



## **Strategic Planning for the Commonsides Trust**

An Interactive Qualifying Project Report for  
A requirement of the Degree of Bachelor of Science from  
WORCESTER POLYTECHNIC INSTITUTE

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## Acknowledgments

- ✓ We would like to give thanks to Dr. Michael Elmes and to Dr. Steven Taylor for their continuous support and guidance throughout the project, for sharing their knowledge and expertise on the subject. Finally, we would like to thank them for doing a wonderful job on facilitating the “Home Day” for us.
- ✓ We would like to thank Ms. Naomi Martin for her incredible input in our data. For putting up time on her busy schedule to make sure she was being helpful enough. For helping us make sure the Home Day was a success and for helping Commonsense feel welcoming for us.
- ✓ We would like to thank Ms. Jenny Bisnouth and Ms. Rebekah Knight for their warm reception, continued open mindedness and excitement for our project, and their valuable input into our analysis of the Aiming High Project. We would love like to thank them for helping us to gather information from the archives.
- ✓ We would like to thank Mrs. Vivien Lovell, Mrs. Maureen Nolan and Ms. Jennifer Sattaur for letting us have a wonderful lunch at Commonsense as well as for helping us setup the interviews with the Lunch Club Clients.
- ✓ We would like to thank Mrs. Tanya Rowen for providing us with her research information on the Aiming High program as well as giving us her perspective on Commonsense.
- ✓ We would like to thank all the participants of the “Home Day,” your input did a great difference on the outcome of the project.
- ✓ We would like to thank Mr. Andy Hodge for your valuable input as well as any other person who we might have forgotten to thank.
- ✓ Finally we would like to thank Mrs. Maria Picanza and Mrs. Angela Opoku-Boateng for providing us with a warm meal every day

## **Abstract**

This project provided the Commonsides Community Development Trust, a charity located in Merton, London, with information and tools to help them understand the strategic planning process better. Using online surveys, interviews and observations, we collected data from key stakeholders to discuss and develop the organization's mission, vision. We also identified strengths, weakness, opportunities and threats for Commonsides. In addition we evaluated current programs and recommended new ones. Finally, we made suggestions for strengthening board-staff relationships and overcome other strategic issues.

## Executive Summary

Strategic Planning gives organizations and companies the tools for long term planning. By engaging on a strategic planning process, organizations and companies can assure a smoother future. Although, nonprofit or charities do not generate a profit strategic planning is an important part of the organizations health.

Charities have been created in order to help fight socioeconomic problems of society. Commonside Community Development Trust is a small nonprofit organization located in the Borough of Merton that aims to help the residents of Pollards Hill, Longthornton and the Eastfields area of Figges Marsh in South London, since these are some of the poorest areas in the Borough. Commonside was “developed as the exit strategy for the Pollards Hill Single Regeneration Budget’s (SRB) program Building Connections, the program was valued at 5 million pounds”<sup>1</sup>. Commonside works based on the following mission statement: “to create a better future for ourselves, our families and our community”.<sup>2</sup> Commonside has worked with past WPI groups in developing a new face in order to become better known by the community. Other projects have helped Commonside build a database of volunteers as well as establishing a system of organization and activities of volunteers. Commonside is well managed and for that reason funding has not been an issue.

Commonside was founded on big dreams. In order for Commonside to run smoother and achieve these dreams, they should have a strategic plan which will give their members a clear vision and mission of Commonside’s future. The strategic plan should include, short and long term objectives, related to annual business plans in order for Commonside to reach the objectives defined in the planning. A strategic plan should help Commonside improve interaction between the board and staff by giving them a common mission and vision. Our project intended to help Commonside Community Development Trust develop an effective strategic plan. With a new strategic plan in place, Commonside can overcome future issues and could become an example for other nonprofits in the Merton area.

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<sup>1</sup> Ferguson, Kathleen, “Branding and Public Relations at Commonside Trust” (MQP, WPI, 2005), 30

<sup>2</sup> IBID

Conversely, our project did not accomplish its initial task since there was no way to agree on a mission and vision statement for Commonsides. Without a vision we were not able to develop the core strategies needed to eradicate the strategic issues and help them achieve their vision. Nevertheless, the project was extremely useful in helping Commonsides identify their strategic issues and helping them start elaborating on a mission and vision statement.

The best nonprofit organizations devote a great deal of time and thought to defining their organization's mission statement and we have no doubts that Commonsides did so in the past. However, looking at their mission statement we can see that it is a little broad and that it does not give a clear idea on what they are out there for. The current mission statement was extremely useful in helping Commonsides establish its base. A broad mission statement gave them the opportunity to explore different areas where funding was available. However, having a broad mission statement makes it hard to be recognized in a community and prioritize programs. This is due to the fact that becoming the best on several areas is a lot harder than just focusing on one.

When we asked the staff about Commonsides's vision, they had no idea what we were talking about. That told us that there was no vision at the moment. Commonsides should start working on creating a vision statement in order to so they will have an idea where they want they want to head in the near future. Also, the vision is of major importance for Commonsides if they desire to build a strategic plan. In order to help them create a new vision we researched for other areas of service in which Commonsides could be involved.

From our research, we were able to identify that, in the Borough of Merton there are a great amount of service opportunities that can be taken advantage by Commonsides. From the client interviews that were conducted by Mrs. Rowen (for the Aiming High, a service that helps young mothers) and us (for the Lunch Club, a service that provides lunch and activities for the elderly) we got ideas on how to improve Commonsides's current programs. From our interviews, all of the Lunch Club attendees would love to have more activities which were in place before Commonsides took over the program. On Aiming High the mom's said they would like to have trips and gatherings with an agenda. In September 2005, Commonsides began the merging process with the neighboring Pollards Hill Community Centre. If the merging process is a success, Commonsides will

have more resources (i.e. funding, building space and staff) to start planning long-term, take on more programs and acquire new funds. The merger will also help Commonsense find some of the resources needed to expand and create new programs.

We held a “Home Day”, which was a facilitated discussion in which the board and staff discussed the data we collected prior to the exercise, in order to build a base for our future strategic plan. This data included common traits from the board and staff on Commonsense’s vision and mission, a SWOT analysis and Identification of Strategic Issues. However, since there was no vision it was hard to say where Commonsense wants to go in the future; and therefore, there was no way to develop strategies that could help Commonsense achieve this vision. Nevertheless, the Home Day was extremely successful in identifying the strategic issues and bringing new ideas that could help Commonsense build a vision and once this is done they might engage again in the development of a strategic plan.

We got some useful information about the organization’s mission or what are Commonsense’s objectives presently and in the future. The general theme of this discussion was “what is Commonsense going to do after the merger?” Right now it was explained by one person that Community Centre and Commonsense were “two organizations under one roof.” A great suggestion was to include the idea of having balance in programs and clients into the mission statement. Lastly, one person made a great comment about Commonsense’s mission statement “it’s relatable to raising a child. You provide help for them but you let them create their own choices”. From our point of view, Commonsense is not ready to create a clear mission statement at the moment.

At our Home Day we saw there are some great ideas on where Commonsense wants to go. One of the most impacting vision statements that emerged through the discussion was “We want to become one organization, self-supported and welcoming...An organization that will grow together with its community”. However, we were not able to bring all these ideas and opinions into a consensus. All the ideas discussed can be found on the results and analysis portion of our project. It is extremely hard to elaborate a vision statement; this is an activity in which the board and staff (possibly including the Pollards Hill Community Centre personnel) should work in during meetings. Once Commonsense, or the new organization that will emerge in the near future, has a vision statement it might give them the ideas to create their mission. Once

there is a clear mission and vision statement, Commonside should be able to engage in the strategic planning process.

One of the strategic issues identified was the lack of staff and board interaction. This issue was discussed on the Home Day and it was agreed that it was most likely caused by the fact that the board is not sure about their role. Therefore, Commonside should consider engaging in a role clarifying exercise. Ms. Martin mentioned that Commonside would benefit from a “practical board”. This means that the board should also contribute in the activities by using their skills and talents in different areas. A clear indicator of this lack is found by looking at the minutes of past board and staff meetings at Commonside we can see that the average number of board members showing to the meetings is seven out of 15 that form the total members of the board. This is roughly a 50% of participation of the board on these meetings. This might also be due to the fact that they are not sure of their role.

During the Home Day we evaluated Commonside’s programs in terms of future level of activity, financial viability and mission impact. The Lunch Club and Aiming High seem to be programs that fit with Commonside’s potential vision. However, Aiming High is having some financial difficulties and therefore some resources should be focused on fixing this problem. The Pollards Hill Cyclists (cycling group that meets once a week) and Common Art (art project that involves the community) are programs that do not seem to fit with Commonside’s mission and their financial liability is uncertain. These programs should be restructured or they should be placed aside. A detailed list of opportunities and suggestions for the programs can be found on the results and analysis chapter of this project.

Hopefully, the information we were able to gather through this project and the tools that we have created will allow Commonside to resume the strategy building process in the future. However, to do so they must complete the merger and then elaborate a mission and a vision. Improving the board and staff interaction will facilitate this process and will assure that there is more input into the elaboration of the mission and vision which, in the end, assures that the whole opinion of the board and staff is included in the elaboration of it. The more people participating in the exercise will assure that a feeling of ownership of the mission will occur; this will help Commonside to run at its best.

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# 1. Introduction

Strategic Planning gives organizations and companies the tools for long term planning. By engaging on a strategic planning process, organizations and companies can assure a smoother future. Although, nonprofit or charities do not generate a profit, strategic planning is an important part of the organization's health. By having long term goals and objectives charities can assure that their programs and services will be adequately provided in the future.

Charities have been created in order to help fight socioeconomic problems of society. Socioeconomic problems impact every country in the world. Some countries have greater socio-economic problems than others, but in the end it has become a problem we all have to face. In the United Kingdom "the 190,000 charities registered with the national Charity Commission have an annual income of over 36 billion British pounds, almost 600,000 paid staff and 900,000 trustees"<sup>3</sup>

Most charities around the world have "one thing in common: they need help. The most important areas in which nonprofits need assistance are financial management, public relations, fundraising and strategic planning."<sup>4</sup> Strategic planning is the area that is often overlooked and misunderstood because of two factors: 1. "people assume that for-profit strategy is the same thing as nonprofit strategy 2. Nonprofits are not able to recruit the higher priced people in the areas of management and leadership because of their limited resources, which leads to more thinking in the fields of management and leadership"<sup>5</sup>. As in other parts of the world, management of nonprofits is very important and is a subject to that is barely discussed. "...little that is so far available to the nonprofit institutions to help them with their leadership and management has been specifically designed for them."<sup>6</sup> This is why this is a hard issue for charities to solve.

Commonside is a small nonprofit organization located in the Borough of Merton that aims to help the residents of Pollards Hill, Longthornton and the Eastfields area of Figges Marsh in South London, since these are some of the poorest areas in the Borough. However, small charities, such as Commonside, registered with the National Charity

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<sup>3</sup> Charity Commission, *Annual report*, 2005 (London: Charity Commission, 2006).

<sup>4</sup> Howe, Fisher. *Welcome to the Board*. (San Francisco: Jossey-Bass, 1995), 3

<sup>5</sup> Gellat, James, *Managing Nonprofit Organizations in the 21<sup>st</sup> Century* (Phoenix: The Oryx Press, 1992), 1

<sup>6</sup> Drucker, Peter, *The Essential Drucker* (New York: HarperCollins, 2001), 15.

Commission, have an annual income of over 4 billion pounds sterling<sup>7</sup>. Commonsense was “developed as the exit strategy for the Pollards Hill Single Regeneration Budget’s (SRB) program ‘Building Connections’, the program was valued at 5 million pounds”<sup>8</sup>. In mid-2003 Merton had an estimated “191,400 residents out of which 20 per cent of 16-74 year olds having no qualifications (i.e. no high school diploma or training) of all economically active people aged 16-74 in Merton”.<sup>9</sup> Commonsense was established for “...the promotion for the public benefit of urban regeneration and community capacity building and of activities bringing direct community benefits in areas of social and economic deprivation in the London Borough of Merton.”<sup>10</sup>



Commonsense Trust has worked with past WPI groups in developing a new face in order to become better known by the community. In order to do so, past groups helped the Trust develop a web site in order to advertise and make more noticeable its activity in the community and to attract institutional donors who may potentially fund the entity. Other projects have helped Commonsense build a database of volunteers as well as establish a system of organization and activities of volunteers. There was also a past WPI student that explained to Commonsense how to improve graphic design as well as how to identify and create attractive advertisement for the Trust.

Commonsense is well managed and for that reason current funding has not been an issue. However, Commonsense is not a perfect organization. In the last year, Commonsense has had a declining activity in the community; as shown in the financial reports of the Trust. Last year, their expenses were greater than their income (which declined compared to the pervious year), due to the lack of an overall business-planning framework. We believe that Commonsense wants to engage in a strategic planning process in order to grow, have a sense of control of the near future and overcome their weaknesses in order

<sup>7</sup> Charity Commission, *Annual report*, 2005 (London: Charity Commonsense, 2006)

<sup>8</sup> Ferguson, Kathleen, “Branding and Public Relations at Commonsense Trust” (MQP, WPI, 2005), 30

<sup>9</sup> Charity Commission, *Annual report*, 2005 (London: Charity Commission, 2006).

<sup>10</sup> Charity Commission, *Registry*, 2005 (London: Charity Commission, 2006).

to reach their high standards. It is paramount for Commonsense to identify new areas where to serve its community. It is also important for Commonsense to train its trustees, in order to develop the skills required to obtain from them a strategic plan for the institution. The strategic plan should include, short and long term objectives, related to annual business plans in order for Commonsense to reach the objectives defined in the planning. Commonsense has also begun a merging process with the Pollards Hill Community Centre, which increases the importance of having a clear strategy that can guide them through the future. As of now, Commonsense is assured a few years of income by providing services that the government cannot provide without them, but it is still important for Commonsense to develop a strategy that will assure them good foundation without having to rely on the government for their income.<sup>11</sup>

Our project intends to help Commonsense Community Development Trust develop an effective strategic plan. A strategic plan should help Commonsense improve interaction between the board and staff by giving them a common mission and vision. With a new strategic plan in place, Commonsense should be able to overcome future issues and could become an example for other nonprofits in the Merton area. We must be clear, however, that the strategic process is very complex and continuously changing. Therefore, it is important that the developed strategic plan be reviewed at constant intervals.

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<sup>11</sup> Martin, Naomi, Telephone Interview by Authors, March 30, 2006.

## 2. Background

Throughout the background we want to make the reader familiar with the concepts of charities and their importance. Then we become more specific by introducing the reader to the British and their relationship to charities so the reader can gain perspective on British charities in general. We then guide the reader to the Borough of Merton which is where Commonsidge is located that way the reader can get a feel for the area and understand why charities are needed there. Once the reader is familiar with the area, we proceed to introduce the reader to what Commonsidge is. Finally, we proceed to introduce the main topic of our project which is strategy development; this way the reader can have easier time to visualize our methodology. In the end, we added a section that covers the different data gathering techniques that we will use on our project.

### 2.1 UK Nonprofit Organizations (Charities)

“Nonprofit organizations are organs of society and therefore they don’t exist for their own sake”<sup>12</sup>. They exist in order to fulfill a specific social purpose or needs of the society, community or individuals. They are not ends themselves but means to help fight socioeconomic problems. This is why it is important to ask ourselves instead of “what are they? What are they supposed to be doing?”<sup>13</sup> Some charities are set up to give direct help, advice, grants or support to people in various kinds of need, for instance, older people, children, or those with a particular medical condition. Charities are also set up to carry out research, provide training or education, or to focus on meeting the wider needs of a particular deprived area (such is the case of Commonsidge). And some charities exist mainly to support other charities, by giving grants and other assistance to them<sup>14</sup>.

In order to help fight poverty and other socioeconomic problems, countries have allowed the creation of nonprofit organizations. The United Kingdom has joined these efforts in order to help eradicate these problems. They have done so by creating, “190,000 charities that are registered with the National Charity Commission. These charities have an annual income of over 36 billion pounds sterling, almost 600,000 paid

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<sup>12</sup> Drucker, Peter, *The Essential Drucker* (New York: HarperCollins, 2001), 15.

<sup>13</sup> *Idem*

<sup>14</sup> Charity Commission, *Annual report*, 2005 (London: Charity Commission, 2006).

staff and 900,000 trustees<sup>15</sup>. As it is clear, charities manage a considerable budget, this shows the importance that charities play in helping those in need.

Charities benefit the community. They are given some tax advantages from the government, such as certain tax exemptions. Under certain circumstances they can trade for profit (in order to raise funds), but they must use any such profit for the purposes of charity. To qualify as a charity, an organization has to meet strict conditions about its overall purposes, also referred to as its mission. The organization also must be set up with a constitution or rules which meet certain conditions. These rules (in the United Kingdom) are usually referred to as a charity's governing document<sup>16</sup>.

## **2.2 British Citizen Involvement in Charities**

In order to better understand our project it is important for the reader to understand how nonprofits play a role in the British community. We start by stating the amount of British people that are involved in any kind of nonprofit activities. We finally guide the reader, to understand the governance policies of nonprofits in the United Kingdom

In terms of participation, 66 percent of the British adults are involved in charity activity this is just slightly less than the 70 percent of the American adults. However, in terms of money, the British are more generous in the following areas: international aid, welfare and animals. In terms of who gives donations, low-income disabled/retired women have the highest rate of giving. However, when asked about how the British government should deal with public services,

“An overwhelming majority of 88% of UK residents felt that ‘the government ought to help more and not rely on charity to raise needed money.’ The reasoning for this that philanthropy still carries disparaging connotations of Victorian ‘do-gooderism’ and is often seen as elitist, patronizing, morally judgmental and ineffective, as well as old fashioned and out of date. It is perceived as an idea whose time came, was proved unworkable, and went—to be replaced by a universal, fair, and more efficient welfare state.”<sup>17</sup>

Although nonprofits, in the world, have not been able to hire the higher priced managers as stated earlier, they are still becoming one of the world's management

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<sup>15</sup> Charity Commission, *Annual report*, 2005 (London: Charity Commission, 2006).

<sup>16</sup> *Idem*

<sup>17</sup> Wright, Karen, “Generosity versus altruism: Philanthropy and charity in the US and UK”, *Civil Society Working Paper (CSWP) 17* (2002), [http://www.lse.ac.uk/collections/CCS/pdf/Cswp17\\_web.pdf](http://www.lse.ac.uk/collections/CCS/pdf/Cswp17_web.pdf).

leaders, by improving “strategy and effectiveness of the board, they are practicing what most businesses preach. And in the most crucial area-the motivation and productivity of knowledge works, nonprofit managers are truly pioneers; working out the policies and practices that business will have to learn tomorrow.<sup>18</sup>” Most people are not even aware that the nonprofit sector is by far England’s largest employer. In England “39% of the population of age 16 and over participate in voluntary work”<sup>19</sup>; this makes clear how nonprofit work is seen as an important activity to the British community.

### **2.3 Government Policies of Charities in the U.K**

In the United Kingdom, there is an organization that provides regulation of charities in England and Wales, in order to increase charities’ efficiency and effectiveness and public confidence and trust. The name of this organization is the Charity Commission.

The Commission was established by law as the regulator and registrar for charities in England and Wales. The Commission has three main objectives<sup>20</sup>:

- Securing compliance with charity law and dealing with abuse and poor practice.
- Enabling charities to work better within an effective legal, accounting and governance framework, keeping pace with developments in society, the economy and the law
- Promoting sound governance and accountability.

The Commission achieves these objectives in numerous ways. They provide information and advice on what the law requires and on good practice and it provides information to the public about charities that are registered. The National Charity Commission equips charities to work better by their registration processes, visiting hundreds of charities a year to review their activities and formally give advice to over 24,000 charities a year. Through publications and casework, they promote legal compliance which gives charities every reasonable opportunity to comply with their regulations<sup>21</sup>

Since our project takes place in the Borough of Merton, it is necessary to understand its history and culture in order to understand the needs of the area. For this reason we are going to start becoming more specific with the aspects of our project.

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<sup>18</sup> Drucker, Peter, *The Essential Drucker* (New York: HarperCollins, 2001), 39.

<sup>19</sup> *Encyclopedia Britannica Almanac*, 2006, s.v. “England”.

<sup>20</sup> Charity Commission, *Regulations*, 2003 (London: Charity Commission, 2006).

<sup>21</sup> *Idem*



## 2.4 Borough of Merton

It was not until the early twentieth century that Merton became an urban area. Before then, it was largely occupied by farmlands and local industries. Due to the low population in the surrounding areas of Pollards Hill, Figges Marsh and Longthornton, much of the area was available for housing construction. Between the two World Wars, the housing population dramatically increased. Between 1920 and 1921 alone the number of houses doubled. Due to the extraordinary increase in such a short time span the local infrastructure was not prepared to accommodate such numbers, leaving schools, buses, stores and roads overcrowded.<sup>22</sup>

“In 1965 the wards of Wimbledon, Morden, Merton and Mitcham combined to form the London borough of Merton. Today there are a total of twenty wards that make-up Merton<sup>23</sup>”. The Borough of Merton is composed of five major areas: Wimbledon,



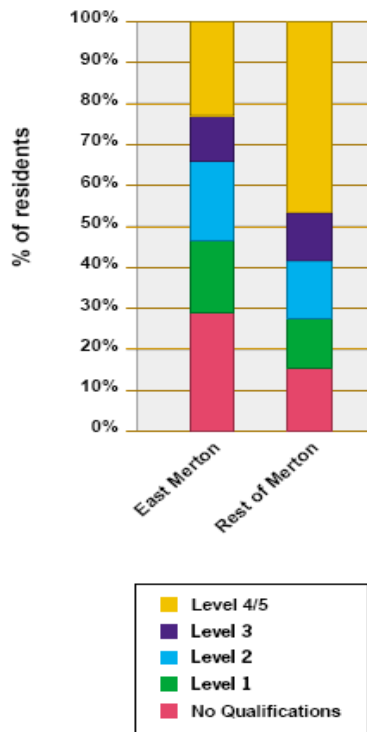
**Figure 1: Location of Merton in relation to other London Boroughs**

Mitcham, Morden, Colliers Wood, and Raynes Park. The Borough is located in the southwest quadrant of London and covers a total area of 37.61 square kilometers (Figure 1)<sup>24</sup>.

<sup>22</sup> Belliss, Michael, Hannafin Timothy, Quigley, Amanda, Roy, Philip, “Community Involvement and the Commonsense Community Development Trust” (IQP, WPI, 2005), 14.

<sup>23</sup> London Borough of Merton, “Making Merton” *A vibrant community*, <http://www.merton.gov.uk/history/makingmerton.htm>

<sup>24</sup> *Idem*



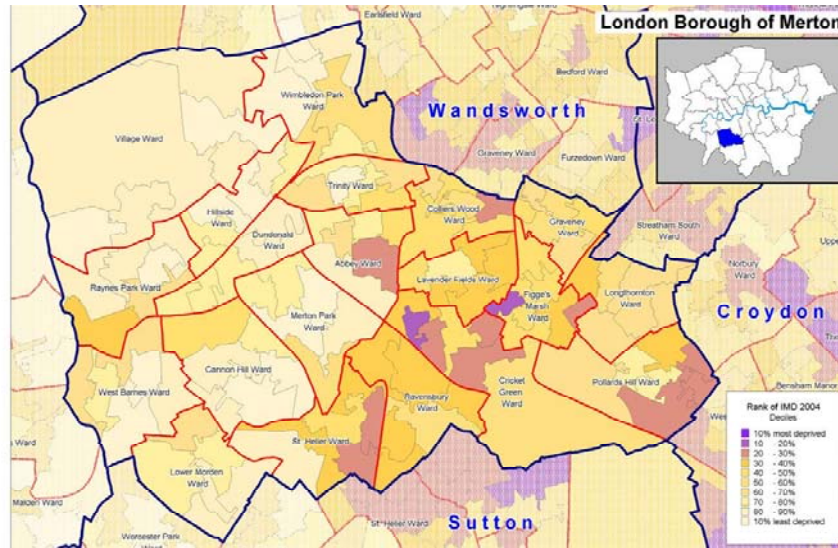
**Figure 2 - Percentage of Residents with Qualifications at Different Levels.**<sup>25</sup>

The Borough of Merton is a thriving and culturally diverse area in south London. The population of Merton is approximately 190,000, which is expected to increase to 209,000 by the year 2016. At 74%, the majority of residents in Merton are between the ages of 16 and 74, while 19% are below 16, and 6% are older than 74 years of age (Merton Council). In mid-2003 Merton had an estimated 191,400 residents out of which 20% of 16-74 year olds have no qualifications. There is an unemployment rate of 3.3% of all economically active people aged 16-74 in Merton<sup>26</sup>. What this means is that even though people have no qualifications (education or training) they still perform basic and simple jobs (Figure 2).

Merton is a borough that is clearly split with regards to affluence and poverty. The wealthy population inhabits the north-west half of the borough; poorer people live primarily in the south-east region of the borough (Figure 3).

<sup>25</sup> Merton Partnership, “Merton’s Neighborhood Renewal Strategy”, (London: 2005) 12.

<sup>26</sup> London Borough of Merton, “Making Merton” *A vibrant community*, <http://www.merton.gov.uk/history/makingmerton.htm>



**Figure 3 Deprivation index in Merton<sup>27</sup>**

East Merton has a net income that is 23% lower than the average of the entire Borough. That is approximately a difference of £122 a week. Since, Mitcham has a somewhat isolated location from the rest of the Borough, it has less expensive housing. Housing in the “low cost valley” costs about one third that of the surrounding neighborhoods. Due to this, large ethnic minority groups have settled in Mitcham, making the neighborhood multi-cultural. It includes a variety of races, multiple income levels and a wide variety of ages. In Longthornton, 17% of the population is Asian, which is extremely high compared to the national average of Asians in England, which is 4.5%. Another remarkable statistic is that Pollards Hill has a black population of 19%, versus 2% on the national level. It is clear that Merton contains a great deal of the international culture within its borders (Figure 4).<sup>28</sup>

<sup>27</sup> Borough of Merton, Merton: A great place to live, work and learn, <http://www.go-london.gov.uk/boroughinfo/borough.aspx?bid=24> (London: 2005).

