

USD'S NONPROFIT INSTITUTE: STRATEGIC PLAN 2012 - 2015

Mission Statement:

The Institute for Nonprofit Education and Research educates leaders and advances best practices in the nonprofit and philanthropic community through academic excellence, applied learning, and research that examines issues of strategic importance to the sector.

Vision Statement:

The Institute for Nonprofit Education and Research will become recognized as a premier national and international academic center by:

- Raising awareness of the integral role of nonprofit and philanthropic organizations in society
- Educating those who support nonprofits using a pedagogy that integrates scholarship and practice
- Conducting and disseminating research that shapes decision-making within individual organizations and the sector as a whole
- Preparing future researchers and scholars to support and advance the field
- Securing resources that enable scholarship on nonprofits and philanthropy

Competitive Advantages:

1. Work that is integral to the mission of USD and SOLES
2. A comprehensive Institute, housed within a respected academic institution, that offers graduate programs at the Masters and PhD levels, a research center, and community education programs focused on nonprofit and philanthropic organizations
3. Research and education focused on the integration of theory with practice
4. MA, community education programs and contracted research that are priced affordably relative to the market
5. Giving opportunities that yield multiple returns on investment for donors. These include, for example, graduate and community education that increase the capacity of practitioners to work more effectively and strategically; applied projects that increase the organizational effectiveness of nonprofits (principally in San Diego); and research that enables practitioners to incorporate trend knowledge and best practices into their work.

Target Markets:

The target geographic market for our MA, PhD and Research Center is regional, national and international. The target market for our Community Education work is regional.

For the MA program: Our primary market is mid- to senior-level professionals committed to developing their leadership and management skills in order to advance the nonprofit sector.

For the PhD program: Our primary market is individuals committed to serving the field through research, evaluation, teaching and/or practice.

For the Research Center: Our primary market is individuals and organizations interested in research on regional, national and international nonprofits/philanthropies.

For Community Education: Our primary market is nonprofit professionals, board members and volunteers.

Strategic Goals 2012-2015:

- 1. Increase our profile locally and nationally**
- 2. Foster continuous improvement in our academic programs**
- 3. Continue to produce and disseminate quality research**
- 4. Involve corporate and nonprofit leaders in research and educational activities that advance the field**
- 5. Secure increased funding for all areas of scholarship**

Goal 1: Increase our profile locally and nationally

Among practitioners by:

- A. Building and promoting the **best practice/online library**. This will include streamlining the process by which excellent student projects are selected for and posted to the library; developing a reciprocal branding/recognition campaign whereby all client organizations will be asked to post a web-link on their respective websites to the library; possibly re-branding/renaming the library; promoting the availability of the library on the Institute's website and by advertising it in national nonprofit-related publications (e.g., Chronicle of Philanthropy, Stanford Social Innovation Review, The Nonprofit Quarterly, Nonprofit Times); and otherwise promoting the applied project work conducted by MA students.
- B. Writing and promoting practitioner-focused publications e.g., The Lobbying Strategy Handbook, as well as articles for Stanford Social Innovation Review, and The Nonprofit Quarterly, etc.
- C. Conducting seminars and webinars that highlight the Institute's expertise.
- D. Releasing a quarterly State of the Sector Report measuring key indicators of the economic health of the nonprofit sector in San Diego (to be launched Dec. 2011).
- E. Ensuring our website and social media optimally showcase the work of the Institute.
- F. Generating a culture and practices among alums to include the degree in their professional bios and profiles.

Within the academic community by:

- G. Enabling doctoral students and faculty members to present research at academic conferences such as ARNOVA, West Coast Nonprofit Data Conference, ISTR, ILA and others.
- H. Working with doctoral students and faculty members to write and publish journal articles.
- I. Continuing to nominate students for distinguished dissertation awards.

Goal 2: Foster continuous improvement in our academic programs

Within the MA program by:

- A. Continuing to evaluate the implementation of applied projects and, based on the findings, making adjustments to the program protocol as needed.
- B. Reexamining the learning outcomes for the MA program to ascertain whether they are appropriate and being met by students and making appropriate changes as needed.
- C. Surveying the alumni every 2 years to assess the impact of the program on alumni practices and careers and analyzing, what changes, if any, should be made to the curriculum as a result of those findings.
- D. Administering exit surveys to students and analyzing, what changes, if any, should be made to the curriculum as a result of those findings.
- E. Providing on-going opportunities for students to meet with the program director and faculty for feedback on the program.

Within the doctoral program by:

- F. Evaluating the curriculum relative to other nonprofit doctoral programs.
- G. Ensuring doctoral students have sufficient opportunities to conduct and present research (particularly those who are not employed by the research center).
- H. Ensuring doctoral students have opportunities to publish research.
- I. Continuing to nominate students for national dissertation awards.

