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Road Map to Organizational Success

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This morning I want to talk about organizational planning. I call this the road map to organizational success. ALDA is a growing organization. A lot of people are joining ALDA, and when they do, they also want to be able to go back home and establish their own ALDA group. But a lot of times, people just don't know how to do that. They don't know what you need to do to form an organization. And the purpose of this workshop is to help you with developing an organizational plan, so that when you go back to your home state and you want to establish a chapter, you will have the tools to do so.

There's basically four major points to an organizational plan. One is a vision plan. A lot of people know what they want to do, but what is hard is to translate that vision into words, so that you can communicate that vision to the people you want to send the message to. Then you have strategic planning. That is how you are going to reach your vision. Organizational plan is putting that strategic plan into place and making it work. And last you have results and communication plans. This is where most organizations fail, mainly because once they do a strategic plan and think they are done and just sit back. You need to do a lot more to make it work and make your efforts successful. The operational plan is where you will implement all of your strategic ideas and goals. And then you must communicate that.

If you want to establish an organization you need to write down why, how and where. This will help you get an idea of what your organization will do and why you want to establish that Organization by writing this description. And then you go further. What exactly do you want to accomplish? How often will you meet and where? You really need to put effort into thinking these details out. The whole purpose of writing all this stuff in here is to help you formulate your vision.

One of the best ways I could figure out how to demonstrate this process was to invent a fictional organization. I came up with the national association of people with hearing loss, or NAPWHL. And I came up with a depository of information, resources by people

with hearing loss. Now note the key word here. Instead of using the word "for," I use the word "by." For a lot of people that is a big change in the way they view things because there is a tendency to say an organization for the deaf or whoever and words make a lot of difference in terms of how you perceive yourself. Now our fictional organization is a national organization consisting of people with or without hearing loss. It assists with providing information about hearing loss to people who need it in a fast, efficient way. Members have access to web sites, books, tapes, documents, products, medical information, consumer watch, and advocacy for hearing loss issues. This is my description. When you do a

Description you put down exactly what you're going to do in that organization. What is it and what does it do? A mission statement tends to be only two or three lines and very to the point, while description is more a blowup of the mission statement. It is far more detailed. You would use the descriptions that you write to develop your mission statement. Because, the hardest part of this whole thing is translating your vision to words. If you start writing descriptions, you will pick up on the key words that you need to make your vision statement as well as your mission statement, which is done after the description.

You can be as intensive or as light as you want to be. It's up to you. But the more you put in, the more clearly you will delineate your vision. Another thing that works well is if you put together a committee. If you have other people helping you it is very beneficial as it gives you the advantage of other viewpoints. Why is this so important? Number one, to plan. If you don't plan, you are going to fail. With a plan you will have a much better understanding of the organization. You understand why you are doing it and where you're going.

So a group effort is very helpful. How do you get dedicated members? By communicating what you're there for. The more you communicate, the more they become bound to the organization because they know the direction you are all headed in. If you don't have any directions or mission statement or vision statement, there is really no reason for anyone to stay. Doing this translates into loyal members, and that translates into dues, which translates into money and budget for your organization, without which you are not going to be able to do much.

Think about your organization's beliefs & purpose. For example, if you are thinking about setting up an ALDA chapter, you're going to follow ALDA's mission statement & ALDA's vision. You would follow along with what they have set as a national organization. But if you're starting an organization from scratch, you're going to have to have your own mission statement and vision so you know where you're going. People join an organization because they feel affinity for that organization. They want information about whatever that organization does to make them as a member feel good, feel better, learn, participate, and so forth. So you must include your belief with your vision statement. If you feel that your organization will make life better for all people, then that phrase should appear in your vision statement somewhere. Your beliefs must align with that organization. If your beliefs do not, you're really not in the right place. Maybe your community has a lot of people who are late deafened and they need some point of resources. They need a place to go and feel comfortable. Where it is easy to

communicate, people all know the same problems and the same barrier. We have the same people here who all share the same issues, barrier issues with communication. Hearing people don't understand, people with hearing loss. Your family members don't understand.

