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# Pathway to Permanence: Strategic Planning for a Creative Nonprofit

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Pathway to Permanence: Strategic Planning for a Creative Nonprofit

by

Virginia L. Bernd

An Abstract of a Project

in

Creative Studies

Submitted in Partial Fulfillment  
of the Requirements  
for the Degree of

Master of Science

May 2018

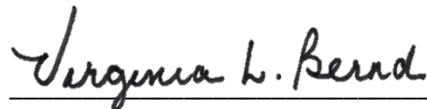
Buffalo State  
State University of New York  
Department of Creative Studies

## Abstract

### Pathway to Permanence: Strategic Planning for a Creative Nonprofit

This project examines a portion of a strategic planning process used by Instar Learning Alliance, an educational nonprofit, to prepare for the final development of a business model and the writing of a business plan. The nonprofit, currently serving older adults in Montgomery County, PA, identified key areas for research to clarify and support their mission and vision. A comprehensive review of an external environmental scan, an analysis of the theory of change and its impact on the direction of the nonprofit, and a serious look at critical success factors collectively provided the founders with data to make informed decisions. The results of the strategic planning greatly increased the possibility of a successful implementation of the future business plan.

*Keywords: nonprofit, strategic planning, environmental scan, theory of change, critical success factors*



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Signature

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May 12, 2018

Date

Buffalo State  
State University of New York  
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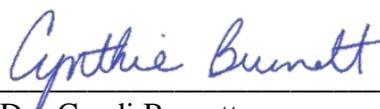
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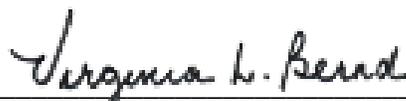
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Associate Professor

May 12, 2018



Virginia L. Bernd

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## Dedication

I wish to dedicate this Master of Science thesis to my mother, Margaret Gross, whose belief in me and my ability to change lives through my teaching and writing, always inspired me to reach beyond what I thought possible.

To my husband, Charles, my sons, Brent and Damon, and my extended family, who supported my decision to attain this degree and whose love and acts of kindness when I least deserved them made me appreciate what it means to be a family.

To the co-founders of Instar Learning Alliance, Amy Ryan Faga, Pamela Mott, and Karen Nice – Pathway to Permanence: Strategic Planning for a Creative Nonprofit is your story, too.

## Acknowledgements

I wish to acknowledge the support and encouragement of the faculty and staff of the International Center for Studies in Creativity. Their professionalism and dedication to the unique program that creates change leaders attracts an international student body whose common denominator is their desire to make a positive difference in the world. The faculty models a style of facilitative teaching that engages everyone in the learning process and clearly considers the individual needs of its diverse student body.

I thank Dr. Susan Keller-Mathers, my advisor, and Dr. Cyndi Burnett for their patience, kindness and support.

Special thanks to Pamela Mott, Communications Director of Instar Learning Alliance, whose technical support and encouragement kept me focused and committed to my dream.

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## **SECTION ONE: BACKGROUND TO THE PROJECT**

### **Purpose and Description of Project**

The purpose of this project is to create a formal plan that will ensure Instar Learning Alliance's ability to grow successfully and become an established educational non-profit, serving its intended audiences. Although a business plan cannot fully guarantee success in the marketplace, the attention to external environmental scans, critical success factors, financial and risk analysis, and an updated implementation roadmap will certainly improve Instar's capacity to expand its influence and meet the needs of the communities it serves.

Instar Learning Alliance is the tangible result of the challenging and personally rewarding graduate program in creativity and change leadership offered by the International Center for Studies in Creativity at SUNY Buffalo State. Although I had been facilitating Creative Problem Solving (CPS) since the early 1980's, having to find an audience with whom I had never used CPS proved to be a most fortuitous assignment in one of my graduate classes. In the fall of 2013, my pilot program at Generations of Indian Valley, an active senior center in Souderton, PA, introduced CPS to a population of recently retired community members – my contemporaries. At 69, I was facilitating my peers. Encouraged by their enthusiasm for the process - a process that also created a warm, friendly social environment - I knew that I wanted to spend part of my retirement continuing to teach and facilitate CPS.

After the successful pilot program, a recently retired teaching colleague of mine, who had coached Odyssey of the Mind (<https://www.odysseyofthemind.com>) and was familiar with CPS, expressed an interest in facilitating at the senior center with me. My niece, who had attended the Creative Problem Solving Institute (CPSI), joined us. From our discussions with activity directors in senior centers and senior resident communities, we learned that no one else was

offering an interactive program that satisfied five out of six criteria used by senior centers to evaluate programs that promote well-being. The Six Dimensions of Wellness, developed by the National Wellness Institute ([www.nationalwellness.org](http://www.nationalwellness.org)), includes five aspects of well-being that are directly impacted by participation in a program of creative problem solving.

- 1) Social: How a person contributes to their environment and their community; and how to build better living spaces and social networks;
- 2) Occupational: The enrichment of life through work and its interconnectedness to living and playing;
- 3) Spiritual: The development of belief systems, values, and creating a world-view;
- 4) Emotional: Self-esteem, self-control, and determination of a sense of direction; and
- 5) Intellectual: Creative and stimulating mental activities and sharing your gifts with others.

As the population of older Americans continues to increase, the well-being of these individuals is of utmost concern to senior residence communities, to senior centers, and to the adult children of seniors who want their parents to remain independent and self-sufficient. Programs that add to an individual's sense of self-confidence and ability to address personal challenges become a valuable asset to all those who serve seniors.

Over the next two years, Instar Learning Alliance was formally co-founded by these three former educators, as an educational non-profit serving the senior population in Montgomery County, PA. In March of 2016, Instar received its status as a federal 501(c)(3). With each graduate course in the Certificate in Creativity and Change Leadership and Master of Science in Creativity's programs, I focused on the development of the non-profit. Through research for the *Current Issues in Creativity* course, I confirmed my belief in the value of

teaching CPS as a way of helping seniors address some of the unique challenges they face as aging Americans (Bernd, 2016).

As a continuing work in progress, the team of three facilitators used the tools and techniques of creative and critical thinking to explore options for promoting Instar. Every aspect of Instar Learning Alliance has evolved over the last two years. For example, in addition to teaching CPS, Instar Learning Alliance now offers academic programs focused on creative aging, optimism and well-being, and creative community - (See [www.instarlearningalliance.org](http://www.instarlearningalliance.org)). Perhaps the most notable change was in the mission and vision. Originally, Instar's mission was "to teach a creative problem solving process that transforms learners into innovative thinkers and facilitators of positive change." However, the more we worked with older Americans, the more we entered resident communities, the more we talked to our participants about their lives and their challenges, the more we came to understand what we truly wanted to do. As executive director of Instar Learning Alliance, my personal mission was "to keep older Americans visible, valued, and their voices heard." My partners were in full agreement. We envisioned "*a future in which the wisdom of senior citizens is openly respected and valued. We seek to build social capital within our communities by focusing on the strengths and capabilities of our senior citizens whose voices need to be heard. We believe strongly that the greater community needs their talent and experience in order to successfully flourish*" ([www.instarlearningalliance.org](http://www.instarlearningalliance.org)).

