

ROCHESTER BUSINESS JOURNAL

VOLUME 19, NUMBER 24

DAILY EDITION: <http://www.rbjdaily.com>

NOVEMBER 28, 2003

Rural Opportunities makes plans for the long term

By KATHLEEN DRISCOLL

He has been at the helm of Rural Opportunities Inc. for more than 25 years, but Stuart Mitchell III is not about to retire.

In fact, he says, the work he is doing now for the organization is critical to its long-term survival.

With a budget of more than \$33 million, Rural Opportunities provides a wide range of programs to farm workers, low-income families and economically depressed communities that are funded by federal, state, local, faith-based and private sources.

Mitchell is a recent graduate of a special executive program at the John F. Kennedy School of Government at Harvard University aimed at helping non-profit community development organizations create "adaptive capacity."

With the help of that program, Mitchell is helping the agency develop a long-term agenda that builds its capacity to support long-term growth, aligns the agency's strategic and business plans with corporate values and expands its financial resources.

"I wanted to look at the long-term sustainability of ROI," he says.

Rural Opportunities has its headquarters on East Avenue in Rochester and operates in New York, Indiana, New Jersey, Ohio, Pennsylvania and Puerto Rico. Programs include adult training and employment, child development, youth education and training, advocacy and public policy, real estate development, housing assistance and property management.

Mitchell was one of 40 non-profit executives who participated in the Harvard program sponsored by the Neighborhood Reinvestment Corp. He says the training program held over the last year—and subsequent discussions with organizational development consultant Douglas Smith—revealed that ROI needs to build a stronger foundation for its operations. The agency has grown significantly in programs and services over 35 years, but it has focused more on delivering programs than on strategic issues.

"(Smith's) message to me was that while we have a good adaptive capacity and we're able to change with the circumstances, we don't have the strategic agenda that goes



Photo by Kimberly McKinzie

"I wanted to look at the long-term sustainability of ROI," says Stuart Mitchell, head of Rural Opportunities, pictured with Velma Smith, ROI's New York State director.

with it," Mitchell says.

Some of ROI's new priorities that have emerged from this training include:

Expanding and refining ROI's business planning process and defining its customer base.

Developing and implementing a succession plan and building an energized, committed work force.

Developing a plan to expand and diversify funding sources beyond state and federal funds.

Designing a political strategy to protect and enhance ongoing support from state and federal resources.

As ROI makes progress in each of the different areas, Mitchell says he has learned lots of lessons, including how to build measurable outcomes into every program. "Most non-profits don't have as many projects as we do."

And he has had to learn to change his management style to take in more of the big picture. That is a challenge, he says, be-

cause he has spent so much time on programs.

"I need to spend more time on the balcony looking down from a strategic perspective so I can get a better handle on the strategic direction and figure out how to lead us there," Mitchell says.

Before this training program, for example, ROI had not spent much time developing a succession plan. But now the agency has completed a draft of an emergency succession plan and is working on the development of a regular one, he says.

The succession planning process was not easy at first, says ROI board vice chairwoman Sheila Banks, who is based in York, Pa.

"When you have an executive director who is a founder, you can get kind of touchy about talking about it. But the way we worked it out, we weren't making any decisions without (Mitchell's) input," she says.

Part of the process of building a strategic agenda also includes re-evaluating

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every ROI program and prioritizing it according to its relevance to the agency's mission and its financial impact on the organization. Velma Smith, ROI's New York State director, says she will spend more time evaluating the 23 programs she oversees.

"Some of the things Stuart is doing for the organization, I need to do for my division," she says.

She acknowledged that the evaluation will force her division to make some tough choices, including possibly cutting programs or combining some. "Maybe a program that is rated low for its relevance to mission wouldn't be low if it was blend-

ed with something else."

Even after reviewing and prioritizing programs, ROI still faces challenges, particularly in integrating planning into the organization's day-to-day operations.

"Because we are a large multibusiness unit organization, it is difficult to communicate effectively throughout each unit," Mitchell wrote in a recent report. "Effective decision making requires thoughtful input from a broad cross-section of the organization. The logistics and expense of gathering this broad cross-section of staff and board together (are) daunting."

In the process of designing an agenda, ROI does not want to lose the "entrepreneurial drive" that built the organization from the ground up. Traditionally, when

staffers saw the need for new programs for farm workers or low-income families, they were able to propose them, and in many cases the ideas were implemented.

"When ideas come in, they come in from field staff," Smith says.

And ROI does not want to be so focused on strategic plans, costs and outcomes that it loses that spirit and energy.

"That's the lesson all of us in leadership have to pay attention to," Mitchell says. "We have to be able to say, 'Let's take risks around this.'"

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