



**Strategic Plan
2017 - 2021**

Revised: January 28, 2017

Facilitated by:



**STRATEGIC
CONSULTING
PARTNERS**

JAMA ENTERPRISES INC

**Monica Gould, MBA, CMC
Bob Whitmore, MBA, D.Ed.**

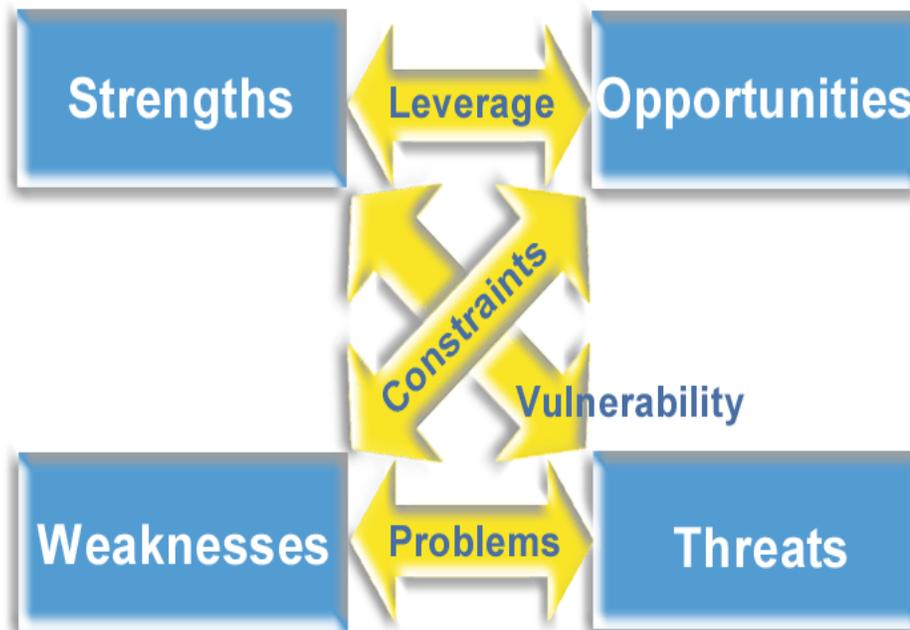
www.yourstrategicconsultant.com



TABLE OF CONTENTS

S.W.O.T. Analysis	3
Strengths	3
Weaknesses	4
Opportunities	4
Threats	4
Vision Statement	5
Mission Statement	5
Strategic Goal Focus Areas	5
Goal 1: Expand existing programs and services and develop new programs that provide mission delivery excellence.	6
Goal 2: Strengthen the bridges to independence’s board of directors in achieving a leadership role of governance and support.	11
Goal 3: Develop and expand community partnerships and collaboration with other supportive organizations.	14
Goal 4: Increase the organization’s financial resources through individual and corporate giving, increasing number of grants and foundation contributions, and maintaining government funding.	16
Goal 5: Enhance and sustain an organization structure and culture that supports accountability and rewards creativity and innovation.	222
Goal 6: Increase the visibility and community awareness of bridges to independence, ensuring the organization is recognized as the leader of services to families at-risk for or experiencing homelessness.	246
Goal 7: Engage and effectively manage community volunteers to support the work of our programs.	299

S.W.O.T. Analysis



Strengths

- Emergency Shelter
- Strength of services
- Positive community reputation
- Program outcomes are excellent
- Purchase of the building
- Website; E-newsletter
- Executive Director
- Staff knowledgeable, experienced, and committed
- Holistic approach to programming
- Committed volunteers
- Social media presence
- Stable County and HUD funding
- New building in fall of 2017

Weaknesses

Need a Program Manager for support staff so Sam has time for community outreach
Lack of planning
Data collection is time consuming
Lack of funding
Over dependence on government funding
High Admin costs
Staff overstretched & overworked
Staff turnover in critical support roles
Operational weaknesses – documentation and accounting
Board support for staff
Communications between Board and staff
Cascading communications
Lack of space
Community reputation
Do not have a marketing/communications staff person
How would we replace key staff members?
As the organization grows, how do we preserve the strengths of volunteer staff and existing programs

Opportunities

Expand programs
Build more business relationships
Capital campaign
More visibility in the community
New building provides better image, more program space
Share your story in the community
Expand program reach
Diversification of funding
Increase volunteerism
Effective use of volunteers to add value to the organization
Volunteer management system
Board development – establish committees, using volunteers to open doors for funders
Partnerships / collaboration

Threats

Changing government regulations
Lack of visibility in the community
Unreliable funding
Negative PR from past performance
Competitors stealing ideas
Lack of affordable housing options for clients
Entrepreneurial economy and environment

Vision Statement

“To break the cycle of intergenerational poverty.”

