



Operational & Organizational Analysis

Sustainable Growth: Business Scaling and Expansion

April 15, 2025



Community Agreements

Stay engaged: We'll be spending an intensive, albeit brief period of time together. It's important that folks take care of their individual needs so that they can stay actively engaged in the entirety of the discussion. Please refrain from being on your phone or computer, unless using to take notes. When virtual, please try to limit other activities.

Listen to understand: As opposed to listening to respond, where we wait for someone to stop speaking so that we might speak, listening to understand invites us to actively take in what our peers are saying and ask follow-up questions to ensure we understand not just what a person says, but what they mean.

Take space, make space: If you're someone who is typically comfortable speaking in group settings, consider paying attention to when and how frequently you share, giving space to those voices the group might hear from less frequently. If you're someone who is typically quieter in group settings, consider taking a chance and sharing your questions, thoughts, concerns, and opinions.

Nobody knows everything, but together we know a lot: Everyone has expertise to contribute whether it be skills, resources, stories or insights. Our collective knowledge far exceeds our individual contributions.

Challenge assumptions: We're here to learn from one another and that means asking difficult questions and challenging what we may assume to be best practice. Many of our assumptions are invisible in our culture and ways of working. How might we get curious about the things we assume to be true to explore if there are ways to innovate and evolve our practices?

Expect and accept non-closure: During our limited time together we will not be able to address and solve all open question. That's ok! Prepare yourself in advance that decisions may remain under discussion, questions may remain open and we simply may not have time to address some topics. This is part of an ongoing conversation and there's more to follow.

Center Participant Workers: Participant Workers are the heart of our work. Keep the resident experiences, perspectives, needs and desires front and center in all things

Embrace Diversity in All of its Forms: Acknowledge and value the diversity of perspectives and opinions within the group, specifically how they may be informed by folks lived vs. learned experiences.

Create a Safer Space for Sharing / Refrain from Attribution: We want people to feel comfortable sharing experiences, observations, and ideas - even if those are ideas aren't yet fully baked. Let's help people be vulnerable and feel comfortable sharing by not attributing specifics.



Program Announcement: Optional Technical Assistance

As a reminder, you can continue to access Technical Assistance through CA RISE. Below are opportunities for additional support beyond the 1:1 project you can access through your RM.

Listen4Good:

We are offering Listen4Good's Premium Program in July 2025 which includes:

- Survey templates for surveying community members, clients, volunteers, staff, and partners
- 1:1 coaching from experts in survey design, increasing response rates, and data analysis
- SurveyMonkey Premier account
- Client survey benchmarks—comparing your survey results to similar organizations
- Step-by-step webinars and a core web app with templates, resources, and FAQs

If interested, please email Galiana at galiana@redf.org

NorthStar Digital Literacy:

We are offering a one-year subscription to NorthStar Digital Literacy Curriculum, which will enable your participant employees to access tools that support:

- Mastering the basic skills needed to use a computer
- The internet in daily life, employment, and education.

This opportunity also includes three 90-minute training flights designed for someone on your staff who is/will be responsible for digital literacy education.

If interested, please email Galiana at galiana@redf.org

CFR Direct Deposit:

We are offering support with direct deposit to your participant workers through CFR focus cards.

Direct deposit is the fastest, safest, and most reliable way to pay employees—and a powerful step toward financial security.

If interested, please email Galiana at galiana@redf.org

Program Announcement: Upcoming Optional Workshops

We will continue to release optional content including workshops that you can attend! We want to gauge interest in the August Sessions as they require a significant time commitment.

