

Assessing Your Situation

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Building Relationships to Advance Education and Philanthropy

Assessing your situation

- Assessing the task before you
- Two methods
 - STARS: defining the situation you face
 - PMMM: analyzing the maturity level of the program you are leading
- Provide some insights and tools for your own work
- Follow up reading

STARS



- Start Up
- Turnaround
- Accelerated Growth
- Realignment
- Sustaining Success

The First 90 Days, by Michael Watkins (2003).

STARS

Start-Up	Turnaround	Accelerated Growth	Realignment	Sustaining Success
Assembling the capabilities (people, financing, technology) to get a new program, department or initiative off the ground	Saving a department or program widely acknowledged to be in serious trouble	Managing a rapidly expanding department, project or program	Reenergizing a previously successful organization that now faces problems	Coming in on the heels of a highly regarded leader with a stellar record of accomplishment

Challenges				
Building the strategy, structures and systems from scratch without a clear framework or boundaries.	Reenergizing demoralized employees and other stakeholders	Putting in place structures and systems that permit scaling.	Convincing employees that change is necessary.	Living in the shadow of the former leader and managing the team he/she created
Recruiting and welding together a high-performing team	Making effective decisions under time pressure	Integrating many new employees	Carefully restructuring the top team and refocusing the organization	Playing good defense before embarking on too many new initiatives.
Making do with limited resources	Going deep enough with painful cuts and difficult personnel choices			Finding ways to take the program to a new level.

Opportunities				
You can do things right from the beginning	Everyone recognizes that change is necessary.	The potential for growth helps to motivate people.	The organization has significant pockets of strength	A strong team may already be in place.
People are energized by the possibilities	Affected constituencies offer significant external support.	People will be inclined to stretch themselves and those who work for them.	People want to continue to see themselves as successful	People are motivated to continue their history of success.
There are no rigid preconceptions	A little success goes a long way			A foundation for continued success may already be in place.

Source: *The First 90 Days*, by Michael Watkins, Harvard Business School Press, 2003.

Start-Up

Challenges

- Building the strategy, structures systems from scratch without a clear framework or boundaries
- Recruiting and welding together a high performance team
- Making do with limited resources

Opportunities

- You can do things right from the beginning
- People are energized by the possibilities
- There are no rigid preconceptions

“Start-up” Assembling the capabilities (people, budget, technology) to get a new program/department/campaign off the ground.

Turnaround

Challenges

- Re-energizing demoralized employees and other stakeholders
- Making effective decisions under time pressure
- Going deep enough with painful cuts and difficult personnel choices

Opportunities

- Everyone recognizes that change is necessary
- Affected constituencies offer significant external support
- A little success goes a long way

“Turnaround” Saving a department or entire division widely acknowledged to be in serious trouble.

Accelerated Growth

Challenges

- Putting in place structures and systems to permit scaling
- Integrating many new employees

Opportunities

- The potential for growth helps to motivate people
- People will be inclined to stretch themselves and those who work for them

Realignment

Challenges

- Convincing employees that change is necessary
- Carefully restructuring the top team and refocusing the organization

Opportunities

- The organization has significant pockets of strength
- People want to continue to see themselves as successful

“Realignment” Re-energizing a previously successful organization that now faces problems.