<sup>28</sup> Andrew Bailey, Rebecca Legere, Tiffany Warrington, “Implementation of a Sustainable Website for the Commonside Community Development Trust” (IQP, WPI, 2006)

LAD	Proportion of Population classified as White, 2001	Proportion of Population classified as Mixed, 2001	Proportion of Population classified as Asian or British Asian, 2001	Proportion of Population classified as Black or British Black, 2001	Proportion of Population classified as Chinese or Other Ethnic Group, 2001	Proportion of Population classified as non-White, 2001	Proportion of Population classified as non-White, 2001 - index	Proportion of Population classified as non-White, 2001 rank (of 408)
Croydon	70.16	3.72	11.31	13.33	1.48	29.84	368.58	16
Merton	74.97	3.12	11.07	7.78	3.05	25.03	309.13	22
Wandsworth	77.95	3.35	6.93	9.63	2.14	22.05	272.32	29
Kingston-upon-Thames	84.46	2.28	7.79	1.57	3.90	15.54	191.92	37
Sutton	89.20	2.07	4.73	2.56	1.44	10.80	133.42	55
Richmond-upon-Thames	90.98	2.20	3.87	0.94	2.01	9.02	111.46	61
Bexley	91.39	1.32	3.38	2.86	1.05	8.61	106.36	65
Bromley	91.59	1.87	2.55	2.91	1.08	8.41	103.93	67
London South	82.61	2.63	7.03	5.77	1.95	17.39	214.79	6 (of 53)
London	71.15	3.15	12.08	10.92	2.69	28.85	356.33	1 (of 11)
Great Britain	91.90	1.18	4.08	2.01	0.83	8.10	100.00	

Figure 4 - Ethnic Population Composition in Merton in Comparison with other Boroughs<sup>29</sup>

In the Merton schools alone, the children speak 101 different languages. The last census found that there are 25% of people under the age of 18 and another 25% over the age of 55. Another startling figure is that 56% of those living in East Merton are unemployed (Figure 5). This puts a burden on the welfare services for the area. Of the 3,000 single parent families in the area, 70% do not have either a part time or full time occupation. Due to these challenges that the Mitcham area has to face, there is a rise of reported crime, which causes a need for charity organizations to provide their services in order to try to make a difference<sup>31</sup>.

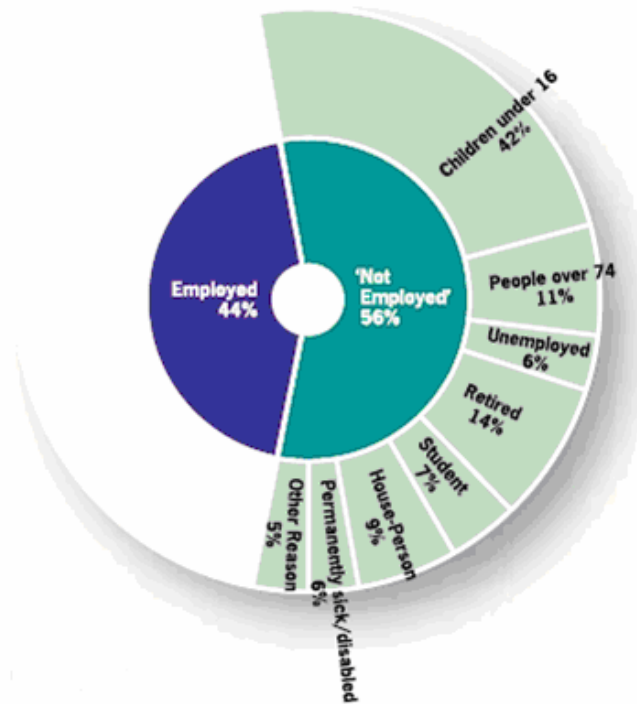


Figure 5 - East Merton Employment Rates<sup>30</sup>

<sup>29</sup> Local Futures Group, "The State of The Borough: An economic, social and environmental audit of the Merton" (London: 2003),17

<sup>30</sup> Merton Partnership, "Merton's Neighborhood Renewal Strategy", (London: 2005), 13

<sup>31</sup> Andrew Bailey, Rebecca Legere, Tiffany Warrington, "Implementation of a Sustainable Website for the

## **2.5 Commonside Community Development Trust**

Commside Community Development Trust is the sponsor for our project. Commonsie is a small nonprofit organization that works in the more deprived areas in the Borough of Merton, specifically the wards of Pollards Hill, Figges Marsh and Longthornton. The trust has been very active with giving help to the community and their projects are well-organized. However, Commonsie seeks to improve the management of their organization, apart from its charity work. Commonsie is a fairly new organization that had a rough beginning; however, they seem willing and able to become a major player in the nonprofit section of Merton.

### **2.5.1 History**

“For years the government of the Borough of Merton has ignored the needs of the lower class in Pollards Hill since the 1920’s because of the fact that Pollards Hill (and all of Merton itself) is located on the outskirts of London. As government neglect became tradition, community groups formed.”<sup>32</sup>

Past large scale governmental changes have degraded the conditions around Pollards Hill, mainly due to Margaret Thatcher’s policy on subsidized housing. A group was formed to respond to the conditions of Pollards Hill that focused on drawing the community together. That organization was and is called Commonsie Community Development Trust which works based on the mission statement “to create a better future for ourselves, our families and our community”.<sup>33</sup>

Established in March 2001, “Commside emerged as the final result of the Pollards Hill Single Regeneration Budget’s ‘Building Connections’ which was valued at £ 5 million.” At first, Commonsie was just going to work in the ward of Pollards Hill only, however, the directors thought that the wards of Figges Marsh and Longthornton needed help as well. Pollards Hill and Figges Marsh are the second and fifth most deprived wards in Merton, respectively and Longthornton has a scarcity of major community buildings and activities. With that information, the founders of Commonsie decided to focus on the three wards, stating “the more people that pay for, or benefit from, the activities that Trust provides, the more money it can make to secure it financial

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Commside Community Development Trust” (IQP, WPI, 2006)

<sup>32</sup> Ferguson, Kathleen, “Branding and Public Relations at Commonsie Trust” (MQP, WPI, 2005), 29-33

<sup>33</sup> IBID

future”. The problem was that Commonsense did not employ a staff to take up this tall order, thus a contractor named Phil Leask was hired to employ the staff. Upon his hiring, Leask wrote Commonsense’s mission, which was “...urban regeneration and community capacity building and of activities bringing direct community benefits in areas of social and economic deprivation...” With this broad perspective, Commonsense looked to the Pollards Hill Housing Association (PHHA) in order to form a working relationship. With PHHA’s resources, Commonsense hoped to create an “area with safe, strong, active confident communities” and coordinate effectively with “public and community facilities and open space”. However, Commonsense encountered some setbacks.<sup>34</sup>

Leask thought that Commonsense would have at least three buildings operating in Pollards Hill with additional buildings in Figges Marsh and Longthornton. Instead, Commonsense was only able to purchase one office, which was a former dentist office, and the fundraising plan for the new buildings fell through. Also, the projects that Commonsense hoped would have positive effects proved too difficult and expensive to execute. Realizing this, Commonsense changed their mission statement to their current one: “to provide a better future for ourselves, our families and our community”, and took on more specific projects that focus on bringing the community together.<sup>35</sup> These events meant that Commonsense would not be able to attain the size: structure-wise and operational-wise, as they initially desired. However, they have recently reincarnated their big dreams with some help from past WPI projects, the purchase of a new office building which offers much more space and the possibility of a merger with the Pollard Hills Community Centre, which is planning to happen in September 2006.

### **2.5.2 Projects and Services offered by Commonsense**

An important service that Commonsense provides is the “Aiming High” program which offers support to teenage mothers and mothers to be. The program offers help by giving advice on money toward the costs of child-care, travel, personal support and guidance. Also, every Wednesday there is a group talk called “Baby Talk” in which

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<sup>34</sup> Ferguson, Kathleen, “Branding and Public Relations at Commonsense Trust” (MQP, WPI, 2005), 29-33

<sup>35</sup> *Idem*

young mothers can meet and chat with other young mothers. So far, there are “33 teenagers involved in the first-year program.”<sup>36</sup>

Commonside’s Lunch Club for Older People (senior citizens) is another service provided that is “open Monday - Friday throughout the year, and offers a freshly cooked meal and after-lunch activities for older, local residents.”<sup>37</sup> The Lunch Club also offers opportunities for the elderly to socialize after their lunch time through some planned activities and games. Some of his activities include bingo, dominoes, discussions and playing cards.

Other services that are offered are free training on bike repairs, organizing popular community events (i.e. fashion and hip-hop shows) and a newly development drawing education program call “I wish I could draw”.<sup>38</sup>

Project events that were planed of the last three years were “Thai Kickboxing, Parent Gateway, Culture Day, Africa Day, Family Learning, Skills for Life Course. One recently completed project was ‘Love your Bike’ in which 200 people participated in”.<sup>39</sup> Recently, Commonside worked with Pollards Hill Community Centre, Moat Housing and Arts Development Merton on hosting “Common Art” which looked to “encourage different communities to learn more about each other, to increase respect between communities and encourage harmonious community relations” via art. Commonside participated by giving mosaic art lessons.<sup>40</sup>

### **2.5.3 Governance Structure**

Commonside is governed by the Board Trustees which has 15 members. The chair of the board is Mr. Adrian Hewitt, who has great experience with the Merton area and its problems. The board consists of a Vice President (Fr. Paul Ensor), a Treasurer (Ms. Melanie Wylie), six local residents, a councilor from each ward and three representatives from various interest groups. The Board meets once a month which is a

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<sup>36</sup> Commonside Development Trust, , “Aiming High”,  
[http://commonside.net/index.php?option=com\\_content&task=view&id=34&Itemid=54](http://commonside.net/index.php?option=com_content&task=view&id=34&Itemid=54)

<sup>37</sup> Commonside Development Trust, “Lunch Club”,  
[http://commonside.net/index.php?option=com\\_content&task=view&id=61&Itemid=88](http://commonside.net/index.php?option=com_content&task=view&id=61&Itemid=88)

<sup>38</sup> Commonside Development Trust, “Common Art”,  
[http://commonside.net/index.php?option=com\\_content&task=view&id=62&Itemid=40](http://commonside.net/index.php?option=com_content&task=view&id=62&Itemid=40)

<sup>39</sup> Commonside Development Trust, “Love your Bike”,  
[http://commonside.net/index.php?option=com\\_content&task=view&id=61&Itemid=16](http://commonside.net/index.php?option=com_content&task=view&id=61&Itemid=16)

<sup>40</sup> Commonside Development Trust, “Common Art”,  
[http://commonside.net/index.php?option=com\\_content&task=view&id=61&Itemid=63](http://commonside.net/index.php?option=com_content&task=view&id=61&Itemid=63)

high rate for a small nonprofit entity. The staff handles the day-to-day operations and the head of the staff is Ms. Naomi Martin.<sup>41</sup>

## **2.6 Strategy**

In business, strategy is a broad overall priority or direction that adopted by an organization to best achieve its purpose. A strategy defines the overall program and organization priorities and therefore, suggests where the organization should be investing its resources now and over the next few years. Every organization must create, change, follow and execute good strategy if they want to stay in business. “In the nonprofit world, strategy is formulated not to make much money as possible but to provide the public services they have promised to carry out to the best of their abilities while making enough money to stay in business.”<sup>42</sup>

### **2.6.1 The mission**

The mission statement is one of the most important parts of the nonprofit strategy development process. “A mission is a comprehensive statement that sets out the board of trustees’ determination of the purposes, the framework, and the bounds of the organization’s activities. Every trustee should understand the mission, endorse it and support it because the mission is the basis for every decision made in the organization.”<sup>43</sup> Basically, the mission is what the organization uses to keep their decisions consistent with the founding principals of the organization. For instance, if an organization deals with projects that mainly targets child hunger, then if a new project is proposed, which deviates from child hunger, the organization has two choices:

1. Reject the proposal because it does not represent what organization is about (which is spelled out in the mission).
2. Change the mission to include the new organization’s scope.

The best nonprofit organizations devote a great deal of time and thought to defining their organization’s mission statement. They avoid sweeping statements full of good intentions; instead they focus on objectives that have “clear-cut” implication for the work of their members-staff and volunteers- perform. A well-defined mission serves as a constant reminder of the need to look outside the organization not only for the

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<sup>41</sup> Commonsense Development Trust, “The Commonsense Trust Board of Directors”, <http://www.commonside.net/newsite/trust.html>

<sup>42</sup> Howe, Fisher. *Welcome to the Board*. (San Francisco: Jossey-Bass, 1995), 13.

<sup>43</sup> *Ibid*, 29-30.



beneficiaries but also for measures of success. The temptation to content oneself with the goodness of their cause and therefore substitute good intentions for results always exists in nonprofit organizations. It is precisely because of this that successful nonprofits have learned to define clearly what changes outside the organization comprise results and to focus on them. Finally, a clearly defined mission will promote innovative ideas and help others understand why they need to be implemented.<sup>44</sup>

## 2.6.2 Strategy Development

Every type of strategy development has this common step: identify the stakeholders. “A stakeholder is any person, group or organization that can place a claim on an organization’s attention, resources, or output, or is affected by that output.”<sup>45</sup> It is necessary for a nonprofit organization to identify the stakeholders’ needs because that is the basis for the mission, which is the basis of the strategy. There are two types of stakeholders, internal and external. Internal stakeholders are the people within the organization and the external stakeholders are the people outside of the organization.<sup>46</sup>

Another common step is identifying the organization’s strength and weaknesses. A simple way of organizing the data is by using a SWOT analysis matrix. A SWOT analysis matrix is a simple table that outlines the strengths, weaknesses, opportunities and threats that an organization will face. However, the matrix will be final result of the analysis; each category must be research and analyzed separately. This will help the organization “focus on their strengths, minimize threats, and take the greatest possible advantage of opportunities available to the organization.”<sup>47</sup> Strengths and weaknesses are internal to the organization; meanwhile, opportunities and threats are external.

Once the upper managers collect all the data that is needed, they can start the process of building a strategy. There are two things that should be considered about the process:

1. Determine what the future might hold for the organization.
2. Justify the existence of the organization and its programs.

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<sup>44</sup> Drucker, Peter, *The Essential Drucker* (New York: HarperCollins, 2001), 41.

<sup>45</sup> Bryson, *Creating and Implementing your Strategic Plan*, (San Francisco: Jossey-Bass, 1996), 115

<sup>46</sup> Ibid, 10

<sup>47</sup> Mind Tools, “SWOT Analysis: Discover New Opportunities”

[http://www.mindtools.com/pages/article/newTMC\\_05.htm](http://www.mindtools.com/pages/article/newTMC_05.htm).

These steps are important to help the organization develop plans that will be consistent with their organization and be prepared for the future.<sup>48</sup>

In order for a strategy to work correctly it is necessary to have good project management. Therefore, we are going to give some background on its definition and importance.

### **2.6.3 Project Management**

One of the main topics in our project is management. By improving their management skills Commonsense should improve their interaction between the Board and staff. Therefore it is very important to define management. “Management is about human beings. Its task is to make people capable of working as a team, to make their strengths effective and their weakness irrelevant”<sup>49</sup>. Since management deals with the integration of people in a common journey (purpose), it is embedded in their cultural background. Managers around the world perform the same tasks. However, how they perform them might be quite different depending on the countries’ tradition, culture and history.<sup>50</sup>

Every nonprofit organization requires commitment to common goals and shared values. Without such commitment there is no entity, only a group of people. The organization must have a simple clear and unifying objective in order to perform at its best. Correct management will also enable the organization and each of its members to grow and develop as needs and opportunities change. However, every organization is composed of people with different skills and knowledge doing many kinds of different works. A good organization must be built on good communication and individual responsibility. Finally, the most important thing to know about any organization is that results exist only on the outside, meaning an organization can only find results if they look at the people they serve. For a nonprofit organization, the result of a well provided service will be a satisfied beneficiary.<sup>51</sup> There are three tasks that management has to perform in order to enable the institution in its charge to function and to make its contribution:

- Establishing the specific purpose and mission of the institution. An institution exists for a specific purpose and mission; “it has a specific social function”

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<sup>48</sup> Howe, Fisher. *Welcome to the Board*. (San Francisco: Jossey-Bass, 1995), 31.

<sup>49</sup> *Idem*

<sup>50</sup> Drucker, Peter, *The Essential Drucker* (New York: HarperCollins, 2001), 10-11

<sup>51</sup> *Ibid*, 11-12.

- Business and nonprofit institutions differ in the economic performance task. In respect to any other task they are similar.<sup>52</sup>
- Making work productive and the worker effective. Every institution has only one true resource: people. And the organization will only succeed by making its human resources productive.<sup>53</sup>
  - Managing social impacts and social responsibilities. “None of our institutions exist by itself and is an end itself. Every one is an organ of society and exists for the sake of society...” To fulfill its job, and services, the institution has to have an impact on people, on communities and on the society that is receiving the service.<sup>54</sup>

## **2.7 Data Gathering Techniques**

In order to complete our process we need to collect some important data about Commonsense, its employees and other charities in the area. In order to do this correctly, we need to identify what techniques to use and how to use it correctly. In this section you will find the definition of the different techniques we will be using in our project, as well as the weakness and strengths of each method.

### **2.7.1 In-Depth Interviewing**

In-depth interviewing is a data collection method relied on quite extensively by qualitative researchers or simply put “a conversation with a purpose”. A degree of systematization will be needed for our multi-site case study (section 3.4.2). Interviewing has some advantages, such as<sup>55</sup>:

- Large amount of data gathered quickly
- Gathers a wide variety of information across a larger number of subjects
- Immediate follow-up and clarification
- Allows us to understand the meanings people hold for their everyday activities
- Understand the “mood” of interviewee

Some disadvantages are:

- Interviewees may be uncomfortable or unwilling
- Potential interviewees may not have time to answer questions
- Inappropriate questions could be asked because of culture difference
- Questions may not be properly comprehended
- Answers might dishonest

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<sup>52</sup> Drucker, Peter, *The Essential Drucker* (New York: HarperCollins, 2001), 15

<sup>53</sup> *Idem*

<sup>54</sup> *Idem*

<sup>55</sup> Marshall, Catherine, Rossman, Gretchen B. *Designing Qualitative Research, 2<sup>nd</sup> ed.* (Thousand Oaks, CA: SAGE Publications, Inc., 1995), 80-81.

## 2.7.2 Facilitated Discussions

Facilitated Discussions can be defined as group interviews, although not in the sense of an alternation between the researcher's questions and research participant's responses. Instead, facilitated discussions rely on the interaction with the group, based on the topic that is supplied by the researcher, who typically takes the role of the moderator<sup>56</sup>. A facilitated discussion is not done for the research of a topic. Instead, it is used to create a dynamic conversation about certain issues that the organization or company wants to find solutions for. Facilitated discussions typically involve eight to twelve individuals that will discuss the topic under the direction of the moderator. The moderator plays an important role in promoting interaction among the group and assures that the discussion remains on the topic. Facilitated discussion sessions will typically range from one and a half to two and a half hours. Facilitated discussions can be conducted in a variety of sites ranging from homes, offices and even through a conference telephone.<sup>57</sup>

The moderator plays an important role in assuring that the group discussion goes smoothly. For this reason, the moderators must be well trained in group dynamics and group skills. Depending on the intent of the research, the moderator may be more or less directive of the discussion as long as it stays within the topic, this allows for the discussion to flow as naturally as possible. However, the amount of direction will influence the type and quality of the data obtained from the group<sup>58</sup>.

Facilitated discussions may be almost useful almost at any research program, but they are particularly useful in exploratory research where rather little is known about the topic of interest. Among the more common uses are the following<sup>59</sup>:

1. Obtaining general background about certain topic.
2. Generating research hypothesis.
3. Stimulating new ideas and creative concepts.
4. Diagnosis of the potential for problems with a new program, service or product.
5. Generating impressions of products, programs, services or other subjects of interest
6. Learning how respondents talk about the topic of interest.

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<sup>56</sup> Morgan, David, *Focus Groups as Qualitative Research*. (California: Sage Publications), 1988), 9

<sup>57</sup> Stewart, David and Shamdasani, Prem, *Focus Groups: Theory and Practice*. (California: Sage Publications), 1990), 10

<sup>58</sup> *Ibid*, 11

<sup>59</sup> *Ibid*, 15

## 7. Interpreting previously obtained qualitative results.

Facilitated discussions are widely used because they provide useful information and offer researchers some advantages. However, they also have some disadvantages. Some of the advantages and disadvantages are<sup>60</sup>:

### **Advantages**

- They are a socially oriented study of participants in a natural, real-life atmosphere.
- It gives flexibility to explore unanticipated issues as they arise in the discussion.
- Results have more face validity because, the method is readily understood and the findings appear believable.

### **Disadvantages**

- There is less control over a group, which can result in lost time.
- Data is harder to analyze due to different opinions on a subject.
- Requires highly trained moderators.
- Groups can vary in great deal and can be hard to assemble
- Logistical problems arising from the need to conduct the discussion as similar to a conversation.

Thus, we can see that or facilitated discussions offer important advantages but these same advantages have associated disadvantages and limitations. However, facilitated discussions still yield qualitative data that is obtained from the relatively small group member interaction with one another.

### **Steps in the Design and Use of Facilitated Discussions<sup>61</sup>**

The following steps are needed in the design of facilitated discussion:

1. **Defining the Problem:** In order to start a facilitated discussion it is required that a clear statement of what kinds of information are desirable and from whom this information should be obtained. A clear understanding of the problem is critical because it gives rise to the specific questions that should be raised by the moderator(s) during the discussion.
2. **Identifying Sampling Frame:** A sampling frame is lists of the people that the researcher has reasons to believe are representative of the larger population of interest. Because it is inappropriate to generalize far beyond the members of the discussion, the sampling frame needs to be a good approximation of the population of interest.

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<sup>60</sup> Marshall, Catherine, Rossman, Gretchen B. *Designing Qualitative Research, 2<sup>nd</sup> ed.* (Thousand Oaks, CA: SAGE Publications, Inc., 1995), 80-81.

<sup>61</sup> Stewart, David and Shamdasani, Prem, *Focus Groups: Theory and Practice.* (California: Sage Publications), 1990, 10

3. **Identifying the moderator:** Once step one and two are completed we should have a good idea of the qualities that the moderators must have. Both the moderators and the types of question forms included in the interview guide should be compatible with the group to be interviewed.
4. **Generating and Pre-Testing of the Interview Guide:** Here the moderator will develop a plan to follow during the interviewing process. In this step he/she will also start to identify the sample audience that needs to be involved in the process.
5. **Recruiting the Sample:** From the steps before the moderator should have the ability to choose the samples required for a conclusive discussion. However, it is important to recruit a few more participants than the number desired just in case they cancel at the last minute.
6. **Conducting the Group:** The discussion itself is the next step in the process. Here the moderator will lead the group through the discussion and questions he/she has in the interview guide. This discussion might be audio or video taped to facilitate later analysis.
7. **Analyzing and Interpreting the Data:** This phase of interpreting the data tends to develop in the same way as those in other type of research. Nevertheless, we should be aware that the data as stated before should not be generalized and that it might be an undesired tangent to the topic.
8. **Writing the report:** This step tends to follow the same guidelines as any other type of research. This process is explained in the last section of our methodology.

In order to facilitate the understanding of these steps we created the chart in Figure

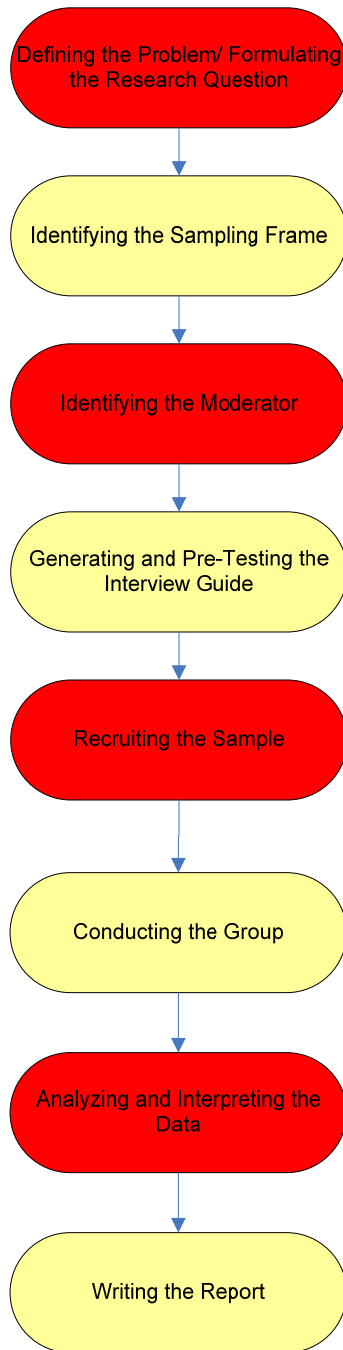


Figure 6 - Steps in the Design and Use of facilitation group

### 2.7.3 Elite Interviews

More specifically we will use “elite interviews” for the internal stakeholders for Commonsense. Elite interviews are a specialized case of interviewing that focuses on a particular type of interviewee. The interviewees will be the influential, the prominent and the well-informed people in an organization. They will be interviewed for their expertise on areas relevant to the research. The interview will only involve one person because dealing with two elites is a tall order. Good questions for elite interviews are about broad areas of content and intelligent, provocative, open-ended questions that allow them freedom to use their knowledge and imagination.<sup>62</sup>

#### **Advantages:**

- Provide an overall view of an organization or its relationship to other organizations
- More likely familiar with legal and financial structures of the organization.
- Able to report on an organization’s policies, past histories, and future plans for a particular perspective.

#### **Disadvantages:**

- Elites are more busy and are under time constraints
- Elites are harder to reach.
- Elites are savvy may resent the restrictions of narrow questions.
- They are used to control meetings, thus might try to take over the interview, meaning controlling the questions and flow of the interview.

### 2.7.4 Document Research

Review of documents is an unobtrusive method that greatly portrays the values and beliefs of the organization. Documents that are useful in developing an understanding of the organization are minutes of meetings, logs, announcements, formal policy statements, letters, etc.<sup>63</sup>

#### **Advantages:**

- Unobtrusive and non-reactive (documents do not have feelings)
- We determine where the greatest emphasis lies after the data have been gathered
- The method of procedure is explicit to the reader

#### **Disadvantages:**

- Reading documents is more time-consuming
- It takes a longer time to clear up ambiguous material
- Reading a pile of documents can be pretty tedious

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<sup>62</sup> Marshall, Catherine, Rossman, Gretchen B. *Designing Qualitative Research, 2<sup>nd</sup> ed.* (Thousand Oaks, CA: SAGE Publications, Inc., 1995, p 83.