May 2025:

- **May 6 – 8: Advancing Financials Series**
 - **May 6:** Double Bottom Line Analysis
 - **May 7:** Raising Impact Capital Strategy
 - **May 8:** Embedding Data & Finance in your Decision-Making – TBD

June & July 2025:

- ▣ **June 3- 17: Executive Skills and Career Readiness Series**
 - **June 3:** Executive Skills
 - **June 4:** Lived Experience and Career Readiness
 - **June 5:** Career Readiness Curriculum Deep Dive
 - **June 17:** The Case for Embedding Executive Skills into your Organization
- ▣ **July 1:** Leveraging Implementation Science to become an Executive Skills Focused Organization
- ▣ **July 10:** Addressing Burnout

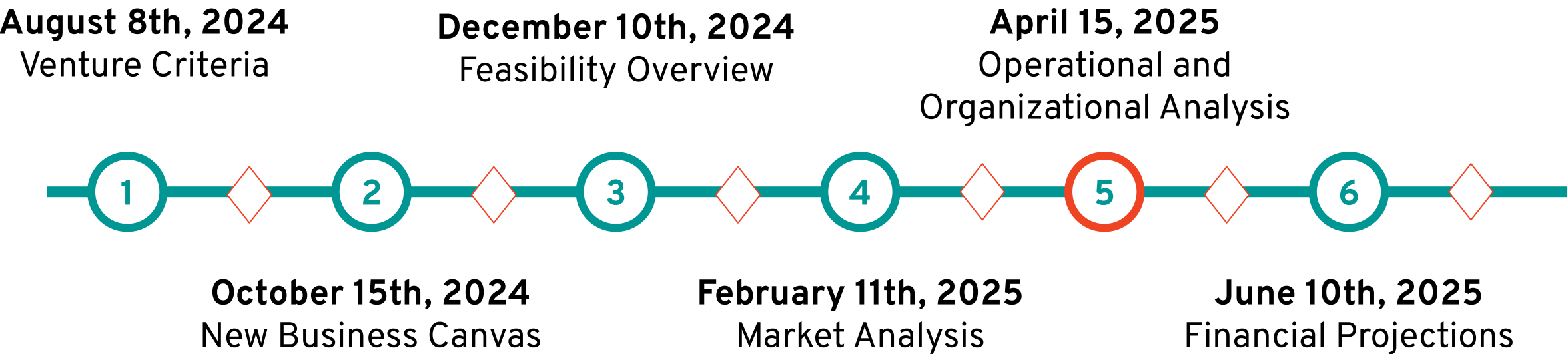
August 2025:

Gauging Interest - We can offer the Management Center's Training on Effective Management, which provides tools and resources on how to drive impact, strengthen culture, delegate projects and responsibilities effectively (without micromanaging), address unconscious bias, build strong manager-staff relationships, and use feedback to manage performance and improve results. Minimum time commitment 6 hours.

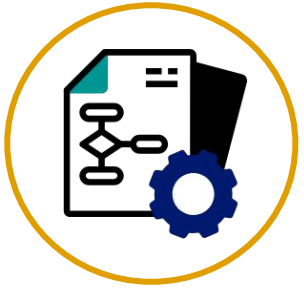
If interested, please email Katie at korovecz@redf.org



Sustainable Growth: Business Scaling and Expansion Roadmap



Introduction to Operational and Organizational Analysis



What is operational and organizational analysis?

Operational and organizational analysis is the process of assessing both what an employment social enterprise **needs to implement** a growth initiative and how it must **adapt internally** to support that growth.