The name "Instar Learning Alliance" was carefully chosen to reflect what we co-founders value and believe. An "instar" is a stage in development. We humans will continue to evolve and may have many productive and creative stages in the second half

of our lives. We want to celebrate that continuing evolution. Learning is life-long and contributes to our well-being as we age. Building alliances that support our programs will bring our mission and vision to the attention of the greater community.

The next step in the development of Instar Learning Alliance is to design a business plan for the next three to five years of its growth and expansion. This project focused on the immediate need of exploring the external environment in which our non-profit now operates and to examine the changing needs of the senior community.

### **Rationale for Selection**

Most teachers want to make a difference in the world. When I brought CPS into my secondary English classroom and my Youth Education Association (formerly Future Teachers of America) meetings, I observed how the process empowered young people. I witnessed their joyful surprise at succeeding in overcoming challenges and solving problems. CPS went with me in my work as public relations/ communications director for a state teachers' organization. My belief in its value has never wavered. In every setting there will be a time and place to ask, "In what ways might we?"

My role as a change agent is to shine a spotlight on positive ageism. Social scientists have agreed that "ageism is still a social problem and that most people have somewhat mixed feelings about the elderly and growing old" (Berger, p.183). With our population of those 65 and older expected to double from 2000 to 2030 (Berger, p.185), opportunity abounds for those of us interested in making our world a more welcoming place for older Americans. My hope is for Instar Learning Alliance to be a vehicle for changing attitudes and perceptions toward our senior community members.

In what ways might we keep our seniors visible, valued, and heard? This question is not just for Instar Learning Alliance. However, Instar could be the organization recognized as bringing that question to the attention of the public. Through our programs, our blog, and our presence in the community, Instar Learning Alliance can be a force for positive change.

## SECTION TWO: PERTINENT LITERATURE

### Introduction

The decision to start a nonprofit filled me with trepidation. What did I know about entrepreneurship? About networking? About risk analysis? About critical success factors? About external environmental scans? Beyond the joyful collaboration that created our mission, our vision, and our initial programs lay the detailed administrative regulations that support state and federal nonprofits. Obviously, I needed to educate myself. I have read extensively over the last four years, broadening my knowledge and understanding of both the world of nonprofits and that of its life line - philanthropy. I have chosen to list those books and articles that have greatly informed my thinking about the venture I was about to embrace. Each entry identifies the credibility of the source, followed by its application for Instar Learning Alliance.

### Annotated Bibliography

Allison, M., & Kaye, J. (2015). *Strategic planning for nonprofit organizations: A practical guide for dynamic times*. Hoboken, NJ: John Wiley & Sons, Inc.

After eighteen years of providing guidance for nonprofit organizations, Allison and Kaye's third edition reflects the need for sustained efforts by leaders of nonprofits to understand all of the changing external pressures that impact the success of their programs. They have added more worksheets and specific examples that clarify the work that needs to be completed by strategic planning teams and linked these to online resources. Based on their work with hundreds of clients, both the framework and the individual sections reflect a direct and practical roadmap for developing a successful business model.

As someone unfamiliar with developing a business plan for a nonprofit, I valued Allison and Kaye's step-by-step process for examining the critical elements that comprise a dynamic plan. Instar Learning Alliance had already begun to design programs for an intended audience based on assumptions that proved to be incorrect. This guidebook brought attention to specific exercises and activities that the organization must complete before finalizing a business model. Learning the vocabulary of strategic design increased our nonprofit's knowledge and therefore, our credibility among our colleagues and intended future partners and potential funders.

Bergvall, C., Consultant at The Catalyst Center for Non-Profit Management, Warrington, PA.

Bornstein, D. (2007). *How to change the world: Social entrepreneurs and the power of new ideas*. New York, NY: Oxford University Press, Inc.

In his introduction, David Bornstein, a journalist who predominantly writes about social innovation, explains that his book is meant to call attention to a particular type of individual who creates social change – a positive change agent – a social entrepreneur whose force in the world is “transformative.” Although he highlights the work of remarkable men and women whose beliefs in their own innovative ideas and their persistence to implement their dreams have made profound differences in people's lives throughout the world, he writes to let us know that these individuals are just like you and me. They come from all walks of life. What unites them is their ideas to improve people's lives. From a restless, growing need to do something, social entrepreneurs begin a movement that may end in systemic and permanent change.

I do not see myself in the category of the social entrepreneurs spotlighted in Bornstein's book. The scope of their outreach is much broader than mine. However, I have always been restless. I could relate to the inner drive that propels one to ask, “In what ways might I?”

Bornstein's six qualities of successful social entrepreneurs have become a virtual GPS for Instar Learning Alliance. The willingness to self-correct, to share credit, to break free of established structures, to cross disciplinary boundaries, to work quietly, and to be ethically motivated is evident in the journey we have begun.

Callahan, D. (2017). *The givers: Wealth, power, and philanthropy in a new gilded age*. New York, NY: Alfred A. Knopf.

Who's really in charge of America these days? In our new world of multi-billionaires, an elite population of the wealthiest Americans, anything can be bought. Wealth and power are often synonymous, as they were in the first gilded age of the Rockefellers, the Fords, and the Carnegies, concentrated in New York, Chicago, and Boston. Callahan, founder and editor of Inside Philanthropy, a digital media site that covers the world of giving (<https://www.insidephilanthropy.com>), paints a different picture, circa 1990. He described a population of wealthy Americans from diverse industries, of independent women, of millennials who never knew life without the internet to octogenarians who have never sent an email. Here is his portrait of these new philanthropists and why they give and to whom. Money of this magnitude held in the hands of a few individuals can – and is – creating a paradigm shift. Everything is for sale – elections, industrial empires, energy, food supplies, water, education, and health care. How will we all adjust to this new monetary landscape?

As a new executive director of a very small nonprofit, I picked up this book thinking that I would find a possible funding source for Instar Learning Alliance. What would a donation of \$50,000 be to a billionaire, just pocket change that would fund us for more than two years. What I discovered is that the landscape for philanthropy has changed dramatically. While there are many who could buy a tech firm or a Hollywood studio or Costco, small nonprofits that provide

services to underserved populations are finding their funding sources diminished. Unlike social entrepreneurs who may be ethically motivated, not all of the new philanthropists have the same ends in mind.

Callahan writes about the need for accountability, about foundations that collectively and collaboratively can reshape America's destiny. He questions which nonprofits should qualify for tax exemptions. He wonders who the watchdogs are. Do we know how our charitable contributions are really being used? He closes with a disturbing question: Does government still speak for ordinary Americans? He suggests that democracy can be – or has been – bought.

Cohen, G.D. (2000). *The creative age: Awakening human potential in the second half of life*. New York, NY: Avon Books.

Before his death, Gene Cohen, M.D, Ph.D., was the Director of the Center on Aging, Health and Humanities at George Washington University. As a pioneering physician and respected authority on creativity and aging, Cohen introduces the reader to a new vision of the second half of life. He writes that becoming aware of our creative potential in our later years allows us to continue to feel empowered. By connecting our knowledge and experience to the extensive research on brain development and creativity, Cohen changes the trajectory of aging. Through multiple examples of productivity and creativity in individuals over the age of 60, Cohen peels back the negative stereotypes of aging and replaces them with inspiring and motivating new patterns to follow. Just as we have come to understand the early stages of human development – childhood, adolescence, adult – Cohen continues with four more developmental phases of adulthood- midlife reevaluation, liberation, summing-up, and encore - each a new opportunity for growth and creativity.

