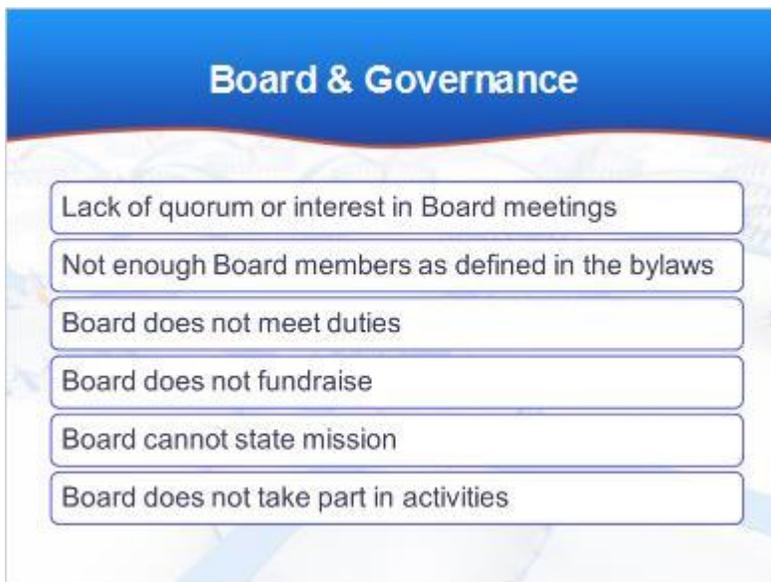
### 1.13 Warning Signs



#### Notes:

So what are the warning signs? When do you know that you're on thin ice?

### 1.14 Board & Governance



#### Notes:

When might the board and governance be on thin ice? Well certainly a lack of quorum or interest in board meetings is an indication that some changes need to be made. Or if there's not enough board members as are defined in the by-laws. Or when the board does not meet its duties and does not fundraise. When board members cannot state the mission, it makes you wonder why they're even on their. Do they even know what it is that they're working towards? And when board members do not take part in organizational activities, it's time to start evaluating exactly what's going on with the board and governance, and how they're assisting the organization in meeting their mission.

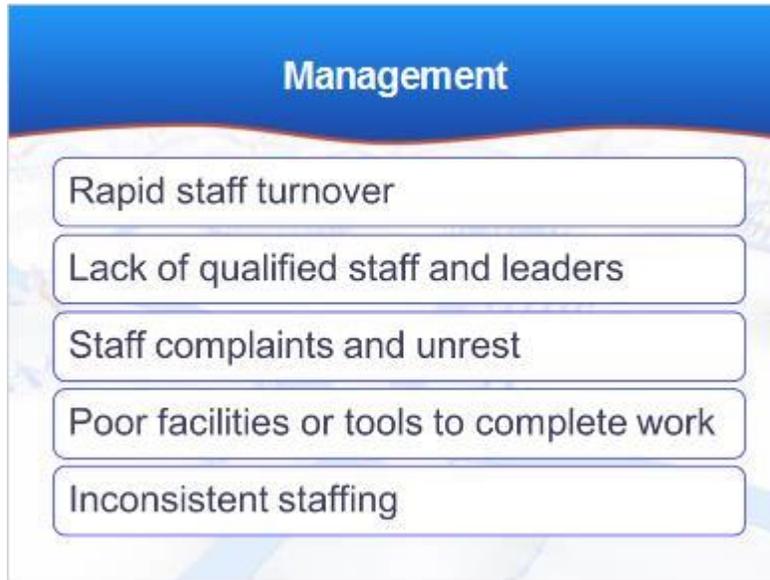
### **1.15 Target Population**



#### **Notes:**

The target population can also offer some insight in to some warning signs that the organization needs to make some changes. Maybe there is no population representation, and people do not attend the functions that are offered. Or people do not know or understand the organization and what it does. Possibly they don't understand or agree with the mission.