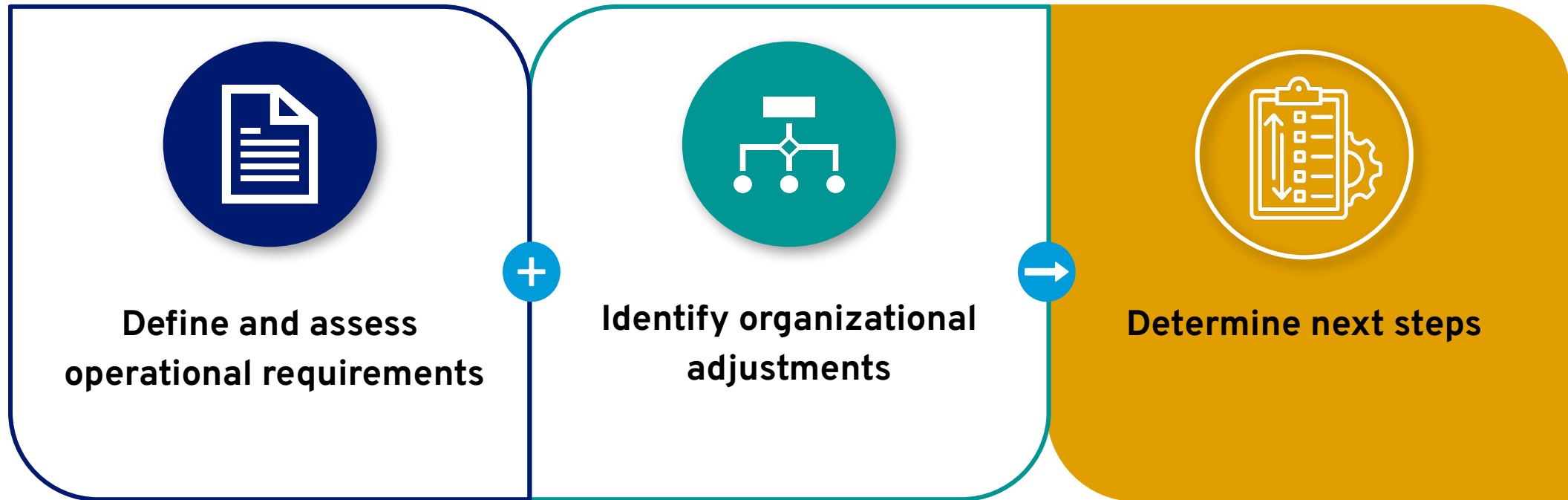
Introduction to Operational and Organizational Analysis



Why do we do it?

- Ensures that you have the right people, skills, systems in place for launch and scale. Helps you to identify gaps in your capacity where you may have to build new functions or adjust existing ones for the new business line.
- Reveals what you can *actually* do and the timing in which you can do it.
- Allows you to scale strategically and effectively sequence how you scale/expand.

How to Conduct Organizational & Operational Analysis



Define and Assess Operational Requirements

Resources	Assess the needs for additional financial resources and human resources, social capital, and other tangible/intangible resources to support growth initiative.
Processes	Identify new processes or potential changes or improvements to existing processes that are necessary to accommodate the new initiative.
Infrastructure	Assess whether the current infrastructure (e.g. the physical or organizational structures and facilities, IT systems, distribution channels) can handle the increased workload or demand. Determine new infrastructure needs.
Logistics and Supply Chain	Analyze the logistical requirements such as shipping, procurement relationships, inventory management, transportation, and distribution networks of goods, services, and/or information to support growth initiative.
Technology	Evaluate if new technology or software is required to support the growth initiative, and how well it integrates with existing systems.
Legal and Regulatory	Research the laws, policies, and standards governing new initiative to ensure compliance. This includes tax regulations, environmental regulations, labor laws, and industry-specific guidelines.

Independent Reflection

- Which operational requirements are you most confident in meeting? Why?



Independent Reflection

- Which operational requirements seem hardest to meet? Why?



Identify Organizational Adjustments and Needs

Structure	Determining whether the organization needs to adjust its structure to accommodate the expansion. For example, adding new departments, teams, or roles.
Leadership and Management	Assessing whether new leadership is required for scaling and how existing management will adapt to the expansion.
Program Model	Evaluating the need for hiring, training, or redeploying employees to meet the demands of the expansion. This also includes assessing the skill sets required for new roles.
Culture	Analyzing how well the organization can handle change. Effective change management strategies are necessary to keep the workforce engaged and reduce resistance during the transition.

Independent Reflection

- Which organizational adjustments feel most urgent or non-negotiable for success?