Instar Learning Alliance continues to rely heavily on the work of Gene Cohen in developing academic programs for seniors. Coupled with workshops on tools and techniques that can enhance personal creativity, these programs promote and encourage our seniors to remove limits from their view of what is possible. From Cohen's examples of famous older artists, writers, musicians, inventors, and entrepreneurs, Instar Learning Alliance moves seniors into an environment that fosters their own personal creativity.

Cohen, G.D. (2005). *The mature mind: The positive power of the aging brain*. New York, NY: Basic Books.

Based on cutting edge neuroscience and brain research, Cohen, former Acting Director of the National Institute on Aging, forecasts an optimistic future, greatly expanding his description of the four phases of adulthood he introduced in his seminal book, *The Creative Age: Awakening Human Potential in the Second Half of Life*. He suggests that many baby boomers, expecting to have twenty to thirty healthy years ahead of them, are already reinventing retirement. Cohen punctuates his research with real life stories of seniors redesigning their lives. He also includes an excellent section of resources for older Americans.

The mantra of Cohen's Liberation phase of adulthood is, "if not now, when?" Instar Learning Alliance is quick to encourage seniors to reframe their thinking about aging, to consider adding items to their "to do" lists, not eliminating them. Creative problem solving becomes a means to assist seniors in exploring possibilities for new ventures. Cohen's work has provided a sturdy foundation on which to build a nonprofit that celebrates older Americans.

Crutchfield, L.R., & Grant, H.M. (2012) *Forces for good: The six practices of high-impact non-profits*. San Francisco, CA: Jossey-Bass.

Crutchfield and Grant, authors, speakers, consultants, and recognized authorities on high impact nonprofits, identified six practices that truly help to address societal needs successfully. Having researched twelve nonprofits that have achieved wide-spread recognition, these authors explain how the six practices can be applied to small, local nonprofits.

When I first read *Forces for Good*, Instar Learning Alliance was not yet a nonprofit. I read about the six practices without fully understanding how they might apply to our vision and mission. Today those six practices speak loudly to who we are and who we are becoming. We now realize the importance of advocating AND serving, of developing partnerships, of becoming part of a non-profit network, of seeing each team member as an active spokesperson for the “cause,” of always being adaptive and flexible, and of building a strong executive team. Each chapter provides excellent examples that illuminate the effectiveness of a practice. More than that, Crutchfield and Grant included a chapter specifically highlighting small, local nonprofits and how applying the six practices changed their results. I can truthfully say the wisdom of Crutchfield and Grant has already made a positive impact on Instar Learning Alliance.

Elkington, J., & Hartigan, P. (2008). *The power of unreasonable people: How social entrepreneurs create markets that change the world*. Boston, MA: Harvard Business Press.

John Elkington, Co-founder and Chief Entrepreneur of SustainAbility, and Pamela Hartigan, Managing Director of the Schwab Foundation for Social Entrepreneurship, strongly believe in the power of unreasonable people to affect change. The rise of social entrepreneurship with its emphasis on non-traditional, creative business models is pushing the boundaries of how positive change is made and managed. While the focus of this book highlights the unique

business models of social and environmental entrepreneurs that have addressed societal global needs beyond the thinking and the reach of most local nonprofits, the conclusion offers some lessons and recommendations that informs the thinking of those whose missions and visions are perhaps less lofty.

I admit I was intrigued by the title and impressed by the international entrepreneurs whose stories astounded me. These “unreasonable” people all seemed to have a sixth sense about the future, seeing opportunities arising from events that have yet to occur, finding solutions to problems that have yet to be defined. On a scale so large, one’s courage is magnified. Fear of failure must take a back seat. These unreasonable people are game-changers. Those who tackle societal problems will not meet with immediate success. The most important thing is to “regroup and head toward the goal” (p. 200).

In its three years of operating as a nonprofit, Instar Learning Alliance has already discovered the need to regroup, to rethink and revise its mission, and to respond to the needs of a diverse community of seniors. Reading the stories of these social entrepreneurs humbled me but did not discourage me.

Fried, L.P. (2014). Making aging positive. *The Atlantic*. Retrieved from

<http://www.theatlantic.com/health/print/2014/06/valuing-the-elderl>.

Dr. Linda P. Fried, Dean of the Mailman School of Public Health at Columbia University, has been a leader in the field of geriatrics and has dedicated her career to the science of healthy aging. As a result of the increase in life expectancy, Fried suggested that we now need to address new challenges. She asked, “What do we want to do with the extra 30 years?” (p. 1). Her research revealed an overwhelming need for older adults to maintain a sense of purpose and meaning in their lives. She wrote that “we are a species wired to feel needed,

respected and purposeful” (p.1). In 1990, Fried partnered with Marc Freedman to create a new, high-impact social model for senior volunteering called The Experience Corps.

Instar Learning Alliance reflects the values embedded in both the Experience Corps and in CEO Marc Freedman’s Encore, Org., an organization that pioneers innovative programs tapping the talent and experience of people past midlife. This article became the affirmation we needed to move forward with our programs. Fried commented that the research on the impact of the Experience Corps “went way beyond what could have been predicted” (p. 4). These programs provide meaningful opportunities for seniors to apply their skills and experience to affect positive change.

Goldsmith, S., & Eggers, W.D. (2004). *Governing by network: The new shape of the public sector*. Washington, D.C.: The Brookings Institution Press.

Stephen Goldsmith, faculty chair of the Ash Institute for Democratic Governance and Innovation at Harvard University’s John F. Kennedy School of Government, and William D. Eggers, senior fellow at the Manhattan Institute for Policy research and coauthor of *Revolution at the Roots: Making Our Government Smaller, Better and Closer to Home*, joined forces to describe governing with partners. Governing by network, a partner-centric approach, is a “radical departure” from the hierarchial, top-down model of the 20<sup>th</sup> Century. Goldsmith and Eggers provided numerous examples of successful networks that have been able to serve the public interest in more efficient and effective ways. Roles and skill sets of government employees may need to change to support new models of governing. Governing by network is a response to the complexities of the problems we face. A “one size fits all” governing model is no longer effective.

Goldsmith and Eggers made one thing very clear to Instar Learning Alliance – collaboration and partnerships are a necessity in today’s social climate. Had I not assumed the position as an executive director of a nonprofit, I would easily have passed over this text. However, nonprofits are part of a growing number of public sector entities that wish to serve a segment of the community. Within its first two years as a nonprofit, Instar Learning Alliance realized the importance of studying the local landscape, meeting leaders of other organizations who also serve the senior population, and exploring ways to work together. Government funding streams change. Networks are often the safety net for smaller, more vulnerable nonprofits.

Jenkins, J.A. (2016). *Disrupt aging*. New York, NY: Public Affairs.

Jo Ann Jenkins, CEO of American Association of Retired Persons (AARP), urges seniors to “own their age.” In 2015, the *NonProfit Times* named Jenkins Influencer of the Year for her leadership and voice for change. Her timely narrative celebrates older Americans, encouraging seniors to take action in the areas of their health, in designing their lives, and in creating the kinds of communities in which they choose to live. “What fulfills you?” she asks, and then suggests that they actively look for opportunities that give them a purpose and a sense of fulfillment. Jenkins disregards commonly held stereotypes of aging in favor of a forward-looking image of older adults who are connected to others, productive, and satisfied with their lives.