<sup>63</sup> Ibid 85-86



As explained in section 2.5, Commonside was founded on big dreams. Those dreams are starting become reality, however, there is still work to do. In order for Commonside to run smoother and achieve these dreams they should have a strategic plan, which will give the members of Commonside a clear vision and mission for their future. In this chapter, a clear description of the area which Commonside strives to improve was given as well as a general description of some of the tools that will be used in this project. The next chapter will take all previously mentioned information into action.

### 3. Methodology

Our project intended to help the Commonsense Trust develop an effective strategic plan. A strategic plan should help Commonsense improve interaction between the board and staff by giving them a common mission and vision. With a strategic plan in place, Commonsense should be able to overcome future issues and become an example for other nonprofits in the Merton area. We must be clear, however, that the strategic process is very complex and continuously changing. Therefore, it is important that the developed strategic plan be reviewed at constant intervals.

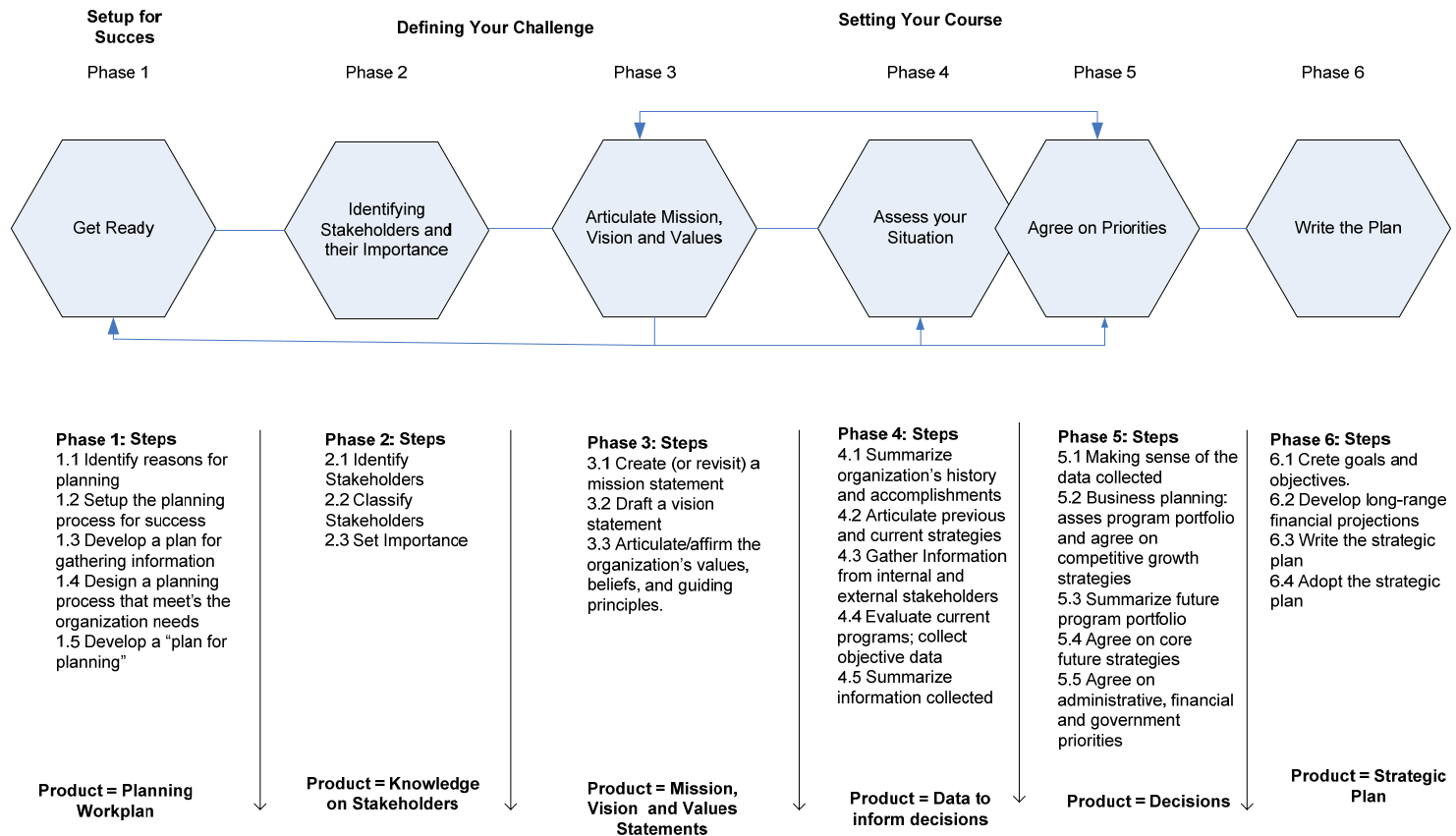
From May 13<sup>th</sup> until July 1<sup>st</sup>, we helped Commonsense by providing tools that would help develop a strategy that fits the entity. Due to time constraints this strategy making process was “moderate rather than extensive<sup>64</sup>” Usually, this means is that not all staff and board members would be involved in the process; however, since Commonsense was a small organization we included all of the staff and a portion of the Board of Trustees. We collected the data required for the mediators to perform the group discussion. We only had one main objective, which was to create an efficient strategic plan for Commonsense.

The strategic planning process is very complex and therefore we subdivided it into six different phases that follow certain logic. These steps are summarized in Figure 7. However, these recommended steps are not the only recipe for doing strategic planning. These phases and related steps have room for modification and creativity. We collected organized and interpreted data for this project. However, both of us were not trained nor experienced enough to engage on a strategy building discussion; this is where Dr. Elmes and Dr. Taylor provided us with great assistance by facilitating a discussion with the board and staff at Commonsense. In this discussion, we planned that all of the data that we have gather in the previous steps would be turned into plans, concepts, ideals and strategies through extensive discussion and exercises. These findings would be the core of our strategic plan (this was what was originally planned). The process by which the strategic plan would have been created will be explained in this chapter.

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<sup>64</sup> Allison, Michael, Kaye, Jude, *Strategic Planning for Nonprofit Organizations: A Practical Guide and Workbook*, (San Francisco: John Wiley & Sons, 2005), 28.

# The Strategic Planning Process



**Figure 7 - Planning Process Summary**

### **3.1 Getting Ready (Phase I)<sup>65</sup>**

The purpose of this step was to develop an initial agreement between the key decision makers and opinion leaders about the overall strategic planning process. In this step, advocates and facilitators (us) were authorized to move forward with the process. Here as well, certain external decision makers and opinion leaders needed to agree, since their support was essential to the success of the process. This agreement is one of the most important steps in the process. In this step many of the commitments necessary to produce a good process and plan were developed. In addition some critical questions regarding the process were addressed, such as:

- Whose plan is it?
- What are the purposes of the process and plan?
- How will the process be managed?
- How will the process be broken into tasks?

#### **3.1.1 Identifying Reasons for Planning**

The reasons for planning and the issues that arouse during the planning process have a major impact on how to go about planning, whom to involve, and even if a strategic plan is needed.

It is fine, if these issues and choices were somewhat vague since the planning process is designed to help bring clarity to the questions as well to bring answers to them. However, if the reasons for planning were not important ones, then the project would have probably fizzle for the lack of commitment and it would have be difficult at the end to determine if it was successful.

Once the issues and questions related to the processes had been drafted, it was important to make sure that strategic planning is the appropriate way to deal with them. For this reason, it was important to sort these issues into one of the following categories:

- Strategic Issues
- Operational Issues

Finally, if certain decisions are not up for discussion, then were put on the beginning of the planning process as non-negotiable. This avoided losing people's time or setting them up for unrealistic expectations about what they could and could not change.

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<sup>65</sup> Allison, Michael, Kaye, Jude, *Strategic Planning for Nonprofit Organizations: A Practical Guide and Workbook*, (San Francisco: John Wiley & Sons, 2005). 46

In order to determine the desired outcomes and issues we used electronic surveys that were completed by members of the staff and board. From our background information on data gathering, we had determined that for this step it would be best to use elite interviews. We decided to use this method because elite interviewees (in our case some members of the staff and board) were familiar with the structures and mechanisms of Commonsense. The elite interviewees also tend to have deep knowledge on Commonsense's mission and vision which are important facts for this step. However, we were aware that interviewees were usually very busy. For this reason we used electronic surveys so the interviewees can answer the questions at their own convenience. However, if someone did not have internet or preferred not to take an electronic survey, we handed out hard copies. In Appendix A you will find the survey that was completed by the staff and board members. This survey identified issues under one of those topics:

- Mission
- Finances
- Administrative capacities
- Governance

The survey was sent to nine members of the board and six staff members. We used a survey service called Survey Monkey© to collect them. Out of the 15 interviews sent we received nine of them back. You may access this information by following the instructions found on Appendix BB. For the username or password please contact any of our team members or Ms. Martin at Commonsense.

### **3.1.2 Setting up the Process for Success**

Every major effort has its proper time. Such is the case for strategic planning. When engaging in a strategic planning process, certain conditions must exist in order for it to succeed. In order to make sure that the conditions were met, we surveyed different members of the staff and board using the survey questions in Appendix B. The survey was very short since it was only yes and no questions; we tried to obtain answers from most members on the board and staff. This survey was sent together with the previous one (See information on how it was done at section 3.1.1).

We finally developed a pie chart with the percentage of persons that answered each question. This provided us with a clear idea that the majority that was required felt that this was the right time to become involved in the process.

However, it was the job of Ms. Martin to assess whether it was the correct time and if the right conditions were present for the organization to engage in a strategy building exercise. She thought it was the correct time and we started our project. If some of the conditions in Appendix B were missing (which they were), then an in depth strategic planning process might have not been adequate at the time. One of those conditions was Commonsense going through the merging process. One of the answers to our survey questions said, “I do not feel this is the right time to go ahead with this process, since we will have to go through it again because of the merger”. Even if the organization is halfway through the process, serious thought should be given to stop the process and restart it later. However, Ms. Martin thought this was the right time so we decided to continue on the process.

This survey was also submitted online together with all the surveys of this phase. To access please refer to Survey Monkey©. You can find instructions for using this service at Appendix BB

### **3.1.3 Develop a Plan for Gathering Information from Stakeholders**

In order to identify the data that might be useful we had developed Appendix C. We completed this form by talking to the different staff members that could help us identify important internal and external stakeholders. We chose to interview staff members since they are elite interviewees were the most likely to report on Commonsense’s policies, plans and structure. The staff members usually have access and knowledge on documents that provide important information for the strategy development process. The process of gathering information involved a broad array of stakeholders at the different phases of the process. Part of this process was identifying those individuals and groups who traditionally will not be thought of as stakeholders. A process that included the right stakeholders should have accomplished the following<sup>66</sup>:

- Add objectivity to the process
- Help build internal and external enthusiasm for commitment to the process
- Develop foundations for future working relationships
- Ensure that the data spans and is deep enough in order to make informed decisions.

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<sup>66</sup> Allison, Michael, Kaye, Jude, *Strategic Planning for Nonprofit Organizations: A Practical Guide and Workbook*, (San Francisco: John Wiley & Sons, 2005). 59

It was important as well to identify the different kinds of stakeholders. Stakeholders can be subdivided into those who provide input (external) and in those that make decisions (internal). Internal stakeholders usually include: the executive director, board of directors, staff members and the advisory board. The external stakeholders include: clients, founders, community leaders, individual donors, competitors and potential collaborators. The process of identifying the stakeholders is clearly defined on the next phase.

As stated at the beginning of this step, another important way of gathering information was by identifying documents that could provide important background information. These documents helped inform some of the strategic questions that arose during the process. Some types of useful documents were: Mission related, financial, administrative capacity and governance documents. We had the chance to find documents that documented past Commonsides retreats and financial reports. However, of particular importance was a past strategic plan that was completed on August 2004. This gave us an idea of past aspirations that Commonsides had and how they had accomplished them. Some other important data was collected from the Merton Community Plan and Merton's Voluntary Sector Committee (MVSC) on an interview with Ms. Morag Plank.

### **3.1.4 Designing the strategic planning process to meet the organizational needs**

As stated before when designing a strategic process, a series of choices needed to be made regarding whom to involve, the role of the participants and how to structure the process. For this reason we looked at several aspects of the design process such as:

- How to involve the different stakeholders
- Time and level of intensity of the process
- Leaders of the process and their roles
- Who will serve as the author and compiler of the strategic planning of the process
- Use of retreats
- Who makes each decision

In order to help answer some of these questions and investigate some of these aspects we used another worksheet which can be found at Appendix D. We looked at those aspects with the help of Ms. Martin since she had the knowledge required to help us determine how and with whom to address the aspects mentioned in the worksheet.

However, due to the welcoming and opened environment that we found at Commonside, we completed those worksheets almost by ourselves.

### **3.1.5 Write a Planning Work Plan**

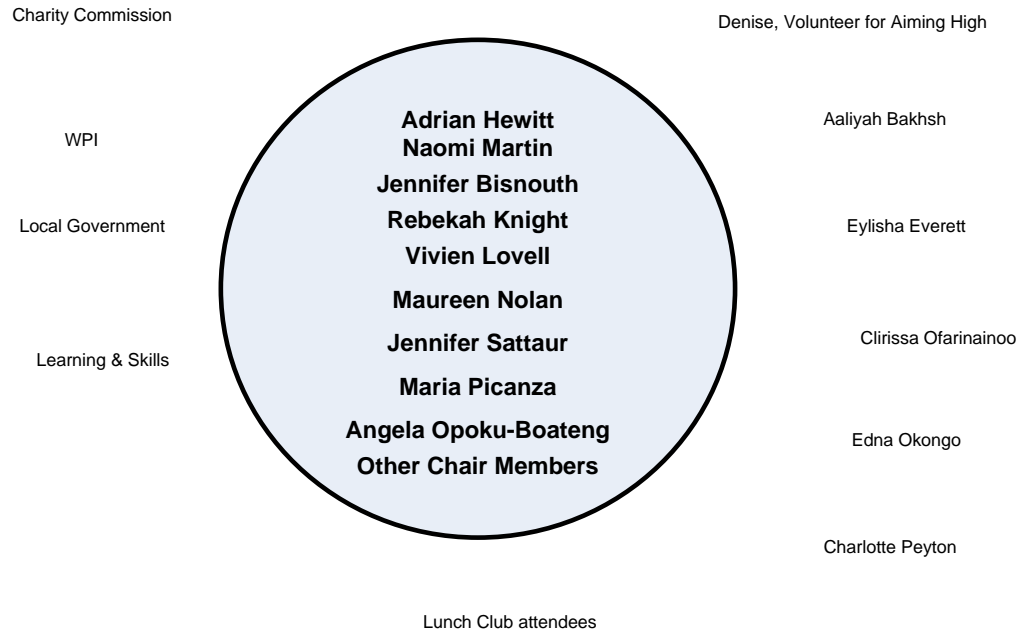
Once we completed the preceding steps of this phase we had a clear work plan. This is the overall work plan for managing the planning effort. However, this methodology served as a work plan itself. Here, we had already created, selected and modified worksheets in order to make them fit with our work plan. However, we were able to construct a clearer work plan once we arrived at Commonside. This work plan includes the types of activities that will be involved, the personnel, the time frame, typical outcomes of the process and the suggested worksheets for the process. In Appendix AA you can find our actual work plan.

## ***3.2 Identifying Stakeholders and their Importance (Phase 2)***

### **3.2.1 Identifying Stakeholders**

Identifying the internal stakeholders was easy; they were just the people who work in the organization (Appendix F & Appendix G). Since Commonside is a small organization there were not many internal stakeholders to identify. However, identifying the external stakeholders was a little more challenging; however, through interviewing Ms. Martin and the staff, we identified the people who are affected by Commonside and vice versa. A few obvious stakeholders (externally) are the clients of Commonside and the Charity Commission. The chart in Figure 8 shows both external (outside the circle) and internal (inside the circle) stakeholders for Commonside.





**Figure 8 – Stakeholder Identification**

### 3.2.2 Which stakeholders should be involved in the project

After the each stakeholder was identified (Appendix E), we determined which stakeholders would be considered in our project and recommendations. We decided to include every internal stakeholder because there are so few of them and our project directly effects how each one of them will do business. For external stakeholders, we only included important clients that gave valuable insight into the quality of programs that are provided. This helped give us recommendations for certain programs. Also, we interviewed a charity assistant organization (the MSVC) in order to identify other areas of service in which Commonsense can get into. We decided to not involve Commonsense’s volunteers because we felt they did not have that much insight into the operations of Commonsense. From this point, we started to conduct our face-to-face interviews which we will explain in Phase 4.

### 3.3 Articulating Mission, Vision and Values (Phase 3) <sup>67</sup>

One of the main reasons for undergoing a strategic planning process is in order to understand the organization’s desires for the future. For this reason it is important to have clearly defined:

<sup>67</sup> Allison, Michael, Kaye, Jude, *Strategic Planning for Nonprofit Organizations: A Practical Guide and Workbook*, (San Francisco: John Wiley & Sons, 2005). 80-104

- Values statement: Guiding concepts
- Mission statement: Statement of purpose
- Vision statement: Image of the future

A mission statement is always important in order to provide people and clients answers to questions such as: Why do we exist? What do we do? And, whom do we serve?

### **3.3.1 Articulating the Fundamental Values that Guide the Work**

Nonprofits are known for being value driven. These values tend to focus on service, quality and work norms. It is always more difficult the first time for a board and staff to define and agree on the values, beliefs and guiding principles that many times have been implied. In order to help identify these values we have created a worksheet (Appendix J) which was used to survey some internal and external stakeholders. These surveys were done electronically in order to assure confidentiality. Using this worksheet, we evaluated which values stakeholders consider that are important and should be committed to everyday practice.

The survey was sent to nine members of the board and six staff members. We used a survey service called Survey Monkey© to collect them. Out of the 15 interviews sent we received six of them back. You may access this information by following the instructions found on Appendix BB. For the username or password please contact any of our team members or Ms. Martin at Commonsides. In order to save the staff and board members some time, we provided this survey together with the survey that identifies Commonsides's Mission and Vision.

### **3.3.2 Writing or Reaffirming the Mission Statement**

In order to write a mission statement or check the current one, we told the stakeholders to make sure that it included these two elements: a purpose and their business.

In order to develop a purpose sentence the entity's board members and staff should have asked themselves "Why do we exist?" This was an important question to answer because failure to do so could lead the entity to ineffectiveness. If the answer to the question was too broad, it might lead the entity to inability to prioritize programs activities. The purpose should have the same understanding to all stakeholders; failure to

do so could lead to confusion and conflicts among the stakeholders. The purpose sentence should include two basic elements:

- An infinitive verb that indicates a change in the current status
- An identification of the problem to be addressed or condition to be changed.

An example of a purpose sentence is “to eliminate the injustices that cause hunger.” (From the Institute for Food and Development Policy-Food First).

Finally in order to solve the element of business the entity’s stakeholders should have asked themselves “What business are we in?” In order to answer this, it was important to clarify the ends and means to do so. In order to facilitate this we created a worksheet (Appendix H) which was completed by internal stakeholders in order to help identify their mission statement. Since this activity was somewhat time consuming, we submitted this worksheet through the internet and those who preferred received a hard copy at the board meeting held on May 29<sup>th</sup>.

Since the building process can take too much time we analyzed the common points on the surveys and drafted three different statements. These statements were discussed at our Home Day on June 13<sup>th</sup>. The mission statement, when completed, was a simple yet inspiring statement that communicated to the internal and external stakeholders what the entity stands for. There is no length required; however, it tends to be one or two sentences long. As said before this survey was sent together with the values and vision building surveys. We did not plan for Commonsense to create a new mission statement before we left. We planned to give Commonsense some ideas about a mission statement, which did happen.

### **3.3.3 Writing the Vision Statement**

A vision is a clear image of what the future might hold. The vision should help provide a blueprint for Commonsense’s work. In other words this should answer the question, what will success look like? The vision statement should be inspirational. It should challenge and inspire the group to stretch its capabilities and achieve its purpose. The pursuit of a shared vision of success motivates people to work together. The vision can be subdivided into two. The external vision defines how the organization plans to change the world. While the internal vision describes what will the organization look like if it is operated effectively and efficiently to support the achievement of that external mission.

Finally in order to facilitate this process, we asked the stakeholders to respond using the worksheet in Appendix I. Since this step is linked to the previous we handed all worksheets at the time through an electronic survey. The ideal case would have been if the board and staff engaged in a building discussion at the Home Day. However, due to time constrain we analyzed the data collected through the survey and built a vision statement that was discussed at the Home Day. We also built a list with both internal and external vision facts that were pointed through the survey. These as well as the activity of the preceding steps were done through internet surveys, the ideas remained anonymous.

### **3.4 Assess the Situation (Phase 4)**

In order to write our plan, we figured that we must know what exactly Commonsides is about. We saw how Commonsides has gotten to where they are today and why. Also, we developed a “scouting report” for Commonsides. Lastly, we used that scouting report to identify the areas which needed more attention in our analysis.

#### **3.4.1 Evaluate status quo**

We planned to start this section by briefly looking at events that might have shaped the organization. Having a common understanding of this historical context helped us to prepare the plan on the same principals in which Commonsides was founded on. The history included three things<sup>68</sup>:

- Key events in the organization’s development will be in a time line format because the information will be present clearly without the use of long statements. Key events will include for example, when certain programs started, management changes, dates of financial grants, etc.
- All specific program activities and services.
- An infrastructure profile. Included will be information on basic management and operation functions that support the current programs. Also, included will be current paid and volunteer staffing levels for all programs and for the entire organization, as well as the size of the Board of Trustees. A summary of funding and other important organizational data will be included as well.

From our background research before we got to Commonsides, we did extensive research into Commonsides’s history, which is detailed in section 2.5.1. The research we

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<sup>68</sup> Allison, Michael, Kaye, Jude, *Strategic Planning for Nonprofit Organizations: A Practical Guide and Workbook*, (San Francisco: John Wiley & Sons, 2005). 127, 129

did give us a good idea of what Commonsense has been through for the last five years and the section 2.5.1, we figured, fit all of three of the requirements of a history.

### **3.4.2 SWOT analysis and other forms of evaluation.**

In order to understand the organization, we performed a SWOT analysis on Commonsense. The information that was needed first came from staff and board members, then through our general observations about Commonsense. Basic questions that were asked<sup>69</sup>:

- What does Commonsense do well? (Strength, Appendix K)
- Where can Commonsense improve? (Weakness, Appendix L)
- What changes are taking place in Commonsense's environment that might allow the organization to better achieve their mission? (Opportunities, Appendix M)
- What changes in the environment does Commonsense need to guard against or prepare for in doing its work? (Threats, Appendix N)

Afterwards, we asked questions that relate to any one of the four aspects. For instance, we asked how Commonsense is actually using their strengths to their advantage, how they are managing their weaknesses and how they are responding to the new changes. Basically, we wanted to assemble data that can help Commonsense take advantage of their strengths and opportunities and overcome weaknesses and threats.

Another aspect of our data gathering was looking for interplay between strengths and opportunities, and weaknesses and threats. Basically, we wanted to see if a certain strength and opportunity shared common grounds. For instance, the purposed merger (opportunity) can only happen if Commonsense has the people that can close a major agreement (strength). This also holds for weaknesses and threats. For instance, if a new organization is created that offers some of the same services that Commonsense does (threat), Commonsense might lose some customers because their services are not as good as the ones provided by the other organization (weakness).<sup>70</sup>

Once all internal stakeholders were asked about the SWOT components, the external stakeholders were asked about the SWOT components. The two types of external stakeholders that we questioned were the clients of the Lunch Club and the

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<sup>69</sup> Allison, Michael, Kaye, Jude, *Strategic Planning for Nonprofit Organizations: A Practical Guide and Workbook*, (San Francisco: John Wiley & Sons, 2005), 135

<sup>70</sup> Allison, Michael, Kaye, Jude, *Strategic Planning for Nonprofit Organizations: A Practical Guide and Workbook*, (San Francisco: John Wiley & Sons, 2005), 135

MSVC<sup>71</sup>. We also used information from an interview with the Aiming High clients that was provided to us from Mrs. Tanya Rowan. There were two reasons why we included these external stakeholders in this process:

1. They have outside perspectives that will help Commonsense make better strategic decisions. An important factor is comparing the external stakeholders' perceptions of the SWOT components to the internal stakeholders' perceptions. Information about external stakeholder needs is a vital in evaluating programs.
2. Involving the external stakeholders makes them feel important, which leads to a better relationship between the two types of stakeholders. If we are interviewing someone that does not know about Commonsense, then we can explain about the services that Commonsense offers.

We were fortunate enough to conduct personal interviews because the Lunch Club coordinators, Mrs. Maureen Nolan and Mrs. Vivien Lovell setup an interview group after the clients were done eating. We preferred to conduct personal interviews because we were able to ask follow-up questions, rephrase complex questions, eliminate unclear answers, gain vital details and see how the questions are answered.

In order to identify opportunities, we went to the MVSC to interview Ms. Morag Plank of the MSVC. We asked her about certain areas of service in which there was funding available and which areas need new organizations. The interview went well, since we got some useful information that we will detail in the next chapter. Also, we used web browsing. A past WPI group detailed website information for many nonprofit organizations in the Mitcham area. Naturally, we used this as a resource in our research. We looked for main services offered, the size of staff and possible financial records. Also, we used the MSVC website and we did get some information but it will not as useful as the interview we conducted.

Lastly, we planned to gain information via archival sources in order to gain historical information on Commonsense's strengths and weaknesses<sup>72</sup>. However, we felt that we had enough information from our interviews and observations that we felt the archives would not give us any fresh information and data. However, Ms. Knight did provide us with Board meeting minutes for the last year. From that we saw some of the problems with the Board meetings and when the merging process actually started.

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<sup>71</sup>Ibid, 140-1

<sup>72</sup> Allison, Michael, Kaye, Jude, *Strategic Planning for Nonprofit Organizations: A Practical Guide and Workbook*, (San Francisco: John Wiley & Sons, 2005) 142-3.