Independent Reflection

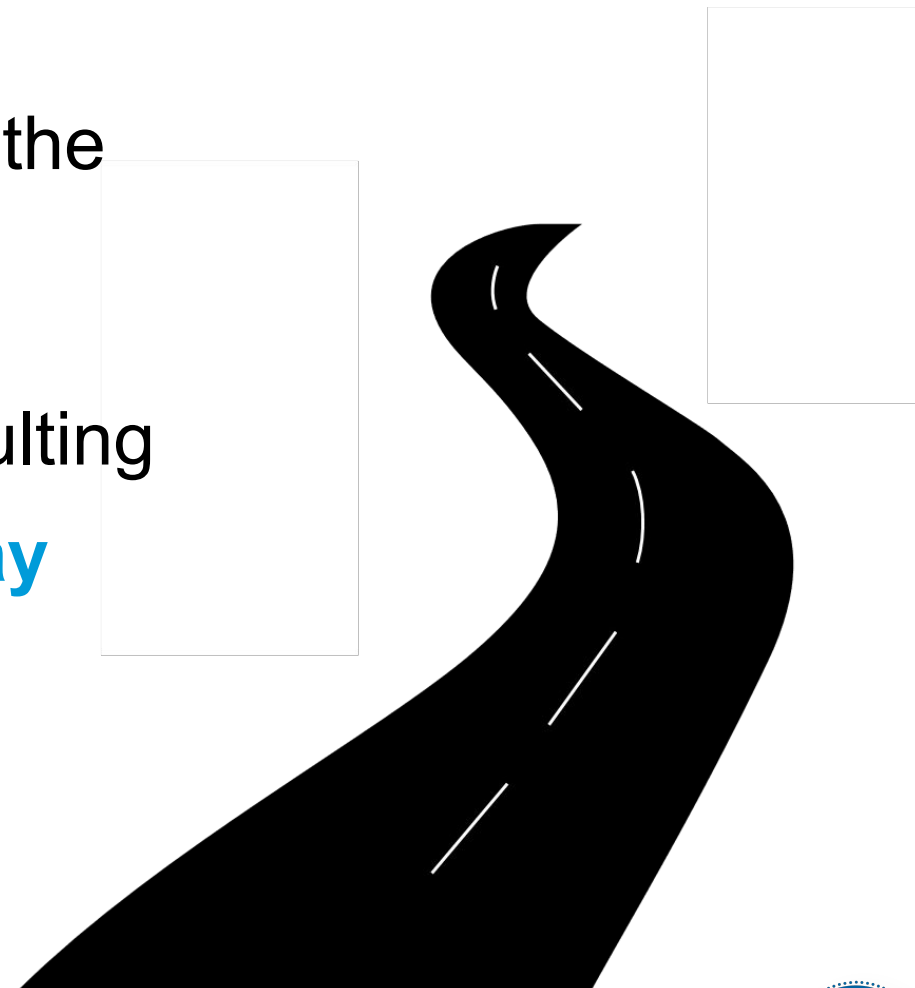
- Are there any organizational adjustments that you are not currently equipped to make?



What's Next?

After this session:

- Keep working on your operational and organizational analysis tool and share the tool with stakeholders.
- Schedule a 30-minute 1:1 coaching session! Email us team@nearby.consulting
- Our next track session is **Tuesday, May 13th** from 11 AM -12:30 PM PST. The session is **VIRTUAL**.



Feedback Survey

Please take a few minutes to fill out our Survey on this session.

<https://bit.ly/SGTScaleAll>

This feedback helps us improve your experience and plan adjustments to make moving forward.

Thank you!



Proposed Agenda

11:00 AM – Welcome & Intro

- Housekeeping notes
- Chat storm warm-up: What's the good news?
- Community guidelines
- REDF Announcements (if applicable)
- Workshop objectives and agenda

11:10 AM – Introduction to Operational & Organizational Analysis

- Lecture Format: What is it? Why do we do it? How do we do it?
- Chat storm: Operational and Organizational Pulse Check

11:25 AM – Define and Assess Operational Requirements

- Lecture Format: Define and assess your growth initiative's operational requirements
- Independent Reflection (on Tool)
- Facilitated Breakout Room Discussion

11:50 PM – Identify Organizational Adjustments and Needs

- Lecture Format: Identify your growth initiative's organizational adjustments and needs
- Independent Reflection (on Tool)
- Facilitated Breakout Room Discussion

12:15 PM – Next Steps

12:20 PM – Survey & Closeout

12:30 PM – Wrap