## 1.16 Management



### Notes:

There could be problems within management as well. One of them might be rapid staff turnover. You hire staff and they leave. You hire staff and they leave. You don't seem to have the ability to keep around anyone for very long. Or, you may have a lack of qualified staff and leaders. You don't have the people that you need to do the work that needs to be done. There could also be staff complaints and unrest. The staff just continually complains about the management and the way the organizations being run. Poor facilities or tools to complete the work can also contribute towards the mismanagement of the organization. If individuals do not have computers and the tools that they need to do the work that needs to be done, it will interfere with the accomplishment of moving towards the mission. And certainly, inconsistent staffing, not having the staff that are necessary to do the job that needs to be done, can be another huge indicator that there's a problem within the management.

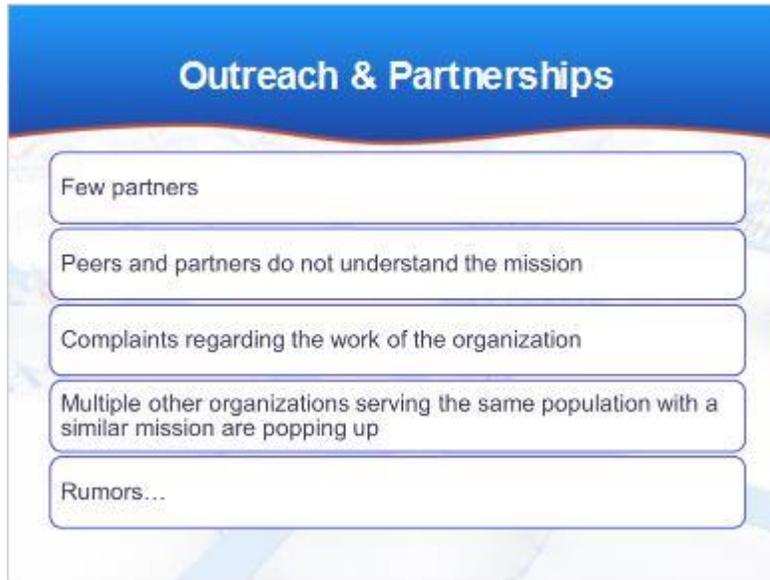
## 1.17 Funding



### Notes:

So when we think about an organization that's having some problems, we often think about funding. And certainly, not having enough funding is an indication that an organization could be headed for a crisis. And funding that comes mostly from one source could be an indication as well. For example, if 99% of an organization's funding comes from one funder, if something happened with that one funder, very quickly the organization could slide from having enough money to having no money at all. Not having unrestricted funds is an indication that an organization needs to do some work to reorganize in a way that allows it to access different kinds of funds from different kinds of areas. A lack of regular financial reports could be a warning sign as well. And then failure to manage the funds according to generally acceptable accounting practices, or "Gap" as we call it, in organizational policy.