Mission Statement

Bridges to Independence leads individuals and families out of homelessness and into stable, independent futures.

Tag Line

Learn Lead Work Thrive

Bridges to Independence Strategic Goal Focus Areas

1. Programs and Services
2. Leadership / Board Development
3. Partnerships / Collaboration
4. Fund Development
5. Internal Operations
6. Communications / Marketing / Branding
7. Volunteer Management

Goal 1: Expand existing programs and services and develop new programs that provide mission delivery excellence.

Objective 1.1

Strengthen core programs, Emergency House and Rapid Re-housing, to enhance the integration of all services and increase the success rate of households leaving the program for safe, permanent and sustainable housing. – By July 1, 2018.

Significance:

Bridges to Independence's core program services are its housing services, Sullivan House and Rapid Re-housing. It is estimated that 70% to 80% of families involved in these programs complete and leave the program successfully. In Arlington County, the County has established a vision of eradicating homelessness in 10 years and the County is nine years into this process. In the City of Alexandria, Bridges is also a part of the Partnership to Prevent and End Homelessness. The development of County initiatives to eliminate homelessness could have a long-term impact on the housing programs provided by Bridges. The economy of both counties also has an impact on housing services with rental rates continuing to increase and rental units could become unattainable to clients.

Resources:

- Staff time
- Development and/or implementation of innovative and best practice strategies

Initiatives

1. Determine the baseline of successful clients leaving housing services over the past five years. – Staff – By June 30, 2017.
2. Develop a measurable outcome criteria scale of program success for clients leaving the housing programs. – Staff – By December 30, 2017.
 - a. Level 1 – Individual / family does not successfully complete the Sullivan House program;
 - b. Level 2 – Earned income gains
 - c. Level 3 – Individual / family leaves Sullivan House and enters Rapid Re-housing program with subsidies.
 - d. Level 4 – Individual / family leaves Sullivan House or Rapid Re-housing programs and moves into independent housing using government subsidies.
 - e. Level 5 – Individual / family leaves Sullivan House or Rapid Re-housing program and moves into independent housing and can pay for housing and purchase food with no government subsidies.
3. Develop an integration of services model that includes the following components – Leadership – By June 30, 2017.
 - a. Clarification of job duties by roles
 - b. Clarification / development of systems and processes used to enhance program operations and services.

- c. Clarification of what services each staff member provides and how these services can be used by all clients.
4. Develop voluntary learning curriculum for all residents of Sullivan House to complete prior to transitioning into other housing services. – Residential Program Staff – By February 28, 2018.
5. Develop core supportive services for clients by hiring additional staff to deliver the services or developing community partnerships that provide the services. – Program staff – By June 30, 2018.
 - a. Family engagement, parenting skills
 - b. Behavior health counseling
 - c. Financial planning
 - d. Strengthening relationships with organizations who specialize in resolving immigration issues
6. Develop a full education curriculum for all program participants, adults and youth, based on the core values of “Lead. Learn. Work. Thrive.” – Program Staff – By June 30, 2019.
7. Train all staff in housing options and have staff complete training to become Certified Housing Counselors. – Residential Staff – By December 2019.
8. Explore converting 50% of Sullivan House into permanent housing – Residential Staff and Executive Director – By December 30, 2020.

Measurement Criteria:

- Defined process plan for the delivery of services to clients.
 - Data on program time for participants to move from Sullivan House to Rapid Re-Housing Program or directly into subsidized or unsubsidized housing.
 - Educational curriculum developed for program participants
 - Supportive services provided internally or contracts developed
 - Number of staff who become Certified Housing Counselors
-

Objective 1.2

Expand youth development and educational programs by June 2020.

Significance:

Bridges to Independence’s Youth Development programs serve 55 youth who are current or past program participants in the housing programs. The organization’s vision is to expand the number of youth served, to develop an innovative leadership curriculum, and to inspire each participating youth to have a challenging career plan after graduation from high school.

