GENESIS CLUB

Strategic Plan
FY21 – FY23

Defining Genesis Club's vision, strategy, direction, and focus to achieve game-changing results for members of the community with mental health conditions.

Fall, 2020

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Strategic Planning Committee

We thank the following staff and volunteer leaders for their assistance as members of the Strategic Planning Committee in designing Genesis Club's strategic plan:

Staff
- **Lisa Brennan**, Executive Director
- **Sarah Brown**, Supported Education and Young Adult Services Manager
- **Sean Minahan**, International Training Manager

Volunteers and Members
- **Jeff Gopin**, Chair, Board of Directors
- **Bob Bureau**, Member, Board of Directors and Clubhouse Member
- **Patrick Cheever**, Clubhouse Member
- **Walter Cunningham**, Member, Board of Directors and Clubhouse Member
- **Patricia Forts**, Member, Board of Directors
- **Patrice Muchowski**, Member, Board of Directors
- **Truong Vo**, Member, Board of Directors

Meeting #	Date	Subject to be Discussed	Time Estimate
1	✓ Board ✓ Leadership Staff	Process and Plan Visioning and Priorities	Board – 5/28 Leadership Team – 6/16
2	✓ June 18, 2020	Process and Plan; Stakeholder Review Vision, Mission	9:30 – 11:00 am
3	✓ July 2, 2020	Vision, Mission, continued; Values	8:00 – 9:30 am
4	✓ July 16, 2020	Finalize Vision, Mission; Create Values, Start SWOT Analysis	8:00 – 9:30 am
5	✓ July 30, 2020	Setting Goals & Strategies, pt. 1 Costs, Measurables, Accountabilities -- Genesis Club Program and Impact	8:00 – 9:30 am
6	✓ August 13, 2020	Setting Goals & Strategies. pt. 2 Costs, Measurables, Accountabilities -- Genesis Club Program and Impact	8:00 – 9:30 am
7	✓ August 27, 2020	Setting Goals & Strategies, pt. 1 -- Administrative Costs, Measurables, Accountabilities	8:00 – 9:30 am
8	✓ September 10, 2020	Setting Goals & Strategies, pt. 2 -- Administrative Costs, Measurables, Accountabilities	8:00 – 9:30 am
9	✓ September 24, 2020	Setting Goals & Strategies -- Fiscal Costs, Measurables, Accountabilities	8:00 – 9:30 am
10	✓ October 8, 2020	Setting Goals & Strategies -- Fiscal Costs, Measurables, Accountabilities	8:00 – 9:30 am
11	✓ October 22, 2020	Evaluate incremental costs and timing prioritization Secure Stakeholder Insight	8:00 – 9:30 am
12	➢ November 5, 2020	Review Draft	8:00 – 9:30 am
13	November, 19 2020	Final Report / Presentation to Board	TBD

GENESIS CLUB'S VISION AND MISSION

*Our **vision** is that all people living with a mental health condition are respected and enjoy meaningful lives as full and equal members of society.*

*Our **mission** is to ensure Clubhouse members have access to meaningful employment, healthy lifestyles, safe housing, and education, and experience genuine belonging, friendships, and purpose.*

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VALUES

Value	Description
Diversity, Equity and Inclusion	The Genesis Club is committed to creating an inclusive, culturally competent environment where diverse voices are active in all aspects of our organization. We demonstrate this commitment by creating a culture of inclusion where differing perspectives, values, thoughts and opinions are encouraged and embraced.
Respect and Dignity	The inherent worth of every person is at the center of all we do -- expressed in our clear, honest, non-judgmental communication with each other, how we maintain our clubhouse, and how we advocate for the rights of members.
Partnership	Genesis Club is based on genuine partnership between members and staff who work side-by-side to run the clubhouse and its programs in the community. This model helps others understand the valuable contributions people with mental health conditions make to our society.
Integrity and Accountability	As an accredited Clubhouse, we strive to exceed the International Standards which serve as a bill of rights for members and code of conduct for staff. We embrace all of our partnerships and programs with honesty, transparency and integrity.
Quality and Innovation	We value innovative thinking and are committed to continuously improving quality by providing an evidence-based program and services that fulfill our mission.
Leadership	As a Clubhouse International training center, Genesis Club is dedicated to being a leader in our field and our community, changing the conversation about mental health.
Hope and Resilience	The Genesis Club community inspires hope and resilience, which help people exceed their expectations and improve the quality of their lives.

Program Goals

GOAL 1: Increase diversity of our clubhouse community.