### **3.4.3 Identifying and Framing Strategic Issues<sup>73</sup>**

From the SWOT components and our first surveys, the strategic issues were developed. A strategic issue is a fundamental challenge affecting an organization's mandates, mission and product or service level. From the previous steps, information has been provided to help frame the strategic issues in the most constructive way. This was designed to have a great impact on how strategies are formulated, how stakeholders assess their interests and weigh costs and benefits of alternative strategies. Issue framing also directly affects the ease with which the plan can be implemented. There are three types of issues:

- Current issues that probably require immediate action.
- Issues on the horizon that are likely to require action in the near future
- Issues for which it is unclear whether any action will be required now or in the future, but that need to be monitored.

This resulted to an inclusive list of strategic issues (Appendix Q) faced by the organization and an ordering of the issues in terms of priority or some other relevant classification. We took the information that was provided from the SWOT matrix and other information we gathered and developed a list of issues that Commonsense might want to consider. We made two groups of issues, regular and important. We introduced these issues at our Home Day, because the answers to these issues were strategies that would be the basis of our strategic plan or so we thought.

### **3.5 Agreeing on Priorities (Phase 5)<sup>74</sup>**

In this phase the planning process took an important turn; these phases before encouraged expansive and exploratory thinking. They all dealt with considering possibilities, gathering new information and encouraging big dreams. In this phase it was time to stop exploring and be more realistic. There are four key steps in this phase:

1. Make sense of the data, review progress to date, and agree on how to move the planning process to completion.
2. Use business planning: assess the program portfolio and develop a future program portfolio.
3. Confirm the three to five core future strategies that will serve as the primary focus of the organization's resources for the coming years.
4. Agree on administrative, governance, and financial priorities.

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<sup>73</sup> Bryson, John, Alston, Farnum, *Creating and Implementing your Strategic Plan*, (San Francisco: Jossey-Bass, 1996). 63

<sup>74</sup> Allison, Michael, Kaye, Jude, *Strategic Planning for Nonprofit Organizations: A Practical Guide and Workbook*, (San Francisco: John Wiley & Sons, 2005). 155-182

This phase was conducted as a facilitated group discussion. As explained before, one of the steps in the design and use of facilitated discussions was identifying the moderators. However, we are fortunate enough to count on the expertise of Dr. Elmes and Dr. Taylor both of whom facilitated the process. As explained in section 2.7.2, the steps of this phase usually take place at a retreat. However, due to time constraints we decided to hold the discussion at Commonsense.

### **3.5.1 Analyzing Data, Review Progress to Date, and Update Work plan**

At this time, we reviewed the specific strategic questions or choices that Commonsense (stated on previous phases) wanted to address during the planning process, as well as what they said they wanted to achieve from the planning process. Has the group learned anything from the previous phases that changes the understanding of the initial questions? We also stopped and reflected a moment on the work done while developing the mission, vision and values statements. Finally, we analyzed if the plan for planning needed modification to accommodate the analysis required for coming to decisions that will be supported by the organization.

In order to make sense of the data that was previously collected, we looked at the juxtaposition of strengths, weaknesses, opportunities, and threats by using a SWOT matrix. This SWOT analysis was done in the preceding phase. We paid attention to it, since it might have shown some important dynamics that influence the organization's strategic choices.

As stated before this phase took place on a board and staff meeting. This meeting was a discussion of the topics mentioned above and it was facilitated by Dr. Elmes and Dr. Taylor. For this day we created an agenda that allowed us to structure the Home Day properly. The agenda was as follows:

- Introduction (1.00-1.10)
- Discuss and revisit Mission (1.10-1.40)
- Discuss and revisit Vision (1.40-2.15)
- Break (2.15-2.25)
- Discussion of Strategic Issues (2.25-3.00)
- Review and Analyze SWOT Components (3.00-3.30)
- Break (3.30-3.40)
- Evaluating Current Programs
  - Bottom Line Matrix (3.40-4.00)
  - Programs Portfolio (4.00-4.20)



- Future Core Strategies (4.20-5.05)

As you can see there was a time frame for each of the components of the Home Day. This was due to the fact that there was a lot of material to cover under a very strict time regime. The Home Day was subdivided into the different topics that had to be covered. For each topic we presented the concepts of it, as well as, its importance; this way we could assure that the board and staff was comfortable with the terms that were being covered. After the topic was presented, we presented the data that we collected from the surveys in order to be able to start the discussion (You can find this data in the Results and Analysis chapter of this project). Once this data was collected Dr. Elmes and Dr. Taylor guided the discussion in order to create new ideas and try to reach consensus.

### **3.5.2 Using Business Planning**

This step is called business planning since it required us to look at the development of programs in a way that it is integrated to the funding strategies. Often charities have developed their program plans and fundraising plans in parallel as opposed to jointly. As charities generate multiple funding streams, different program activities have different potential for revenue generation. This is why it is important to develop both program and funding strategies in parallel, it is also important in order for the charity to achieve financial viability.

In the work evaluation done in the previous phase, we investigated various ways to increase impact or add new service offerings in order to achieve impact. In this phase we were concerned with determining the future scope and scale of programs; fundamentally this was a set of questions about the Commonsides' growth.

There are a couple of tools that could have helped us in deciding what programs or other activities should make our program portfolio. The tools were similar and they both produce recommendations for programs. The available tools were the Compass Point's Dual Bottom-Line Matrix and the Competitive Strategies Matrix. However, for our project we chose the Compass Point's Dual Bottom-Line Matrix since it offered an approach to the program portfolio building that explicitly took into account the relationship between the mission accomplishments and the revenue potential for each program area. The model of the Compass Point's Dual Bottom-Line Matrix can be found on Appendix R.

This matrix was presented at the Home Day. As we presented this matrix we explained to the different board and staff members what each quadrant meant in a simple way (you can find a clear description of each quadrant at the bottom part of this section). The board and staff then proceeded to fill this matrix using Post-it Notes© of different colors. Each color represented a different program. We then provided one Post-it Notes© of every program to each stakeholder. Afterwards, each stakeholder placed their Post-it Notes© on the different boxes of the matrix. After all the post it notes had been placed we quickly counted them and entered this data into a spreadsheet that we had previously designed. The spreadsheet provided us with a quick pie chart of the opinion of the different participants of the Home Day. In order to fill each of the components of the matrix lets define the characteristics of the different rows and columns.

A star program has high mission impact has tangible results, visible progress towards the achievement of the organization’s mission and high leverage potential. The program also tends to have relationship with other programs. On the other hand, some characteristics of a program with high financial reliability are:

- All costs are covered
- A surplus of revenue
- A Projection of financial sustainability for the future
- A proven financially viable business model

**What is a Recommended Strategy for each Quadrant?**

**Star=High Mission Impact + High Financial Viability**

**Business Strategy → Invest**

A star program is one that Commonsense want to keep and grow. To do so they must invest time, money and attention in it. Some of the ways to invest on this program is by:

- Ensure that the staff on this program is top notch.
- Recruit board members that have the ability to advice the program
- Publicize materials with special aspects and information of the program.

The opposite of a Star Program would be one that has low impact and low liability.

**Question Mark= Low mission Impact + Low Financial Viability**

**Business Strategy → Discontinue or Give Away**

If a program falls into this quadrant, the entity must decide whether the program can be changed to have a greater mission impact and/or greater financial viability, or should the program be discontinued.

A money maker program is one that brings money that supports the organization but does not do much for the future or the organization's mission. Often these are special fundraising events. The recommended strategy for a money maker is to enhance mission impact.

**Money Maker=Low Mission Impact and + Low Financial Viability**

**Business Strategy → Enhance Impact and /or Maximize Profits.**

Most organizations have at least one program that has a high impact, is deeply associated to the organization and is under funded. The strategy for a heart program is to keep it, but try to contain the cost or see if there is a way to increase revenues.

**Heart= High Mission Impact + Low Financial Viability**

**Business Strategy → Contain Costs**

### **3.5.3 Agreeing on Each Program's Future Growth Strategy and Developing the Program Portfolio**

This step was done in order to create a program portfolio. A program portfolio outlines all programs in terms of current and proposed scope and scale. It is important to remember that in this step we were not looking at the structure of the program, but rather a description of all programs that an organization intends to offer over the next few years. This portfolio would be the basis for developing specific objectives for each program goal and will be used to define the management and support goals and objectives needed to support all products and services.

In this step the staff should be assigned the responsibility of recommending a business program for each of the programs in terms of:

- What are we currently doing? Describe the level of services and program activities.
- What is the suggested future business strategy?
- Significant changes? Are there any recent?
- Advantages and risks on the recommended business strategy.
- What is the desired future scope and scale of the program?
- What resources are implied in order to deliver the strategy?

In order to complete the program portfolio we will show the tables on Appendix S with an example that we were able to create from the survey data that was collected from the Lunch Club. After the example is shown we will start evaluating all four of Commonsides' program as the discussion of the program's future develops.

### **3.5.4 Confirming Future Core Strategies**

*Due to the fact that we could not come up with a clear vision, we could not do this part of the methodology. However, we have a feeling that Commonsense will attempt again to build a strategic plan, which is why we decided to leave this section in the report. From reading this section, Commonsense will have a good idea of how to continue the strategic planning process that we hoped to finish. This is also the case in section 3.5.5.*

By this time in the planning process, the future core strategies should be evident, and now it is time to make them explicit. Core strategies will articulate Commonsense's future direction and communicate how and where it will focus its resources in the future. If strategies are successfully implemented they will have a major impact on how resources are allocated. A strategic plan should include a description of a few core strategies the organization will use in order to achieve its purpose and vision. In order to facilitate this process we will use the matrix located in Appendix T. This matrix explains the relationship between goals, objectives and strategies. The moderator will guide the board into identifying these strategies. While the moderator guides the board our team will be recording in the Matrix (possibly located on a blackboard). At this step it is also important to look at the SWOT analysis done previously since it might reveal new ways of thinking.

When writing up the core future strategies, one needs not only articulate the strategy but also make clear the following points:

- The assumptions, facts and values that support the proposed strategy.
- The possible obstacles that the organization may face in implementing the strategy
- What warning signals might encourage the organization to reevaluate the suggested new strategy?

### **3.5.5 Agreeing on Administrative, Financial and Governance Priorities**

*As we mentioned in the previous section, we were not able to complete this section of the methodology. This section is a process that Commonsense should consider if they want to continue the strategic planning process.*

Once core future strategies have been defined and the program portfolio created, the attention to the administrative, financial, and governance activities required to support the programs, such as the following:

#### **Finances**

- Resource development
- Financial management systems

#### **Administrative Functions**

- Staffing and benefits
- Marketing/public relations
- Infrastructure: management information systems, technology, and facilities
- Planning, evaluation, and quality control

#### **Governance Functions**

- Board of directors
- Advisory board

The complexity of the entity will determine the actual process for the selection of the finances, governance, and administrative priorities. If the discussions that were previously held regarding strategic issues and program priorities have not provided sufficient guidance for the setting of these priorities (in this report), then some questions from Appendix Z should be addressed.

After the different stakeholders, have satisfactorily answered these questions the discussions should be summarized by filling out the form in Appendix U. For each of the functions listed, one or more goals (broad general results) and objectives (specific, measurable priorities) should be written.

At the end of this phase there should be a clear idea on how Commonsides programs are doing in terms of financial viability and mission. The priorities for the near future should be identified and we should also be able to have clear future core strategies. By this time, the data collected on phase three has to be re-evaluated, as well as the mission statement as well as elaborate a vision for Commonsides. The programs are to be evaluated one by one as the facilitators guide the board and staff through the SWOT and the Compass Point's Dual Bottom-Line Matrix.

### **3.6 Groundwork for the plan (Phase 6)**

*Originally we planned to write a strategic plan for the future of Commonsides, due to the fact that a vision for Commonsides was not clearly established at the Home Day, the participants felt that the time was not right to develop strategies. However, we were still able to gain enough information for Ms. Martin to draft a strategic plan herself once the merger is officially over. This section is the process that should be considered to writing a strategic plan, which was planned as our end result for our project.*

In order to write the plan, Commonsides' goals and how they want to achieve them must be determined. Commonsides should figure what they would like to see in the plan and finally write the plan and see the plan is feasible.

### **3.6.1 Create goals and objectives<sup>75</sup>**

In order to write the plan, Commonsides must establish their goals and objectives, based off of the data we collected. The goals that are set in these areas should be realistic. Revisiting the organizational profile would be a good starting point, as we will group similar programs and services and create goals for those specific groups. The information for writing these goals will come from the last three phases of the process. The vision statement will give a better understanding of what Commonsides wants to achieve in the future, which will serve as a good basis for writing the goals. The mission statement will do the same for the objectives, because that is how Commonsides plans to achieve their vision. The SWOT analysis data will be used in order to set goals and objectives for Commonsides. The opportunities and threats are related to the goals because they are both "end products". The strengths and weaknesses are more related to the objectives because in order for Commonsides to achieve the plan's goals, they must take advantage of their strengths and improve their weaknesses. Also the program portfolios will provide more detail in our objectives. Most of the goals of Commonsides will be reached through their programs, hence it is important to outline which programs and methods will help Commonsides reach their goals.

Determining Commonsides' objectives are next. The objectives are how the goals of the organization will be accomplished. The objectives will consist of the following sentence structure: [(a verb noting direction of change) + (an area of change) + (the target population) + (the degree of change) + (the time frame)]. An example would be "to facilitate more interaction between departments before the end of the school year". The created objectives should be precise, measurable and time-phased. There are two kinds of objectives: process and outcome. Process objectives are activities that are undertaken by the organization. They involve the staff and volunteers and they use the verbs: develop, implement, establish and conduct. Outcome objectives are outcomes that will be made by

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<sup>75</sup> Allison, Michael, Kaye, Jude, *Strategic Planning for Nonprofit Organizations: A Practical Guide and Workbook*, (San Francisco: John Wiley & Sons, 2005) 235-240

the end users of organization's services, changes that are a result of process activities. They involve change in behavior skills, awareness, etc and they use the verbs: increase, decrease and improve. These objectives will be specific and measurable. Basically, the objectives will briefly describe how Commonsense will achieve their goals.

Three sections that were discussed in section 3.5.5 (Financial, administrative and governance) should have their own goal statement and objectives, which will be as specific and measurable as possible. The selection of goals will depend on the complexity of the organization. In this case, the selection of goals will be simple because of the lack of size to Commonsense. For instance, some of the management goals of Commonsense could be in the areas of fundraising, program development and administration.

### **3.6.2 Creating strategies to solve issues<sup>76</sup>**

From the issues identified from section 3.4.3 specific strategies will be created to handle those issues. Each staff member and as many Board members as possible should be handed worksheets (Appendix V& Appendix W) with questions about the goals of each strategic issue, the barriers of achieving these goals, initiatives that might be pursued to solve to the issue, what steps should be taken and who should be responsible for each step. This information will help identify the strategic steps and techniques that the organization wants to pursue. Also, it could create new specific responsibilities for Commonsense's employees. Once the Board can agree on a specific strategy, questions should be asked about the strategy in order to highlight the strengths and weaknesses of the method suggested. Some questions will be "What are the strategy's key elements?", "What is the purpose of the strategy?" Lastly, the Board will have to come up with a system on how to evaluate their strategies ( Checklist of Suggested Criteria for Evaluating Strategies). They should come up with criteria that are easily measurable (so that are no biases) and have direct relation to the organization's goals and objectives.

### **3.6.3 Writing the strategic plan<sup>77</sup>**

From all the data we have gathered from previous phases, a strategic plan will be written based of it. It is important to have a review committee in order to make sure that

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<sup>76</sup> Bryson, John, Alston, Farnum, *Creating and Implementing your Strategic Plan*, (San Francisco: Jossey-Bass, 1996). 75,79-80

<sup>77</sup> Allison, Michael, Kaye, Jude, *Strategic Planning for Nonprofit Organizations: A Practical Guide and Workbook*, (San Francisco: John Wiley & Sons, 2005). 249-269

the perspective of Commonsense's future (agreed on the preceding phases) is included in the strategic plan. Hopefully the suggested revisions will be small matters, which include adding detail, revising format and changing wording in a particular section.

The document should be about 8-12 pages long. The first page will be an introduction by the Chair of the Board of Trustees. This document will simply be an introduction to the plan for the readers. Also it will serve as a stamp of approval to the plan and demonstrates that the organization has achieved a critical level of internal agreement, this will be the final section added to the document. The second page will contain the mission, vision and values statements and that is all (no introduction required). The third page will be a summary of core strategies. This section will introduce the readers to the strategies that Commonsense will take on for the next few years. Each strategy will have its own section which includes a description of the strategy and why Commonsense decided to undertake that particular idea. The next pages will contain a list of program goals and objectives. This section will provide the plan of action and what Commonsense hopes to achieve for the next few years. This will serve as a useful guide to annual operational planning and a reference for evaluation. Lastly, there will be some appendices, including, a summary of Commonsense's SWOT components and results of the surveys that we administered. The plan will also take into consideration realities, emergencies and contingencies. Once the plan is written and the review committee is done editing, the plan should go to the Board for approval. Board approval will make the plan official, provide closure for the process and energize the all the stakeholders to put the plan in action. Next, the Board should publish a condensed public version of the plan which should include:

- Introduction to the Plan and the Planning Process
- Mission Statement
- Vision Statement
- History of the Organization
- Values, Beliefs, and Guiding Principles
- Core Future Strategies and a one or two paragraph description of why the strategy is important.



### **3.6.4 Adopting the strategic plan<sup>78</sup>**

In order for the plan to work, almost everyone in the organization must agree with it. This is where consensus building comes into play. Ideally, everyone involved in Commonsense would agree with the plan because every internal stakeholder will carry out his or her roles efficiently and with optimism. This is the most likely scenario because throughout this chapter we have detailed how to involve internal stakeholders from the beginning to the end. During that time almost all of the stakeholders' input with regards to our plan should be considered. When Ms. Martin is satisfied with the final plan, she will answer any final concerns that the staff might have and prepare to put the plan to action (Appendix X).

However, when the plan is approved, Commonsense should put the plan in action immediately and think about what events will have to happen in order to draft a new plan.

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<sup>78</sup> University of Colorado, "Consensus Building", <http://www.colorado.edu/conflict/peace/treatment/consens.htm>, 1998

## **4. Results and Analysis**

In this section we will present the data that was collected through the surveys that were conducted initially. However, since we collected a large amount of data, we are only including the most relevant data here. The data collected through this project is mostly qualitative, so the analysis was mainly based on common themes that were found on the opinion of the different interviewees. Most of this data was collected electronically using a survey service called Survey Monkey©. A clear explanation on how to access these surveys electronically will be provided on Appendix CC.

### **4.1 Mission Statement**

On the second set of surveys, one of the surveys dealt with creating a Mission Statement. The data obtained was qualitative, so we had to look for patterns in the data that showed agreement between the different stakeholders. The completed survey can be found at Survey Monkey©. Looking at the answers to the surveys, we were able to identify the following main points that were regularly commented on:

- Building skills
- Creating a close community
- Providing educational services
- Improving the lives of community members

For example, we identified creating a close community from the following input on the survey: “Commonside hopes to bring the community together through events and education, allowing individuals and groups to grow and help each other”.

From these ideas, we tried to elaborate possible mission statements for Commonside. When doing so we also looked at the ideas that were provided at the vision survey (see Survey Monkey©), since there is a relation between the Vision and Mission. The vision works as the goals that Commonside wants to achieve for the future and the mission is the objective that guides Commonside work in order to accomplish their vision. However, since Commonside is still in the process of creating a definitive vision statement, the mission answers were broad and based off of current programs and practices, not potential future ones. These were some mission statements that we drafted from the data we gathered:

- To provide educational and recreational services to the community.
- To help the community members create skills and engage in social activities.

- To bring the community together by providing leisure and educational activities that help the members improve their lives.

We planned to use these mission statements as a starting point in our discussion about the mission at the facilitation group.

## **4.2 Vision Statement**

One of the main problems we identified easily about Commonsense was the lack of a vision. As stated previously, there is no vision statement for the organization. In order to identify an appropriate vision for Commonsense, we followed the procedure explained in the methodology. It is important to remember that a vision is divided into two sections, the internal and the external one. The internal vision at the same time is subdivided into two more sections, the program and the administrative vision.

Looking for common grounds on the data obtained through Survey Monkey© we were able to determine the following visions in each of the subsections:

From the surveys collected at Survey Monkey©, we looked for common grounds. For example: “The world wouldn't change at all, but... The local communities would interact more” could be related to “less social exclusion in the area”. Therefore, we narrowed down these points to just “less social exclusion in the area” since it includes both respondents’ input opinions in one simple phrase.

The bullets below represent the main ideas that we were able to collect through the online surveys. The external vision shows the changes that the community would undergo if Commonsense is successful in completing their mission. These ideas are based on the board and staffs opinion.

### **External Vision**

- Young people in the area engaged in positive activities.
- Enhanced self esteem of young people and parents.
- Less social exclusion in the area.
- Higher levels of skilled or semi-skilled employment.
- The world wouldn't change at all. But maybe the immediate local area would.
- People would have more respect for each other and would know who everyone was.
- People would be more open to education.
- People would gain qualifications and skills to empower them and improve self esteem.
- There'd be useful, interesting and constructive things for everybody in the community to join in with.

The program vision shows the changes that the staff and board consider beneficial for Commonsides programs. These ideas are based on the board and staffs opinion.

### **Program Vision**

- Active and beneficial partnership with statutory bodies health, education/children's services, police, planning, housing, vulnerable adults services, library, adult education etc.
- Commonsides would have a base in all three areas that it covers as an assembly point/meeting place.
- Perhaps day trips to gardens and the country (i.e. strawberry-picking) could be organized with pick-up and drop-off points in each area? Trips to West End shows?
- Events that bring the old and young together, perhaps the youth helping with gardening? Older people passing on any skills they have (cooking?)
- To continue the great work that Commonsides already does locally.
- To increase the number of projects within Commonsides.
- Financially more viable not just reliant on short term funding.
- To have more diverse groups (something for everyone). For the groups to interact with each other.

The administration and management vision are the internal changes that Commonsides would like to achieve during the next few years. These changes will greatly benefit the way that Commonsides is currently run and operated.

### **Administration/Management Vision**

- Financial and administrative support to manage growing finances, business planning and financial reserves policy.
- Expert Health and Safety support (fire, cleaning products, first aid etc).
- Project coordinators for funded projects to deliver at grass roots level.
- Would like Commonsides to be self-sufficient, with enough income to cover our overheads and buy extras/arrange more events if we wanted to.
- Easy adaptation to changes in structure and size.
- That Commonsides continues with an identifiable image, logo and style.
- Continue strong and committed management.
- Professional business plan to cover next 5 years.
- Active and confident Board.
- A receptionist at the front of the building.
- That there would be more staff to take on specific jobs.
- A Webmaster to keep our website updated.

From all these ideas we drafted the following vision statement: “To grow in order to provide our services to more clients in the areas of Pollards Hills, Longthornton and Figges March”. This statement clearly states a finish that Commonsides wants to reach. This vision statement was then discussed at the Home Day. You will find the ideas that

emerged as well as some remarks that took place during the discussion in the Home Day section of the results.

### **4.3 Strategic Issues**

From the data collected on the first survey we identified the strategic issues that Commonsense face. These issues were collected as open-ended questions. After this data was collected we started to analyze the data and looked for common ground. By doing so, we identified the following strategic issues:

- **No vision**
- **Lack of long-term planning**
- **Board-Staff interaction**
- **Better Marketing**
- **Lack of Business plan**
- Disagreement of merger
- Continue great project management
- Improve current programs with external input
- Improve neighbor relations
- Handle growth
- Lack of staff resources
- Need for a specific mission

When we asked the staff about Commonsense's vision, they had no idea what we were talking about. That told us that there was no vision at Commonsense. Also, there are some potential problems that might arise in regards to the merger. For instance, there has been some disagreement about the name of the new organization. The proposed name is "New Horizons Community Centre"; however, some feel that since Commonsense is absorbing the Community Centre, the name should simply be "Commonsense Community Centre".

Since Commonsense is in the process of merging with the Pollards Hill Community Centre, some of these strategic issues do not play a major role, yet. For this reason, we are able to reduce the strategic issues to the ones that are bolded above. All the other strategic issues should disappear or be negotiated as the merger takes place. However, as we agreed at the beginning of the project, we did not look at the merger process.

As part of the strategic issues, we also identified whether this was the right time to start the strategic planning and how different issues are affecting Commonsense at the moment. This data was also obtained through Survey Monkey©. This data is a

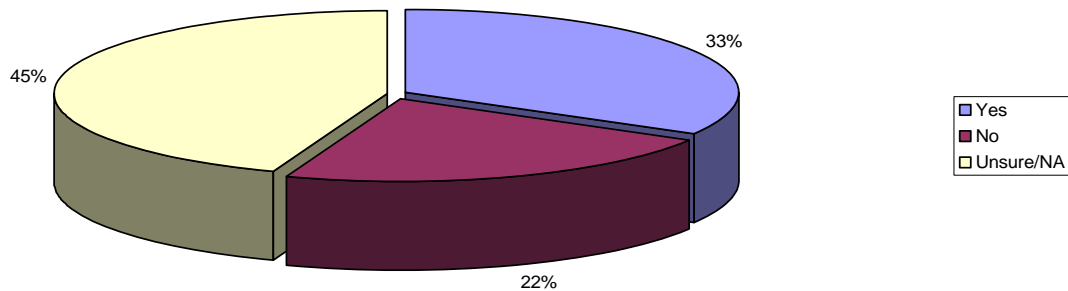
representation of the opinions of the different internal stakeholders on some of the aspects that play an important role in the strategic planning process; this is displayed in Table 1. We then analyzed this data by using Microsoft Excel and constructing pie charts. We decided to convert this table into pie charts because the human mind tends to digest visual data faster. The complete list of charts can be found in Appendix CC.