Resources:

- Staff time
- Training room to facilitate educational classes
- Leadership curriculum

- Computers and educational software for student work
- Additional staff as enrollment increases

Initiatives:

1. Develop a youth leadership curriculum, including assessment of individual strengths and interests, to be used with all youth enrolled in the program. – Youth Development Program Staff – By June 30, 2017
2. Develop a comprehensive network of supportive services to youth that addresses behavioral health challenges and trauma. Youth Development Program Staff – By September 1, 2018.
3. Expand the Afterschool program to 40 students and include these components – Youth Development Program Staff – By September 2019.
 - a. Larger facility
 - b. Operating four days per week
 - c. Clearly defined high expectations
 - d. Assessment of student reading and math levels through parent engagement, report cards, and test scores
 - e. One-on-one tutoring
 - f. Computer based instruction to provide remediation or accelerated learning
4. Increase number of youth completing their high school education and enrolling in a certificate or higher education program to 40 graduates a year. – Youth Development Program staff – By June 30, 2020.
5. Expand youth development services to an enrollment of 150 youth at a time. – Youth Development Program staff – By June 30, 2020.

Measurement Criteria:

- Participating youth feel safe and secure in the program
- Comprehensive youth leadership curriculum is developed
- Number of youth served in each program
- Number of youth graduating each year
- Increase in academic performance levels
- Youth leaving the program have a challenging career plan
- Entry into college, vocational school, trade school or apprenticeship

Objective 1.3

Develop employment services initiatives to provide enhanced client services and create client independence and self-sufficiency. – By June 30, 2021.

Significance:

The vision of the Bridges to Independence organization is to break the cycle of intergenerational poverty. To achieve this vision, clients must be encouraged to develop skills that will provide an opportunity to obtain quality employment that provides sufficient income to sustain housing, food and basic needs for the family.

Resources Needed:

- Staff
- Innovative ideas for program development
- Have staff become a Certified Workforce Development Professional and member of the National Association of Workforce Development Professionals
- Funding, grant or program resources, to develop and implement programs

Initiatives:

1. Develop direct to work opportunities for clients – By December 30, 2017 and ongoing
2. Develop soft skills training opportunities for clients – By July 1, 2018 and ongoing
3. Expand the number of certificate training opportunities entered by clients – By July 1, 2018.
4. Train staff and volunteer base in workforce development curriculum and staff complete training and certification to become Certified Workforce Development Professionals. – By December 2020.

Measurement Criteria

- Number of direct work opportunities clients obtains in a year.
 - Number of On the Job training opportunities initiated and completed in a year.
 - Number of certificate training programs clients enters in a year.
 - Job retention at the 3, 6, 9 and 12-month mark
 - Number of clients completing certificate training programs.
 - Number of clients earning sustainable wages needed to obtain their own housing and create self-sufficiency.
 - Number of staff Certified Workforce Development Professionals.
-

Objective 1.4:

Conduct a feasibility study on becoming a social enterprise to provide employment opportunities for program participants and generate operating revenue by June 2019.

Significance:

Building a social enterprise business supports the organization in two ways: a for-profit business provides important non-governmental funding to support the organization and program participants have an opportunity to develop work skills and build a financial reserve.

Resources:

- Executive Director
- Workforce Development initiatives
- Staff time

Initiatives:

1. Research Social Enterprise ideas appropriate for program participants and assess the program implications for Bridges. – Executive Director or designated staff – By December 2018.
2. Considering joining the Social Enterprise Alliance and build connections with existing organizations in the Washington D.C. area or similar type organizations throughout the country, that support their program efforts with profit making adventures. – Executive Director or staff selected to lead the Social Enterprise initiative – By December 2017.
3. Build a business plan for the implementation of a social enterprise initiative and explore financial support. - Executive Director or designated staff, Development Director – By June 30, 2019.

Measurement Criteria:

- Business plan developed for a social enterprise adventure
 - Profitable business adventure initiated
 - Number of jobs created for program participants
-

Goal 2: Strengthen the bridges to independence's board of directors in achieving a leadership role of governance and support.

Objective 2.1

Engage the Board of Directors in a board development process to clarify governance practices beginning in January 2017 and continuing through June 2018.

Significance:

Good governance requires the right ingredients (the right mix of board members), a chef to provide leadership and accountability, and careful mixing and stirring of candid discussions, transparent practices, and governance policies.