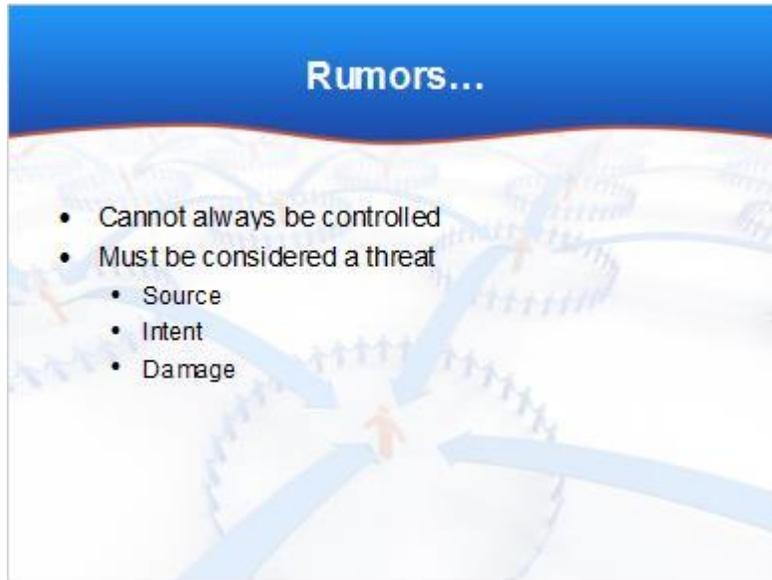
## 1.18 Outreach & Partnerships



### Notes:

Outreach and partnerships can also hold some clues into the need for the organization to make some changes. Maybe there are too few partners. Maybe the organization does not have the kind of partners one would expect with an organization serving that population. Possibly the peers and the partners do not understand the mission. Maybe the mission is too complicated. Maybe the organization is not promoting the mission in the way that they should. Or possibly, there's complaints regarding the organization and the way that they do their work. And, it is a possibility that multiple other organizations pop up that are serving the same population, making one wonder whether people really understand what it is that the organization does to begin with. And then finally, there's the rumors.

### 1.19 Rumors...



#### Notes:

Rumors cannot always be controlled. And remember, rumors can be true, they can be not true, they can be scandalous, they can be very kind of innocent, but whispered in groups, just anything that they can do to undermine the capacity of the organization to meet their mission. But whenever there's a rumor, you must consider this a threat. You think about the source. Is the source coming from someone who does not want the organization to be a strong advocate? Is it possible that the source is a competitor for some of the dollars that the organization has? And you think about the intent. Is the intent to totally ruin the organization, or just get rid of one individual? And then of course, you have to consider the damage that it can do, not only to the organization, but to the population that the organization serves, and its mission.

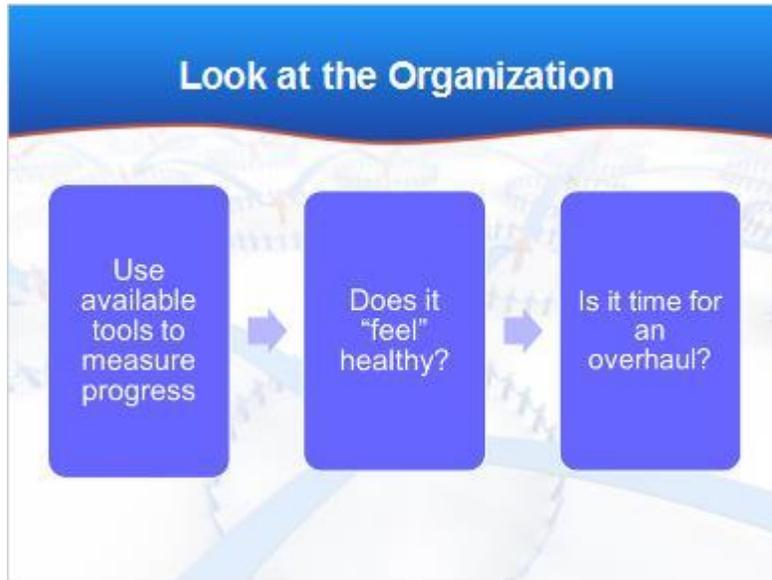
## 1.20 What Will You Do?



### Notes:

So what will you do? First, you need to continually look at your organization, and consider it in a relation to the mission. Because remember, the organization is to serve the mission. Watch for any warning signs. Be vigilant, and respond to each of these in a purposeful manner. So let's look at these individually.

## 1.21 Look at the Organization



### Notes:

When you begin to look at the organization, use available tools to measure your progress. There are many out there and available to you, and if you need others you can always call the Café TA Center. Some of them are organizational assessments that look at your development and growth compared to your mission, while others use benchmarking or other measurements to see where you're going. Does it feel healthy to you when you look at the organization? Does the organization feel the way that you want it to? Or is it time for you to consider some kind of overhaul. Maybe not an overhaul, but some slight tweaking.