Question	Yes	No	Unsure/NA
Commitment, support, and involvement from top leadership, especially the executive director and board president, throughout the entire process	89%	0%	11%
Commitment to clarifying roles and expectations for all participants in the planning process, including clarity as to who will have input into the plan and who will be decision makers	67%	22%	11%
Willingness to gather information regarding Commonsides strengths, weaknesses, opportunities, and threats; the effectiveness of current programs; needs in the community, both current and future; and information regarding competitors and (potential) collaborators	89%	0%	11%
The right mix of individuals on the planning committee(i.e. Board, Staff and us)—strategic thinkers and actionaries (individuals who are in a position to see things through to completion), as well as big-picture (conceptual) thinkers and detail-oriented (perceptual) thinkers	67%	11%	22%
Willingness to be inclusive and encourage broad participation, so that people feel ownership of and are energized by the process	67%	0%	33%
An adequate commitment of organizational resources to complete the planning process as designed (e.g., staff time, board time, money spent on the process for market research, consultants, etc.)	75%	12%	12%
A board and staff that understand the purpose of planning, recognize what it is and is not able to accomplish, and have clarity about the desired outcomes of the process and issues to be addressed	56%	22%	22%
A willingness to question the status quo, to look at new ways of doing things; a willingness to ask the hard questions, face difficult choices, and make decisions that are best for Commonsides current and future constituencies as well as a willingness to support organizational change as a result of the planning efforts.	50%	12%	38%
Commonside has the “financial capacity” to sustain itself for the immediate future without a financial “crisis” appearing to detract from strategic planning	33%	22%	44%
Top management’s commitment to carefully considering recommendations made during the planning process rather than disregarding decisions in favor of his or her intuitive decisions	75%	12%	12%
There is no serious conflict between key players within Commonsides (although a healthy dosage of disagreement and perhaps some heated discussions can be expected during a strategic planning process)	89%	0%	11%
There are no high-impact decisions to be made in the next six months by an external source	33%	11%	56%
Board and top management should be willing to articulate constraints and non-negotiable upfront	89%	0%	11%
A commitment to tie the strategic planning process to Commonsides annual planning and budgeting process—to create a detailed annual operating plan for the upcoming year, and monitor/revise the strategic plan as needed	67%	11%	22%
A commitment to allocating sufficient resources to support the implementation of core strategies	67%	0%	33%
Does Commonsides have the administrative capacity to effectively and efficiently support their programs and services?	67%	22%	11%
Does Commonsides have effective financial management systems in place to monitor their finances?	67%	11%	22%

Table 1 - Conditions for Planning Survey Results.

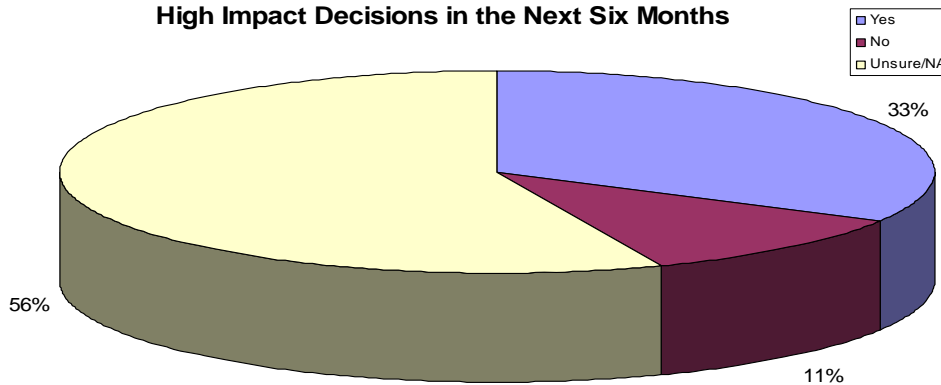
After looking at the Pie Charts, we were able to identify that 67% of the interviewees were either not sure or believed that Commonsense is not financially viable at the moment (Figure 9). Another important fact that came out was that 50% of the interviewees were not sure or believed that Commonsense would not be willing to evaluate their current status quo (Figure 11). The last point that was clearly made on these surveys was that 67% of the interviewees believed that Commonsense is currently going through a high impact decision(s) (Figure 10). This last point was not that surprising since they have started a merging process with the Pollards Hill Community Centre.

**Commonside has the Financial Capacity to Sustain Itself for the Immediate Future**



**Figure 9 – Financial Capacity (Pie Chart)**

**High Impact Decisions in the Next Six Months**



**Figure 10 – High Impact Decisions (Pie Chart)**



## Willingness to Question Status Quo and Looking at New Ways of Doing Things

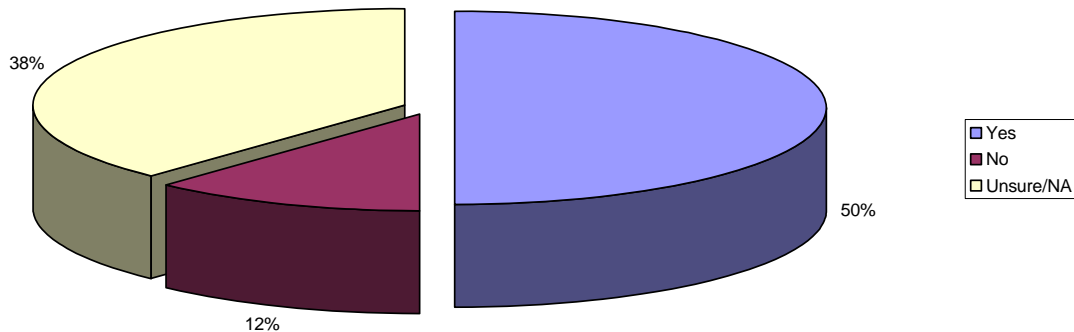


Figure 11 – Status Quo (Pie Chart)

However, initially there was some agreement among us, our advisors and Ms. Martin on the idea that the merger would not play an important role in the strategic planning process. However, this belief was proved false at our Home Day. This can be clearly seen in the results and analysis section of the Home Day.

All other strategic issues were identified through looking at the common grounds among the different responses collected on the electronic surveys. Please refer to the surveys on conditions for successful planning (part two), found at Survey Monkey© for full listing of the results of these surveys.

Finally, the list of strategic issues shown above was presented at the Home Day. These issues were discussed and they are presented on this section of our project under the Home Day results.

### **4.4 SWOT Components**

A SWOT analysis was performed on Commonsense in order to give an honest outline of Commonsense's characteristics. You may find the SWOT matrix completed in Appendix DD. From the answers that we got via interviews with staff and clients, observation of Board Meetings and staff operations and Mrs. Rowan's work, a common

theme was established for the matrix: Commonsense is a good small organization that wants to expand and has the opportunity to do so, however, there are some serious obstacles and shortcomings that the organization must rectify first.

In the Strengths category, Commonsense has the necessary qualities that a small nonprofit organization must have and maintain. Some specific traits are that Commonsense has a nice, welcoming and committed staff that puts great effort into their work. Also, the programs that are currently running at Commonsense are going smoothly because of effective short-term planning and positive customer relations. Another strong point lies in the facility of Commonsense; it is in the center of Pollards Hill and it is quite spacious, which has led to renting of space from different organizations, a money maker for Commonsense.

Commonsense has weaknesses that have been exploited when the organization has tried to go to the “next level”, as mentioned in the full section 2.5.1. People have noted the staff is too passive with regards to their project management and obtaining funding. However, if Mrs. Rowan’s project is a success, then this weakness will cease to exist because staff will have the tools to request loans and grants on their own. Another group that has been too passive is the Board of Trustees. The Board has practiced a “hands-off” approach towards giving direction to the staff; this is a result of the Board not receiving appropriate training for the tasks they have to perform. Without direction, the staff has to operate strictly on a “day-by-day” basis because no one is telling them where to go in the foreseeable future. Adding to this problem is that there are only four full-time staff employees on Commonsense’s payroll; hence Ms. Martin has to concentrate strictly virtually all of her time to the day-to-day activities of Commonsense, which forbids her from spending the appropriate time on long-term planning. With the small number of staff and resources that Commonsense has, some programs that were successful (i.e. Common Art) were indefinitely suspended due to a lack of funds. Lastly, Commonsense has a great staff; however, it is not officially recognized because they have not had the time to go through an accreditation process. Ms. Martin is in the midst of trying to dispatch an accreditation team to Commonsense, so hopefully this problem will dissolve. With an accredited staff, there would be more confidence in Commonsense to take up more challenging projects and add some credentials to their loan applications.

The Borough of Merton has a great number of program opportunities, that Commonsides can take advantage. This includes to improving their current programs and bringing in new programs. From the MSVC we learned that child care is looming to become a huge service area because of Local Authority's regulation, which encourages school students to put more hours into schoolwork. Related to that service area, local hospitals are looking for help with more extensive care for children with disabilities. More social events are desired for the children to know each other and adapt easier to the outside world. Another area, which we found from the MVSC, is alcohol and drug abuse prevention. There are not many organizations that provide help to substance abusers, which is unusual because Mitcham has taken an aggressive front stopping crimes and accidents related to substance abuse.

Mrs. Rowan conducted interviews with the Aiming High clients and we did likewise with the Lunch Club clients in order to get ideas on how to improve Commonsides's current programs. For Aiming High, the volunteers and the clients suggested that there should be more incentives for coming to meetings. The specific ideas were field trips for regular attendees, more free food and having Ms. Knight and Ms. Bisnouth spending more time with the young mothers, (i.e. accompanying the mothers while they are search for jobs on the Internet) and being a little more forceful to get the mothers to keep coming back. Another issue that was brought up was a lack of an agenda for meetings, which has led to much disorganization for the meetings. From our interviews, all of the Lunch Club attendees would love to have more activities, many of which were in place before Commonsides took over the program. Some of these activities were a weekly hair dresser, which was almost a unanimous request, field trips to parks and the heart of London, more games besides bingo, cards, dominoes, and massage therapists. Another suggestion was to add more variety to the menu; some persons were sick of fish and chips each week. Some of these opportunities require a substantial amount of resources, resources that Commonsides have little of. However, there is another opportunity that can take care of that.

In September 2005, Commonsides began the merging process with the neighboring Pollards Hill Community Centre. The road to the actual completion of the merger has been a winding one; however, the planned completion of the merger is September 2006.

If the merging process is a success, Commonsense will have more resources (i.e. funding, building space and staff) to start planning long-term, take on more programs and acquire new funds. The merger will bring new ideas for Commonsense's mission and vision statements. If Commonsense can take advantage of this opportunity then the other opportunities that the new Commonsense wants to pursue will be achieved and they will have an easier time planning for external issues that might threaten the organization.

With any organization, there are external factors that can hurt them. The first step to dealing with these detriments is recognizing them. There is no main theme to the threats of Commonsense because each one has its own unique category of problem. The Aiming High program is facing a major financing problem as the European Union is cutting the funding to the program and giving the money to Eastern European charities. Without the right amount of funding the very idea of Commonsense helping young mothers will die. The program will no longer be called Aiming High since it is the European Union's name for the charitable program. Commonsense will lose the funding in March 2007.

The other major threat that Commonsense faces is that there is some strong opposition to the merger. Some of the Community Centre's Board members are opposed to the idea because Commonsense will actually be taking over the Centre and their ideals will be the only ideals when the merger is complete. There is also some disagreement about how the new board will be formed. It is proposed now that the Board Director will be a neutral person that is not on either Board. Some of the Community Centre's Trustees feel that they should choose the Chair of the Board, just so there is still some influence from the Community Centre's personnel. However, some Commonsense members want the same "take over" effect to happen on the Board, which is going to happen with regards to the actual building. At the moment the number of people opposed to the merger is too small, hence no major problems will arise in the near future. However, it is still a long time until September.

Basically, Commonsense should maintain strengths, hide or fix weaknesses, take advantage of opportunities and handle threats.

## **4.5 The Home Day on June 12th**

The Home Day, as explained in our methodology, was a facilitated discussion in which the board and staff discussed the data shown previously in this section. The initial idea of the Home Day was to develop future core strategies. However, as the facilitated discussion took place, it was evident that there was a lack of vision. Since there was no vision it was hard to say where Commonside plans to go in the future and therefore there was no way to develop strategies that could help Commonside achieve this vision. Nevertheless, the Home Day was extremely successful in identifying the strategic issues and bringing up new ideas that could help Commonside build a vision. Once this is done they might engage again in the development of a strategic plan.

### **4.5.1 Mission Statement**

At the Home Day we got some more useful information about the organization's mission, and Commonside's current and future objectives. The general theme of this discussion was, "what is Commonside going to do after the merger?" This perception came from the fact that there was a great amount of discussion about how the two organizations will act as one. For instance, both organizations have a perception about them that states "Pollards Hill only," which is problematic to Commonside since their area of interest is in two other wards besides Pollards Hill. Another example was that there might be some "tension" between the two Boards because the Community Centre is more of an "engaging" group while Commonside is more of a "professional" group. Being a local leader in self-improvement was another theme from the discussion. There were four areas in which Commonside wants the statement based on, according to Ms. Martin:

- Skills/employment training
- Leisure/fitness
- Children's future
- Financial security for families

Another theme of the discussion was the for a more specific mission statement. One board member told us that the mission statement was intentionally broad because Commonside was just finding itself (they have only been around for five years) and figuring out what they were going to be about; hence a broad mission would give the organization the freedom to build its base easier. However, the discussion ended in

disappointment. The issue of specification is not slated to start until after the merger because it was expressed that all resources should be organized first and then the goals and objectives of each specific area of the organization can happen. Right now it was explained by one person that Community Centre and Commonsides were “two organizations under one roof.”

Most of the information that came from this portion of the discussion was suggested criteria to use in drafting and evaluating a statement. A great suggestion was to include the idea of having balance in programs and clients in the mission statement. Some other criteria that were suggested:

- Not to make the mission statement too “Victorian” (paternalistic)
- A limitation on words
- The statement should be “to the point and easily understood”
- More specific than the previous one
- Have a “to do” statement instead of “to create” statement

From the three suggested mission statements that we introduced earlier, the participants thought that the third one, “To bring the community together by providing leisure and educational activities that help the members improve their lives,” had the best “fit”. It has a general theme that everyone likes (community closeness), involves current programs (Aiming High is educational, the Lunch club is leisure), shows balance and relation of programs and is only one sentence long.

Lastly, one person made a great comment about Commonsides’ mission: “it’s relatable to raising a child. You provide help for them, but you let them create their own choices”. From our point of view, Commonsides is not ready to create a clear mission statement at the moment. In order to do so, they will have to wait until the merger happens. Once the merger happens, Commonsides should use the surveys we designed (located at Survey Monkey©) in order to look at some common traits that could create a mission. A good way to do this exercise is to create a clear vision statement beforehand, although it might be difficult, it is necessary. This is due to the fact that once they know where they are heading, the mission should just tell them how.

#### **4.5.2 Vision Statement**

The vision statement was the guiding topic throughout the Home Day. The lack of vision was clearly evident and of major importance for Commonsides if they desire to

build a strategic plan. The vision tended to focus mainly on the idea of the merger and what the new organization would be like. Some of the questions the participants considered were:

- How could it be improved?
- Who are we reaching?
- What is our new building going to be like?

Those were just a few of the questions that started to emerge as the discussion took place. As they imagined the new organization, the idea seemed wonderful to the entire board and staff. A board member described his/her ideas during the discussion as, “We need to have this conversation between both charities, it will show us the benefits of merging and once we have a clear vision we could merge very smoothly”.

Although we tried elaborating a vision statement for Commonsides, it did not seem to fit what the members of the board and staff were looking for. However, some ideas emerged during the discussion. “We want to become one organization, self-supported and welcoming...An organization that will grow together with its community”. “We want to be a magnet for clients”. “We want to merge in order to grow and benefit from the different skills that each organization has. Together we will be the place to which the community members will come.” A clear list of the ideas given was:

- Work for Unemployment
- Work towards financial independence
- Include young people as part of our programs
- Create a close community, in which the neighbors know each other.
- Generate events that bring people together creating a social good.
- Expand Service hours
- Serve foods for people of different backgrounds and ages.

It is extremely hard to construct a vision statement; this is an activity on which the Board and staff (possibly including the Pollards Hill Community Centre personnel) should work during meetings, as stated previously. Once Commonsides, or the new organization that will emerge in the near future, has a vision statement, this might give them the ideas to create their mission. Once there is a clear mission and vision Commonsides should engage in the strategic planning process in order to develop the long-term strategy that they hoped for when our project started. The process should

become easier since they already have the guidelines the tools we provided on this project.

### **4.5.3 Strategic Issues**

During the Home Day, we presented the following strategic issues that were previously identified as explained on the beginning of the results and analysis section:

- **No vision**
- **Lack of long-term planning**
- **Board-Staff interaction**
- **Better Marketing**
- **Lack of Business plan**
- Disagreement of merger
- Continue great project management
- Improve current programs with external input
- Improve neighbor relations

The five strategic issues that are bolded were considered the most important ones. The merger was excluded since it was considered, by many, a non-factor before the Home Day started. However, during the facilitated discussion the merger took an important role in the decision of a vision for Commonsides. Now, we will explain the different opinions and discussions that took place for the five important strategic issues that were identified previously (no other issues were identified during the discussion).

#### **4.5.3.1 No Vision**

This was the main issue identified and the issue that guided most of the discussion on the Home Day. This issue is clearly analyzed in the previous section.

#### **4.5.3.2 Lack of long-term planning**

This was an issue that was barely discussed during the Home Day. However, there was agreement on the lack of long term planning, but it is practically impossible to plan long-term without having a clear vision. There were no other major disagreements or arguments on this strategic issue. We also concluded that they have a particularly broad mission; they do not focus in certain program areas, which makes it easy for them to alternate programs as new sources of funding appear. Another point that was raised was that Commonsides does not want to sacrifice the quality their effective short-term planning process in order to incorporate some long-term practices.



### **4.5.3.3 Board-Staff Interaction**

This issue was an eyebrow raiser, especially for the members of the board. However, there was some agreement that this is an area that can be improved. It seemed overall that the Board recognized the problem of interaction; however, they just do not know how to fix the problem. A reason for that statement was that virtually none of the Board has received specific instructions on their duties.

One of the main ideas raised was that the board needs to play an active role because they should supervise the work that is being done by the staff members. “Staff members could be doing a great job; however, it might be inappropriate”. This means that the general, overall work performed might not be in the context of the vision or desired by the majority of the board.

One of the main points given, by one of the participants, was that the board “should decide on where the entity wants to go”. If this is decided and the staff interaction is improved, they should guide the staff to accomplish the tasks needed to get the entity where they want to go. As mentioned by Ms. Martin, Commonsides would benefit from a “practical board”. When the facilitators asked her to elaborate on this idea she said: “by practical I mean physical help, the board has a lot of talents and skills, we just need to take advantage of them...However, we must set clear limits in order to avoid the board from becoming intrusive.”

As the discussion went along, board members asked, “How can we achieve this?” And the suggestion of “clarifying the roles of the board members and engage the board in strategic planning training” emerged. This was the last clear point that was raised on the issue.

The Home Day also served as a clear indicator of building a more active relationship between board and staff. An important thing to realize is that only six out of 15 board members showed up to the activity, nevertheless, it is difficult to get volunteers to show up for a four hour meeting. By looking at the minutes of past board and staff meetings at Commonsides we can see that the average number of board members showing to the meetings is seven. It is important as well to realize that only seven board members tend to attend regularly for these activities; all the others either do not show up or have inconsistent attendance.

There are two main ideas that come to our mind that could be causing the lack of board and staff interaction. First, the board is not clear on what their role is. Second, there is no incentive to attend the meetings and some of the members believe that the board meetings do not end in concrete conclusions.

Lastly, another cause for these meetings having such a low turn-out rate is that they are not serious enough. There are a lot of jokes going around as ideas are being discussed. While humor is a great way to build board and staff relation and improving interaction between them but, everything has an appropriate time, and maybe the board and staff meetings are not that time.

#### **4.5.3.4 Better Marketing**

Marketing was the next issue we discussed. Due to the lack of marketing, Commonsides has not been able to reach its goal, which is expanding their influence to the other two wards outside of Pollards Hill. Commonsides “is a place for the community and we are growing to better give the impression.” “We want people to feel that this is their place, where they can come for counseling, tea or just meet other people in the community.” Through good marketing “we could make people aware that this is there place.”

When asked how this area can be improved, one of the main ideas that were raised was “making commitments.” “If we are able to commit with our clients, and our clients commit to us, word of mouth would improve, they will feel at home.” “We should do more advertisement at local libraries, bus stops in the areas that we want our clients to come from.”

The facilitators then guided the discussion towards finding the benefits of better advertisement. The members of the facilitated discussion listed the following, “we could become a community magnet.” “People will understand that is their community centre”. “Our mission will be better achieved.” We need to remember that Commonsides has a broad mission and no clear vision of the organization’s future, yet. A marketing campaign should start once they have a clear vision. A clear vision will guide the campaign toward the achievement of it.

#### **4.5.3.5 Lack of Business Plan**

This was the last strategic issue we touched on. There was not much said on this issue. However, Mr. Hewitt is working on the creation of a business plan, and this plan, together with Mrs. Rowan's research, should help Commonsense improve their financial weaknesses. Once Commonsense is able to assure financial viability, their programs should expand in order to include the new ideas that emerged on the program portfolios.

#### **4.5.4 SWOT Analysis**

At the Home Day, the SWOT (see Appendix DD) components were introduced after our strategic issues exercise was over. We wanted to show the participants where Commonsense's traits and strategic issues came from.

The group participants virtually agreed on the strengths and weaknesses since we got a many of those points from them via our surveys. Some opportunities received some attention; the Aiming High suggestion list was lengthened. The participants liked the reward system and thought that the Lunch Club attendees could join along with the young mothers to create more social interaction and to cut costs as well. Also, it was suggested that there could be more speakers for the young mothers in order to educate them more on being a mother and to give them a variety of methods. However, Ms. Jenny Bisnouth, co-coordinator of the Aiming High Program, said that she and Ms. Rebekah Knight, the other co-coordinator, might have some problems being forceful while maintaining their pleasant personality. Also, she was concerned that forcing might scare clients.

For the Lunch Club opportunities, Mrs. Nolan has said that she has heard the request for a hair-dresser ever since Commonsense got the Lunch Club contract, and she explained why those past programs were cut: "The activities are not funded because they are not apart of the Lunch Club. The contract states that we can only receive funding for providing meals." Also, she mentioned that the contract for the Lunch Club will expire in 2010, which could be a threat if a contract extension is not offered within the next three years. Mrs. Nolan did say, however, that she could help make the child with disabilities programs (possible new service area) happen because she does have the right connection with the MSVC, however, she admitted that the bus transport that is provided to the Lunch Club might not be offered to the disabled children.

The participants had some positive thoughts about the merger. They felt that both sides would benefit from each others' resources and felt that the methods that both organizations used would compliment each other. Someone commented that some common rules must be agreed upon as well, in order for the merger to be a success.

After the SWOT exercises at the Home Day, the participants felt that they had great tools to reevaluate their program and know what exactly to pursue when they are ready to expand their influence. The SWOT analysis worked as a great tool to introduce the evaluation of programs.

#### **4.5.5 Program Evaluation**

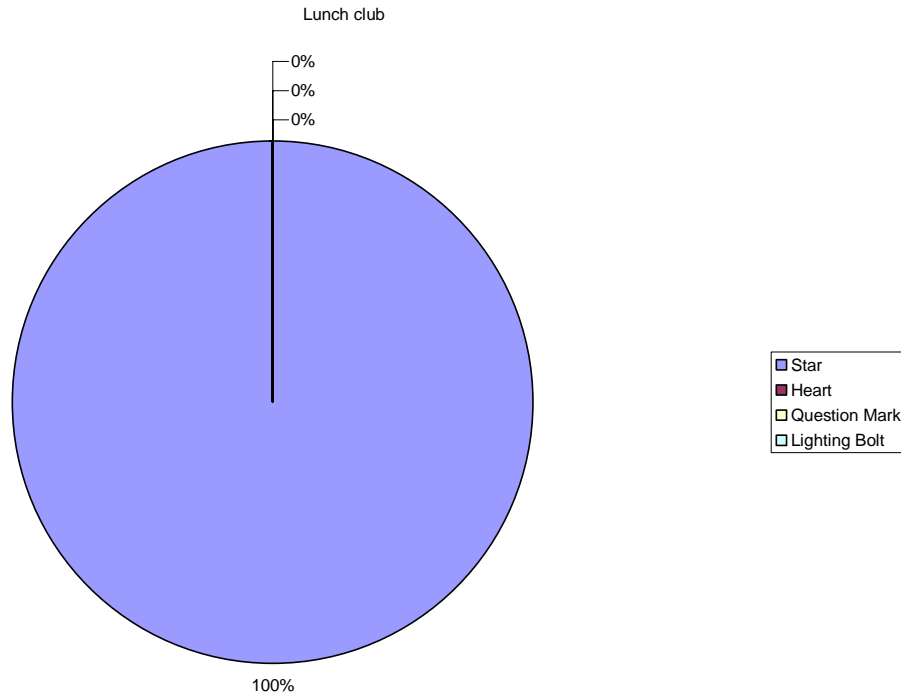
During the Home Day we evaluated Commonsides' programs in terms of future level of activity, financial viability and mission impact. The methods used for these evaluations were explained in our methodology. In order to understand the categories in the pie charts, please refer to section 3.5.2.

##### **4.5.5.1 Lunch Club**

The Lunch Club is currently offering a daily meal and an hour of social activities afterward. In terms of the desired growth strategy it was decided that the best option was to modify the program. Ideas for modifications included the following:

- Longer Hours
- More independent and mobile clients
- New activities such as
  - Trips (theatre, parks, shopping)
  - Food and healthy living talks
  - Hair Dressers

The chart below represents the participants' perception on the program in terms of mission impact and financial viability.



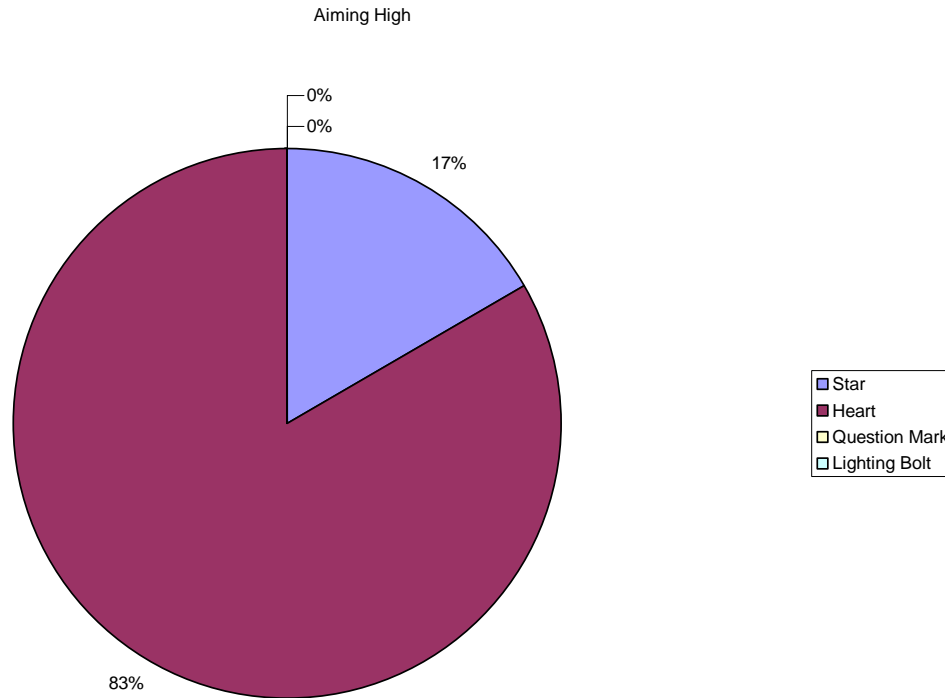
From this chart, we can see that the Lunch club is a program that goes with Commonsides’s mission and is financially viable. Therefore, this is a program in which Commonsides should focus their resources to improve and grow the services. Some recommendations for growth were made above.

