

Keys to Life Cycle Transitions

	Grass Roots - Invention	Start-Up - Incubation	Adolescent – Growing	Mature – Sustainability	Stagnant And Renewal	Decline and Shut-down
Program And Services	<ul style="list-style-type: none"> Identify key unmet client/community needs Develop a concept plan Identify and evaluate program options Clarify results & expectations of work 	<ul style="list-style-type: none"> Assess and begin to improve quality Establish criteria for what activities and programs to pursue 	<ul style="list-style-type: none"> Develop a strategic plan to clarify & integrate. ID and track client outcomes Learn to say 'no' to opportunities Develop collaborations to better serve client needs 	<ul style="list-style-type: none"> Explore new program delivery models Develop internal process for evaluating new opportunities Review strategic plan & develop a long-range program plan 	<ul style="list-style-type: none"> Undertake strategic planning to review activities – reduce and focus efforts Conduct formal program evaluation – survey clients Explore best practices and models New collaborative relations 	<ul style="list-style-type: none"> Reduce programs to core essence Explore partner to transfer programs Immediately improve quality
Management	<ul style="list-style-type: none"> ID someone with time, skills and energy to formalize the organization 	<ul style="list-style-type: none"> Provide a mentor or coach for development of the leader Assess ED's ability - maximize strengths and minimize weaknesses 	<ul style="list-style-type: none"> Clarify ED's primary roles Establish ED annual priorities Delegate and offer more admin support Begin succession planning for key staff 	<ul style="list-style-type: none"> Enhance ED annual evaluation process Clarify ED's roles related to staff management Explore additional coaching 	<ul style="list-style-type: none"> Develop succession plans for key leadership May need a new or interim Executive Director 	<ul style="list-style-type: none"> Coach current ED or recruit interim ED with turnaround and financial experience
Staffing	<ul style="list-style-type: none"> Estimate initial staffing needs ID and determine how best to utilize volunteers Create a basic staff orientation plan 	<ul style="list-style-type: none"> Use and recognize volunteers well Hire administrative support Consider contract or part-time for needed expertise – accounting, etc. 	<ul style="list-style-type: none"> Hire more admin support Develop job descriptions and work charts Refine volunteer management functions Expand volunteer base Create personnel policies 	<ul style="list-style-type: none"> Increase personnel management Provide more training, including management training Ensure proper volunteer programs Conduct salary review and comparison Prepare staff for diversity 	<ul style="list-style-type: none"> Prepare for major staff changes Push for enhanced internal collaboration Re-evaluate the volunteer program Explore ways to keep essential staff Reassign staff as needed Consider new staff structures 	<ul style="list-style-type: none"> Conduct staff retreat – input to address critical operational issues Engage third party to mediate conflicts Recognize challenge for staff – plan to address burn-out Explore severance packages if shutdown
Governance Board	<ul style="list-style-type: none"> Begin to ID potential board members Obtain information 	<ul style="list-style-type: none"> Expand the board Clarify board member roles & 	<ul style="list-style-type: none"> Conduct board retreats for planning & training 	<ul style="list-style-type: none"> Institute an annual board evaluation Enhance board 	<ul style="list-style-type: none"> Re-energize or develop new board Explore partnerships 	<ul style="list-style-type: none"> Board resign or build new board Engage third party to

	<ul style="list-style-type: none"> on forming a board. • File articles of incorporation and by-laws • Recruit an initial board chair. • Obtain legal advice 	<ul style="list-style-type: none"> responsibilities – offer training • Create formal governance structure – including committees 	<ul style="list-style-type: none"> • Formalize board recruitment process • Culturally diversify board composition • Develop board orientation & mentor program • Focus on policies 	<ul style="list-style-type: none"> fundraising capacity • Enhance board committee structure 	<ul style="list-style-type: none"> with others • Board retreat -revise board and planning • Revitalize board nomination process • Clarify board roles 	<ul style="list-style-type: none"> mediate conflicts • Board retreat to develop plan to address critical issues
Administrative Systems/ Operations	<ul style="list-style-type: none"> • ID initial infrastructure and operation needs • Determine any compliance needs • Decide on 'home office' • Obtain accounting expertise 	<ul style="list-style-type: none"> • Formalize record keeping and • Begin to establish basic program polices and manuals 	<ul style="list-style-type: none"> • Automate data management • Purchase necessary technology and equipment • Develop maintenance & replacement plan • Improve internal communication 	<ul style="list-style-type: none"> • Develop a risk management plan • Upgrade technology hardware and software • Ensure adequate administrative staff • Formalize internal communication 	<ul style="list-style-type: none"> • Centralize key administrative functions • Look to revamp systems and equipment • Re-examine policies – reduce red tape 	<ul style="list-style-type: none"> • Shore up broken systems • Reduce red tape • Find external financial expertise
Finances	<ul style="list-style-type: none"> • ID initial funding sources, including researching targeted foundations • Develop a proforma budget • Develop an initial development plan 	<ul style="list-style-type: none"> • Expand funding sources • Institute formal accounting policies and procedures • Hire an experienced accountant • Begin to plan for future financial needs 	<ul style="list-style-type: none"> • Develop a multi-year budget – including capital budget • Establish formal financial controls • Create a development plan • Diversify funding streams – expand individual giving base • Hire a development person • Explore capital campaign feasibility 	<ul style="list-style-type: none"> • Develop an operating reserve & policies • Review fundraising plan • Start planned giving program • Enhance fundraising capacity 	<ul style="list-style-type: none"> • Expand funding sources • Detailed financial analysis • Explore short term cost reductions • Analyze current fundraising strategies • Add resources to development 	<ul style="list-style-type: none"> • External audit • Short-term budget and funding plan • Budget cutbacks • Emergency meeting with key funders
Marketing/ Community Awareness	<ul style="list-style-type: none"> • Explore a name – test with key audiences • ID and 'sell' concept paper to key potential stakeholders • ID initial marketing and promotional needs • Verify community need and interest in addressing need 	<ul style="list-style-type: none"> • Develop a condensed fact sheet • Create talking points for board/volunteers • Begin to develop an organization brand/identity • All staff and board to provide potential contact list (possible funders) 	<ul style="list-style-type: none"> • Have board more involved in community relations • Develop brand and image • Enhance professionalism of promotional material • Develop proactive PR plan 	<ul style="list-style-type: none"> • Enhance marketing capacity • Better utilize technology for communication • Develop a long-term marketing plan • Enhance public relations • Reassess logo and image 	<ul style="list-style-type: none"> • Proactive public relations campaign • Keep key stakeholders updated 	<ul style="list-style-type: none"> • Engage technical assistance in crisis communication