GOAL 2: Effectively utilize the hybrid clubhouse model in order to build strong relationships that support member engagement and recovery.

GOAL 3: Rebuild Employment Services to reflect post-COVID realities, changing landscapes and emerging jobs/sectors, so that we can help members successfully enter or re-enter the workforce.

Goal #1: Increase diversity of our clubhouse community

Strategy to Achieve Goal	Timing of Implementation	Incremental Costs	Who Leads	KPI
1. Create a culture where all people with mental health conditions regardless of ethnic and racial backgrounds, sexual orientation, gender identity and physical disabilities feel welcome, safe, and supported as they address their recovery needs through (a) recognizing our biases, (b) understanding the depth and source of racial disparities in mental health services,	FY21 Q3: Strategies in *year 1* will focus on increasing racial and ethnic diversity	None None	Ruth with Leadership Team	Identify training resources for the clubhouse community on recognizing bias (workshops, discussion series, in-house experience panels, etc.) Number of participants Increase in understanding as reported through pre-post surveys
2. Build partnerships with organizations where underrepresented groups live, work, learn and worship.	FY21 Q3	None – just staff time	Ruth with Membership Services	2 organizations will be outreached per quarter
3. Adapt programs and services to be responsive and relevant for all people with mental health conditions regardless of ethnic and racial backgrounds, sexual orientation, gender identity and physical disabilities.	FY21 Q3	Primarily staffing time	Ruth	Increased referrals, enrollments, members
4. Ensure that the racial, ethnic, and linguistic diversity of the staff reflects that of the Worcester community	FY21 Q3	Cost – ability to reach people; $2,500 per position	Ruth	Staffing reflects racial demographics.

Currently 30% of active membership is from racially/ethnically underrepresented communities. The City of Worcester is 43%. Our goal would be incremental in year 1 to reach 34%, year 2 – 39% and year 3 – 43%

GOAL #2: Effectively utilize the hybrid clubhouse in order to build strong relationships that support member engagement and recovery.

Note: *"Hybrid" refers to a physical clubhouse provides various options for people to have access to and participate in the clubhouse community (typically by telephone or on-line platforms)*

Strategy to Achieve Goal	Timing of Implementation	Incremental Costs	Who Leads	KPI
1. Research the various on-line platforms available for sharing work and connecting with others. Decide which platforms are best for our purposes, and increase our ability/educate community on how to utilize them effectively. (Prioritize Slack, Zoom, WebEx, others?)	FY21 Q2	$1,000 (purchase of various subscriptions for multiple units/users)	Ruth with managers	Increased number of members involved in hybrid work in each unit.
2. To increase access and utilization to new technologies (Chromebooks, tablets, laptops, smartphones) for members interested in accessing the clubhouse community remotely.	FY21 Q2	$1500 per Q= $6K/year = $18K/3 yrs	Ruth with managers	Number of people who access IT support and GWCF funding for devices
3. Ensure that every unit has sufficient and meaningful hybrid work for members who chose to engage in the work-ordered-day remotely.	FY21 Q3	Staff time	Ruth with managers	Each unit has clearly defined list of hybrid work available
4. Ensure that we maintain meaningful outreach (whether by phone, Zoom or other methods) to every member.	FY21 Q2	FY21 – Current Staff; FY22+ -- Additional FTE ($50K) = $100K/2 years	Ruth with managers	Maintain monthly outreach numbers
5. Develop a process to regularly evaluate our hybrid work to see if it is meeting the needs of the members, especially as COVID restrictions change over time, and adapt our services accordingly.	FY21 Q4	Staff time	Ruth with managers	Track number of members involved in hybrid activities vs number in the building (some may do both)

GOAL #3: Rebuild Employment Services to reflect post-COVID realities, changing landscapes and emerging jobs/sectors, so that we can help members successfully enter or re-enter the workforce.

Strategies to Achieve Goal	Timing of Implementation	Incremental Costs	Who Leads	KPI (% employed – 18% of active membership)
1. Identify the changes in local workforce: how has the workforce changed since COVID; a. what new industries and jobs are emerging, what skills are employers looking for b. what types of jobs are now remote and do members need to adapt their skills to access them?	FY21 Q3	None	Ruth with Career Development Unit (Ken)	Summary of initial findings complete by June 30
2. Determine what Genesis Club members are asking for and how we can best meet their employment needs in this new environment.	FY21 Q2	None	Ruth with Career Development Unit (Ken)	Number of members actively seeking employment and engaged in services
3. Expand our existing employer network	FY21 Q4	None	Ruth with Career Development Unit (Ken)	Number of new employer partners that reflect research findings (smaller employers with more flexible on-boarding, understanding of our mission, minority-owned, rom emerging sector, etc.)