Resources:

- Board of Directors
- Executive Director
- Outside facilitator, if needed, skilled in nonprofit board development

Initiatives:

1. Establish a formal Board Governance Committee. – Board of Directors – by June 2017.
2. Schedule Board meeting time to review Board Governance and operations. – Board Executive Committee or Governance Committee – By June 2017.
3. Review and revise if appropriate, Board member expectations, attendance at meetings and term limits. - Board Executive Committee or Governance Committee – By June 2017.
4. Establish a process for ensuring Board member accountability to policies. – Board Executive Committee or Governance Committee – By June 2017.
5. Develop board cultivation strategy for targeting potential board members – Board Executive Committee or Governance Committee – By June 2017.
6. Review the Board's Committee structure and clarify if the Board Committee structure aligns with organization operations and the strategic planning process. – Board Executive Committee or Governance Committee – By June 2017.
7. Develop an annual schedule for the Board to complete essential Board governance activities – Board Executive Committee or Governance Committee – By June 2017.
 - a. Review of the annual operating budget;
 - b. Review of the annual financial audit and 990;
 - c. Discussion and review of annual operations plans for the organization aligned with the strategic plan;
 - d. Completion of conflict of interest statements;
 - e. Review of Board effectiveness and performance, membership diversity, and identification of gaps in Board membership;
 - f. Annual review of the Executive Director and establishing a compensation package for the next fiscal year.

8. Develop an orientation program for new Board members to acquaint them with program and Board information and processes. – Governance Committee and Executive Director – By June 2018.

Measurement Criteria:

- A regular Board member schedule is established and followed.
 - Orientation program is in place for new Board members.
 - Board self-evaluates its performance.
-

Objective 2.2

Review the roles and responsibilities of the Board and Executive Director to reaffirm Board member expectations and update the Bylaws to ensure alignment with organization procedures by December 2017.

Significance:

The organization has hired a new Executive Director within the past year. Each time the leadership role within the organization changes it provides an opportunity for the Board to clarify the roles, responsibilities and expectations of both the Executive Director and the Board members and to review its governance practices.

Resources:

- Board of Directors
- Executive Director
- Outside facilitator skilled in nonprofit board development

Initiatives:

1. Review the roles and responsibilities of the Board members and Executive Director. – Board Executive Committee or Governance Committee – By June 2017.
2. Facilitate a fundraising training for the Board of Directors to support the Board's involvement in the capital campaign and general fundraising for the organization. – Development staff and outside consultant – By June 30, 2017.
3. Develop a Board member "give and/or get" financial and/or time obligation policy to the organization. – Governance Committee and Fundraising Committee – By December 2017.
4. Revise or amend the Bylaws, if needed, to create alignment with changes in Board responsibilities and expectations or Committee structure. – Governance Committee – By December 2017.

Measurement Criteria:

- Clarified and agreed upon roles and responsibilities for Board members and Executive Director.

- Board expectations defined for Board members and members sign a commitment agreement.
 - Committee structure is reviewed and refined if necessary.
 - Bylaws are reviewed and revised/amended if necessary.
-

CONFIDENTIAL

Goal 3: Develop and expand community partnerships and collaboration with other supportive organizations.

Objective 3.1

Develop and enhance partnerships with community complimentary organizations to enhance services to clients and strengthen the organization's position and annually monitor progress – July 2017 and annually.

Significance:

Developing community partnerships provides an opportunity for Bridges to Independence to expand services and provide supportive services to program participants.

Resources:

- Executive Director
- Staff members

Initiatives:

1. Explore partnering with other safety net non-profit organizations in Arlington and the City of Alexandria to collaborate on future RFPs that are aligned with our vision and mission. – Executive Director – By September 1, 2017.
2. Develop working relationships with Volunteers of America, Arlington THRIVE, Arlington Street People's Network, and Arlington Partnership for Affordable Housing and Doorways for Women and Families to explore collaborative opportunities, complimenting services, and sharing of resources. – Executive Director – By July 1, 2018.
3. Develop working relationships with community organizations, small businesses, and local entrepreneurs. - Ongoing

Measurement Criteria:

- Partnership agreements
-

Objective 3.2:

Expand outreach to faith-based organizations, increasing the support dollars provided and volunteers available to support organization programs. - By December 2019.

Significance:

Faith-based organizations have always been valued supporters of the organization in providing financial support, volunteers and Board members. Expanding outreach to faith-based organizations increases community awareness and support to the organization.

Resources:

- Board of Directors
- Executive Director
- Staff

Initiatives:

1. Develop an outreach message for faith-based organizations that describes the organizations work, successes, and organization needs. – Development Staff – By September 30, 2019.
2. Reach out and inform faith-based organizations of the organization's mission through presentations, bulletin inserts, and social media. – Development Staff and Program Staff – By September 30, 2019.
3. Develop a list of financial initiatives that faith-based organizations can support. – Development Staff and Program Staff – By September 30, 2019.
4. Develop a list of volunteer activities that faith-based organizations can support as individuals or as a group initiative. – Development Staff and Program Staff – By September 30, 2019.