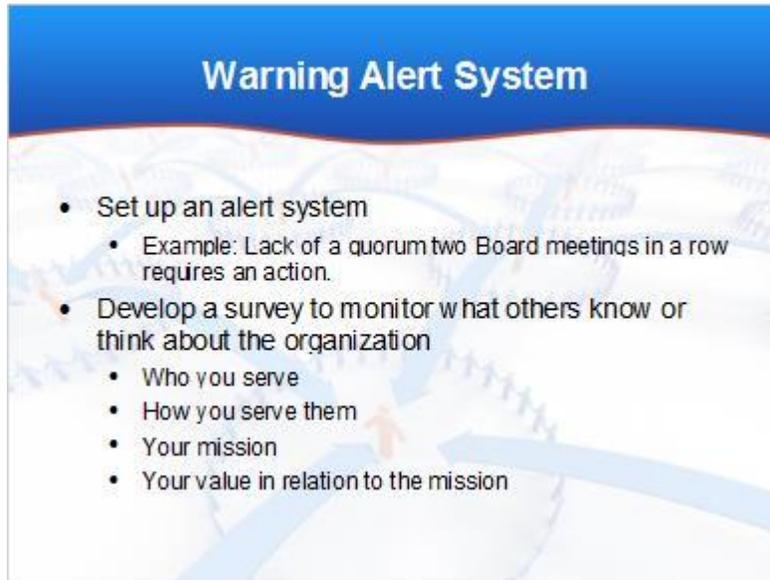
## 1.22 Mission Consideration



### Notes:

And what things might we look at when considering our mission? Are you meeting your mission? Is your organization progressing in the way that it should to meeting the mission and serving the population that you have targeted? Can you measure and prove your work in relation to the mission? Have you set up some kind of process and procedure to make sure that you can measure, monitor, and improve your work? And finally, does your mission need a revision? Is it possible that the mission needs to be changed to accommodate changes in the environment or changes in the population, or most certainly changes within your organization?

### 1.23 Warning Alert System

A presentation slide titled "Warning Alert System" with a blue header. The slide contains a bulleted list of two main points. The first point is "Set up an alert system" with a sub-bullet: "Example: Lack of a quorum two Board meetings in a row requires an action." The second point is "Develop a survey to monitor what others know or think about the organization" with four sub-bullets: "Who you serve", "How you serve them", "Your mission", and "Your value in relation to the mission". The background of the slide features a faint, light blue graphic of a globe with several arrows pointing in various directions.

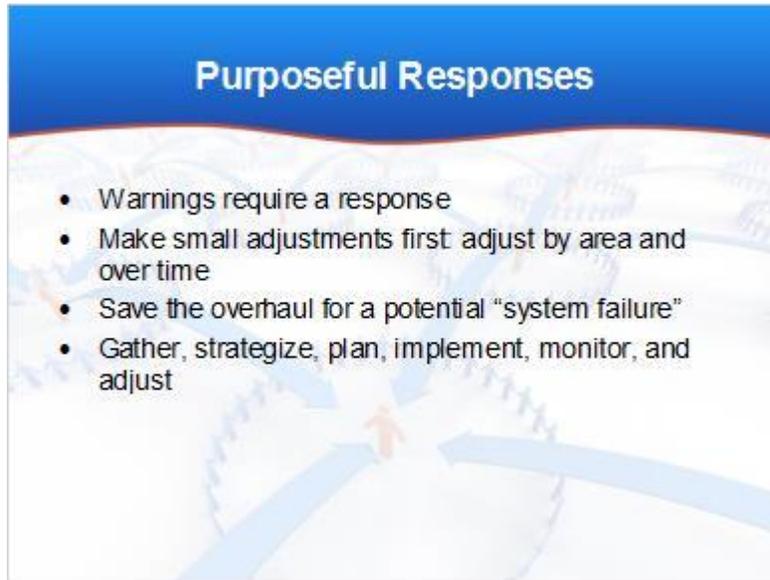
**Warning Alert System**

- Set up an alert system
  - Example: Lack of a quorum two Board meetings in a row requires an action.
- Develop a survey to monitor what others know or think about the organization
  - Who you serve
  - How you serve them
  - Your mission
  - Your value in relation to the mission

#### Notes:

And you might want a warning alert system, so you would set up an alert system. For example, if there's a lack of quorum two board meetings in a row, this requires an action. So the warning sign was a lack of quorum, and it gave you an idea of what you needed to do to recognize and then act on that warning. Develop a survey to monitor what others know or think about your organization. For example who you serve, how you serve them, your mission, and your value in relation to the mission. This gives you a chance to look at yourself through the eyes of the people that you're trying to work with or to serve.