Want to move towards 25% over the next 3 years. In year 1 our KPI is 20%, year 2 – 23%, year 3 – 25%

GOAL #3: Rebuild Employment Services to reflect post-COVID realities, changing landscapes and emerging jobs/sectors, so that we can help members successfully enter or re-enter the workforce.

Strategies to Achieve Goal	Timing of Implementation	Incremental Costs	Who Leads	KPI (% employed – 18% of active membership)
4. Develop TE positions which allow members access to structured vocational rehabilitation opportunities to build their skills and ability to re-enter the competitive workforce. (First tactics is to conduct a thorough assessment of current TE positions and employers.)	FY21, Q4	No cost	Ruth and CDU	100% of TE capacity is filled
5. Ensure staff have the competencies necessary to provide TE placement management that help members build skills, explore employment opportunities and obtain and maintain employment.	FY21, Q4	No cost	Ruth and CDU	All staff meet expectations for placement management. At least one member who provides feedback for staff performance evaluations has a TE with that staff.
6. Ensure that all TE positions are structured so that members do not entirely lose their benefits while working. (i.e., address the challenges members face while working, balancing minimum wage and SGA, leveraging PASS or similar programs).	FY21, Q4	No costs	Ruth and CDU	Hours and wages don't surpass SSA maximum income guidelines for 100% of TE positions

Administrative Goals

GOAL 1: Develop and implement a comprehensive communications and marketing strategy to increase awareness and visibility, promote our services, raise funds and more effectively promote the Genesis Club brand.

GOAL 2: Develop a plan for the updating and maintenance of our properties so that we continue to offer space that conveys dignity and respect, and is safe and accessible.

GOAL 3: Strengthen training and development opportunities for staff, particularly new staff.

GOAL 4: Strengthen the Boards' understanding of the Clubhouse model (the restorative value of the work-ordered-day, importance of working side-by-side, etc.) so that they can serve as effective ambassadors for Genesis Club and contribute to the organization's success.

GOAL 5: Expand Board and increase expectations of their role and contribution to the organization's success.

Goal #1: Develop and implement a comprehensive communications and marketing strategy to increase awareness and visibility, promote our services, raise funds and more effectively promote the Genesis Club brand.

Strategy to Achieve Goal	Timing of Implementation	Incremental Costs	Who Leads	KPI
1. Assess current marketing and communications materials and practices	FY21, Q1	$2,500	Lisa	Completed assessment and recommendations report

2. Develop a marketing and communications plan for year one including the use of social media, print, local public access (radio and TV) in order to promote the Clubhouse model and reduce stigma around mental illness.
  a. Develop a marketing plan that supports Program Goal #1 and embraces GC objectives to attract racially diverse members, while understanding cultural bias around mental illness, and highlight the value of community-based interventions
  b. Ensure marketing focus on priority audiences: members, donors, service partners – with distinct strategies for each segment
	FY21 Q3
	Note: marketing plan must reflect learnings from internal work on understanding bias – implicit and cultural – conducted in Q2
		$1,500	Lisa	Marketing materials available for outreach

3. Develop language that communicates the effectiveness and importance of Clubhouse services to the community.	FY21,Q3	None. Done internally.	Lisa	Feedback from website users
4. Update website content and features so that users can easily access information, connect with others, and support the clubhouse. (Should include virtual tours, member stories, mobile phone optimization. May include the development of Chatbots.	FY21, Q2	$5,000 (est)	Lisa.	User metrics

Goal #2: Develop a plan for the updating and maintenance of our properties so that we continue to offer space that conveys dignity and respect, and is safe and accessible.