Measurement Criteria:

- Number of faith-based presentations delivered each year.
 - Financial contributions received from faith-based organizations each year.
 - Number of volunteers utilized from faith-based organizations each year.
-

Goal 4: Increase the organization’s financial resources through individual and corporate giving, increasing number of grants and foundation contributions, and maintaining government funding.

Objective 4.1

Develop and initiate a capital campaign to successfully raise funding to underwrite the purchase and furnishing of the new organization offices and training center. – By September 2017.

Significance:

In 2015, Bridges to Independence sold its office building and moved the administrative offices into the Sullivan House shelter. The purchaser of the previous building has torn down the building and is currently building a new high rise multi-use office and apartment building. Bridges will be purchasing office space in the new building. This new space will provide administrative and staff office space, meeting and training rooms, and a higher visibility profile for the organization. The organization is hoping to also equip the offices with new equipment and furnishings and state of the art technology.

Resources:

- Development staff
- Capital Campaign Committee
- Development consultant
- Board of Directors

Initiatives:

1. Develop a capital campaign strategy for reaching individual, corporate, and community donors. – Development staff, development consultant, Board of Directors. – By March 30, 2017.
2. Engage the Board of Directors Fundraising Committee in fundraising for the capital campaign. – Board of Directors – By March 30, 2017.
3. Engage individual and corporate donors to provide at least \$1 million for the capital campaign. – Development staff, Board of Directors – by December 30, 2017.

Measurement Criteria:

- Board of Directors actively engaged in fundraising activities and reaching out to individual, corporate, and community donors.
- Total funds raised in the capital campaign, target is \$2.5 million.

Objective 4.2

Build relationships with current individual and corporate donors to support their continuing giving and initiate new opportunities for support through an established cultivation strategy beginning in December 2017.

Significance:

Continuing financial and program support is important to the resources of the organization.

Resources:

- Development staff
- Executive Director

Initiatives:

1. Establish a strategy for cultivating and asking gifts from major donors – Development Staff – By December 31, 2017
2. Build and cultivate the relationships with major donors and companies, such as E-Trade. – Executive Director and Director of Development - Continuously

Measurement Criteria:

- Continuation of financial and volunteer support
-

Objective 4.3

Increase and diversify the organization's revenue streams to include grants, fee for services funding, foundation giving, individual and corporate giving, fundraisers, and government funding beginning March 2017.

Significance:

Building diverse sources of revenue is important to the long-term sustainability of the organization. Government funding is an important resource but is also vulnerable to a changing political environment. Diversified and balanced revenue streams and less reliance on government funding will provide enhanced cash flow and sustainability to the organization.

Resources:

- Development staff

Tasks:

1. Hire a new contracted grant writer to support the organization, define expectations and performance measures for the grant writer, and compensate the grant writer on an hourly basis. – Executive Director and Director of Development – By March 30, 2017.

2. Establish targets for diversifying revenue sources and project amounts to be raised on an annual basis. – Executive Director, Director of Development, Accounting staff, Board Finance Committee – By June 30, 2017 and annually.
3. Research grants available from foundations, private organizations, and government programs not currently being used. Grants to be used for program development, capital purchases, and supporting existing program operations. – Development staff – By December 2018 and ongoing.
4. Build relationships with foundations, government agencies, community funders, individual and corporate donors, and United Way to cultivate the partnership and gain support for the work of the organization. – Development staff – By December 2018 and ongoing.
5. Engage program staff to identify existing program needs and to brainstorm innovative program ideas to grow the organization. – Executive Director, Development staff – By December 2018 and ongoing.
6. Write and submit grant proposals aligned with program and organization needs. – Development staff – By December 2018 and ongoing.

Measurement Criteria

- Number of grants submitted during a fiscal year
 - Number and dollar amounts of funded grants
-

Objective 4.4:

Expand and solidify fundraising events and campaigns. Monitor effectiveness and profitability of events - December 2017 and annually thereafter.

Significance

When we achieve our fundraising goals, we will be able to cover our general operational costs and have money for investing in development.

Resources

- Development staff
- Board Fundraising Committee
- Staff time to coordinate events
- Donors
- Electronic newsletters and social media promotions

Initiatives:

1. Identify existing fundraising events/campaigns and evaluate effectiveness. – Development Staff – By June 30, 2017.
2. Survey community, staff, and leadership to choose which events/campaigns to hold and which to change. – Development Staff – By December 30, 2017.