In other words, you are a community of your own. One thing a lot of people realize when they think outside the box is this is not the way they normally do things. Sometimes you will get resistance from your members. If that's the case, you have to learn to compromise and come up with a language that everybody will feel comfortable with. Be open to changes. Sometimes they may not be so pleasant, but for the most part, they are supposed to be good.

When you start to think about a vision statement, it's okay to dream big. That's what a vision is for: To dream big. It may be too big for your chapter or your small organization, but that's okay. Ultimately, what do you want to see happen with ALDA? Ten, fifteen years from now?

Develop memorable imagery and stories about the organization. That's what draws people into your group: Memorable imagery. Give people a reason why they want to join your organization. A lot of people have the same issues. Then all of a sudden, the big issue you had is really not an issue anymore. It goes away because you have other people who share the same thing. So what you want to try to do with your vision statement is to convey the emotional attachment that people would have with an organization. Last week I was at the National Association of the Deaf (NAD) board meeting, and they're struggling with this. The perception in the world today is, why do we need NAD? Why do we need ALDA? Why do we need SHHH? What's it for? We're not so important anymore. But in reality, the opposite is true. When people think you don't need an organization anymore, that's when you really need it. You need to take time to really think this over and develop the imagery connected to your organization.

What values do you have? Making sure that people who have lost their hearing late in life know that ALDA exists for people like them, so they are not alone. They are not isolated. They are not the only ones who are having communication issues with hearing loss. Is that your purpose of ALDA? If it is, tie your values to the action. How are you going to let people know that ALDA exists? Do you advertise in the newspaper? Do you go to Rotary Clubs and give presentations? How are you going to get the word out? The ideas are to distribute information at doctor's and audiologist offices, conduct presentations at community meetings like Rotary Club, Lion's club, etc., having fun, or Karaoke night. Maybe have a costume contest or an annual picnic. What do you do at the picnic? Invent games that have to do with hearing loss to help hearing people realize what you're going through as a person with hearing loss. Just write it out. What you do here ties into your vision. Then you pull the key words and play it out like a puzzle game and put the words in order that make your vision very clear. Use all your key words from your description. If you go back to the NAPWHL description, you'll see that I mentioned the national office, Washington D.C., one-stop shopping, web site, library, museum, and artifacts. Those are key words. I pulled out all the key words that I had in that description. Now, the challenge is to take those words and make a vision statement. For example: One-stop shop for those seeking information and resources about hearing loss. It should

not be long. Maybe one or two sentences at the most. Second, it should be easy to say. You want to teach your members that. Drill it into them. Show that at every meeting. Put that in all your brochures and all of your printed materials. That way, when the members are out in the community, and people ask what's ALDA? They will say, "Oh, it's a one-stop shop of information for people who have lost hearing late in life." They are all saying the same thing and it's easy to remember.

Now that you have a vision, you want to make it happen. To do that, you create a mission statement. The difference between vision and mission is vision tells what you want to be and mission tells how you're going to be what you want to be. They are two different things. Vision tells you what, mission tells you how. Some people in NAD said they were debating about their vision a couple of weeks ago. One of the things that somebody came up was that the vision of NAD is to put themselves out of business. That's what they want to do. What that meant was, if you put yourself out of business, the world must be perfect. No more barriers. No more discrimination. There's no need for NAD. We have captioning. We have relay services. We have everything we need. We're finished. We've put ourselves out of business.

The mission says how to do it. How do we put ourselves out of business? By watching the government, making sure they pass laws that are favorable to people with hearing loss and so forth. When you create a mission statement, it's a statement of purpose and function specific to the organization. Mission statements should be short, to the point and easy to remember. Here are a couple of examples: By providing quality education, we empower individuals to become caring, competent, responsible citizens who value education as a life long process. That's a mission statement for some educational firm.

This is another one: We are a world-class network consulting company. We help our clients leverage technology to achieve a competitive advantage. We achieve this through our exceptional team, our consistent methodologies, our knowledge sharing, our absolute commitment to quality work and client satisfaction. This is good, but long--a lot of words. A lot of people probably won't remember that.