Strategy to Achieve Goal	Timing of Implementation	Incremental Costs	Who Leads	KPI
1. Create a property/facilities committee of the Board	FY21, Q4	None	Lisa with Board	Committee formed with statement of work and timeline
2. Conduct capital reserve assessment to understand building upgrade and maintenance needs.	FY22, Q3	$10,000	Lisa with Board and committee members	Completed assessment report
3. Based on the assessment, determine priorities to address maintenance and upgrade issues. Prioritize projects that address access for members with physical challenges and ADA compliance.	FY22, Q3	$30,000 (currently budgeted)	Lisa with Board and committee	Completed annual maintenance plan and prioritized projects
4. Develop an annual plan/schedule for regular building maintenance (painting, window cleaning, 3rd floor and basement cleanout, etc.)	FY 21, Q4	See above	Ruth (or designee) .	Visible improvement of property grounds and community connections made
5. Participate in annual Earth Day neighborhood "clean up" events and invite corporate/volunteer engagement	FY21 Q4	$250	Lisa with Board	Funding sources are identified and secured for annual maintenance
6. Develop a funding strategy to ensure adequate revenue is available for regular upgrades and maintenance of Genesis Club properties.	FY22, Q3	No cost to develop funding strategy	Lisa with Board	Adequate funding secured for annual maintenance and priority upgrades

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Goal #3: Strengthen training and development opportunities for staff, particularly new staff.

Strategy to Achieve Goal	Timing of Implementation	Incremental Costs	Who Leads	KPI
1. Identify key competencies that are essential for new staff in year one.	FY21, Q3	No cost to identify competencies	Ruth	All new staff meet competencies after 1 year
2. Invest in the professional development of staff to inspire personal and professional growth and their contributions to GC.	FY21, Q4	Participation in colleague training, may need to purchase training modules or on-line training to support manager development - $8500	Ruth	All managers have access to training opportunities that support their role at the clubhouse.
3. Create succession plan for senior staff positions	FY 22, Q1	None	Ruth with Lisa	Succession plan is reviewed annually.

Goal #4: Strengthen the Boards' understanding of the Clubhouse model (the restorative value of the work-ordered-day, importance of working side-by-side, etc.) so that they can serve as effective ambassadors for Genesis Club and contribute to the organization's success.

Strategy to Achieve Goal	Timing of Implementation	Incremental Costs	Who Leads	KPI
1. Support Board participation in relevant Clubhouse International training opportunities (USA Conference, International Conference, WANA webinars, Directors' Training, Colleague Trainings)	FY21, Q2	Conference registration and related costs - $1000	Lisa	75% of Board participates on 1 training annually
2. Increase opportunities for Board member participation in the work-ordered day at the clubhouse, unit work, and side-by-side (virtual) work in an effort to build relationships with staff and members	FY21, Q4	No cost	Lisa with Ruth and managers	75% of Board participates in clubhouse activity twice annually.
3. Provide opportunities for Board members and encourage Board members to take the initiative to serve as ambassadors in the greater Worcester community	FY21,Q4	No cost	Lisa with Board Chair	100% of Board participates in Ambassador and other community-awareness events annually.

Goal #5: Expand Board and increase expectation of the role and contribution to the organization's success

Strategy to Achieve Goal	Timing of Implementation	Incremental Costs	Who Leads	KPI
1. Expand number of Board members, with focus on partnership opportunities, diversity, employment opportunities, and wealth markets.	FY21, Q2	No costs	Lisa an Board Chair	Increase in Board membership from 14 to 17 by 2023
2. Increase Board expectations related to generating philanthropic revenue for the organization. (See #2 Fiscal Goals)	FY21, Q2	None	Lisa and Board Chair	100% Board giving and 100% of Board members achieve minimum $$ raised expectations from individuals, corporations and foundations.

Fiscal Goals

Goal 1: Increase sustainable, unrestricted revenue to support Genesis Club programs, operations and strategic priorities

Goal 2: Increase Board's expectation and accountability for the growth in philanthropic revenue.

Goal 3: Increase the human resource capacity necessary to generate the revenue to meet fiscal goals.

Goal 4: Improve systems for tracking and analyzing donor data to inform fundraising programs and goals.

Goal #1: Increase sustainable, unrestricted revenue to support Genesis Club programs, operations, and strategic priorities.

Strategy to Achieve Goal	Timing of Implementation	Incremental Costs ($15K)	Who Leads	KPI
1. Create a comprehensive, multi-year development plan that that decreases dependency on DMH/State funding	FY21,Q4	No cost to create the plan	Lisa with Chair of Development Committee	Convert from 82/18 to 60/40 ratio of State vs. philanthropic revenue within 3 years
2. Increase reserves from three months of operating capital ($475K) to six month minimum (50% of $1.9M budget)	FY22 Q1	$75K	Lisa, Investment Committee and Board Chair	Achieve six month reserve goal; set annual goal of $75K of carryover of unused operating $ and budget $75K per year
3. Create a Major Donor and Leadership Giving program with multi-year commitments	FY22, Q2	Dedicated staff time, recognition events, etc.	Lisa with Executive Committee/ Development Committee	Identify and create stewardship plans for 30 top donors/prospects
4. Create a Corporate Partnership program (employment, $ support, Empl. Engagement, recognition)	FY22, Q3	No cost to create the program	Lisa with Development Committee	$25,000 annual corporate sponsorships
5. Revise and relaunch the Legacy/Planned Giving program (in order to increase GC endowment over time)	FY22, Q4	Planned Giving mar/com package that integrates with communications platform. Research needed to estimate cost	.Lisa with Executive Committee/ Development Committee	Defined # of donors who have made a provision to include GC in their estate plan