Measurement Criteria

- Number of events held each year
 - Number of participants in attendance
 - Net profit per event
 - Funds raised per event and for the year
 - Community visibility obtained
-

Objective 4.5:

Establish an “Adopt-A-Family Fund” to solicit and secure gifts to cover critical financial needs and incidental expenses for clients served by the organization’s Rapid Re-Housing programs and services. – By December 30, 2019.

Significance:

Establishing a special fund to support families in the organization’s rapid re-housing program will provide vital resources to assist families in making a transition to self-sufficiency. Funds can be used to provide emergency healthcare, transportation, housing, child care, and barrier reductions for clients. Supporting individuals and families with critical financial needs and incidental expenses differentiates the Bridges to Independence organization from other organizations who provide similar housing services.

Resources:

- Executive Director and Director of Development staff time.
- Financial, accounting, and legal assistance in structuring the program.

Initiatives:

1. Define the Adopt-A-Family Fund – Development Director, Executive Director, and Program Staff – By December 30, 2018.
 - a. Purpose
 - b. Use of funds
 - c. Eligibility of recipients
 - d. Criteria for accessing the funds
2. Establish a separate accounting fund to monitor Fund gifts and expenditures. – Accounting staff – By December 30, 2019.
3. Develop communications information/brochures on the Fund for distribution to potential donors and the public. – Development Director – By December 30, 2019.

Measurement Criteria:

- Establishment of a fund to support the rapid re-housing program.
- Amount of contributions given to the fund each year.
- Tracking of fund expenditures and the difference provided to clients.

Objective 4.6:

Establish a reserve base of funds to support organization growth and long-term sustainability. – By December 30, 2019.

Significance:

Establishing cash reserve will help smooth the ups and downs in Bridges' operations and ensure the long-term sustainability of the organization.

Resources:

- Board of Directors
- Executive Director and Director of Development staff time.
- Financial, and accounting support

Initiatives:

1. Define the purpose and parameters of the reserve cash account – Executive Director – By December 30, 2018.
 - a. Purpose
 - b. Use of funds
 - c. Annual operating goal for contributions to the reserve account.
 - d. Criteria for accessing the funds

Measurement Criteria:

- Amount of contributions allocated to the reserve account each year.
-

Objective 4.7:

Establish protocol for soliciting, accepting and storing in-kind gifts. – By July 1, 2017.

Significance:

Bridges to Independence receives a significant amount of in-kind gifts from its generous donors. In the past, the organization said 'yes' to everything and anything. However, with little storage space this is not feasible. Bridges will have more space in its new headquarters, but need a clear protocol for accepting non-monetary items.

Resources:

- Development Director
- Executive Director

Initiatives:

1. Develop information and solicitation materials to reach out to potential donors of in-kind gifts and resources. – Development staff – By July 1, 2017.
2. Identify in-kind program needs to support the organization on an ongoing basis. – Program staff - By July 1, 2018.
3. Develop an internal process and procedures for soliciting in-kind donations to support organization. – Development staff, Executive Director – By July 1, 2017.
4. Develop recognition and acknowledgment materials for individual and corporate donors compliant with IRS guidelines for donations. – Development staff – By July 1, 2017.

Measurement Criteria:

- Solicitation materials developed
 - Donations received
-

Goal 5: Enhance and sustain an organization structure and culture that supports accountability and rewards creativity and innovation.

Objective 5.1

Strengthen the financial position of the organization and ensure accurate and detailed financial statements are prepared for the organization's leadership to review and use for decision making. Complete by January 31, 2018.

Significance:

Bridges to Independence has recently experienced challenges in their financial accounting processes and recording of transactions. The organization has taken actions through the changing of personnel to correct these financial challenges. The proper and timely recording of financial transactions is critical to managing the cash flow of the organization and profitability of each program. Accurate financial statements are also critical for the leadership of the organization and Board of Directors to guide decision making.