Disrupt aging is precisely what Instar Learning Alliance strives to do. Through our interactive workshops, seniors have opportunities to address issues that they confront in their daily lives. By improving the problem-solving skills of our participants, we change their expectations for a brighter future. We value their creative ideas and facilitate activities that result in strategies for positive change.

Having voices like Jenkins, calling attention to a new generation of older Americans and their potential as productive members of society, gives credence to the programs and workshops that Instar Learning Alliance offers.

Osterwalder, A., & Pigneur, Y. (2010). *Business model generation*. Hoboken, NJ: John Wiley & Sons, Inc.

The story of how this book became a reality is proof positive that the creators of it were themselves visionaries and game changers. From Osterwalder's 2004 Ph.D. dissertation with Professor Pigneur to the conceptual thesis model being applied online around the world, the bound paper volume was, in essence, the combined work of 470 practitioners in 45 countries! To say that "this is not your ordinary business model textbook" would be an incredible understatement. Colorful, highly visual in content, and obviously creative, the contributors selected Creative Problem Solving (CPS) as a preferred process. There are recognizable elements of CPS and "out-of-the-box" thinking. Although somewhat difficult to read because of the small print, the recommended techniques for developing a business model involve teams in highly productive sessions that yield distinctively different results.

Although the business model terminology may have been new to us, the process outlined for generating a unique business model relied heavily on familiar creative problem solving techniques that the team at Instar Learning Alliance knew and understood. We valued the guidance of the creative minds whose suggestions challenged our thinking.

Puccio, G., Mance, M., & Murdock, M.C. (2011). *Creative leadership: Skills that drive change*.

Thousand Oaks, CA: SAGE Publications, Inc.

From the International Center for Studies in Creativity at the State University of New York, Buffalo, Director Gerard Puccio and faculty members Marie Mance and Mary Murdock have crafted a definitive handbook for change leaders. Built on the framework of their Thinking Skills Model and the foundational skills of creative problem solving, this seminal work reflects the years of research and development of a model that equips today's leaders with skills that will make them highly effective change agents.

Each chapter focuses on one stage of the problem solving process - outlining the skills needed to assess the situation, exploring the vision, formulating a challenge, generating ideas, searching for solutions, finding acceptance for ideas, and planning for action. A skilled leader moves easily from critical thinking to creative thinking, from diagnostic thinking to visionary thinking, from the cognitive to the affective domain. Puccio, Mance, and Murdock skillfully provide the leader with both the background knowledge and the direction to facilitate a process for positive change.

The three co-founders of Instar Learning Alliance facilitate creative problem solving and have designed programs for senior citizens that incorporate creativity and problem solving and serve to keep seniors engaged in productive activities that contribute to building the social capital of their communities.

Seligman, M.E.P. (2013). *Flourish*. New York, NY: Atria Paperback.

In *Flourish*, Dr. Martin Seligman, Director of the Positive Psychology Center at the University of Pennsylvania, unveiled his theory of well-being. Built on his extensive research on positive optimism, Seligman's five measurable elements that make-up the construct of well-being offer individuals a different lens through which to view their lives. Each of the five elements – positive emotion, engagement, positive relationships, meaning, and achievement –

collectively create well-being in individuals. Seligman provides interactive and thoughtful exercises that personalize each element. By extension, the esteemed psychologist envisions schools, corporations, and communities flourishing.

Instar Learning Alliance has developed a one-hour presentation based on Seligman's ground-breaking research and book that supports the changing image of older adults. Keeping purpose and meaning in one's life, maintaining relationships and staying actively engaged all serve to promote optimism about one's future. Having something yet to achieve on one's to do list is an undeniable motivator. Seligman's message brings hope to an aging population.

Seligman, M.E.P. (2006). *Learned optimism: How to change your mind and your life*. New York, NY: Vantage Books.

As a young psychology major, Martin Seligman questioned why his field of study focused more on pessimism, depression and mental illness instead of optimism, happiness, and well-being. Consequently, the founder of the Center for Positive Psychology at the University of Pennsylvania established himself as the leader of the positive psychology movement. His book, *Learned Optimism* shifted the public's focus from the popular, unscientific, "pollyanna-ish" belief in the power of positive thinking to his researched-based understanding of learned optimism. From *Learned Optimism* to *Authentic Happiness* to *Flourish*, his books chronicle a professional career of extensive research that is the hallmark of his exceptional contribution to human development.

Instar Learning Alliance has received numerous requests for a program on positive thinking. We take that opportunity to move our audiences from the well-known work of Dr. Norman Vincent Peale to Seligman's research-based science of learned optimism and on to his theory of well-being in *Flourish*.

## **Conclusion**

The resources listed here have moved the founders of Instar Learning Alliance from educators and facilitators of creative problem solving to their new roles as executive director, communications director, and director of facilitation. Through the application of knowledge gained from these successful entrepreneurs and consultants, we embarked on a journey whose destination was only vaguely understood. As we approach the end of our second fiscal year, we are poised to begin a new phase of development.

## **SECTION THREE: PROCESS PLAN**

### **Goals and Outcomes**

Writing the formal business plan for Instar Learning Alliance will require the careful integration of forced divergent and convergent thinking with the detailed and analytical application of the accepted formats that comprise strategic planning for nonprofits. As a prerequisite to becoming a 501(c)(3), the first portion of the business plan has been written. Instar Learning Alliance has an identifiable team, a Board of Directors, a mission, a vision, and current programs. In addition, Instar has a website that provides a presence on the internet ([www.instarlearningalliance.org](http://www.instarlearningalliance.org)).

The three critical areas that had not been addressed by the co-founders of Instar Learning Alliance are: 1) the analysis of the changing external environment, 2) the importance of the theory of change, and 3) critical success factors. The implementation roadmap, another identified portion of the business plan, may also change as a result of the findings from the three areas of analysis. Recognizing that our organization is now at a critical growth juncture, Instar Learning Alliance has obtained the services of a Certified Public Accountant (CPA) from The Catalyst Center, a nonprofit that serves fledgling nonprofits in our geographic area. Our consultant has reviewed the first three years of the budget and provided us with the expertise needed to design a financial plan for growth. She continues to work in conjunction with our accountant on the financial piece of the business plan and has met with our entire team to identify areas in the external environmental analysis, the theory of change, and the critical success factors.

Over the past two months, I have studied in depth the strategic planning guidelines for non-profit organizations regarding the external environmental scan, the importance of the theory of change and its impact on Instar's program portfolio and critical success factors. The Instar team has convened several times to address questions, consider alternative scenarios, and decide on a path forward. Using the tools of creative problem solving, we carefully explored ideas that took us into unfamiliar territory where we needed to be in order to grow.

Having realized the importance of networking and collaborating with organizations that shared similar missions and served the same population, in September 2017 Instar Learning Alliance joined the Bucks-Mont Collaborative, a nonprofit that supports the efforts of organizations serving a two-county area of eastern Pennsylvania. Through this collaborative we had the opportunity to share our mission and programs with others who may want or need our services. The Board of Directors of Instar Learning Alliance formally moved to make the building of alliances its primary goal during the present fiscal year, which runs from September 1, 2017 to August 31, 2018.

As we reached out to potential new clients through the Bucks-Mont Collaborative, we discovered new areas of our external environment, areas that may contribute to our future success or impede our development and expansion. Meetings with potential partners are reflected in the project timeline and fall within the external environmental analysis.