Within community education programs by:

- J. Continuing to examine the impact of the governance symposium on the practices of attendees and their organizations and making changes to the event as indicated.
- K. Evaluating the efficacy of corporate board training programs and making changes to the training if indicated.
- L. Using the strategy screen developed by the advisory board (see attached) to determine the need for additional community education programs (e.g., certificate in advocacy; distance learning programs; board governance for well-established organizations, etc.).

Goal 3: Continue to produce and disseminate quality research by:

- A. Releasing “signature” reports including: Quarterly State of the Sector Index (economic indicator) reports beginning Dec. 2011; an annual Nonprofit Labor Force Trends Report; and a grantmaking report (every 2-3 years) describing the state of San Diego’s philanthropic sector.
- B. Training doctoral students in scholarly research practices.
- C. Targeting opportunities to collaborate with external academic and non-academic institutions on research.
- D. Collaborating with faculty members throughout USD on research pertaining to nonprofits and philanthropy.

Goal 4: Involve corporate and nonprofit leaders in research and educational activities that advance the field by:

- A. Holding annual “signature” events including the Nonprofit Governance Symposium; the Nonprofit Labor Force Trends Symposium; the State of the Sector Report (a.k.a. Spotlight Report); and, approximately every 2 years, a philanthropy report.
- B. Creating an expert panel to advise on research pertaining to philanthropy.
- C. Continuing to train corporate leaders in best practices for nonprofit board service (consider an onsite training).
- D. Leveraging relationships with external stakeholders for education and training activities.
- E. Investigating the creation of a board training program designed for high performance boards.

Goal 5: Secure increased funding for all areas of scholarship by:

- A. Continuing to demonstrate transparency and organizational learning by posting program evaluation results on the Institute website.
- B. Developing a document that communicates multiple ROI to donors.
- C. Identifying and cultivating key community leaders and philanthropists who have interests that parallel those of the Institute.
- D. Working in collaboration with OSP and others on national research grants and contracts.
- E. Developing the capacity of doctoral students and faculty to seek outside funding for research.

Revised Advisory Board Structure:

A restructured advisory board will advance the mission of the Institute and the goals described in this plan. The new structure will consist of a 7-10 person steering committee that will meet quarterly with the staff and dean to oversee the work of the Institute including oversight of 4 newly formed working committees. Each working committee will contain a representative of the steering committee (ideally as chair). Working committees may include outside experts who are not members of the advisory board. The advisory board as a whole will meet annually prior to the meet and greet with students and donors and again as a group once a year to review the previous year's accomplishments and discuss an overall strategy session for the coming year's plans. No USD faculty/administrators will be listed as advisory board members. All advisory board members (with the exception of students) will be asked to participate in the portfolio review process.

- 1. Best practice library working group:** Will be tasked with overseeing Goal 1. In summary, the work of this group will be to design the best system for incorporating projects into the library, for marketing the library, and for connecting/co-branding organizations for which applied projects have been completed with the library
- 2. Program assessment + continuous learning working group:** Will be tasked with overseeing Goals 2 and 3. In summary, the work of this group will be to ensure the Institute's academic and community education programs are being assessed on an on-going basis through multiple mechanisms and to ensure that feedback from evaluations are incorporated into the delivery of programs, products and services offered by the Institute.
- 3. Philanthropy round table:** Modeled on a working group in place at USC, the group will advise on Goal 4. In summary, the work of the round table will be to introduce and involve prominent funders in the work of the Institute in a way that connects funder interests and concerns with the Institute's products and services.
- 4. Resource development group:** Will be tasked with overseeing Goal 5. In summary, this group will act as boundary spanners between private-sector organizations, donors and philanthropists who can support the work of the Institute through research center contracts, sponsorship support for special events, and grants.

Strategy Screen for Strategic Decision-Making

Tier one items for strategy screen

1. Is it consistent and with our mission?: The Institute for Nonprofit Education and Research educates leaders and advances best practices in the nonprofit and philanthropic community through academic excellence, applied learning, and research that examines issues of strategic importance to the sector.
2. Does it build on, reinforce or add to our competitive advantages (see above).

Tier two items for strategy screen

- A) Will it yield a result that is sustainable?
- B) Is it innovative within the context of our mission?
- C) Is it an effort that further institutionalizes us on campus and/or in the broader community?
- D) Will it increase our visibility on campus and/or in the community?
- E) Will it break even or produce a surplus in a reasonable amount of time?
- F) Will it not displace an existing activity that is more strategically important?
- G) Has it been fully vetted by all key stakeholders including the advisory board and staff?
- H) Can an evaluation process be crafted to assess the impact over time?
- I) Can a sunset period be agreed upon to end the effort if it does not prove to be successful?