Resources:

- Staff time to correct prior financial inaccuracies.
- Financial accounting software capable of producing accurate financial statements and comparisons to budget projections.
- Support from the external auditors to verify the accuracy of financial statements

Initiatives:

1. Complete the accounting process to correct past financial inaccuracies. – Accounting staff – By March 30, 2017.
2. Prepare operating budgets, including allocation of overhead expenses, for all programs, and present to the Board for adoption. – Accounting staff – By June 15, 2017.
3. Review / develop internal controls policies for managing cash, payment of invoices, separation of duties, and accounting for program and grant expenditures, and managing the organization's assets. – Accounting staff – by December 30, 2017.
4. Provide current financial statements, comparison to budget projections, and explanations for variances, to the Board at each Board meeting. – Accounting staff – By August 2017 and monthly thereafter.
5. Board of Directors reviews the external audit, Auditor's management letter, and 990 each year when completed. – Executive Director - By November 2017 and annually.
6. Explore the possibility of becoming accredited by the Council on Accreditation (COA) – Executive Director – By January 30, 2018.
7. Board of Directors completes training refreshers to maintain basic understanding of nonprofit financial core issues. - Annually

Measurement Criteria:

- Verification by the external auditor that the financial records are current and correct.

- Completion of monthly financial statements and comparison to budget projections.
-

Objective 5.2

Establish an effective human resources management system through defined policies, compliance with all federal, state, and local laws, designating an internal HR person, or contracting for HR oversight - By December 31, 2017.

Significance:

The effective management of staff is a critical component for all organizations. Bridges to Independence must ensure the organization has effective and compliant HR policies, a positive accountability performance management system, and a process for establishing and monitoring a compensation and benefits program for the organization. The organization has recently added new staff members and other staff members have changed roles. Job descriptions should be revised/updated to align job duties with the expectations in the role.

Resources:

- Executive Director
- Personnel Committee from Board
- HR Professional (Board Member or Community Volunteer)

Initiatives:

1. Re-align the Office Manager role to incorporate HR administrative tasks. – Executive Director and Management team – By March 30, 2017.
2. Develop a plan for the development of an internal HR manager or contract with an external HR consultant to review and develop HR processes and written employee information (Employee Handbook). – Executive Director – By June 30, 2017.
3. Develop / refine the HR management system to include the following components: - By December 31, 2017.
 - a. Updated written job descriptions for all positions and volunteers, including defined performance expectations and measures.
 - b. Written personnel policies.
 - c. Personnel policies reviewed and updated.
 - d. Hiring and orientation procedures for new staff.
 - e. Employee benefits policies and procedures reviewed and updated.
 - f. Performance management process reviewed and updated.
 - g. Record keeping procedures reviewed and updated.
 - h. Written policies on wage and salary administration and payroll processes reviewed and updated.
 - i. Professional development and training policies and procedures reviewed and updated.
 - j. Board of Directors establishes/identifies a Board committee to provide oversight of HR processes and policies for the organization.

Measurement Criteria:

- Designated internal HR person all staff can access for information
 - Written personnel policies
 - Updated job descriptions
 - Performance management system
-

Objective 5.3

Establish a pro-active staff professional development plan for all staff that aligns with organization needs and expectations. – By July 1, 2017.

Significance:

Staff professional development is critical to providing high quality services to clients and enhancing and maintaining the organization's professionalism within the community.

Resources:

- Staff time
- Designated staff Coordinator of professional development
- Financial resources for staff to attend professional development programs, when no cost programs are not available.

Initiatives:

1. Each staff member will complete an individual professional development plan as part of their annual performance process and consultation with their program supervisor.
2. Each staff member will complete 40 hours of professional development each fiscal year.
3. Management staff will identify professional development opportunities for staff to complete aligned with organization goals. (i.e. Certified Housing Counselor).

Measurement Criteria:

- Completion of an individual professional development plan by all staff.
 - Completion of 40 hours of professional development annually by all staff.
-

Objective 5.4

Develop a Succession Plan policy for the organization. – By January 1, 2018.

Resources:

- Board of Directors

- Executive Director

Initiatives:

1. Draft a short term emergency succession plan for the organization – Executive Director – By September 1, 2017.
2. Draft a long term succession plan for the organization - Executive Director – By September 1, 2017.
3. Short term and long term succession plans reviewed and approved by the Board of Directors – December 2017.

Measurement Criteria:

- Completion of short term emergency succession plan by the Board of Directors.
 - Completion of the long term emergency succession plan by the Board of Directors.
-

CONFIDENTIAL

Goal 6: Increase the visibility and community awareness of Bridges to Independence, ensuring the organization is recognized as the leader of services to individuals and families at-risk for or experiencing homelessness.

Objective 6.1

Enhance the organization's communications and outreach and assess effectiveness of the effort. - July 2017 and annually thereafter.

Significance:

Bridges to Independence can reach community volunteers and supporters through diverse communications venues. Different generations use different communication methods and the organization must be able to utilize the most effective process to access volunteers, donors, and supporters.