A secondary goal was to have a new marketing piece for Instar Learning Alliance. We had been very fortunate to have a local graphic designer agree to develop this piece for us as an in-kind contribution. This piece cannot be finalized until we have completed a second analysis of our target audiences as a result of the meetings we have had with potential partners. Although our focus on seniors will not change, it is possible that requests from new partners may find us

delivering services to the staffs or administrators of other organizations and/or to the people they serve. Training other clients in the tools and techniques of creative problem solving could potentially be a source of income for Instar that will fund more activities for our older citizens. This would then be reflected in the marketing portion of the business plan. That marketing piece will not be completed until August of 2018.

The last four years have been a study in the tolerance of ambiguity. Instar Learning Alliance is a dynamic, fluid entity that has been informed by the experiences we have had with our intended audiences. We have adjusted some programs, created new ones at the request of clients, and struggled with service fees. Developing a business plan will enhance our credibility with funding sources and provide a framework that can ensure a more successful future and a pathway to permanence. This project centers on our immediate need to complete the external environmental scan that will provide critical information about our intended audiences. It includes an examination of the theory of change as it applies to our participants and clients and the Instar's team analysis of critical success factors.

### **Project Timeline**

This project continues to be informed by the activities and commitments of the non-profit organization and the creative ideas of the Instar team. The timeline indicates meetings, workshops, and presentations that have advanced the goals for this fiscal year. However, with the exception of the financial analysis and the budget, which will be completed by Instar's accountant with the guidance of the professional CPA, I have been responsible for leading the analysis of the external environment, the theory of change, and the critical success factors. The time-line reflects those work sessions.

**February**

<b>Scheduled Dates</b>	<b>Purpose</b>	<b>Time to Complete</b>
February 8.	Instar team meets with CPA consultant 1-3 pm.	With travel 5 hrs.
February 11.	Concept paper submitted	
February 13.	Presentation to the Bucks-Mont Collaborative Purpose: To inform members of the Collaborative of our CPS programs and how we might be of help to their staffs and/or clients	Prep/Travel 4 hrs.
February 15.	Instar Meeting to schedule strategic planning work sessions Prepare discussion questions for evaluation of a residence council training completed in 2017	3 hrs.
February 20.	Return to the residence council that received training in February 2017 to receive feedback on effectiveness. Continue work on “empathy map” for external environmental scan	
February 22.	Instar work session for input on strategic planning	With travel 6 hrs. 5 hrs.

**March**

During the month of March, I read the two texts on strategic planning for non-profit organizations and consulted with members of the Collaborative and the Instar team. I assembled the reading materials needed to advance the development and writing of the plan, focusing on strategies for the external environmental scan, theory of change, and the critical success factors. I spent approximately 25 hours on the project. In addition, I prepared talking points for a meeting with the staff of a Veterans’ Center, a potential new client that took place on April 2.

## April

Scheduled Dates	Purpose	Time to Complete
April 2.	Presentation to the staff of a nonprofit that serves veterans. Possible partnership to train their staff.	With travel 3 hrs.
April 3.	Instar strategic planning meeting 10:30-2:30	4 hrs.
April 5	Instar strategic planning meeting 11:30- 2:30	3 hrs.
April 9	Instar strategic planning and May event 10-2:30	4.5 hrs.
April 12	Instar strategic planning and May event 10-2:30	4.5 hrs.
April 16	Instar strategic planning and May event 10-2:30	4.5 hrs.
April 17	Writing the outcomes of the strategic planning	8 hrs.
April 18	Attended a training workshop by the Anti-Defamation League on prejudice, bias, racism 8-12:30	With Travel 6.5 hrs.
April 19	Writing the outcomes of the strategic planning	7 hrs.
April 20	Working on chapters 4, 5, and 6 of project paper	7 hrs.
April 21	Working on chapters 4, 5, and 6 of project paper	8 hrs.
April 22	Working on chapters 4, 5, and 6 of project paper	8 hrs.
April 23	Public relations work for the May event	5 hrs.
April 30	Final rehearsal for May event 11-2:30	3.5 hrs.
May 1	The Creative Age: 55 & Better! Celebrating creativity in the second half of life and spotlighting older “creatives” in our community at our public library	3 hrs.
May 2	Final editing of body of paper	4 hrs.
May 3	Preparing introductory pages, references appendix	6 hrs.

May 4	Completing paper for submission	6 hrs.
May 10	The Creative Age: 55 & Better! (Repeat)	3 hrs.
		Total 142 hrs.

### **Evaluation Plan**

This project - the strategic planning process for the development of the business plan will impact the future direction of Instar Learning Alliance. The business plan will reflect the creative and critical thinking of the Instar team in the programs Instar will offer organizations and individuals who serve older Americans. Initially, the business plan will be reviewed and evaluated by two independent Certified Public Accountants (CPA) who will provide suggestions, if needed, to strengthen the document. Ultimately, the effectiveness of the business plan will be judged on its ability to attract donors, volunteers, and new Board members to support the programs. The founders of Instar Learning Alliance fully understand that the next three years are critical and will determine whether the entity establishes itself as a viable – and permanent – nonprofit.

## **SECTION FOUR: OUTCOMESIntroduction**

This project focused on three specific areas of strategic planning: the external environmental scan, the importance of the theory of change, and the identification of critical success factors. During the early stages of Instar Learning Alliance's development, the founders needed to write both a mission and a vision statement and provide a description of the proposed programs and intended audiences in order to apply for status as a nonprofit. It was not necessary to engage in extensive strategic planning or to write a business plan in order to become a 501(C)3. We eagerly offered our creative problem solving workshops to a few welcoming senior centers in our immediate communities. By the middle of our second fiscal year, we realized that we might be missing some pertinent information. The meeting with the consultant from the Catalyst Center indicated we were correct in that assumption. She strongly suggested several strategic planning activities.

Since the founders of Instar Learning Alliance serve as the working Board and therefore, design, develop, and implement the programs of the nonprofit, it is critical for these three key members to understand the external context in which they serve. While environmental scans can include a broad spectrum of areas for research, Instar Learning Alliance identified four environmental issues that relate to the nonprofit's programming and future direction: 1) demographics, 2) needs of the population that is being served, 3) trends and developments in state funding for aging, and 4) changes in competition (Allison and Kaye, p. 100). Each member of the team had several weeks to think critically about these four factors. Although Instar Learning Alliance currently serves populations predominantly in Montgomery County, Pennsylvania, our external environmental scan revealed good reasons to strongly consider expanding our sphere of influence.

## Scanning the External Environment

### The Demographics

In the December 1, 2017 issue of the Central Penn Business Journal, Jason Scott reported that the “65-plus population in the commonwealth grew 13.5 percent from 2010 to 2016,” according to the Pennsylvania State Data Center drawn from the U.S. Census Bureau. There are now 2.2 million people over the age of 65 in Pennsylvania.

<http://www.cpbj.com/article/20171201/CPBJ01/171209988/aging-in-pennsylvania-65plus-population-has-grown-by-135-percent-this-decade>. The demographics suggest that the need for services and programs to a senior population will certainly not decline in the near future.