VOICE: One of the best mission statements I've ever read is Anheuser Busch. If you go to the web site it's right there. It's one sentence, sweet and to the point and then they use their vision and value statements to expand on that to tell you more about it.

Andy Lange: I think I know what you're talking about. I think I've seen their web site. They are trying to do something different also by putting "born on" date on all the beer. They want to show the world they make the freshest beer of all. That's reflected in their vision statement. So what Anheuser Busch did is really expand on that vision. That really helps the organization not only in operating efficiently but also making sure the employees know the purpose of what they're doing and why they are there.

Let's look at the mission statement for NAPWHL. "We will be a one-stop shop for people who seek information on hearing loss. Our organization shall function as a depository of information and resources geared towards hearing loss. We will be an advocate for people with hearing loss and offer assistance where possible." It's repetitive,

number one. Number two, it's long. So if I go back and look at this, I think, well, I could modify that a little bit more. Actually, a good mission statement would be "We're a one-stop shop for people with hearing loss." That will be easy for people to remember and easy to repeat.

Now you know what you want and how you're going to get there. That determines the direction of your organization, where you're going to go for the next year or so. Most organizations do a strategic plan for one year and three years. The first year is more of what you're going to do right now. The three-year plan is what you're doing now and then what happens next. Everything is changing so fast today that going more than three years may not be worth the effort because you will probably have to go back and change them anyway.

Let's discuss strategic analysis. What you want to do is sit down and analyze what you're planning to do. Come up with all the things you want to do and then you list them and develop what you have to do for each of those things. Put down everything you want to do in your organization, and then plan for those things. Remember, everything you want to do ties into the vision.

VOICE: Strategic planning helps coordinate or determine what the needs are and how they relate to various resources, instead of having to depend on other entities. It would be there for support or to increase support monetarily. I think that would be really nice to have.

Andy Lange: That's very true. Especially when you go into big-ticket items. You need to plan for those. Get sponsors maybe. You have to make sure everything is accessible communication-wise. For example, if you're planning to educate people, maybe it's a good idea to set up the captioning, the PowerPoint, because people with hearing loss function best when they have access to a variety of communication methods. The PowerPoint, the captioning, the voicing, the assistive listening devices--That stuff is not cheap and it's not free. It's really expensive. So you may have to really plan for that event. And if you're doing a lot of different events, remember the vision. You're having this event for a purpose. And that purpose is to educate people.

VOICE: Perhaps money that's fund raised itself could be collected specifically for that organization.

Andy Lange: that's correct. Fund-raising is a big part of an organization. So with strategic analysis, what exactly do you want to do? From there, you develop your direction by developing operational plans. Who is the chairperson for the event? Who's responsible for getting sponsorship? You go through all the details. When you do that, your members will see that the organization is really thriving for a point. A lot of people join organizations and it falls apart because there's really no direction.

Strength, weakness, opportunity and threat: SWOT. A lot of companies use this. Each one has a lot of stuff. What's your strength? The organization is strong because there are so many people in this group. Write down what your organizational strengths are. If you don't know, then you may need to really discuss that at your next committee meeting.

What are your weaknesses? What opportunities do you have coming down the road? And what are the threats? Threats could be a disgruntled member establishing another organization that is almost similar to yours or the FCC put in some kind of policy where others are not permitted using the assistive listening devices are not permitted. That's a threat. Make a list of all the threats, the opportunities, the weaknesses, and the strengths and then you can develop a strategic plan from those things. The affinity diagram helps with that, too. You gather all the information you need, and you sift through them and you will see a pretty common pattern emerge from that information that you have. Maybe you want to find out if your members are using ALDs, assistive listening devices. And if so, what kind? You know why that's important?

Because then if you find out 90% of the members use a particular brand of listening device, you can write a really nice letter to the company and tell them, you know that 90% of our members use your devices. Isn't that wonderful? We're having an event and we could really use your support. Companies love that stuff.