Goal #2: Increase Board's expectation and accountability for the growth in philanthropic revenue.

Strategy to Achieve Goal	Timing of Implementation	Incremental Costs	Who Leads	KPI
1. Establish a Development Committee of the Board	FY21,Q3	No cost to create committee	Board Chair	Committee charter/scope completed
2. Set and reach annual board contribution goals of a minimum combined 'give/get' expectation	FY21, Q4	No cost	Board Chair and Development Committee	Annual goal reached
3. Set and reach annual goals for major donor and leadership gifts	FY21,Q4	No cost	Lisa with Board Chair	Annual goal reached
4. Increase Board involvement in and accountability for building strategic partnerships	FY22,Q1	No cost	Board Chair	5 key partnerships formed/ strengthened

Goal #3: Increase the human resource capacity necessary to generate revenue to meet fiscal goals.

Strategy to Achieve Goal	Timing of Implementation	Incremental Costs	Who Leads	KPI1.
1. Fully staff the training and development unit.	FY21,Q2	Cost for posting positions - $500	Ruth	2 positions filled
2. Build in-house capacity to effectively manage donor data input, and reporting to aid in fund raising efforts.	FY21, Q3	Training - $1500	Lisa	Robust use of Salesforce, accurate data, timely reports
3. Add experienced, full-time dedicated development professional – either at the associate or director level	FY21 Q3	$60,000 - $80,000	Lisa.	Position filled

Goal #4: Improve systems for tracking and analyzing donor data to inform fundraising programs and goals.

Strategy to Achieve Goal	Timing of Implementation	Incremental Costs	Who Leads	KPI
1. Ensure complete, accurate and timely data in Salesforce	FY21, Q3	Possible staff time	Lisa and Dev Staff Member	% of donor records are complete/ accurate (increasing percentage each year)
2. Integrate web-based marketing and communications with Salesforce and Quickbooks for more tracking and reaching revenue goals	FY22, Q2	Research needed	Fran and Lisa	Monthly reports with donor data
3. Leverage data to inform development program decisions	FY21, Q4	None	Lisa	Data analytic reports utilized → achieve revenue goals

The New Kensington Group

Helping education and nonprofit leaders grow their organizations

Strategic Plan Design led and facilitated by Charles B. Gordon, President and CEO, New Kensington Group, chuckgordon1979@gmail.com, 857-334-6177

APPENDIX

SWOT Analysis

Evaluating Genesis Club's Strengths, Weaknesses, Opportunities and Threats

Strengths: *Internal attributes and resources that support a successful outcome*

Weaknesses: *Internal attributes and resources that work against a successful outcome*

Opportunities: *External factors that you can capitalize on or use to your advantage*

Threats: *External factors that could jeopardize your success*

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Strengths: Program

- International/national reputation

- Safety net / Support / Shared Experiences

- Knowledge of Clubhouse Working Model / Egalitarian model and work mediated relationships

- Work Ordered Day

- Commitment to International Standards

- Core Programs and Services for Young and Older Adults with Strong Outcomes: Strong employment, education services (employment as full citizenship for people living with SMI

- Staff: Committed, Qualified, Skilled, Dedicated

  - Program Director Ruth Osterman and her 20+ year experience at Genesis Club

- Partnership/Collaboration Between Mentors and Staff

- Culture of Innovation, Consensus-Building and Continuous Learning

- Community Networks

- Employment and Education: Training, Wellness and Young Adult Programs

- Community that really cares about one another

- Egalitarian, work-mediated relationships

- Safe place to be, welcoming

- Gives members meaning and purpose

- Reducing stigma via employer relationships

- Flexibility – meeting members where they are at

- Freestanding Clubhouse allows us the ability to innovate, try new things, and be a leader in our community