Statistics from the LeadingAge PA, a statewide association of not-for-profit providers of long term services and supports for older adults, shows a dramatic growth in the age 65 to 84 population over the next two decades,

<http://www.cpbj.com/article/20171201/CPBJ01/171209988/aging-in-pennsylvania-65plus-population-has-grown-by-135-percent-this-decade>. From our work in both senior centers and senior resident communities, the Instar team discovered the important differences in how our programs were received by the spectrum of older adults. We understood from the demographics that as this population ages, their needs will require changes in the programs that currently serve them.

### Descriptive Results of the Empathy Map

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After two years of introducing creative problem solving to a variety of senior audiences, Instar Learning Alliance clearly understood that a “one size fits all” approach to the senior population would not be successful. As part of the strategic planning process, Instar examined the needs of the senior population using an Empathy Map, a tool designed by visual thinking company XPLANE (Osterwalder & Pigneur, p.131). First, we identified three specific groups of seniors that we had served: independent seniors living in private homes, independents in resident communities, and residents in assisted-living communities. Those in assisted-living facilities ranged in age from 80 to 95. As a facilitation team, we had observed groups and talked to many participants about their lives. Although we did not formally interview individuals, each of us had many conversations with our participants. We used the questions provided by the empathy map as a guide for us to describe what we knew about the three groups we currently served.

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- 1) What do these seniors think and feel? What worries them? What is most important?
  - 2) Who or what influences these older citizens? What do friends tell them?
  - 3) What is their environment like?
  - 4) What do they say and do in public? What is their attitude? Appearance?
  - 5) What are their fears? Frustrations? Obstacles in their lives?
  - 6) What do they want and/or need? When do they feel successful?
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The time spent on this exercise provided invaluable information that we needed to redesign successful programs and new marketing pieces. The outcomes reflect the enormity of clarity received from this one strategic activity.

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Perhaps the most startling revelations occurred during our team discussions, as we read through notes from workshops and conversations we had had with our participants. Our responses to the questions created snapshots of three groups of adults, all 65 and older, but having different expectations and needs in regards to the programs Instar Learning Alliance offers.

For most seniors living in their own homes or apartments, independence equated with freedom of choice. The independent seniors who remain in their own homes and still drive have the freedom to choose from among many educational, recreational, and cultural programs within a 5-20 mile radius of their homes. What really counts for them is their ability to stay independent. They worry about losing their ability to drive. They are concerned about chronic health issues that might lead to a disability that could restrict their independence. The friends that they meet at the senior centers or in educational classes or at the gym have the same fears. They are buoyed by the research that tells them to continue to use it or lose it. They pride themselves on their good health and ability to showcase 70 as the new 50. These independents may have made plans for themselves to join a resident community at a time when they feel ready. If so, their income is such that they may continue to travel, to stay actively engaged as grandparents, and to enjoy physical activities with intergenerational friends and family. If they are not experiencing financial or physical concerns, their attitudes tend to be positive and upbeat. They maintain an entertaining sense of humor. What frustrates them are people who put them in an “age-related” box. Ageism is alive and well in many communities. Their greatest fear seems to be the onset of the inevitable changes in physical and mental abilities that will erode their independence.

When this group of more affluent independents do move into a long-term care resident community, they tell us that they wished they had made the move sooner. These independents have taken the burden of concern off the shoulders of their children. These plush senior communities provide a variety of meal plans, housekeeping, lawn care, and on-site medical support. Social engagement is everywhere – in the billiard room, gym, woodshop, greenhouse, and bistro. Bridge, pinnacle, mahjong, bingo, shuffleboard, golf, tennis, swimming, and pickle ball are usually available. The security of the long-term care simply means that the resident can glide easily from independent living to assisted-living and into personal and memory care facilities in the same complex if and when the need arises. The anxiety that comes with having to make life changes has been lessened by their decision to become part of an extending living community. Their resident community is all-inclusive.

Our second group, those independents who do not have the financial resources to move into many of the residential communities, have other or additional concerns. Their fixed incomes often prevent them from making the choices they might prefer. For example, several of our pilot program participants told us that the nominal fee we were going to charge for our next round of workshops was still too much for them. While they thoroughly enjoyed the CPS workshop and would like to return for more, when faced with either paying for a medical prescription or a CPS workshop, they really had no choice. These independent seniors are still independent because they can have a hot meal at the senior center for \$2.00 and take an aerobics class for a donation. The senior center offers transit service to those who sometimes need transportation. They can contact care-giver entities to help with housekeeping and lawn care and rides to doctors' appointments. They have limited disposable cash. Their greatest fear is the loss of independence and the need to move in with a son or daughter or be placed in a less than

desirable senior resident community. They want to continue social engagement, mental stimulation, and physical activity, but, in many cases, are finding that they cannot always afford to pay for these “luxuries.” They depend on senior centers or the YMCA for their lower cost programs.

The third group we served are residents of an assisted-living community. These seniors are comparatively older, 80-95. Many struggle with loss of hearing or vision problems. For some, chronic illnesses, such as heart disease, diabetes, arthritis, or Parkinson’s, cause some degree of disability. Setting up the room for a CPS workshop in this environment requires attention to the need to navigate with walkers and wheelchairs. Those with hearing or vision issues need special seating. Lack of mental acuity changes the dynamics of the language-based process of creative problem solving. For this group, the world is often limited to the building in which they live, which includes their room or apartment, the community dining room, and social areas where activities like ours occur. They rely on family members to take them out to restaurants or home to family gatherings. Those who have no family nearby depend on the staff to assist them with daily tasks they cannot do for themselves. The need to emphasize well-being and positive thinking is readily discerned. Some seniors have already put themselves in an “age-related box.” There is nothing left on their “to do” lists. They feel as if they have given up control over most things in their lives. While some continue to be optimistic and hopeful, many others simply seem resigned to their circumstances. Yes, Instar Learning Alliance certainly has potential clients, but what we initially had to offer did not always seem to fit their needs or wants, at least not in the way we had envisioned.

## **Funding Trends**

The Pennsylvania Department of Aging (PDA) develops, implements and administers State Plan on Aging. One of the key initiatives of the PDA's 2016-2020 State Plan is AgingInPlace (<http://www.aging.pa.gov/publications/state-plan-on-aging/pages/default.aspx>). The concentrated effort to keep seniors in their homes could require creative solutions to the challenges facing these retirees. Through meetings with other members of the Bucks-Mont Collaborative, Instar Learning Alliance learned about critical changes in how state funds for services to the elderly would be directed. Entities that are specifically designed to provide direct service to current independent seniors are expected to see an increase in their budgets. We recognized the possibility of partnering with the nonprofits providing in-home care services. If these entities were to increase their program budgets, Instar could be hired by these nonprofits to work with both their staffs and their clients – independent seniors.

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The Instar team's discussions involving demographics, the changing needs of the aging population, and new state initiatives would impact our future programming choices.

## **The Competition**

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Realizing the magnitude of our competition opened our eyes to the importance of understanding our external environment. At first the large national organizations, such as AARP (<https://www.aarp.org/>), or the Retired and Senior Volunteer Program (RSVP) (<http://www.cssny.org/programs/entry/retired-and-senior-volunteer-program>), and Next Avenue (<https://www.nextavenue.org/>) were not really on our radar screen. We had thought of our competition as only those programs in the senior centers or resident communities. However, these national organizations not only have state and local chapters providing information and on-line opportunities for seniors, but are often linked to many more online sites and often promoted

in the newsletters of local community centers. Community colleges and universities, as well as afternoon and evening educational programs at local high schools, offer a variety of on campus and on-line educational programs at a nominal cost to the senior participant. After presenting at a few senior centers and in several resident communities, we were far more aware of the extensive in-house programming available to the older adult population. Despite the fact that we knew creativity and problem solving workshops were not being offered by other groups or organizations, we now were aware of how difficult it was to add to the choices already available to this population.