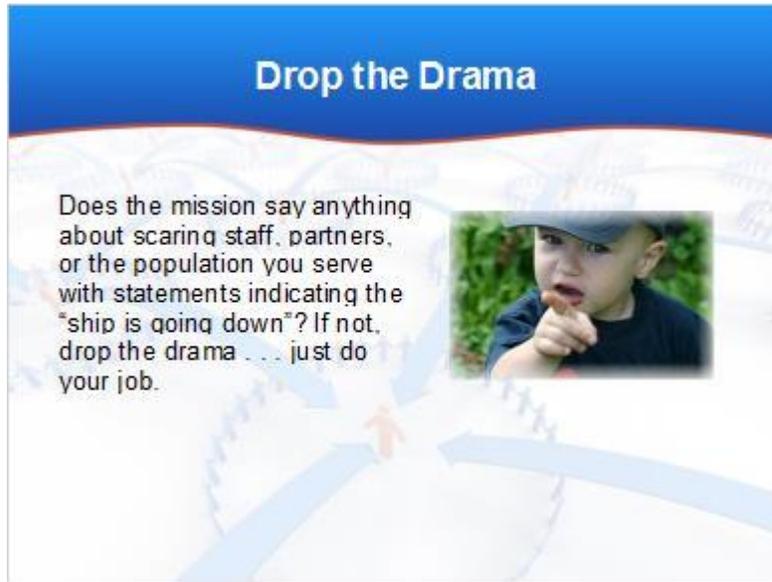
## 1.24 Purposeful Responses



### Notes:

Each of these requires a very purposeful response. Warnings always require response, whether that’s just a quick look and consideration of how they might impact your organization, or something further that might require some strategic planning and changing in the overall organization and the way that it operates. Make small adjustments first. Adjust by area and over a period of time. Save the big overhaul for a potential system failure, and then gather, strategize, plan, implement, monitor, and adjust. Again, measurement is so critical when you’re making changes within your organization. How will you know if they worked if you’re not measuring where you are, where you’re going, and finally how you got there.

## 1.25 Drop the Drama



**Drop the Drama**

Does the mission say anything about scaring staff, partners, or the population you serve with statements indicating the "ship is going down"? If not, drop the drama ... just do your job.



### Notes:

Most importantly, drop the drama. Does the mission say anything about scaring staff, partners, or the population you serve with statements indicating that the ship is going down? If not, drop the drama and just do your job. Don't create more crisis than what already is occurring.