Open house. That's good. Let people know what you're doing and how you're doing it. Include community members in the team. It would be a really good idea if you invited somebody from the Rotary Club to participate in your event. Then they will say, oh, well why should we? That's where your vision statements, your mission statements all come into play. You can explain to the Rotary Club your purpose. Oh! Well, yeah, that's an organization that the Rotary Club wants to become a part of. You know why that's important? Rotary members are usually community leaders. They have access to all kinds of resources, information, and support. Take advantage of the resources that you have available to you.

Another thing is ongoing tech support. Let's say you're growing and you decided to open up an office. You're going to need a building and tech support. You know it's expensive, so maybe you'll use the local community college, tech students as their community involvement credit, and get them involved and use them without having to pay. This helps you visualize the things that you could do for your organization. Don't limit yourself. Just dump your brain. And then you sift through that with a SWOT Analysis. Sometimes you will hit on an issue that may seem too big, too complex to handle. You can break down the issues that you are facing and maybe assign those issues to certain people. List the directions you want to take. For example, produce an annual Christmas party. That's one direction. Provide information to the community about people with hearing loss. That's another direction. Have ALDA meetings every month at a certain location. That's another direction. Then break them down into what you need to do to meet each. The idea is to make a plan where you can say, step one, I have to do this. Step two, step three, step four, go all the way down. That way if something comes up and you as the author have to leave or something, you could just pass it on to the next person. The fictional company again, NAPWHL. Promote NAPWHL more aggressively by advertising in hearing loss related periodicals. You know, it's really sad, hearing loss related periodicals are disappearing. Deaf Nations shut down. Deaf America magazine shut down. Silent News I hear is shutting down. So there's not a lot of deaf or hearing loss related magazines around anymore. Maybe one strategic direction ALDA could take is set up a magazine. This is one way NAPWHL will get their information out. Expand NAPWHL museum by including TTY machines and other deaf-related equipment.

Locate the home office closer to downtown so that tourists can visit the museum. Continue expansion of NAPWHL depository of books and information. Establish recruitment and development goals for the organization. These are strategic plans that NAPWHL wants to do you notice they are pretty simple.

Now, you know what you want to do. You have to plan to make it work. The action plan specifies action needed to address strategic plans and organizational issues. Now what? Number one, you have to develop the ad. Number two; you have to find the periodicals. Do you have a name and address list? Number three, can you afford it? Promote NAPWHL more aggressively by advertising hearing-loss related periodicals. How much budget do you have? What periodicals are out there? Who is going to look for them? Who is going to do the research? Who is doing the research on finding those magazines? Then you have to ask the magazine how much it costs to put an ad in their magazine. You have to come down to the next step, who is going to develop the ad? You need a plan. Not only that, you need a time line with each item and exactly what you're going to do with each. Who is involved and what they are doing. To what extent is the president involved? Members, what do you need from them to do that? And then when you communicate that to your members, they are going to look and say that the president will make the initial contact. John over here will develop the ad. He's going to contact the advertising agency. Mary is going to do the budget. She'll be the one who will investigate and find out how much it costs. So the members all know who is responsible for what. Then put deadlines on each one. John is going to find out by December which advertising agency is going to develop the ad. Mary will know about the budget by next week. The reason for that is to make people do it--Especially in a volunteer organization. You want accountability. Then you develop the plan for each item. Determine results measurements. Now, speaking about the ad, you put them in the newspapers and you're done. What were the results? Did you get more members? New members? Did you get more inquiries, people asking questions? You need somebody to track that and then report the results at the next meeting. Oh, you know, the ad in magazine "a" produced five new members, 200 inquiries, and 10 people asking about sponsorship. So you get the results and how well it works, then the next time you do it, it's simple. You know exactly where to go, which magazines are better. The audience, the members will feel it's worth my membership dues and it's worth my donating money to the organization because I know you're really working at it and you really care. So you're keeping up and you're investigating this stuff by reporting the results. And by reporting results, you're also communicating that you're working. Don't ever forget result measurement. So put down your organizational name and then operational plans, and you list them. If you're Doing a meeting like this, you would have your plans listed, and then you explain them as you go along. Remember, communication is the key. So NAPWHL's operational plans are to promote NAPWHL more aggressively by advertising in hearing loss related periodicals. There's a 500,000 budget. When is it due? Due the first quarter. Do you see how I'm breaking it down?