This first phase of strategic planning – the external environmental scan – made us realize the value of learning as much as possible about the context in which we operate as a nonprofit.

### **The Theory of Change: What It Revealed**

When the Instar team met with our consultant from the Catalyst Center for an overview of the strategic planning process, she asked all of us what changes we expected our programs to make in the lives of our participants. What impact did we want Instar Learning Alliance to have? How did that impact fulfill our mission? As a result of those questions, the Instar team spent time considering “the causal links between programs and the outcomes desired” as part of the theory of change (Allison & Kaye, 2015, p. 119). The theory of change “claims that if you have the necessary resources and use them to conduct program activities with certain observable outputs based on certain assumptions, then the desired change will take place” (p. 119).

The theory of change would require that we identify the resources we now had at hand – the three working board members, our expertise, and limited funds. Second, we needed to identify the activities that presently define Instar Learning Alliance – programs on well-being and creativity and CPS workshops tailored to the varying needs of groups of seniors. The third

component of change is that it results in identifiable outcomes. As the team discussed the implications of the theory of change, we realized that we had never considered the impact of our programs in terms of an “identifiable change.” While we enjoy our interaction with our participants, we have been unable to determine whether we have made any difference in their lives at all. As former teachers, we believed in the value of life-long learning. We knew that the research on well-being included engaging groups, stimulating the critical and creative thinking of participants, and offering a warm, welcoming environment for exchanging ideas and addressing challenges.

A business plan must include a business model that reflects the components of the entity’s impact on its clients. Funders and donors expect a nonprofit to make a difference – to change attitudes, to change public opinions about aging, and/or to change the lives of the senior population we seek to serve. We admittedly had not thought about the role of change in garnering financial support for Instar’s programs.

Examining the theory of change in relation to yet another area of strategic planning – critical success factors – made us question the future of Instar Learning Alliance.

### **Critical Success Factors: Did We Know What We Wanted**

The third important question posed to us by the consultant from the Catalyst Center involved critical success factors. How would we know Instar was successful? The Instar Learning Alliance team had never really clarified what each of us thought about success. What were our critical success factors? For the first time, the co-founders, after three years of facilitating and teaching together in a myriad of settings, spoke from the heart about what each of us wanted success to look like. The outcome of this intense emotion-packed session certainly made us question the future of our creative endeavor.

All three of us came to the table with our critical success factors in hand. We listed what Instar Learning Alliance must do well in order to succeed.

- 1) Maintain a presence on social media through our website, blog, and facebook.
- 2) Be recognized as an educational nonprofit that promotes the well-being of seniors.
- 3) Be a sought-after resource for creative problem solving facilitation.
- 4) Expand the Board of Directors and shift its purpose to that of fund-raising.
- 5) Attract volunteers who have a background in facilitation and/or wish to be trained in creative problem solving and facilitation.
- 6) Establish Instar Learning Alliance as a voice to combat ageism.
- 7) Partner with established organizations that serve the senior population.
- 8) Create the concept of a “senior corps” of problem solvers that addresses real issues.
- 9) Continue to keep seniors visible, vocal, and valued in many different ways as Instar’s primary focus.
- 10) Find one or more “angel” donors whose sponsorship would attract other donors.
- 11) Become a more diversified facilitation team – gender, race/ethnicity, age.
- 12) Actively recruit volunteers/facilitators from the communities we have served.

We stared at the newsprint. Our biases were evident. We had established an entity that would now require an inordinate amount of time to maintain and grow. Some of us just wanted to facilitate CPS or create a program to teach about well-being and creativity or be a spokesperson for positive aging. Others wanted to grow the entity. We all wanted more help to do everything. Three passionate teachers/facilitators, using the tools of creative problem solving, had created an entity that now promised to control their time and talent. Instar Learning Alliance had reached a critical juncture.



## **SECTION FIVE: KEY LEARNINGS**

### **Introduction**

In reality, the development of the nonprofit Instar Learning Alliance IS my Master's project. Instar has been my defining creative endeavor, a manifestation of an idea brought into being by applying the tools of Creative Problem Solving. It has incorporated facilitating CPS, designing academic programs, and developing partnerships in the community. I have learned much in the process of birthing Instar Learning Alliance. The knowledge that I have added to my experience bank falls into three main categories: 1) the process of building a new organization, 2) the importance of understanding context, and 3) personal growth as a change leader.

### **From Concept to Reality**

The decision to apply for status as a nonprofit brought mixed feelings to the co-founders. Excitement, trepidation, and courage to step into the unknown fueled us. The energy generated by the first three successful pilot programs, followed by an invitation to deliver four academic programs to a large group of seniors from seven different residence communities, encouraged us and solidified our earlier decision. Transforming Instar Learning Alliance into a bona fide nonprofit created immeasurable stress. In hindsight, the process of becoming a nonprofit was a bit like boiling a frog. We started cold – no roadmap, no GPS. Each semester of the Master's program presented an opportunity to add to the development of Instar. By the time the water began to boil, we had achieved the 501(C)3 status and needed to produce a business plan to secure a fiscal future.

During those four years of development, we trusted the advice of friends and colleagues who steered us in the right direction. We relied on expertise from an accountant and a lawyer

who knew how to traverse the state and federal terrain of nonprofits. We became knowledgeable about operating a business, building a website, running a fund-raising campaign, and responding to the needs of our intended audiences. We realized the important need to forge partnerships with established organizations whose support and counsel strengthened our resolve.

We also learned that we held assumptions that were incorrect. We believed that the uniqueness of our workshops would entice seniors and activity directors to hire us. After our first free pilot programs - workshops on Creative Problem Solving - met with positive results, we were eager to begin offering our workshops for a nominal fee, certainly far below what we would have received in a corporate setting or for an educational inservice. Despite the low cost and our attention to keeping the parts of the workshop to 90-minute segments in time slots recommended by the senior centers, only a handful of seniors registered. We opted to reschedule.

Charging a modest fee for our workshops seemed reasonable. Having to cancel a workshop left us despondent and troubled. We expanded what we were willing to do, tailoring workshops to specific senior audiences. Asked by one senior resident community administrator if we could train a resident council in the skills of creative problem solving, we, of course, accepted the challenge and designed a four-day workshop for which we were more fully compensated for the preparation and implementation.

We learned that building an organization requires the ability to adjust to a changing landscape. Our enthusiasm for what we loved to do – facilitate and teach – was not always enough to overcome obstacles. We remained optimistic and flexible. We understood that becoming a sustainable entity took much more time than we had given it. However, we now knew that we needed to do some serious fact-finding. Fortunately, to take the next steps in

preparing to write a business plan, the strategic planning process would require us to examine the context in which Instar Learning Alliance operated.

### **The Importance of Context**

From this semester's focus on strategic planning, the founders realized the value of acceptance-finding, that critical last step of Creative Problem Solving that asks the important questions about whether one's creative idea will be met with support or resistance. From the outcomes of the external environmental scan, the impact of the theory of change, and the critical success factors, the Instar team found itself at a crucial juncture, one that would require more serious problem solving.