Resources:

- Staff time
- Development staff

Initiatives:

1. Develop an operations plan for using social media to support the organization's communication efforts – Staff – By June 30, 2017.
2. Train staff on the effective and safe use of social media and compliance with organization policies. – June 30, 2017.
3. Engage in more social media conversations – Facebook, Twitter, Instagram, – Staff – By June 30, 2017.
4. Redesign the newsletter that reaches over 2700 community stakeholders and volunteers to highlight the achievements of the organization and program participants. – Staff – By June 30, 2017.
5. Initiate a Bridges to Independence “blog” on the organization website and encourage all staff members to prepare “blogs” for posting. – Staff – By December 30, 2017.
6. Build a community of supporters for the organization, across generations, and using social media to engage these supporters. – Staff – By December 30, 2018.

Measurement Criteria:

- Action plan for social media communications developed.
- Level of engagement in social media
- Internal organization policy on use of social media developed.
- Staff trained on social media policy.

Objective 6.2

Update the organization's collateral material, included a new brochure and updated annual report. – By June 30, 2018.

Significance:

Increasing community awareness of the programs and services provided by Bridges to Independence is important to continue community financial and program support.

Resources:

- Development staff time

Initiatives:

1. Create a new organization brochure describing the services and programs provided by the organization and including the new office and training room. – Development staff – By June 30, 2017.
2. Create supportive brochures on each organization service that can be used by program staff when giving presentations to community individuals, groups, funders, and potential donors. – Development staff – By June 30, 2018.
3. Update the website to reflect new language and content – Development staff - By June 30, 2018.

Measurement Criteria:

- New organization brochures
 - New supportive brochures and informational packets
-

Objective 6.3

Hire a full-time communications manager – By July 1, 2019.

Significance:

Creating community awareness and informing the community of the services provided by Bridges to Independence and successes of clients is important to growing the organization's programs and financial resources.

Resources:

- Financial resources to hire additional staff

Initiatives:

1. Develop a job description describing the job duties, responsibilities, performance measures, and qualifications for a Communications Manager. – Development staff and Executive Director – By December 30, 2017.
2. Explore individual, corporate, or faith-based donors that would fund initially fund the Communications Manager position. – Development staff and Executive Director – By December 30, 2018.
3. Include a full-time Communications Manager position in the organization annual operating budget. – By June 30, 2019.

Measurement Criteria:

- Financial resources to hire a full-time Communications Manager.
 - Job description defining the job duties, qualifications and performance measures for the position.
-

Goal 7: Engage and effectively manage community volunteers to support the work of our programs.

Objective 7.1

Implement a volunteer management database and upgrade processes to effectively utilize volunteers in all programs by December 31, 2017.

Significance:

Bridges to Independence currently has 200 volunteers in their internal data system and actively uses 80 volunteers to support program services. Effectively managing volunteers is critical to internal operations of the organization and currently takes one staff member's time. Developing a robust online database system will reduce staff time to manage the program and will also enhance the application process and training of volunteers. This system will also make the utilization of volunteers easier for other program staff.

Resources:

- Funds to purchase and maintain a volunteer database management system.
- Staff time to set-up the volunteer database management system and complete all processes and systems to operationalize the system.

Initiatives:

1. Purchase new volunteer management database and operationalize the system to enter active volunteers. – Staff – By January 31, 2017.
2. All volunteers entered into the new database system. – Staff – By February 28, 2017.
3. Develop and implement an online application process and integrate into the database system. – Staff – By July 30, 2017.
4. Develop and implement a volunteer online orientation program. – Staff, Community partners (4-H) – By December 31, 2017.
5. Train staff on the volunteer database system and how they can access volunteers and effectively engage and manage volunteers in programs. – Staff – By December 31, 2017.
6. Engage administrative support staff to manage the Volunteer database system and the process of orientation for new volunteers. – Staff – By December 30, 2017.
7. Develop and implement a volunteer survey tool to obtain feedback on the volunteer experience and gather ideas for improving the volunteer experience. – Staff – By December 31, 2017.
8. Recruit volunteers with specialized expertise to serve on working committees of the Board of Directors. – Board of Directors – By December 31, 2017.

Measurement Criteria:

- New volunteer management database purchased and in operations.
- All volunteers entered into the database system.

- Online application process completed and integrated into the database management system.
- Online orientation program for volunteers completed and operational.
- Staff trained on the use of the volunteer database system.

CONFIDENTIAL