#### 4.5.5.2 Aiming High

Aiming high is currently undergoing some transformation since the funding is currently being looked for. Some of the proposed future levels of activities include:

- More Activities:
  - Computer Class
  - Picnics
  - Peer Mentoring
  - Trips
  - Open Days
- Guiding the program more towards education and improving the skills for young adults.

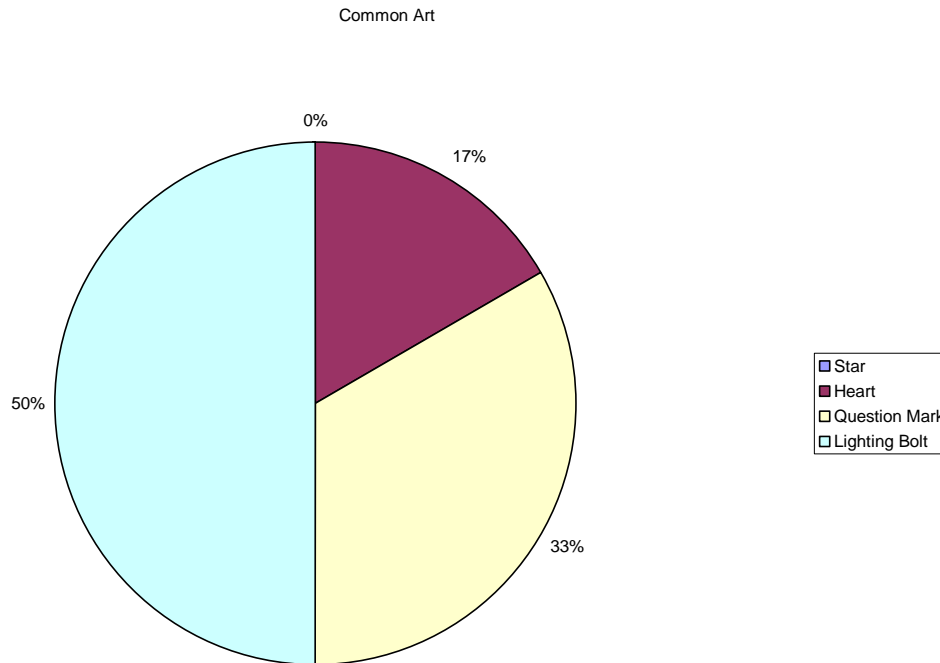
After the list of future level of activities was created the participants gave their perception on the mission impact and financial viability of the program. The chart below represents this perception.



From this chart we can see that the Aiming High is a program that goes with Commonsides’s mission but it is not financially viable. Therefore, this is a program in which Commonsides should focus resources in trying to make the program financially viable. Some recommendations for growth were made above.

#### **4.5.5.3 Common Art**

Common Art is a program that is not active right now. There were no major recommendations besides thinking of regularizing it could be beneficial. It was also said that this is a program that gets “very small money pots from time to time” and consume “too much staff and resources to put them together.” The participants’ perception of this program in terms of mission impact and financial viability is shown below, which shows some mixture of opinion of the program.

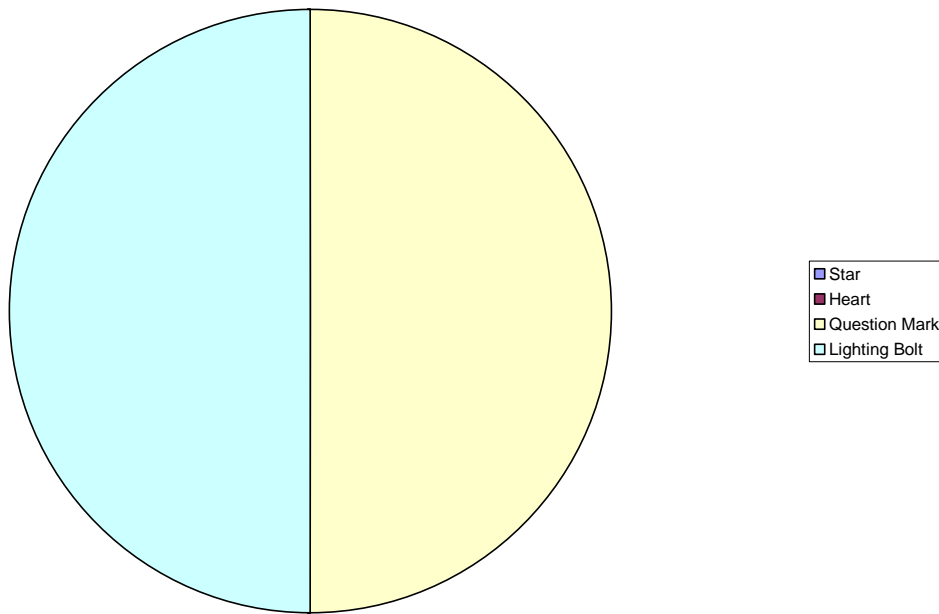


From this chart we can see that the Common Art is a program that, according to most participants, does not go with Commonsides’s mission but it seems somewhat financially viable. Therefore, this is a program that should be reevaluated in order to investigate whether it should be still offered in the future.

#### **4.5.5.4 Pollards Hill Cyclists**

On June 12<sup>th</sup> (the date of the Home Day) there was no staff member in charge of this program. The program was left aside, although Mr. Mark Dawson kept running a small cycling group during Sundays. Fortunately, Ms. Yemisi Sowemimo recently joined the Commonsides staff to take over this program and other environmental related programs. There was no major suggestion for this program besides the need to involve people from the area. In our interview with Mr. Dawson, he also commented that raising volunteers that could help running the program would be great. The chart below represents the boards and staff perception on the financial liability and mission impact of the program, which is not that favorable towards the program.

Pollards Hill cyclist



From this chart we can see that the Pollards Hill Cyclist is a program that does not go with Commonsense's mission and there are some doubts about its financial liability. However, we believe that the program is in line with Commonsense mission. The problem is that the environmental focus of the program is not being stated clearly. People are seeing the program simply as a fun activity for community members. Some recommendations for growth were made above (Source: Interview with Mr. Dawson).



## **5. Conclusions and Recommendations**

From the seven weeks we spent at Commonsense, we have seen that Commonsense is undergoing some big changes. Because of those changes, we were not able to finish our project the way we planned to. From what we have seen, Commonsense is a small organization that has big aspirations; however, they do not have the necessary tools to reach those desires. From the information that we have provided on this project, Commonsense should have the ability to develop the necessary tools. In this section we will outline the general information we gathered and how to use that information. From this information, we will build some recommendations that could help Commonsense reach their aspirations.

Throughout our report we have commented on Commonsense's mission being too broad. At the Home Day we found out that the mission statement was deliberately broad in order to give Commonsense some freedom to find exactly what they wanted to focus on and accept more programs, which would bring in more funding. We feel that Commonsense has a good idea of the areas of service which they want to pursue: education, leisure and environmental services. Although the merger will change the organization significantly, we still feel that Commonsense should think about changing the mission statement right now. Because the Commonsense's services will stay the same, all of the staff will remain and Commonsense is actually taking over the Community Centre. A new mission statement would save Commonsense some time to organize their new resources around. The mission would enable them to prioritize all aspects of the new organization.

In our background we discussed the importance of not only having a mission but a vision statement as well. At Commonsense, there is no vision statement present at this time. We understand that creating a vision statement from scratch is a difficult process that takes an abundant amount of time and effort. However, it is a necessary step that must be taken in order for Commonsense to plan towards the future. Commonsense cannot plan long-term unless they know where exactly they want to go in the next few years. In order to build the vision, the staff and board should have another facilitated discussion group that just focuses on creating a vision for Commonsense. This should be after the merger because Commonsense should familiarize itself with their new resources and, as

reported throughout this report, a satisfactory vision statement can not be drafted unless there is a clear and specific mission statement.

As stated earlier in the project, the strategic issues are the problems that must be solved in order to develop an efficient strategic plan. Before the Home Day, we were able to determine five important strategic issues which the organization should seriously consider. However, after the Home Day, we saw the real issues that Commonsides is facing in regards to strategies. First, we see that having no vision is even more of a problem than we realized, and as said in the previous section, it must be fixed soon. Second, we saw that the mission is out of date, and as previously stated, it must be fixed as soon as possible. Third, Commonsides's marketing needs major improvement. Commonsides is not known in the wards of Longthornton and Figges' Marsh, which are the two other target areas for Commonsides. One suggestion was to advertise via local libraries and/or bus stops, which we think is a great idea. However, the marketing campaign should start once they have a clear vision. With a clear vision, Commonsides will be able to guide their marketing campaigns into the direction that will allow them to achieve their vision.

One of the main issues mentioned in the results and analysis chapter is the lack of board and staff interaction. This is an area that requires immediate attention in order to build a mission and vision statement, because the vision and mission building exercises are usually performed by the board and staff. From an outsiders' perspective, we believe that there are a couple of things that could be done in order to help improve the board and staff interaction. The first thing that should be done is to clarify the role of the board, so that they can become more practical. Also from our perspective, there are two problems that are occurring at meetings. The first one is that out of the people that attend only a very small number of the participants will guide the conversation, the rest of them do not interact much during the meetings. This can be caused by fear of saying something inappropriate, others criticizing their ideas or they do not understand that sharing their ideas and opinions is part of the role as a Trustee. We also recommend that there should be more "social" events for the board and staff to get their casual talks out of the way, in order for meetings can be held in a more formal way. Lastly, the staff and board officers should draft pamphlets (or something similar) for the Board detailing what is expected of

them. Improving their weakness might be a tall order to Commonsides; however, it is a necessary step that Commonsides must make.

From information that we used to create the SWOT matrix, we saw that some components are incredibly important and must be seriously looked at in order for Commonsides to remain a healthy organization.

It seems that all of Commonsides's strengths will remain as strengths, since none of the welcoming, committed and relatable staff members are planning on leaving anytime soon, and Commonsides's lease on the new building will not expire for awhile. Also, if Commonsides looks to plan more long-term then they might lose some ability to plan in the short-term, which is a real specialty of the organization. We feel that Commonsides's ability to relate to clients, manage specific programs and connections with the community (via the Lunch Club) are great things that Commonsides has and should continue to maintain and practice.

Some weaknesses for Commonsides might be irrelevant if the merger with the Community Centre is a success. Those weaknesses mainly deal with Commonsides's lack of resources in number of full-time staff members and financial incomes. Other weaknesses can be fixed with a clear mission and vision, because Commonsides will know where to go in the future. Some of these weaknesses are long-term planning and marketing. Although we feel that the staff at Commonsides is professional, they will benefit from having new tools and/or practices. Some clients have commented that the staff is not involved as much in the activities, and they encourage attendance too lightly. However, this could be easily changed by just adopting a more hands-on persona. Another weakness is the staff has trouble getting funding for projects. No staff member has received proper training in how to write a loan/grant application. However, if Mrs. Rowan's project on Commonsides's finances is successful, then the staff will have the tools to improve for funding.

New activities seem to present themselves as a great opportunity for Commonsides's services. From the MVSC, we learned that children with disabilities are not provided with the services they need. We feel that this is an area Commonsides should get into because local authorities will give funding for it, and it would serve as a great replacement to the Aiming High program if the staff cannot provide a spin-off for Aiming

High. Another area that needs some help is drug and alcohol abuse. There is not much provided, with regards to prevention to substances, for those currently involved in this area. These are areas that Commonside might want to look at in the near future if they want to start new programs.

From the services that Commonside currently provides, there have been requests to provide a greater variety of activities. The Aiming High programs can be improved by providing young mothers with more field trips, speakers and having some order to the meetings, which will increase the number of mothers that participate in the program. Also, the Lunch Club could be more than a Lunch Club. Through providing desirable activities, such as field trips to the heart of London, more variety of games, hairdressing and more menu variety, the Lunch Club would provide great leisure for the elderly.

As we have stated repeatedly, the merger with the Community Centre would be quite advantageous to Commonside. The merger will provide Commonside with the resources that they desperately need. Also, it will allow Ms. Martin to focus more on general administration and long-term planning, since a couple of staff members from the Centre will take care of the day-to-day activities. We do feel, however, that Commonside should take a more aggressive role in the merger process, since Commonside is actually absorbing the Community Centre. The new organization should be called Commonside Community Centre so that there is some consistency in marketing, and potential clients will not be confused on where to go for the services Commonside provides. Commonside should act as though they are controlling the organization's future with input from the Community Centre's personnel. This will be a hard idea to impose but keeping the image in the community will bring several benefits in the marketing campaign. It is a lot easier to maintain an image in society (and merging and maintaining the name shows power and strengths) than creating a new one.

A major threat to Commonside is the fact that one of the main programs, Aiming High, will lose its funding on March 2007. This would result in a significant loss of clients to the organization. In order to counter this problem, new sources of revenue must be discovered. The other major threat is that there is some opposition to the merger because some Community Centre personnel feel that their views/concerns will not be considered at all. Commonside should assure the Community Centre personnel that their

input will be greatly considered in the operations of the organization, and try to merge the two Boards into one. If this deal falls through, then Commonsense will be desperate for the resources they need.

Originally, our project was to provide Commonsense with a strategic plan based off of the ideas that we discussed at the Home Day. However, as the facilitated discussion took place it was evident that there was a lack of vision. Since there was no vision it was hard to say where Commonsense wants to go in the future and therefore there was no way to develop strategies that helps Commonsense achieve this vision. Nevertheless, the Home Day was extremely successful in identifying the strategic issues and bringing new ideas that could help Commonsense build a vision and once this is done they might engage again in the development of a strategic plan. In order to do so, we recommend that Commonsense should reword their mission statement, complete the merger, create a vision statement, organize their new resources and then have another retreat in which Ms. Martin can get the final pieces of data necessary to build a strategic plan by following the guidelines we provided through this project.

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**Directory of Development Organizations, “Welcome”,  
<http://www.devdir.org/index.html>**

This website provides a directory of nonprofit organizations. The directory aims to promote interaction and active partnerships among governments, private sector and key development organizations in civil society, including NGOs, trade unions, faith-based organizations, indigenous people’s movements, foundations and research centers.

**Howe, Fisher. *Welcome to the Board*. (San Francisco: Jossey-Bass, 1995)**

Howe covers several important factors of the nonprofit in this book. He starts by stating that nonprofits are not a business he also gives his opinion on the board joining process and the qualities of a good board member. He also provides detailed description on the responsibilities and the role of the members as well as their organization.

**Gellat, James, *Managing Nonprofit Organizations in the 21<sup>st</sup> Century* (Phoenix: The Oryx Press, 1992)**

This book includes important topics such as how to run a productive meeting, communication, partnership among the staff, volunteers, fund raising, mission of the organization and human resources management.

**Charity Commission, (London: Charity Commission, 2006).**

The charity commission is the institution that regulates all charities in London. It is required by law that all charities must be registered on the commission in order to be allowed to operate. This site provides information on the number of charities and a description of each charity individually

**Ferguson, Kathleen, “Branding and Public Relations at Commonsense Trust” (MQP, WPI, 2005)**

This is a past MQP that was written in order to help the Commonsense Community development trust. This Project provided us with some background and sources in which to broaden our research.

**Martin, Naomi, Telephone Interview by Authors, March 30, 2006.**

We talked to Ms. Martin about some logistics about Commonsense and our project. According to her, our objectives seem right on. She also said that the merging process will not be apart of our project and that there is a visitor coming to Commonsense during September, which will be a good test of our new strategy. Also, she mentioned that the board could take a higher involvement on the activities that Commonsense performs, in other words, the staff wants the Board to adopt a more "hands-on" approach.



**Drucker, Peter, *The Essential Ducker* (New York: HarperCollins, 2001), 15.**

Peter Drucker is one of the authorities on the nonprofit management field. This book is a compilation of all his best essays and interviews on the topic. The book provides great information on how have nonprofits became pioneers in the management fields

**Wright, Karen, “Generosity versus altruism: Philanthropy and charity in the US and UK”, *Civil Society Working Paper (CSWP) 17 (2002)*, [http://www.lse.ac.uk/collections/CCS/pdf/Cswp17\\_web.pdf](http://www.lse.ac.uk/collections/CCS/pdf/Cswp17_web.pdf).**

This paper help give stats about British philanthropy and charity. Also, it made understanding the British view towards charity more clearly by comparing it to the American feelings.

**Encyclopedia Britannica Almanac, 2006, s.v. “England”.**

This is a regular almanac that contains statistics of all the countries of the world. This almanac was helpful by providing us what percent of British population is involved on charity related activities.

**Belliss, Michael, Hannafin Timothy, Quigley, Amanda, Roy, Philip, “Community Involvement and the Commonside Community Development Trust” (IQP, WPI, 2005).**

This is an IQP about helping Commonside build a database. This IQP gave a lot of background information and introduced some key stakeholders with Commonside. Also, it served as a great template for our introduction. They also provided a list of projects that Commonside did over the last 3 years.

**London Borough of Merton, “Making Merton” A vibrant community, <http://www.merton.gov.uk/history/makingmerton.htm>**

This is a paper that summarizes a strategic development plan that is taking place on Merton. This paper provided us with some facts about the population and problems on Merton.

**Andrew Bailey, Rebecca Legere, Tiffany Warrington, “Implementation of a Sustainable Website for the Commonside Community Development Trust” (IQP, WPI, 2006)**

This is an IQP that took place this C-term. The project helped Commonside improve their website and how to maintain it. There was also some great information about Commonside's background. Also, their project helped us shape our methodology.

**Commonside Development Trust, “The Commonside Trust Board of Directors”, <http://www.commonside.net/newsite/trust.html>**

This is the company's website. Here we found a great deal of information on the projects that Commonside performs as well as some key information (i.e. the Board of Directors). Lastly, we got the Commonside logo from there and found a picture of what the Trust looks like from the outside.

**University of Colorado, “Consensus Building”,  
<http://www.colorado.edu/conflict/peace/treatment/consens.htm>, 1998**

This site gives a quick overview about how to build consensus. Steps are outlined, psychology factors are explained and exercises are introduced. Also, there are websites provided that dives into more specific areas of consensus building.

**Bryson, John, Alston, Farnum, *Creating and Implementing your Strategic Plan*, (San Francisco: Jossey-Bass, 1996).**

This book gives steps on how to build strategy for nonprofit companies. Included are some worksheets that are in the appendix, which will be used for the project. The book explained each step in detail and provides a glossary of terms that was useful for ambiguous statements.

**Mind Tools, “SWOT Analysis: Discover New Opportunities”  
[http://www.mindtools.com/pages/article/newTMC\\_05.htm](http://www.mindtools.com/pages/article/newTMC_05.htm).**

This site gives a detail account of what a SWOT matrix is, how to use it and why it is important to use it. Also, provided a SWOT matrix and a quote by a CEO on why SWOT matrices are so useful.

**Connors, Tracy, *The Nonprofit Organization Handbook*, (New York: McGraw-Hill, 1988), 11.4.**

This is a book that covers broadly the governance and laws of Nonprofits. However, the laws are based on the Laws of the US so it was only useful in the Governance structure,

**Allison, Michael, Kaye, Jude, *Strategic Planning for Nonprofit Organizations: A Practical Guide and Workbook*, (San Francisco: John Wiley & Sons, 2005)**

This is a very extensive book that provides information on how to develop a strategy for a nonprofit organization. The book includes several worksheets as well as examples on how to elaborate on them.

**Darryl, Ellis and Pekar, Peter. *Planning for Non-planners*. New York: New York, 1980.**

This book is a simple guide to help managers establish their objectives and action programs and to put those programs into effect. The author has a very practical approach by including several examples of real life cases.

**Ellis, Jeffery. *Managing Strategy in the Real World: Conclusions and Frameworks from Field Studies of Business Practice*. Massachusetts: Lexington 1988.**

This book starts by setting the scene of actual problems on the managing strategy of businesses in the real world. It then proceeds to introduce the reader to the problems in the real world through several examples. Finally it analyses the examples and gives conclusions on an overall.

**Choo, Chun Wei. The knowing organization. New York, NY: Oxford University Press, 1998.**

The book highlights different areas of management. The book tends to deal with how managers should deal with certain problems (i.e. Ambiguity) and how to share information better. Information from book can help with miscommunication problems.

**Wooldridge, Bill and Floyd, Steven W. Building Strategy from the Middle: Reconceptualizing Strategy Process. Thousand Oaks, CA: Sage Publications, Inc., 2000.**

The book provides insight on how middle managers are just as important to companies as the higher-ups. The authors explain that the ideas of the upper managers can be a reality without effective middle managers to carry out the ideas. Also states how important the middle guys are in regards towards social network analysis, trust and complexity.

**Hamermesh, Richard G. Making Strategy Work. New York, NY: John Wiley & Sons, 1986.**

Making Strategy Work is a great introductory book into distinguishing different types of strategy. The book is based off Portfolio Planning principals and uses real-world situations from companies such as GE and The Dexter and Memorex Corporations.

**Gardner, James, Rachlin, Robert and Sweeny, Allen, Handbook of Strategic Planning, (New York: New York, 1986)**

This is a book that covers the basis of planning. It includes its definition, implementation, functional plans and some special cases. The book is mostly focused for companies.

**Covey, Stephen, The 7 Habits of Highly Effective People: Powerful Lessons in Personal Change, (New York: New York, 2004).**

This book deals with the habits that person should have in order to succeed. It also explains the importance of organization, mission statement and planning on our personal basis.

**Dougherty, David, Strategic Organization Planning: Downsizing for Survival, (Connecticut: Westport, 1989)**

This book deals with the principles and techniques of organization planning, managing the organization planning staff and then provides some real cases in organization planning and control. These cases include: the hard rubber company, the automobile company, the recreation company, the church, the art association (small nonprofit) and the management association chapter. It also gives an insight of the future of organization planning.

## Appendix A Identify Planning Process Issues and Outcomes<sup>79</sup>

- What does Commonsense wish to achieve from a planning process?
- What issues or choices do you think need to be addressed during the planning process?
- Are there any non-negotiable that need to be articulated upfront or any constraints regarding the planning process?

What would success look like at the completion of the planning process? What do you wish to achieve from a planning process?

1. *Mission.* How well are we achieving our mission and how could we have a greater impact?
2. *Financial.* Are Commonsense's operations financially viable, and how can we ensure the long-term financial stability of our organization? Do we have effective financial management systems in place to monitor our finances?
3. *Administrative capacity.* Do we have the administrative capacity to effectively and efficiently support our programs and services? What would it take to maximize our organizational capabilities in terms of planning, human resources and leadership, organization culture and communication, and our technology and facilities infrastructure?
4. *Governance.* How effective is the board at protecting the public's interest, ensuring that charitable money is used effectively and efficiently and that the organization is fulfilling its mission? What can we do to ensure that our board is able to fulfill its governance role now and for the future?

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<sup>79</sup> Allison, Michael, Kaye, Jude, *Strategic Planning for Nonprofit Organizations: A Practical Guide and Workbook*, (San Francisco: John Wiley & Sons, 2005).

Are there any specific strategic questions or choices does your organization need to address during the planning process?

Strategic (longer-term) issues to be addressed—framed as a question:	Short-term focus? Are there some operational questions that need to be addressed in the near future? If yes, list below:

(Use other side for additional issues.)

Are there any issues that are non-negotiable (not open for discussion)? Any constraints regarding the planning process?

## Appendix B Set up Your Planning Process for Success<sup>80</sup>

- Are the conditions and criteria for successful planning in place at the current time? Can certain pitfalls be avoided?
- Is this the appropriate time for Commonsense to initiate a planning process? Yes or no? If no, where do you go from here?

	<b>The following conditions for successful planning are in place:</b>	<b>Yes</b>	<b>No</b>	<b>Unsure or N/A</b>
1.	Commitment, support, and involvement from top leadership, especially the executive director and board president, throughout the entire process			
2.	Commitment to clarifying roles and expectations for all participants in the planning process, including clarity as to who will have input into the plan and who will be decision makers			
3.	Willingness to gather information regarding the organization's strengths, weaknesses, opportunities, and threats; the effectiveness of current programs; needs in the community, both current and future; and information regarding competitors and (potential) collaborators			
4.	The right mix of individuals on the planning committee—strategic thinkers and actionaries (individuals who are in a position to see things through to completion), as well as big-picture (conceptual) thinkers and detail-oriented (perceptual) thinkers			
5.	Willingness to be inclusive and encourage broad participation, so that people feel ownership of and are energized by the process			
6.	An adequate commitment of organizational resources to complete the planning process as designed (e.g., staff time, board time, dollars spent on the process for market research, consultants, etc.)			
7.	A board and staff that understand the purpose of planning, recognize what it is and is not able to accomplish, and have clarity about the desired outcomes of the process and issues to be addressed			
8.	A willingness to question the status quo, to look at new ways of doing things; a willingness to ask the hard questions, face difficult choices, and make decisions that are best for the organization's current and future constituencies as well as a willingness to support organizational change as a result of the planning efforts.			
9.	The organization has the "financial capacity" to sustain			

<sup>80</sup> Allison, Michael, Kaye, Jude, *Strategic Planning for Nonprofit Organizations: A Practical Guide and Workbook*, (San Francisco: John Wiley & Sons, 2005).