Certainly the demographics of the expanding senior population would support another nonprofit serving this sector. However, Instar Learning Alliance now had a much clearer picture of at least three distinct groups of seniors with very different needs and expectations. Which group of older citizens would become their target audience? What impact would Instar Learning Alliance have on that population? How would that impact be recognized? Which of the twelve critical success factors identified by the Instar team could the nonprofit productively and successfully address? The team realized the enormous complexity of refocusing Instar's mission and vision. To produce a business plan that would attract potential donors required analyzing all of the acquired data and converging on specific goals and objectives.

One key learning for the Instar team was realizing that they had built an entity that would require additional staff and volunteers in order to grow and survive. The Instar team faced a dilemma. Would they find ways to limit the growth of the nonprofit by narrowing its mission to one that could be fulfilled by the co-founders? Or would they decide to spend time garnering

resources and volunteers to support a broader mission? What would be the commitment of each of the original founders now that their creative idea had become a reality?

### **Perspectives of a Change Leader**

Despite the fact that our first mission was “to teach a creative problem solving process that transforms learners into innovative thinkers and facilitators of positive change,” the co-founders of Instar Learning Alliance became increasingly aware that they were not the change agents they had set out to be. Through their interaction with seniors in many settings, they sensed the emergence of a different mission. Instar Learning Alliance could fight ageism. Instar could keep seniors visible, vocal, and valued. Our first mission left potential donors scratching their heads and asking, “Well, what exactly do you do?” Our revised mission more often made them reach for their wallets. Keeping seniors visible, vocal, and valued was a more noble cause.

Now the team had new challenge statements to address: In what ways might we keep seniors visible? Keep their voices heard? Keep them valued in their communities? In our nation? These questions excited us. There were unlimited possibilities. In May, Older Americans Month, Instar Learning Alliance presented its first public program to spotlight local seniors and their creativity: The Creative Age: 55 & Better! ([www.instarlearningalliance.org](http://www.instarlearningalliance.org)). As the Executive Director of Instar Learning Alliance, I felt good about spotlighting those special creative seniors in our community. I was proud that Instar could be seen as a support for the well-being and creativity of our older citizens. I thought about making Older Americans Month (May) a time for Instar to sponsor an annual event to celebrate the senior community.

Despite the good feelings of this latest program, I felt uncomfortable with how far we had strayed from our original mission. The strategic planning process had forced me to investigate and question the convoluted path that we had taken. Each decision made during the past three

years was based on the information we had gathered from our own experiences doing what we had originally set out to accomplish. Each venture into unknown territory informed us and brought us to a new place. Perhaps the role of a change leader is to allow for the members of her team to experience the frustrations and exhilaration of building an infrastructure together. Her leadership is marked by her inclusiveness, her willingness to allow the team to struggle with the future, to make the difficult decisions, and to collaboratively decide the fate of the organization.

Whereas engaging in the process of strategic planning - exploring the external environment, the impact of change, and the critical success factors – revealed a number of key learnings, Instar Learning Alliance’s four-year journey from creative conception to a functioning nonprofit validated the value of creativity and problem solving and its direct impact on every aspect of this new organization. If anyone would have told me that at 74 I would be finishing a Master’s degree in Creativity, Problem Solving, and Change Leadership, and as a result of that program I would be the executive director and co-founder of a non-profit organization whose mission is to keep senior citizens visible, vocal, and valued, I truly would not have believed it.

What I have learned is that years of experience and thoughtful reflection combine to fuel the next wave of creative production. This journey forced me out of a comfort zone and into an arena fraught with challenges. I learned the value of trusting others with my dream, something I had always resisted. For the first time in my professional life, I was working outside of an institutional framework. I had to build my own infrastructure. At a time in life, when the loss of independence is feared by so many, I would like to facilitate a challenge statement that says “In what ways might we see the positives in being interdependent?” What do we gain instead of what do we lose?”

Judging from the long list of critical success factors, the team of Instar Learning Alliance has a steep hill to climb. However, we have added an enormous amount of knowledge and experience to our stockpile by simply taking one step at a time, applying our creativity and problem solving skills, and continuing to move forward. The next steps beckon.

## SECTION SIX: CONCLUSION

When I consulted the CPA from the Catalyst Center in November of 2017, explaining that we didn't seem to be growing as fast as I would have liked, her immediate comment was that our timeline was way too short. A nonprofit like Instar will take years to reach a level of visibility and recognition, to obtain partnerships and sponsors, and to be known for its mission and vision. Her advice that day? "Go have coffee in the community." I believe what she meant in all honesty was that Instar Learning Alliance is a viable and valuable entity. Go sell it.

As much as I believe that being seen in the community, networking with other organizations and individuals, does increase visibility and recognition, I also know that in the real world of fiscal responsibility, a unique business model wrapped in a coherent and sound business plan is essential to an organization's long-term growth and stability. My next step is to review all of our resources and current programs in relation to the strategic planning information we generated and begin the slow process of analyzing the data. The founders of Instar Learning Alliance will need to agree on a mission that can be supported by current or future programs that will result in an observable and, hopefully, measurable change for the populations we serve.

It is also clear from our experiences and key learnings that only through creating partnerships will we be able to find volunteers and future Board members to grow our nonprofit. We have plans to speak to the Board of Directors of a Pennsylvania Retired Teachers Association and to a regional Board for the public libraries in southeastern Pennsylvania. Both of these organizations could be a source of volunteers and future Board members. We have reached out to the North Penn YMCA, a local "Y" that has a senior center, a food bank, and senior living apartments, all within the same complex where we can provide a variety of

programs. We will continue to network with members of the Collaborative, as well as expand the number of senior resident communities and senior centers that we regularly contact.

We know that we cannot sustain ourselves on the small honorariums and generosity of friends and relatives, especially if we are going to support a paid employee. The next step is designing a business model that will create fiscal responsibility for the entity. We will rely on the expertise of our consultant from the Catalyst Center for these next steps.

After the business plan is written, the Instar team will collaborate with the graphic design team to create a marketing piece that will showcase all of our programs for seniors and business partners. In addition, our website will be updated to reflect the changes in programs, as well as increase a user's ability to navigate the site.

Being a change leader means taking responsibility for the manifestation of a vision. It requires enthusiasm and persistence, continued belief in oneself and others, and the ability to tolerate ambiguity. Change is inevitable. For some, being a change leader is a way of life.

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## Appendix A



## THE CREATIVE AGE: 55 & BETTER!

May is nationally recognized as, "Older Americans Month," a time to showcase the achievements of our senior population. Join *Instar Learning Alliance* as we celebrate creativity in the second half of life!

Our presentation will focus on Dr. Gene Cohen's fascinating research on creativity when combined with age and experience, as well as examine some well-known senior creatives and their extraordinary accomplishments.

We will also highlight local individuals who, at the minimum age of 55, have found fulfillment in art, music, writing and other fields, proving that it's never too late to learn a new skill or begin an encore career.



*Do you think  
about trying  
something new?*

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*Need motivation  
to explore your  
creative side?*

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*Two  
opportunities!*

**May 1, 1:30PM**

**May 10, 7:00PM**

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*Join us.*

*You will be  
inspired!*

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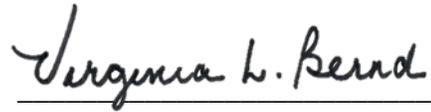
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Name

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May 12, 2018

Date