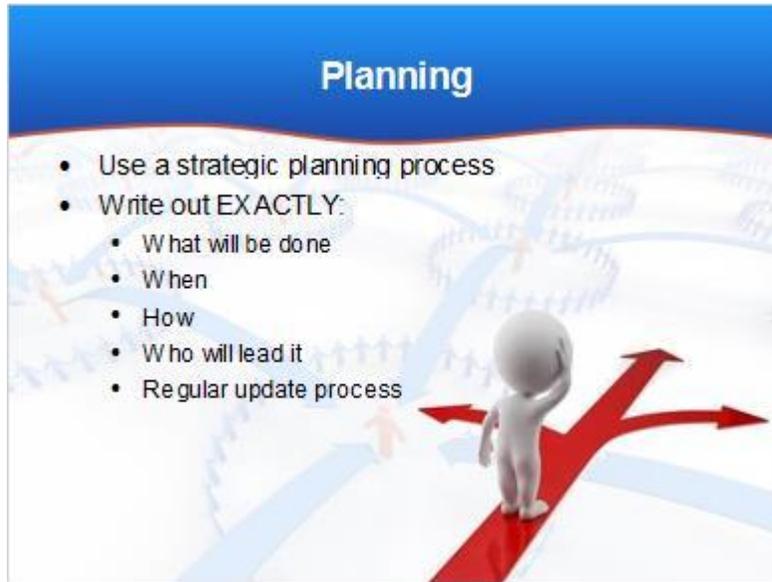
## 1.26 The Process



### Notes:

Most importantly, drop the drama. Does the mission say anything about scaring staff, partners, or the population you serve with statements indicating that the ship is going down? If not, drop the drama and just do your job. Don't create more crisis than what already is occurring.

## 1.27 Planning



### Notes:

Use a strategic planning process for your change. Write out exactly what will be done. Make sure you understand when it's going to be done, and how that will be accomplished. Also, you're going to want to know who will lead it. You want to hold them responsible for making sure that it's done the way that it's supposed to, and within the timelines that you have set. And make sure that you provide regular updates on the process, how it's working, what adjustments you had to make, what changes you see, and how the organization is moving in the direction that you had planned.

## 1.28 Reorganization



### Notes:

When reorganizing the organization, use good marketing strategies. If you're not all ready branding the work that you're doing, learn how to brand, or get some assistance with it. And always be consistent. One of the things that often contributes toward organizations being misunderstood is a lack of consistency. Eradicate that. Make obvious changes to your web site, the materials that you develop, how you do your outreach, and most certainly with your management. Make yourself a new organization.

## 1.29 Rebirth



### Notes:

I like to call this phase the rebirth. Set a grand reopening date. Work toward having everything done on that date. Send out announcements. Hold a celebration. Create a new climate for the organization, and introduce any changes that you have made, the mission, the staff, the name, do it all at once as if the organization was being reborn.

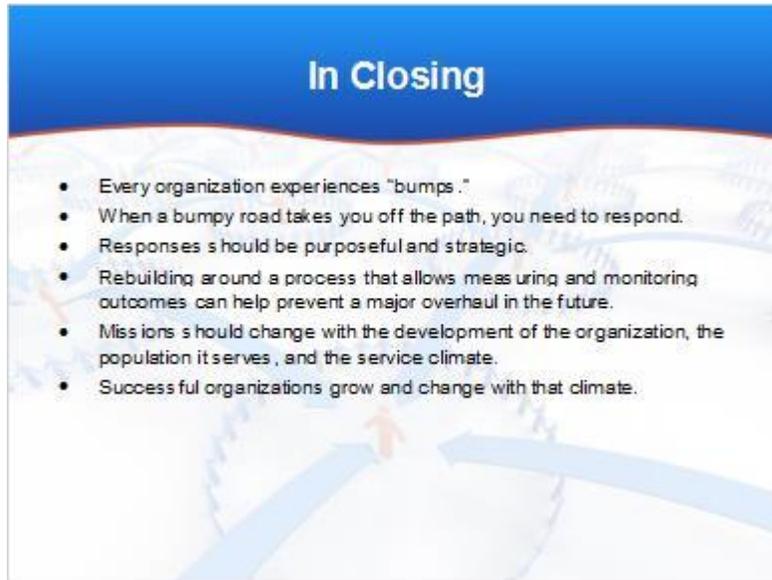
### 1.30 Follow Up



#### Notes:

And finally, do your follow-up. Be vigilant and monitor and watch for any problems. Use your strategic plan. When you see things that need to be changed, make small adjustments as you go along. Then promote an environment of success. It helps everyone who's involved in reorganizing the organization to feel confident that there is a plan, that there is a way of measuring and monitoring the outcomes, and that everyone who has a job to do knows exactly what it is.