Sustaining Success

Challenges

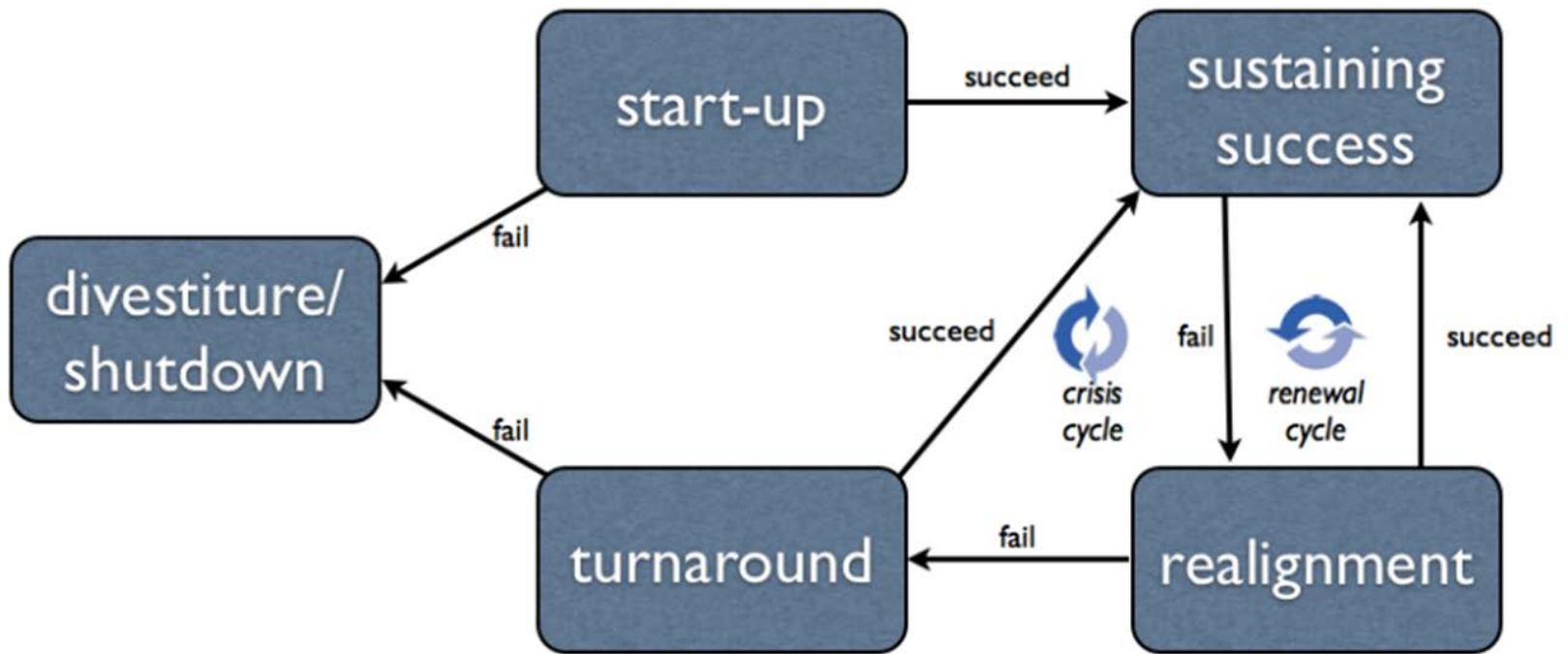
- Living in the shadow of the former leader and managing his/her team
- Playing good defense before embarking on too many new initiatives
- Finding ways to take the program to a new level

Opportunities

- Strong team may already be in place
- People are motivated to continue their history of success
- A foundation for continued success may already be in place

“Sustaining Success” Coming in on the heels of a highly regarded leader with a stellar record of accomplishment.