	<b>The following conditions for successful planning are in place:</b>	<b>Yes</b>	<b>No</b>	<b>Unsure or N/A</b>
	itself for the immediate future without a financial “crisis” appearing to detract from strategic planning			
10.	Top management’s commitment to carefully considering recommendations made during the planning process rather than disregarding decisions in favor of his or her intuitive decisions			
11.	There is no serious conflict between key players within the organization (although a healthy dosage of disagreement and perhaps some heated discussions can be expected during a strategic planning process)			
12.	There are no high-impact decisions to be made in the next six months by an external source.			
13.	No merger or other major strategic partnership effort is under way (separate strategic planning conversations are not taking place while strategic restructuring negotiations are taking place).			
14.	Board and top management should be willing to articulate constraints and non-negotiables upfront.			
15.	A commitment to tie the strategic planning process to the organization’s annual planning and budgeting process—to create a detailed annual operating plan for the upcoming year, and monitor/revise the strategic plan as needed			
16.	A commitment to allocating sufficient resources to support the implementation of core strategies			

Comments to explain—and/or suggestions on how to respond—to “No” or “Unsure or N/A” answers

Other issues/concerns?

Is this the appropriate time for your organization to initiate a planning process? Yes or no? If no, what steps need to be put in place to ensure a successful planning process—where do you go from here? Or, should the organization consider doing something other than a formal strategic planning process?

## Appendix C Develop a Plan for Gathering Information from Internal and External Stakeholders<sup>81</sup>

- Using the strategic issues you identified in Appendix B, develop a plan for gathering information—from internal and external sources—to inform those questions.

### Data Collection from Internal Stakeholders—Board and Staff

Internal Stakeholders	Outcome of contact with them? Questions they can answer? What information do you want to gather from this stakeholder?	How best to involve them (such as surveys, discussions at regularly scheduled meetings, retreats, in-depth program evaluation worksheets, etc.)	Details (this column may be filled out when starting to implement data collection phase: time frame and who is responsible for implementation)
Staff—do you want to engage: <ul style="list-style-type: none"> <li>• All of the staff</li> <li>• Management team</li> <li>• Some staff (specific)</li> <li>• Volunteer staff</li> </ul>			
Board of directors			
Others—do you want to engage others (such as advisory board members, volunteer staff, etc.)			
Department/programs			

<sup>81</sup> Allison, Michael, Kaye, Jude, *Strategic Planning for Nonprofit Organizations: A Practical Guide and Workbook*, (San Francisco: John Wiley & Sons, 2005).



Specific individuals to be interviewed (such as director of finance, development director)			
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## Appendix D Design a Strategic Planning Process to Meet Your Organizational Needs<sup>82</sup>

- What has been your previous experience with strategic planning?
- Consider some of the choices to be made when designing your strategic planning process
- Other considerations for the strategic planning process

### **What has been your previous experience with strategic planning—what has worked or not worked in the past that might inform the design of your strategic planning process?**

The following is a list of some of the choices to be made when designing a strategic planning process:

- Who makes what decisions—who decides the strategic direction for the organization, and what degree of input is sought from the board and the staff
- Whether to involve external stakeholders in addition to internal stakeholders (board and staff)
- How long a process to have (abbreviated, moderate, or extensive)
- Whether to use an existing committee or a strategic planning committee for such activities as coordinating the work and assisting with some of the planning activities (such as external stakeholder interviews, research, etc.)
- Whether to have a strategic planning committee—and/or ad hoc issue-focused task forces—charged with the responsibility for discussing future program or administrative options and making recommendations to the board
- If using a strategic planning committee, deciding who should be on that committee. If using ad hoc task forces, deciding membership of those committees (including the decision as to whether non-board members might be on those committees)
- Who will lead the process
- Who will be the primary writer of the plan (with guidance from a consultant if necessary)
- The sequencing of discussions (i.e., “do data collection first and then have a retreat” or “kick off the planning process with a board/staff retreat and then create issue-focused board/staff task forces to collect and analyze data and make recommendations to the board of directors”)

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<sup>82</sup> Allison, Michael, Kaye, Jude, *Strategic Planning for Nonprofit Organizations: A Practical Guide and Workbook*, (San Francisco: John Wiley & Sons, 2005).

- Whether to use a consultant and, if yes, how best to use a consultant/expectations regarding the consultant's role

Other considerations for the strategic planning process:

*Planning committee membership:*

<b>Name</b>	<b>Representing what key stakeholder</b>
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

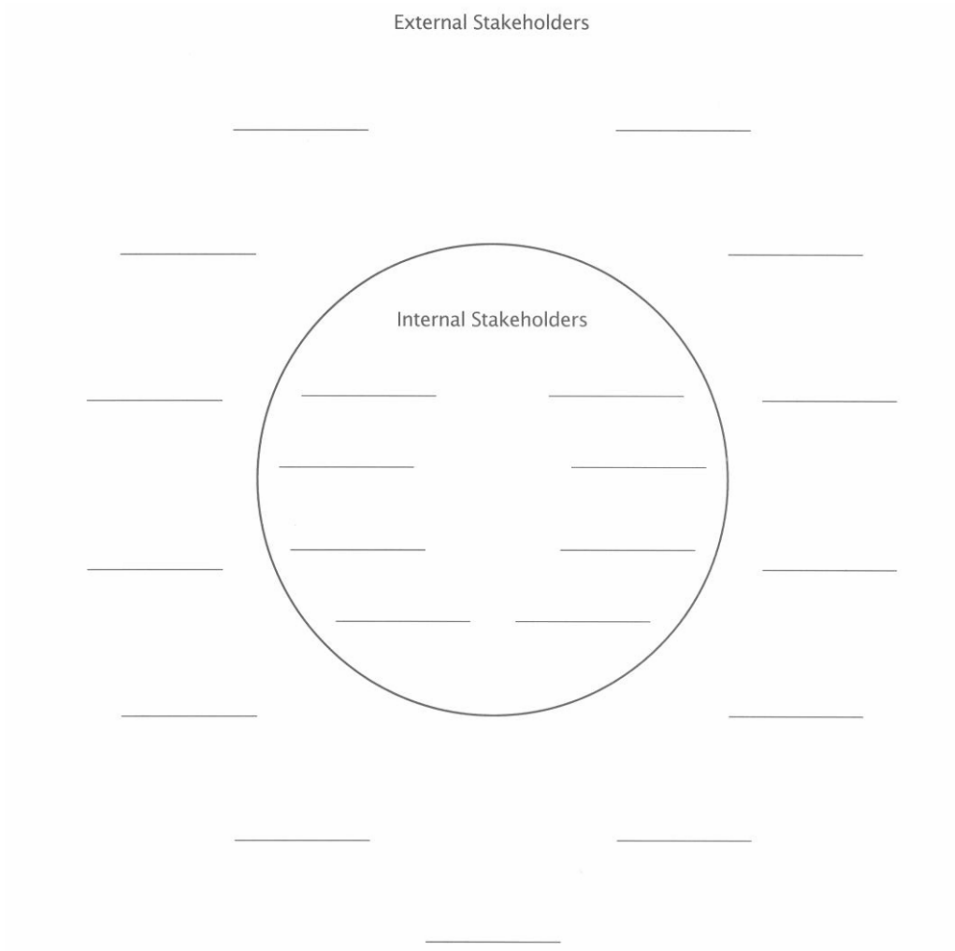
*Milestones and deadlines:*

*Planning principles and values* (e.g., we are committed to being inclusive of all key stakeholders; we are willing to look at new and different ways of doing things and face the hard choices regarding how to best use our resources; client input is critical to creating a plan that will meet client needs):

*Meeting agreements* (e.g., when offering a dissenting opinion, be willing to offer a solution that meets your needs and the needs of others; show up at meetings and be prepared; seek first to understand, then to be understood; respect differences):

*How will board and staff be kept informed about the strategic planning discussions?*

## Appendix E Stakeholder Identification



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<sup>83</sup> Bryson, *Creating and Implementing your Strategic Plan*, (San Francisco: Jossey-Bass, 1996), 47

## Appendix F External Stakeholder Analysis<sup>84</sup>

**Instructions:** An external stakeholder is any person or group outside of Commonsense that can make a claim on Commonsense’s attention, resources, or output or is affected by Commonsense’s output.

For each external stakeholder listed on Appendix F, fill out a separate Stakeholder Analysis worksheet.

Rank the stakeholders in terms of their importance to Commonsense.

Stakeholder:			
Criteria Used by Stakeholders to assess our performance	Our sense of Their Judgment About Our Performance		
	Very Good	Okay	Poor

How do they influence us?

What do we need from them?

How important are they?

- Extremely
- Reasonably
- Not very
- Not at all

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<sup>84</sup> Bryson, *Creating and Implementing your Strategic Plan*, (San Francisco: Jossey-Bass, 1996)

## Appendix G Internal Stakeholder Analysis<sup>85</sup>

Reminder: An internal stakeholder is any person or group inside the organization that can make a claim on Commonsense's attention, resources, or output, or affects or is affected by Commonsense's output.

Instructions: For each internal stakeholder listed on Stakeholder Identification, fill out a separate Stakeholder Analysis worksheet.

Rank the stakeholders in terms of their importance to Commonsense.

Stakeholder			
Criteria Used by stakeholders to Assess our performance	Our Sense of their Judgment About our Performance		
	Very Good	Okay	Poor

How do they influence us?

What do we need from them?

How important are they?

- Extremely
- Reasonably
- Not Very
- Not at all

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<sup>85</sup> Bryson, *Creating and Implementing your Strategic Plan*, (San Francisco: Jossey-Bass, 1996)

## Appendix H Create a Mission Statement<sup>86</sup>

- Draft a mission statement for your organization (please write legibly)

What is the focus problem(s) that our organization exists to solve? (In considering the focus problem or need, you might want to consider the following questions: What need or opportunity does our organization exist to resolve? Who is affected by the problem? How are they affected? If we were successful, what impact would we have regarding this problem?)

What are the assumptions on which our organization does its work?

What is the purpose of our organization? (A purpose sentence answers the question of why an organization exists; it does not describe what an organization does. The sentence should be a short, succinct statement that describes the ultimate result an organization is hoping to achieve. When writing a purpose sentence, make sure to indicate outcomes and results (e.g., to eliminate homelessness), not the methods of achieving those results, which is what you do (e.g., by constructing houses).

What are the methods that our organization uses to accomplish its purpose? Describe our business or businesses—our primary services or programs:

Combine your purpose sentence and description of primary services/activities in a compelling mission statement:

Develop a powerful tag line or slogan:

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<sup>86</sup> Allison, Michael, Kaye, Jude, *Strategic Planning for Nonprofit Organizations: A Practical Guide and Workbook*, (San Francisco: John Wiley & Sons, 2005).

## Appendix I Create a Vision Statement<sup>87</sup>

- Dare to dream the possible. What is your organization's realistic but challenging guiding vision of success? (please write legibly)

*External vision:* Describe how the world would be improved, changed, or different if our organization was successful in achieving its purpose.

*Internal vision:* Envisioning our organization's future

Programmatic vision:

Administrative vision:

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<sup>87</sup> Allison, Michael, Kaye, Jude, *Strategic Planning for Nonprofit Organizations: A Practical Guide and Workbook*, (San Francisco: John Wiley & Sons, 2005).



## Appendix J Articulating Your Organization’s Values, Beliefs, and Guiding Principles<sup>88</sup>

- Clarify your Commonsense’s belief systems: What are some of the values, beliefs, and/or guiding principles that do (or should) guide your board and staff’s interactions with each other and with constituencies?
- Practical impact: What behaviors should you commit to doing in everyday practice to support your values and beliefs?

Clarify your Commonsense’s belief systems: What are some of the values, beliefs, and/or guiding principles that do (or should) guide your board and staff’s interactions with each other and with constituencies?	Practical impact: What are the behaviors we should commit to doing in everyday practice in support of our values, beliefs, and guiding principles?

<sup>88</sup> Allison, Michael, Kaye, Jude, *Strategic Planning for Nonprofit Organizations: A Practical Guide and Workbook*, (San Francisco: John Wiley & Sons, 2005).

## Appendix K Internal Strengths<sup>89</sup>

**Reminder:** Internal Strengths are resources or capabilities that help Commonsense accomplish its mandates or mission (Example: professional staff, adequate resources, leadership).

**Instruction:** Fill out as many worksheets as necessary to derive a complete list. Discuss each of the eight to ten strengths you consider of highest priority.

<b>Strengths</b>	<b>Description</b>	<b>Options for keeping or building strengths</b>

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<sup>89</sup> Bryson, *Creating and Implementing your Strategic Plan*, (San Francisco: Jossey-Bass, 1996)

## Appendix L Internal Weaknesses<sup>90</sup>

**Definition:** Internal weaknesses are deficiencies in resources and capabilities that hinder an organization's ability to accomplish its mandate or mission. (*Examples:* lack of effective communications, absence of clear vision or mission, flawed organizational structure, noncompetitive pay structure).

**Directions:** Fill out as many worksheets as are necessary to derive a complete list. Discuss each of the eight to ten weaknesses Commonsense considers of highest priority.

Weakness	Description	Options for Minimizing or Overcoming Weakness

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<sup>90</sup> Bryson, *Creating and Implementing your Strategic Plan*, (San Francisco: Jossey-Bass, 1996)

## Appendix M External Opportunities<sup>91</sup>

**Reminder:** External Opportunities are outside factors or situations that can affect your organization in a favorable way. (Examples: New funding from a federal program, political support for a potential project, a chance to modify an outdated mandate).

**Instruction:** Fill out as many worksheets as necessary to derive a complete list. Discuss each of the implications for the strategic planning process of the listed opportunities.

<b>Strengths</b>	<b>Description</b>	<b>Options for keeping or building strengths</b>

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<sup>91</sup> Bryson, *Creating and Implementing your Strategic Plan*, (San Francisco: Jossey-Bass, 1996)

## Appendix N External Threats<sup>92</sup>

**Definition:** External threats are outside factors or situations that can affect Commonsense in a negative way (*Examples:* loss of state funding, increasing demand for a specific service, union/management conflicts.)

**Directions:** Fill out as many worksheets as are necessary to derive a complete list. Discuss the implications for the strategic planning of the listed threats.

Threat	Description	Options for Minimizing or Overcoming Threat

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<sup>92</sup> Bryson, *Creating and Implementing your Strategic Plan*, (San Francisco: Jossey-Bass, 1996)

## Appendix O Staff and Board Perceptions of Organization's SWOT<sup>93</sup>

- List Commonsense's primary (program and administrative) strengths and weaknesses—internal forces working for and against our organization achieving its mission.
- List Commonsense's key opportunities and threats—political, economic, social, technological, demographic, or legal trends that are or may impact Commonsense's ability to achieve its mission.
- (Optional) Indicate any possible connection between an opportunity or threat and a strength or weakness? (Are there any opportunities we can take advantage of because of a particular strength? Are there any threats that are compounded by a weakness? )

(Optional) Draw lines connecting any opportunity or threat that may be either positively or negatively impacted by any of the organization's strengths or weaknesses

⇓

Internal Forces	External Forces
Strengths: <ul style="list-style-type: none"><li>•</li><li>•</li><li>•</li><li>•</li></ul>	Opportunities: <ul style="list-style-type: none"><li>•</li><li>•</li><li>•</li><li>•</li></ul>

<sup>93</sup> Allison, Michael, Kaye, Jude, *Strategic Planning for Nonprofit Organizations: A Practical Guide and Workbook*, (San Francisco: John Wiley & Sons, 2005), 161.

Weaknesses:

- 
- 
- 
- 

Threats:

- 
- 
- 
-

## Appendix P Individual Strategic Issue Identification<sup>94</sup>

**Instructions:** The purpose of identifying selected strategic issues is to enable Commonsense to focus on key challenges or policy choices. This worksheet is to be filled out by individuals. Complete a separate worksheet for each of five to nine issues.

1. What is the issue? Be sure to phrase the issue as a question that has more than one answer. The issue should be one that Commonsense can do something about.
  
  
  
  
  
  
  
  
  
  
2. Why is this issue? How is this related to Commonsense's mission, mandates, internal strengths and weaknesses, or external opportunities and threats?

Mission

Mandates

Threats

3. What are the consequences of not addressing this issue?

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<sup>94</sup> Bryson, *Creating and Implementing your Strategic Plan*, (San Francisco: Jossey-Bass, 1996)



## Appendix Q Master List of Key Issues<sup>95</sup>

**Instructions:** Prepare a master list of key issues phrased as questions that have more than one answer. The issues should be ones the organization can do something about.

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1.

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2.

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3.

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4.

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5.

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6.

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7.

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8.

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9.

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10.

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11.

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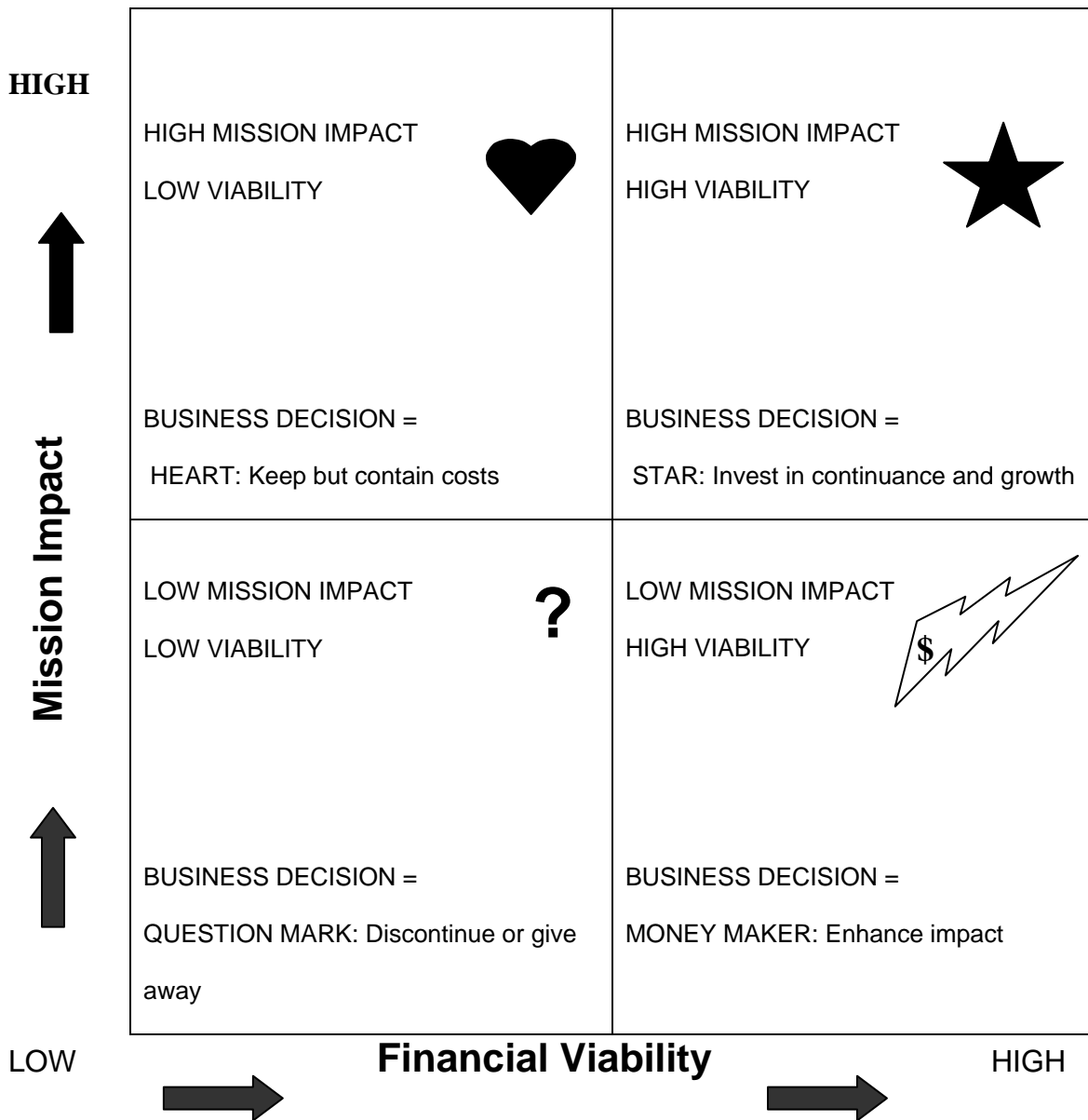
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<sup>95</sup> Bryson, *Creating and Implementing your Strategic Plan*, (San Francisco: Jossey-Bass, 1996)

## Appendix R- Business Assessment Tools for Developing a Program Portfolio<sup>96</sup>

- Use the criteria listed for each tool and plot out where each of your programs and other business activities fit within the chart

### Compass Point's Dual Bottom-Line Matrix



- Some of the characteristics of programs with *high impact mission*: tangible results; visible progress toward the achievement of the organization's mission; high leverage

<sup>96</sup> Allison, Michael, Kaye, Jude, *Strategic Planning for Nonprofit Organizations: A Practical Guide and Workbook*, (San Francisco: John Wiley & Sons, 2005).

potential—synergy with other programs: and high-quality services that distinguish the organization from its competition

- Some of the characteristics of high viability: At the very least covers all costs (both direct and indirect); generates a surplus of revenue; projected to have financial sustainability for the future; a proven financially viable business model

## Appendix S- Summarize Your Future Program Portfolio<sup>97</sup>

- Develop a detailed program portfolio.

For each of your proposed future programs or services:

- What is the program's current level of activity? (This question, of course, applies only to existing programs. New programs will not yet have a current level of activity.)
- What is its proposed growth strategy (expand, maintain, decrease, eliminate, start new program, modify existing program)?
- What is the program's projected future level of activity?

Program or service	What is the program's current level of activity? (This question, of course, applies only to existing programs. New programs will not yet have a current level of activity.)	What is its proposed growth strategy (expand, maintain, decrease, eliminate, start new program, modify existing program)?	What is the program's projected future level of activity?

<sup>97</sup> Allison, Michael, Kaye, Jude, *Strategic Planning for Nonprofit Organizations: A Practical Guide and Workbook*, (San Francisco: John Wiley & Sons, 2005).

## Appendix T Core Future Strategies<sup>98</sup>

- Identify and assess your core future strategies

Proposed strategy	Assumptions, facts, and values that support this proposed strategy	What possible obstacles do we face in implementing this strategy?	How to respond to possible obstacles: strategies for overcoming obstacles and short-term priorities	What triggers might encourage us to reevaluate this strategy?

<sup>98</sup> Allison, Michael, Kaye, Jude, *Strategic Planning for Nonprofit Organizations: A Practical Guide and Workbook*, (San Francisco: John Wiley & Sons, 2005).

## Appendix U Summary of Administrative, Financial, and Governance Priorities<sup>99</sup>

- For each administrative, financial, and governance function, list the overall goal or objectives and any long-term objectives/priorities to be included in the strategic plan.

<b>Administrative Functions</b>	<b>Goal(s)</b>	<b>Long-Term Objectives/Priorities</b>
Staffing and benefits		
Public relations and communications		
Infrastructure: information systems, technology, facilities, etc.		
Planning, evaluation, quality control		
<b>Financial Functions</b>	<b>Goal(s)</b>	<b>Long-Term Objectives/Priorities</b>
Financial management		
Resource development		
<b>Governance Functions</b>	<b>Goal(s)</b>	<b>Long-Term Objectives</b>
Board of directors		
Networking and collaboration		

<sup>99</sup> Allison, Michael, Kaye, Jude, *Strategic Planning for Nonprofit Organizations: A Practical Guide and Workbook*, (San Francisco: John Wiley & Sons, 2005).

## Appendix V Five Key Questions for Identifying Strategies<sup>100</sup>

**Instructions:** Fill out a separate worksheet for each issues

Strategic issue:

Issue-specific goals:

1. What are the practical alternatives, dreams, or visions we might pursue to address this issue and achieve our goal?

2. What are the barriers to realizing these alternatives, dreams, or visions?

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<sup>100</sup> Bryson, *Creating and Implementing your Strategic Plan*, (San Francisco: Jossey-Bass, 1996)

3. What major initiatives might we pursue to achieve these alternatives, dreams, or visions directly, or else indirectly through overcoming the barriers?

4. What are the key actions (with existing resources of people and dollars) that must be taken this year to implement the major initiatives?

5. What specific steps must be taken within the next six months to implement the major initiatives, and who is responsible for taking them?

Step

Party responsible for step



## Appendix W Checklist of Suggested Criteria for Evaluating Strategies<sup>101</sup>

Instruction: Identify the issue and goals to be addressed and the performance measures to be used. Evaluate how the strategy works against the following criteria:

Issue:

Strategy:

Goals:

Objectives

### **Performance Measures:**

Acceptability to key decision makers, stakeholders, and opinion leaders

Acceptability to the general public

Client or beneficiary impact

Consistency with values, mission and philosophy

Coordination or integration with other strategies, activities or programs

Technical feasibility

Financing and cost

Cost-effectiveness

Risk Assessment

Long Term-Impact

Staff Requirement

Flexibility

Facility requirements

Timing

Other criteria

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<sup>101</sup> Bryson, *Creating and Implementing your Strategic Plan*, (San Francisco: Jossey-Bass, 1996)

## Appendix X Plan Review and Adoption Process<sup>102</sup>

### Directions:

1. Determine who needs to be involved in reviewing and adopting the strategic plan. Pay attention to goals, concerns and interests of key stakeholders. Obtain necessary resource commitments.
2. Assess how to best reach key stakeholders. Develop arguments and counterarguments in support of the proposal and engage in formal review sessions.
3. Ask the plan leaders to perform the suggested and necessary reviews.

1. Determine who needs to participate in reviewing and adopting the plan.  
Plan Review Plan Adoption

2. Assess who will support or oppose the plan.  
Support Opposition

3. What can be done to maintain support and convert opposition to support

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<sup>102</sup> Bryson, *Creating and Implementing your Strategic Plan*, (San Francisco: Jossey-Bass, 1996)

4. Develop a plan review and adoption process.

What will be done	Who will do it	When will be done	How it will be done
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5. Outline a communications and information process to inform key stakeholders of the plan, the review process, and its adoption. (Examples: memos, newsletters, meetings, s).

