



Strategic Initiatives Model Project

*“When written in Chinese the word “crisis” is composed of two characters – one represents danger and the other represents opportunity.”
~John F. Kennedy, address, 12 April 1959*

These times call for innovation, strategy, and positive leadership. The Hearing, Speech & Deafness Center (HSDC), has seized this learning opportunity with all three and is in better shape than ever before.

True leadership also means sharing what you learn and giving back to colleagues across the sector. HSDC is known for that. Excellent conveners and collaborators, HSDC has emerged as a leader in working together and benefitting from the strength of shared knowledge.

To maximize both the learning and the sharing, HSDC has developed the *Strategic Initiatives Model Project*. “*Strategic Initiatives*” for the Center to manage and mitigate risks while seizing mission-aligned opportunities. “*Model*” to provide concrete training/reference tools and information for other nonprofits to support positive outcomes in their agency.

The project consists of two phases, each with designed results to improve the health and stability of nonprofits.

The primary purpose of the Strategic Initiative Model Project (SIMP) is two-fold: 1) to strengthen the Hearing, Speech & Deafness Center’s (HSDC) capacity to adapt and successfully manage risks, opportunities, and change, and 2) to partner with and share information, templates and systems with other nonprofits to strengthen both the nonprofits individually and the sector as a whole. The model portion of the project is to develop replicable models for other nonprofits to use in establishing their own coalitions, partnerships and strategic teams in addition to understanding and addressing their own management needs - which will help ease the effects of the recession. This project is being led by HSDC’s CEO Susie Burdick, who brings 37 years of nonprofit leadership and lessons.

Phase I

STEP I: Before the Hearing, Speech & Deafness Center began to feel the effects of the downturn in September 2008, it had already started a strategic journey. It began with a continuing focus on **LEAN** – the Zen-like approach to space and process to eliminate waste and facilitate flow. With the generous and skilled volunteers sent to us by The Boeing Company, HSDC had begun a process that is now in its third year and will continue for the life of the agency. With a focus on continual process improvement, the Center is realizing efficiencies contributing to increased productivity, accuracy, and resource utilization.

STEP II: The next step in Phase I arose from the economy – the need to develop a thoughtful and thorough **Risk and Opportunity Management Plan (ROMP)**. This comprehensive plan identifies and plans for potential risks and opportunities the agency is currently facing and will face in the future. The document was written by HSDC’s CEO, Susie Burdick and then vetted with the Leadership Team, the Board of Directors,

Staff, and Key Volunteers before full implementation beginning January 2009. Through the positive outcomes realized through its performance to date, *ROMP* has now been integrated as a significant component of the *Annual Agency Workplan* and *Fiscal Year Budget*.

Steps III and IV came from *ROMP – Shared Services Coalition* and *Strategic Partnership Team*:

STEP III **Shared Services Coalition**

HSDC had heard about the concept of sharing back office functions, purchasing power, etc. between different nonprofits. Conveners by nature, the Center decided to move forward and found its own coalition. In March 2009, HSDC CEO Burdick invited the leaders of the following organizations to start these discussions:

1. FareStart – Megan Karch
2. Northwest Harvest – Shelley Rotondo
3. Little Bit Therapeutic Riding – Kathy Alm
4. Provail – Mike Hatzenbeler and Jerry Hynes
5. Executive Alliance – Melany Brown
6. Make-a-Wish Foundation – Barry McConnell

Burdick chose these leaders because they were smart, innovative and she had worked with them in different capacities and found them to be very effective. The discussions started around our nonprofits “flexing” our combined purchasing power by sharing resources in IT, Human Resources, and other “back office” functions. Many ideas and projects are underway and the Coalition is experiencing its first success: HSDC is sharing its annual formal pro bono training opportunities on topics such as Anti-Harassment, Diversity, Supervisory, First Aid/CPR, and others with the staffs of the participating agencies. By having cross-agency participation in these trainings, all agencies will save money, time, and resources and be in compliance with business requirements.

The Coalition is fully engaged and continues to develop a long list of potential partnership opportunities for both efficiency and cost-savings. These areas range from accounting functions to marketing to sharing of administrative staff.

This is clearly a new strategy that will serve the agencies in good times as well as bad.

STEP IV **Strategic Partners Team**

Part of the learning in the fourth quarter of 2008 was about the purchasing power of the nonprofit sector and the value of our business to our vendors. At that time, HSDC began evaluating its vendor relationships and have changed banks and benefits brokers to receive a higher level of customer service and more direct involvement in supporting the Center.

It was time to transition our major vendors from transactional relationships to strategic partnerships to take HSDC to the next level of health and excellence. In addition, HSDC wanted to further engage partners and supporters who believe in the agency and had could help strategically guide the organization. Currently, we are beginning formation of a **Strategic Partners Team** to include the following:

- Pacific Continental Bank (confirmed)
- Jacobson & Jarvis (confirmed)
- Kibble & Prentice (confirmed)
- Hearing Aid Manufacturers
- 3 Corporate Partners

- 3 Partner Foundations
- 3 Major Donors
- 4 Members of HSDC Board of Directors
- 3 Members of HSDC Executive Leadership

This group will meet twice a year to discuss short and long-term strategies for the Hearing, Speech & Deafness Center with the goal of responsibly growing the agency to better realize economies of scale while using existing and new resources to their maximum potential.

Phase II

This phase will involve the “Model” component as HSDC develops information and training tools for other nonprofits to use in their own planning and risk/opportunity management. HSDC CEO Susie Burdick is currently writing a workbook that explains the various components of the Strategic Initiative. **“Don’t Waste the Crisis” – A Phrase That Sparked a New Perspective™** – is a field guide for nonprofit leaders outlining processes used by HSDC in this project. It will include a searchable CD of interviews, outcomes, meetings, documents (ROMP, Annual Workplans, etc.), and tools on how to adapt this for different organizations.

Strengthening and continually evolving our agency is vital to the services we provide and our long-term stability. Sharing what we learn is our opportunity to contribute to the nonprofit sector and the communities we all serve. It is both a responsibility and an honor.