### 1.31 In Closing



#### Notes:

In closing, every organization experiences bumps. It's inevitable. When a bumpy road takes you off the path, you do need to respond, and those responses should be purposeful and strategic. Rebuilding around a process that allows measuring and monitoring outcomes can help you prevent a major overhaul in the future.

## 1.32 Resources

**Resources**

**Writing a Mission Statement:**

- [How to Write a Nonprofit Mission Statement](#)
- [Avoiding and Correcting Nonprofit Mission Drift](#)

**Strategic Planning:**

- [Ten Keys to Successful Strategic Planning](#)
- [Strategic Business Planning for Nonprofits](#)

### Notes:

There are many resources available to help you with all of this, from how to write a nonprofit mission statement, and how to avoid and correct nonprofit mission drift. In the ten keys to successful strategic planning, in how to develop strategic business for nonprofits. We'll make these all available for you on the Café TAC web site where you found this training so that you can easily go into any one of these and gain more information to assist you in the work of helping your organization meet its mission.

### Writing a mission statement

[How to Write a Nonprofit Mission Statement](#)

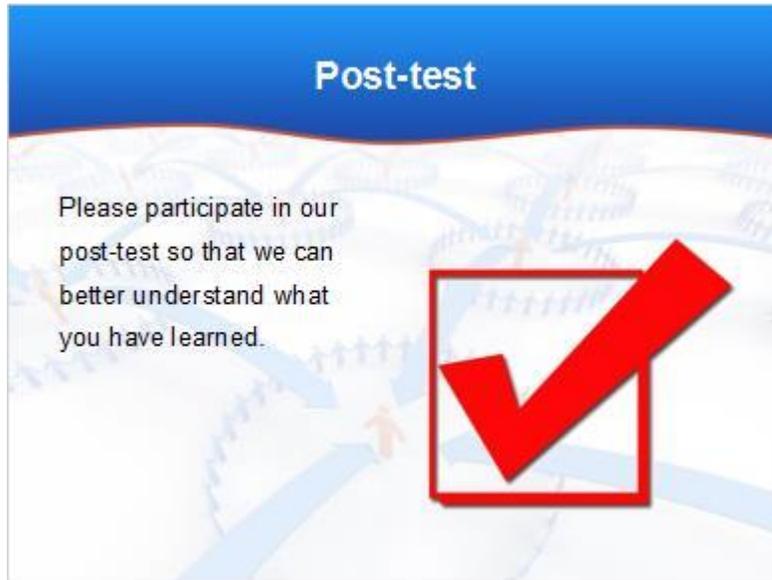
[Avoiding and Correcting Nonprofit Mission Drift](#)

### Strategic Planning:

[Ten Keys to Successful Strategic Planning](#)

[Strategic Business Planning for Nonprofits](#)

### **1.33 Post-test intro**



#### **Notes:**

Please participate in our post-test so that we can better understand what you have learned and what we might have to do in order to increase and enhance your learning.

### **1.34 Post-test**

Please fill out the form and click "Submit" then return to this document.

[Click this link to take the Post-Test now.](#)

### 1.35 The Café TAC



**The CAFÉ TAC**  
Tallahassee, FL 32303  
1-855-CAFETAC  
1-855-223-3822  
<http://cafetacenter.net>

The Café TAC is supported by SAMHSA to operate one of its five national technical assistance centers; providing technical assistance, training, and resources that facilitate the restructuring of the mental health system through effective consumer directed approaches for adults with serious mental illnesses across the country.

#### Notes:

Thank you so much for joining us today. We hope that this e-briefing sparked an interest in this area or it gave you some new ideas of things to watch for and how to begin considering reorganization of your organization, and how to go through that rebirthing process. If you feel that you need more in-depth training, or step-by-step help, or technical assistance with this area, please don't hesitate to call the Caffè TAC. The Caffè TAC is supported by SAMSA to operate one of its five national technical assistance centers providing technical assistance, training, and resources that facilitate the restructuring of the mental health system through effective consumer-directed approaches for adults with serious mental illness across the country. Thank you so much and we look forward to hearing from you.