6. Identify resources necessary for implementation of the strategic plan and indicate whether or not they are assured

	Assured	
	Yes	No

## **Appendix Y Interview questions for Mr. Hewitt (Chair for the Board of Directors)**

1. Does the organization have a vision statement and a page long version of that statement?
2. What issues are discussed at Board meetings? How long are they?
3. What ways does the Board communicate to the staff about their decisions/ideas?
4. Is there a model that is used when deciding to accept a project (decision making model)?
5. Is coming to a consensus hard for the Board members? If so, why?
6. What are some achievements by Commonsense that the Board takes pride in?
7. What are some ideas you have that could improve the Board's efficiency?
8. Do you feel that the Board should exercise more control over the organization?
9. How does someone become a Board member?
10. Is attendance an issue for Board meetings?

## Appendix Z Questions to Determine Priorities<sup>103</sup>

**Instructions:** Answer the following questions regarding the topics listed.

### Finances

#### *Resource Development*

- What resources do we need to support our future vision? Can we invest in this future?
- If we have to raise more money, how much? What is our plan for how to do this?
- Do we have sufficient development staff to succeed in meeting our financial goals?
- What should be our future funding mix?

#### *Financial Management Systems*

- What kinds of systems or processes do we need to support (or develop) up-to-date, accurate, and useful financial management and reporting?
- Are we invested wisely, and how can we best maximize the financial return on our investments?
- How well are we recovering costs from financial contributors? Are our overhead cost rates appropriate?
- Are our costs per mission unit competitive?
- Do we have a comfortable unrestricted reserve?

*Process note:* These questions are best answered by staff with financial management responsibilities, along with the treasurer of the board and/or the finance committee.

### Administrative Functions

#### *Staffing and Benefits*

- What is our current ability to provide services to our clients/customers?
- What additional staff is needed to meet increased levels of service? (Or, if staff cuts are anticipated, how will these cuts be managed?)
- How can we remain competitive with regard to salary and benefits?
- How do we recruit and retain quality Staff?
- How do we orient and provide continuing education for our paid and volunteer Staff?
- What other reward and recognition systems can we implement to support Staff?
- How do we improve other performance appraisal systems?

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<sup>103</sup> Bryson, *Creating and Implementing your Strategic Plan*, (San Francisco: Jossey-Bass, 1996)

*Process note:* Although the board will ultimately have to approve the budget to support the staffing objectives, Staff members should take the lead in answering these questions and coming up with staffing goals and objective recommendations.

#### *Marketing/Public Relations*

- How strong is our ability to communicate with intended clients/customers?
- What strategies should we put in place to communicate program/service changes?
- Can additional marketing materials be prepared or alternative methods for communicating for our mission to be developed?
- What are our short-term and long-term priorities for increasing our visibility in the community?

*Process note:* If there is no one connected to the organization that has a strong marketing and public relations background, the planning committee might consider asking a public relations firm to donate some time to assist with the responses to marketing-related questions.

#### *Infrastructure: Management Information Systems, Technology, and Facilities*

- What information do we need on an ongoing basis to assess efficiency and effectiveness of our services/programs?
- What management information systems do we need to improve or change in order to produce reports to assess our efficiency and effectiveness?
- What other processes need to be developed to support the overall operations of the organization (such as file maintenance systems; materials acquisition and management; equipment maintenance, etc.)?
- What are our short-term and long-term technology needs regarding phones and other communication systems, computers, and so on?
- Are our current facilities adequate for current and future service delivery models? What changes are anticipated, and how do we go about financing them?
- What capital improvements are necessary to maintain our existing facilities?

*Process note:* Staff should take the lead in answering questions regarding structure.

#### *Planning and Evaluation*

- How should we formalize our strategic and operational planning processes so as to be better able to monitor our results and to respond in a timely way to changes in our environment?
- What processes do we need to put in place so that we can, on an ongoing basis, assess customer satisfaction, constituent needs, and our ability to meet those needs in a quality, cost-effective way?

*Process note:* One of the major by-products of a strategic planning process is ideally the institutionalization of strategic thinking by both the board and the staff. Formalizing the strategic and operational planning processes can lead to a more strategically managed organization, and strategic management keeps an organization adaptive, relevant, and more effective.

### **Governance Functions**

*Board of Directors*

- Given the future vision of the organization, does the role of the board need to change and, if so, how?
- Does our board composition need to change to effectively govern and support our preferred future and, if so, why and how?
- How do we provide continuing education, support, and recognition for our board?

*Process Note:* The board should devote at least one or two meetings to respond to these board-related questions and develop its own short term and long-term priorities



## Appendix AA Actual Workplan <sup>104</sup>

Personnel involved	Format	Time Frame	Strategic plan: products to come out of the strategic planning process	Suggest worksheets
<p>Entire board and Staff.  Also, some external stakeholders</p>	<p>Meetings with Staff and the Board.  Individual interviews  Document Research  Collection of data regarding the external environment and stakeholders' expectations and needs.</p>	<p>Seven weeks</p>	<p>An 8-12 page strategic planning document that includes:</p> <ul style="list-style-type: none"> <li>• Executive Summary</li> <li>• Mission statement</li> <li>• Vision statement</li> <li>• Value statement</li> <li>• Summary of core strategies</li> <li>• Program and management/ operation goals and objectives</li> <li>• Program and management/ operation priorities</li> </ul>	<p>Before the Focus Group in Phase 5:</p> <ul style="list-style-type: none"> <li>• Mission statement</li> <li>• Vision statement</li> <li>• Organizational history</li> <li>• SWOT</li> </ul> <p>During Phase 5:</p> <ul style="list-style-type: none"> <li>• DuPont Bottom Line Matrix</li> <li>• Future Program Portfolios</li> <li>• Core Future Strategies</li> <li>• Priorities in Finance, Administration, Governance</li> </ul>

<sup>104</sup> Bryson, *Creating and Implementing your Strategic Plan*, (San Francisco: Jossey-Bass, 1996)






















## Appendix BB Using Survey Monkey©

Survey Monkey© is a free web survey tool that we used to collect data to our project. This is a set of instructions that you can use to access the responses that were submitted as well as resend the surveys in case you need to revisit the strategic planning process.

**Please note: The information collected on the surveys is strictly confidential and can only be used by the Commonsense Community Development Trust members.**

### Steps

1. Go to [www.surveymonkey.com](http://www.surveymonkey.com)
2. Login using the provided username and password on the left of the home page.
3. Once logged in you will see the screen below which contains the surveys

Open/Close	Survey Title (click to preview)	Date Created	Design	Collect	Options	Analyze
 Open	<a href="#">Values</a>	5/19/2006				 6
 Open	<a href="#">Vision Statement</a>	5/19/2006				 6
 Closed	<a href="#">Planning Part 2</a>	5/16/2006				 6
 Closed	<a href="#">Conditions for Succesfull Planing</a>	5/16/2006				 9
 Open	<a href="#">Mission Statement</a>	5/16/2006				 6

4. On the left you will see a box next to each survey, if you click on the box it will close if open and vice-versa. An open box means that the interviewees will be able to access the survey if closed they will not be able to.
5. On the right you have the following options:
  - a. Design: Edits the current survey (adds, removes and edits survey questions). In order to change the survey design you must make sure the survey is closed.
  - b. Collect: Here you can choose different options to collect the surveys. The most common and useful option is to create a link that can be emailed.
  - c. Options: allows you to edit certain parameters of the survey such as adding a password which will have to be entered by respondents in order

to access the survey. You can also change the amount of time which an interviewee can enter input.

- d. Analyze: Here you will be able to access the data collected on the survey. You will see the question of the survey, and then under it press the option view to see the input for that question. Below is a screen shot

Page Size: Show 10 per page      Displaying 1 - 6 of 6

Practical impact: What are the behaviors that Commonsense should commit to doing in everyday practice in support of our values, beliefs, and guiding principles?

1.	Open doors: informed and welcoming reception for local people. Encourage people to ask questions about local services, become involved in improving them. Non-judgemental - those it difficult to approach 'the authorities' will find it easy to discuss their difficulties and possible practical solutions with Commonsense staff. A safe (financial, accountable) pair of hands for staff partner with for local delivery of services.
2.	We need to advertise our services to the whole community we serve. We should also arrange more events that appeal to a wider audience and perhaps have more social/community cent the community.
3.	keeping people informed about what is going on in their area through open days information events newsletters commonsense is both a voice for the local people as well as for the council bring the two together when consultation is needed or local issues/problems that need bringing to council's attention
4.	Be efficient and work to our best abilities
5.	- Reach people in the community that may feel overlooked (find out who they are). - Take care of ourselves in order to be able to be friendly and supportive (we can't pretend to be happy diverse gatherings. - Have fun/celebration events or gatherings.
6.	Commit to ensuring communication across all Board members.

**NOTE:** If you click on the number at the left you can see all the input for the survey from that interviewee. However, the user information is anonymous.

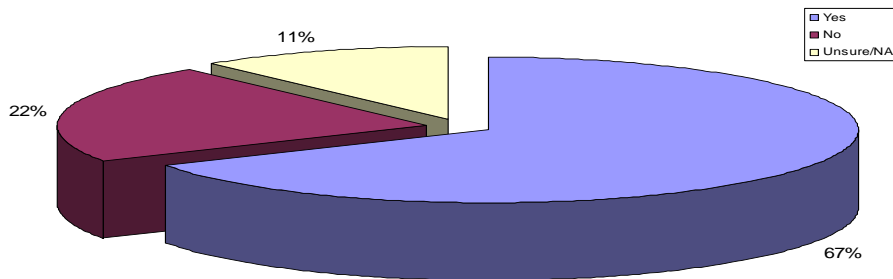
- e. Clear: The clear option will erase all input that was collected on the analysis. Please be careful once the information is cleared it can't be recovered.
- f. Delete: This option will delete the survey permanently, please take caution when using it.

## Appendix CC Setting Up the Process for Success (Survey Responses)

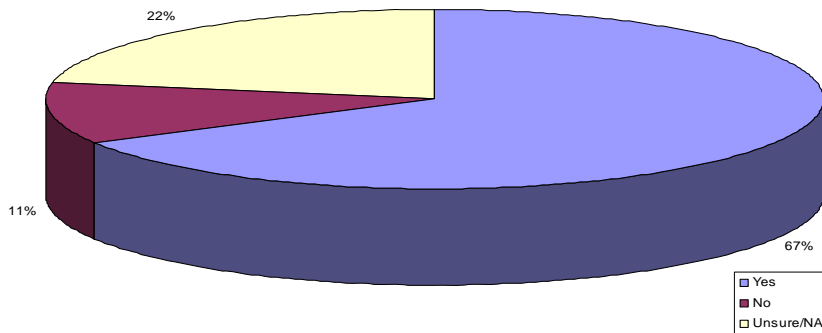
The survey follows the following legend on all charts.

- Blue → Yes
- Purple → No
- Cream → Unsure/NA

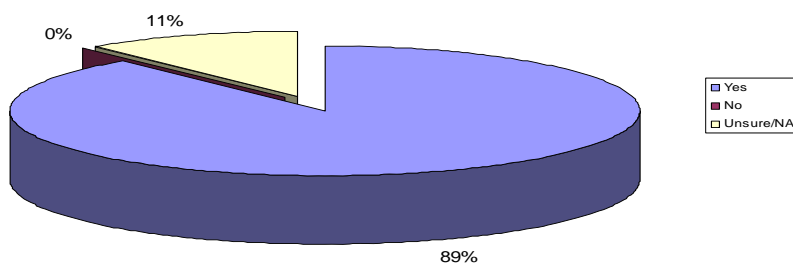
**Commitment to Clarify Roles and Expectations for all Participants in the Planning Process**



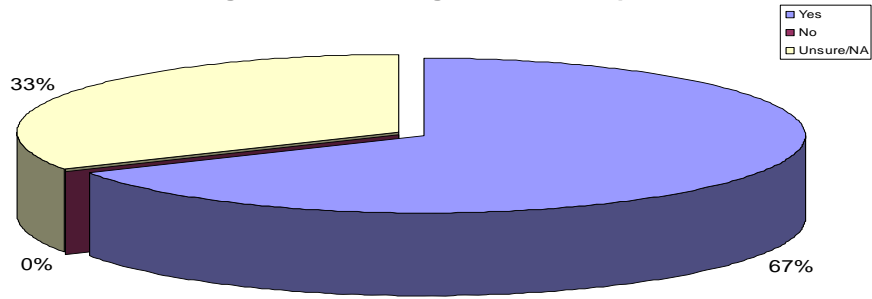
**Right Mix of Individuals on Planning Committee**



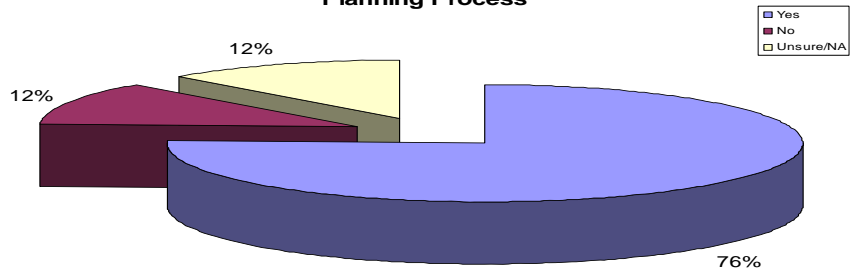
**Top Leadership Commitment**



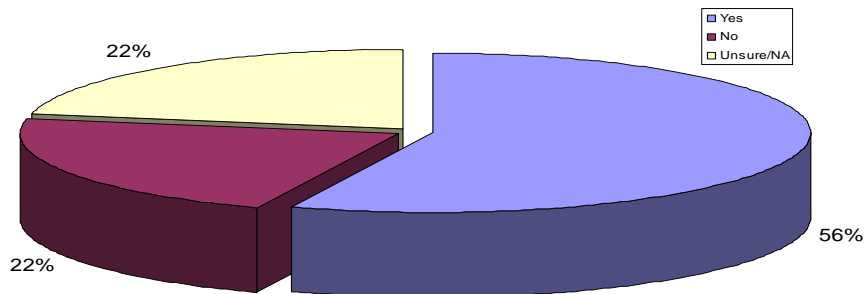
**Willingness to Encourage Broad Participation**



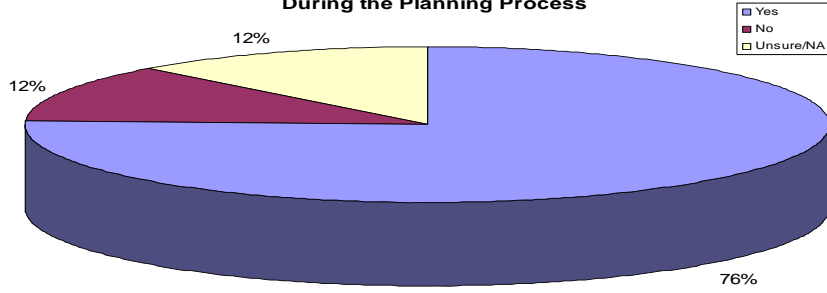
**Adequate Commitment of Organizational Resources to Complete the Planning Process**



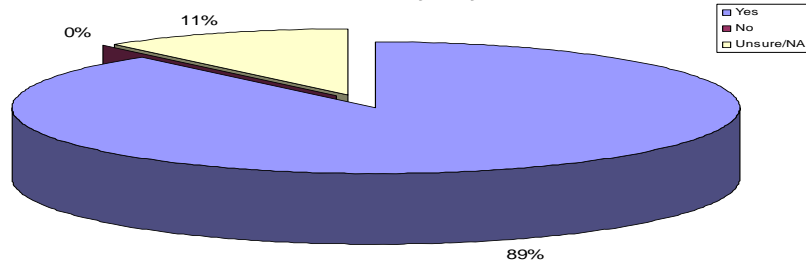
**A Board and Staff that Understands the Purpose of Planning**



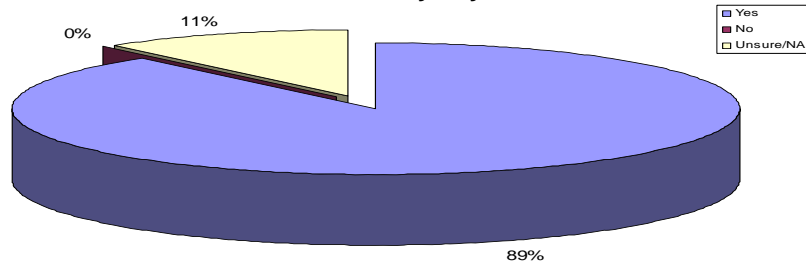
**Top Management's Commitment to Carefully Considering Recommendations Made During the Planning Process**



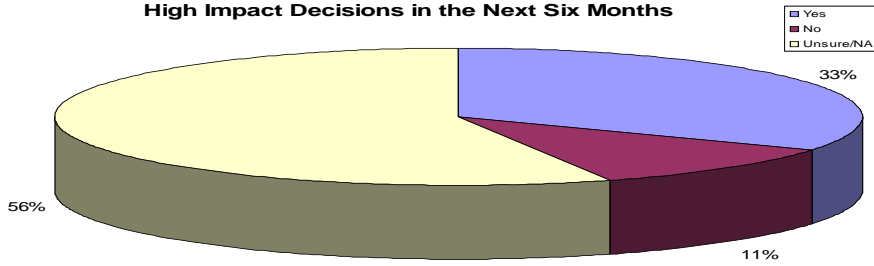
**There is No Serious Conflict Between Key Players Within Commonsense**



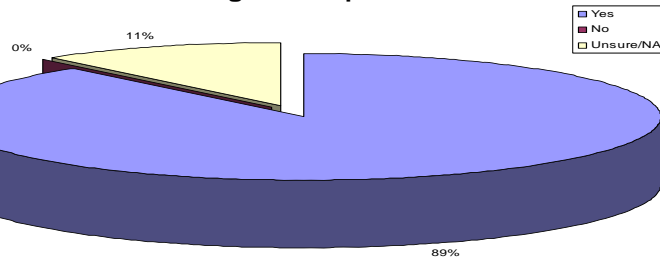
**There is No Serious Conflict Between Key Players Within Commonsense**



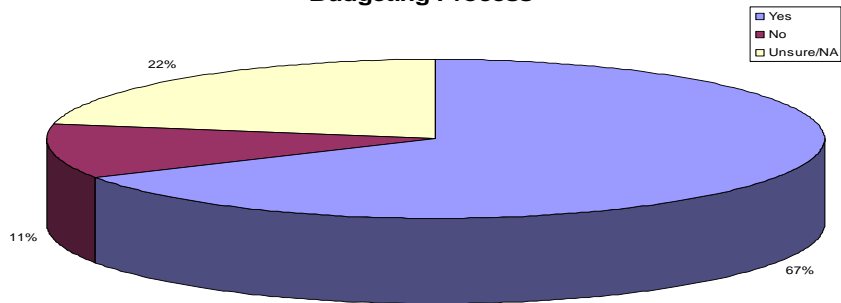
**High Impact Decisions in the Next Six Months**



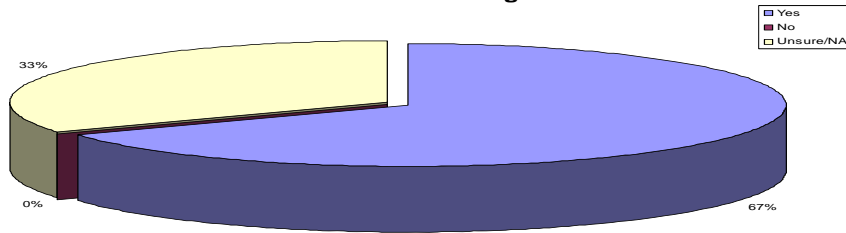
**Board and Top Managements are Willing to Articulate Constrains and Non-Negotiable Upfront**



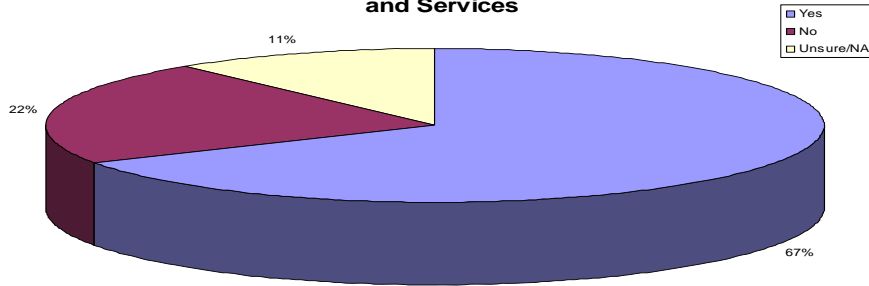
**Commitment to Tie Strategic Planning Process to Commonsense's Annual and Budgeting Process**



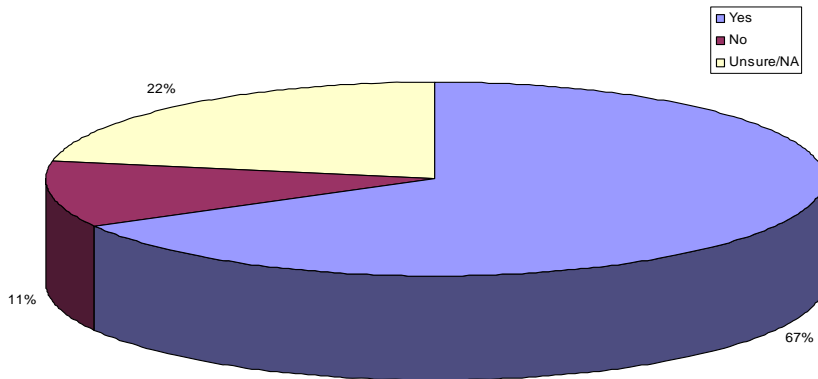
**Commitment To Allocate Sufficient Resources to Support the Implementation of Core Strategies**



**Administrative Capacity to Effectively and Efficiently Support their Program and Services**

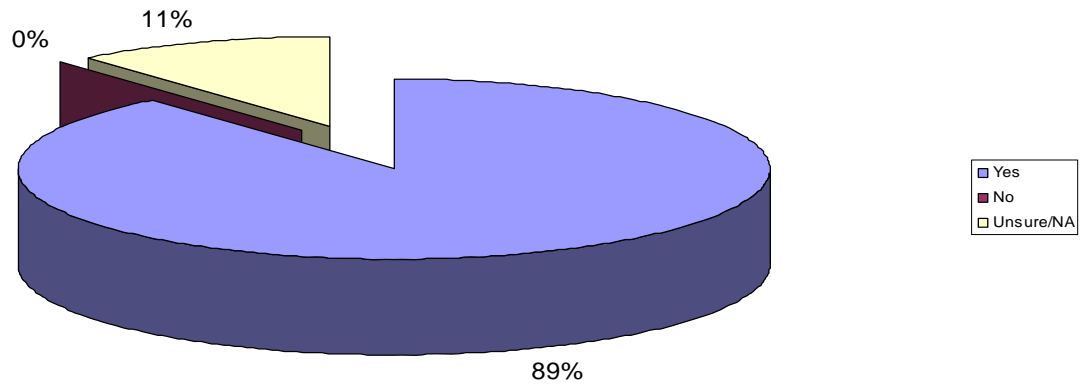


**Effective Financial System to Monitor their Finances**

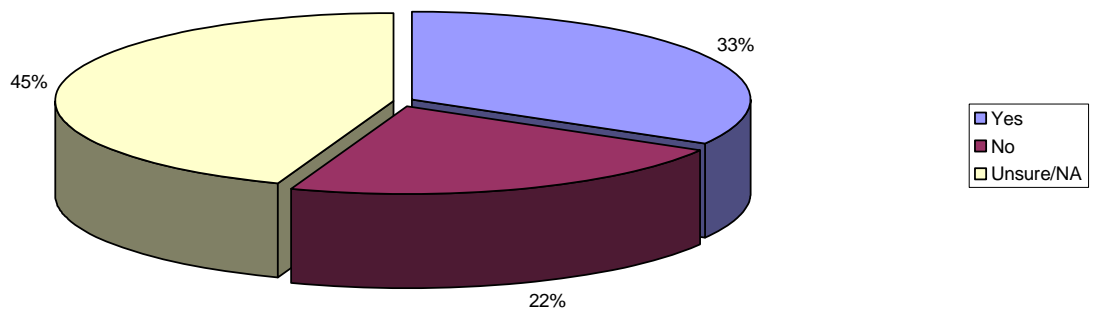




### Willingness to Perform a SWOT Analysis



### Commonside has the Financial Capacity to Sustain Itself for the Immediate Future



## Appendix DD SWOT Analysis

<b>Strengths</b>	<b>Weakness</b>
<ul style="list-style-type: none"> <li>• Short Term Planning</li> <li>• Nice and Welcoming Staff</li> <li>• Project Management</li> <li>• Facility Size</li> <li>• Good location</li> <li>• Good customer relations</li> <li>• Commitment amongst staff</li> <li>• Good Relations with local Council</li> <li>• Good connections with community</li> <li>• Strong leadership from the Chair</li> <li>• Coincidence of Purpose</li> </ul>	<ul style="list-style-type: none"> <li>• Long Term Planning</li> <li>• Lack of Staff and Client Interaction</li> <li>• Insufficient Board and Staff interaction</li> <li>• Lack of advertisement in the Community</li> <li>• Some Programs were placed aside due to the lack Staff</li> <li>• Improve Financial Reliability</li> <li>• Accrediting staff</li> <li>• Staff needs to be more assertive with clients.</li> </ul>
<b>Opportunities</b>	<b>Threats</b>
<ul style="list-style-type: none"> <li>• New Programs               <ul style="list-style-type: none"> <li>○ Alcohol and Drug abuse prevention programs</li> <li>○ Social Activities for people with disabilities.</li> <li>○ Child Care Provision for kids with disabilities.</li> </ul> </li> <li>• Merging               <ul style="list-style-type: none"> <li>○ Program Increase</li> <li>○ More ways to become known in society</li> <li>○ New Sources of Income</li> </ul> </li> <li>• Aiming High (Source: Tanya's Interview with Clients)               <ul style="list-style-type: none"> <li>○ Create field trips</li> <li>○ Try to create more gatherings with an Agenda</li> </ul> </li> <li>• Lunch Club               <ul style="list-style-type: none"> <li>○ Hair Dressers</li> <li>○ Days out</li> <li>○ More variety of games</li> <li>○ Massage Therapists</li> </ul> </li> <li>• GP Commission</li> <li>• Local authority               <ul style="list-style-type: none"> <li>○ After school programs (Extended Schools)</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Aiming High               <ul style="list-style-type: none"> <li>○ Financial Resources</li> </ul> </li> <li>• Difficulties with other places in Commons side area</li> <li>• Opposition to merger</li> </ul>