The Stars Align



The biggest challenge



Those fateful words

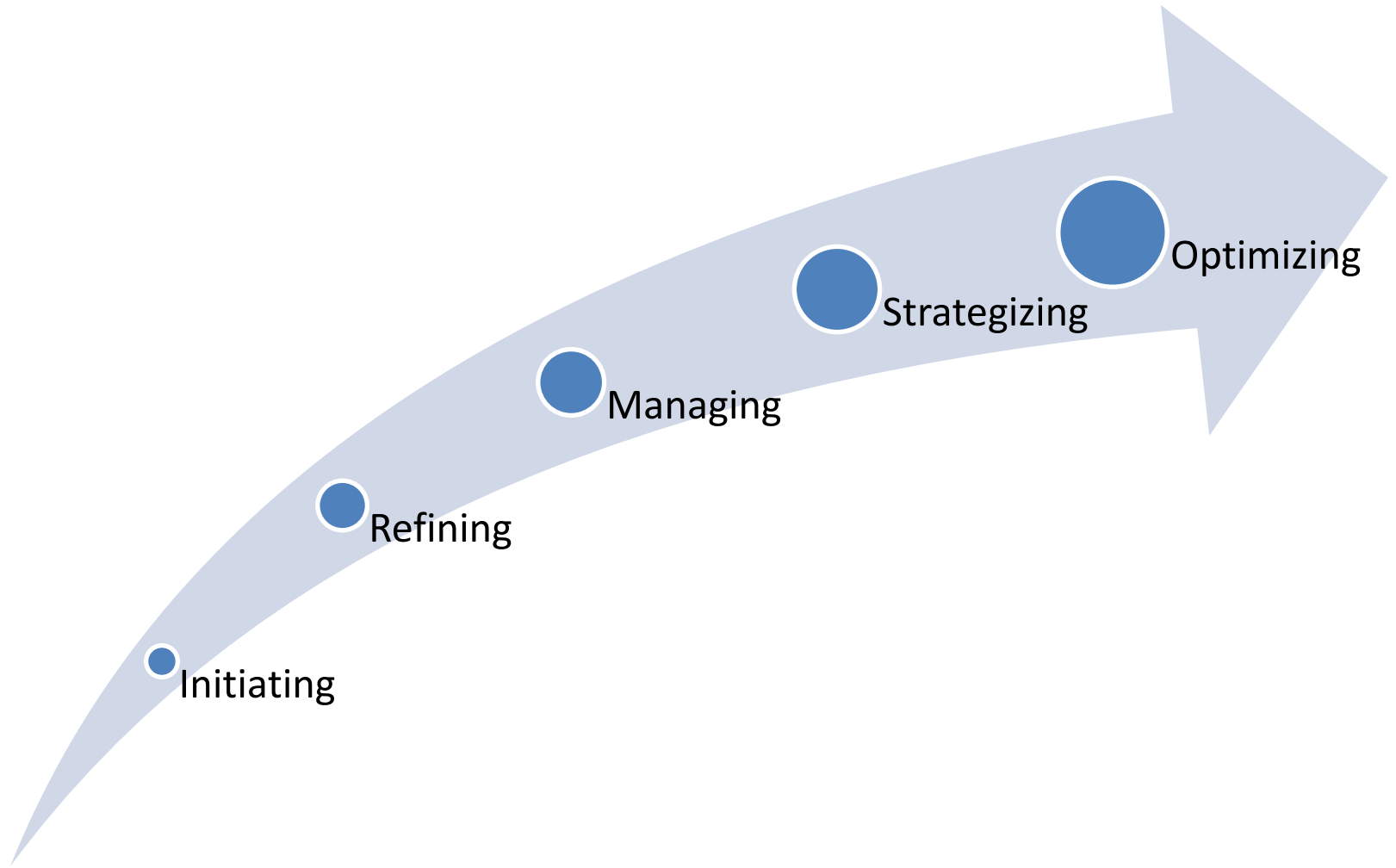


“We want you to take our program to a new level.”

Performance Management Maturity Model

- Assessment of program maturity to achieve goals
- Robust use of assessment tools
- From developing, to competent, to integrated and strategic
- Strategy designed to move up the trajectory

Source: “Performance Management Maturity Model: Raising the Bar of Fundraising Performance.” by Donald A. Hasseltine, Ed.D., CASE White Paper, 2010. *Used with permission.*



Initiating

Refining

Managing

Strategizing

Optimizing

Level 1: Initiating

- Ad hoc, ritualistic, inconsistent processes
- Organization unstable, chaotic
- Success depends on competence of people, rather than proven processes

Level 2: Refining

- Clearly articulated mission and goals
- Measures of operational effectiveness are established and being tracked
- Strategies to achieve goals have been articulated and based on clear analysis of internal and external landscapes

Level 3: Managing

- Program is established, tailored, improves over time
- Procedures are in place; consistency
- Assessment systems produce timely, relevant and accurate performance info

Level 4: Strategizing

- Differentiating from ‘competent’ to ‘integrated and strategic.’
- Managed toward division and institutional goals
- Performance and capacity cross silos
- Culture of assessment
- Sense of synergistic possibilities
- “This is where the work gets fun.”

Level 5: Optimizing

- Programs meet and exceed goals regularly
- Seasoned and effective management
- Seek continual innovation and incremental improvements
- Revise strategies based on greatest impact on improving outcomes

Incorporating the models

- Conduct the initial assessment:
 - Identify conflicts within your division
 - Identify areas for investment
 - Sequence activities
 - Identify roadblocks to success
 - Staff training and development needs
- Return to the model and tweak it
- Find others that work for you

Suggested Reading

- The First 90 Days: Critical Strategies for New Leaders at All Levels, by Michael Watkins, Harvard Business School Publishing, 2003.
- Performance Management Maturity Model: Raising the Bar of Fundraising Performance, by Donald A. Hasseltine, Ed.D., CASE White Paper, 2010.
- What Got You Here Won't Get You There, by Marshall Goldsmith with Mark Reiter, Hyperion, 2007.

Questions?

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