Once you assign this to the marketing person or whoever, that person then breaks it down even more. How many magazines is that? How many ads is that? Which magazine is going to get the ad? Expand NAPWHL museum by including TTY machines and other deaf-related equipment. Assigned to whom? Upper level management? Headquarters?

Develop plan of action. What kind of TTYs do you need? Where are you going to get them? Who is going to do that? Who is going to do the research?

Let each group report their results at the next meeting. Or you can list them and say, John is responsible for this. Mary is responsible for this. Bobby is responsible for that. If you're interested in one of these, see one of those three people. And then they form committees, get them together and break it down even more. I find that when you include a lot of people in the process, they are more likely to buy in on what you want to do, goals, mission, your vision, and they will be more loyal and more devoted members. Get them involved, because then they'll have a reason to come to the meetings and be a part of the organization. Who should write the plan? Don't let one person do it., because that's really hard for one person to do. Better to have a committee. Develop several drafts. Put them up and see what other people may think. Maybe they have a different view. Then revise your statement and so forth. Most of the time, an organization like ALDA, NAD, SHHH, they have what are called a board of directors. And usually they have to approve things that they are going to do on a national level.

The board of directors tends to be the officers, the president, the vice president, the treasurer and the secretary. Once they agree to that, the rest of the organization should agree, too. If you are in a very political sticky situation, like most organizations are, it's a good idea to identify the leaders of your group and explain to them what you're trying to do. Get them to buy in before you present it to the big group. Once you get them to buy in, during the meeting, they will voice their support and then the rest of them will tend to go along with that.

Always accept feedback and suggestions. If you react negatively, the other people will not say anything and they'll start thinking, well maybe I shouldn't be in this group. When people start feeling that way, that's bad. Always be willing to accept feedback and suggestions. I emphasize results and communication. Track your results. How many people showed up at your event? What did you do? What was the result of what you did? Did you play a game? If so, what was the result of that game? Maybe a person who doesn't have hearing loss learns something; they shouldn't talk away from a person who has hearing loss. So you have a result there. What was the result? People learn to speak to me directly. Post the results. If you have a web site, put them on the web site. Then when other people or prospective members go to your web site they'll read that and think, " I have the same issues. I should join that group. I'm willing to pay dues and be a member."

Ultimately, the goal of your organization is to get more members. Advertise your results. If you have a magazine or a newsletter, put them in there. You have a budget, annual budget review, put the result of that in there and so forth. Announce it at your board meetings; announce it at your membership meeting. If it's a really big event, celebrate it. Maybe during the meeting, yell, "Yea! We earned 20,000 dollars last night." That way people can feel good about it and want to be part of your group. That's what you really want them to do.

VOICE: In addition to the vision and the mission statement, some organizations, including Gallaudet, have a credo. Do you have any thoughts on why that's important and how that successfully influences an organization?

Andy Lange: A credo is more of a personal pledge. For example, in Sprint, one of our credos is that all employees of Sprint will be ethical and honest and law-abiding. Because today, it's a big deal in the corporate world. So, in other words, I'm telling myself that I will be honest. I will be ethical. I won't do anything bad. A credo is more of a personal oath, personal agreement that I will make an effort to practice as opposed to a vision statement, which is something that the organization as a whole will go for. Some groups actually list them. Other groups it's more of an unwritten rule. It varies from organization to organization.

Andy has 20+ years of business experience, with The Forhan and Wakefield Group, AT&T, CSD, and Sprint. He is currently employed by Sprint as Senior Government Account Executive with Sprint TRS. Andy is responsible for sales management of the West and Southeast Regions of the United States. Andy is active in community organizations. He is a long time member of ALDA and also a board representative of the National Association of the Deaf and President of the Gallaudet University Alumni Association. Andy graduated from Gallaudet University in 1983 with a BS degree in Business Administration and Data Processing. In 1995, Andy graduated from the University Of Phoenix with a Master's Degree in Organizational Management.

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