- Holistic supports – not just one support at a time; complimentary supports

- Renowned in the Clubhouse community

Strengths: Administrative

- Accredited / Certified / Strong Reputation Clubhouse – Generates Income
- Strong Staff Leadership: Experienced / Dedicated / Forward Thinking
  - New ED
  - New CFO
  - Program Director
  - Management Committee
  - Dedicated / Knowledgeable / Collaborative Staff
  - Experienced / Committed Business / Financial Manager / Accounting / Technology
- Regular technology upgrades/maintenance/support
- Expanded Board of Directors / Varied Experience / Mix of Veteran and New Leadership / Committed
- Commitment to rebuilding the Board of Directors
- Staff / Business Management and Performance Management Systems: Competitive Pay Scale, Formal Review Process / Budget Planning Process
- Investment in technology that is bringing us more up-to-date with community

Strengths: Fiscal

- Relationship with / Support from Department of Mental Health

- Positive financial position / Cash flow

  - Resources / Reserves to Invest

  - Emerging Investment Strategy

  - Emerging Endowment

  - Balanced budget and fiscal stability

- Philanthropy:

  - Excellent Relationship with Funders

  - Few, but loyal donors

  - Generous Donors

  - New funding sources in 2020

- Grants

  - Strong Grant Writing

  - Good Relationships

- Independent 501©3, not operating like other Clubhouses as a program of the state or another nonprofit

Weaknesses: Program

Programming:

- Daily activity has decreased (even prior to COVID)
- Social programming needs to be revisited/restructured; Increase opportunities for 'fun'
- Art Focus needs to be revisited
- Virtual literacy: Support members to build skills in accessing technology and social media
- Supporting members who are Deaf or hearing-impaired living with a mental illness

Service Delivery:

- Expertise and experience very focused among a few people
- Worcester public transportation can be unreliable and can be challenging for older adults
- Limitations Resulting from COVID, including challenges balancing work from home with work-ordered day and complete change to how you provide employment services
- Internal, cross-unit communication
- Language that the helps the general community understand what we truly do

Lack of Stakeholder Diversity: Racial, LGBTQ

Other:
- Security Breaches
- Technology in work and in innovation
- Losing Track of Members / New Referral Sources
- Links to UMass Medical diminishing
- Relative isolation within the community

Weaknesses: Administrative

Marketing / Branding / Communications / Visibility:

- Awareness Poor: Not Well Known in the Community (Best Kept Secret in Worcester)ng
- Limited Marketing; Difficult to Market Complex Model
- Outdated Website
- No Coherent Communications Plan
- Online presence, social media

Staff:

- Thinned staff; limited depth; high turnover that feeds into diminished sense of community
- Insufficient Training, Especially in Social Practice
- Freeing up Lisa from Normal Everyday Tasks
- Lack of Administrative Support for Operations
- Insufficient structure to build management capacity and succession planning
- No Human Resources Department

Board of Directors:

- Underleveraged (especially re: fundraising); limited use
- Disconnected from Members and Staff
- Expansion and Diversification

Facility / Facility Management:

- Lower in-building capacity (during pandemic)
- Need new windows, basement is "atrocious", build better habits to maintain and clean our building ; no maintenance schedule or planned upkeep of Lincoln Street or Chandler House.
- Updating Needed / Ventilation Challenges / Potential Asbestos Issues in Basement
- Clubhouse building is not as physically accessible as it should be

Technology / Data Systems:

- Staff and member technology
- Donor database and donation history

Weaknesses: Fiscal

Insufficient Revenue Diversification to Fund Expanded Clubhouse Programs / Operations

Revenues just cover expenses (break even budget)

State Funding:

- Reimbursement inadequate

- Over-Reliance: Failure to Achieve 50/50 Diversification Model of 50% DMH and 50% Grants/Fund Raising/Contracts; Insufficient Unrestricted Funding

Philanthropy:

- Low Overall Fundraising

- Poor Fundraising Program

- No Comprehensive Development Plan

- Few Donors

- Competition for Funding

- Board of Director Contributions

- Expectations Too Low and Performance Weak Re: Board Supporting Fundraising Efforts

- Insufficient Staff Capacity

Poor Systems:

- Poor Donor Tracking , Histories, Etc.

- Underleveraged Salesforce System for Donor and Partner Development

- No Donor Recognition Program

Sustainability

- Small Endowment

- No Planned Giving Program

Opportunities: Program

Expand Program Model / Service Delivery System(s):

- Expand methods to provide services

- Expand experience of "virtual clubhouse" to expand membership

- Expand opportunities for member/new member engagement through "hybrid" clubhouse

- Improve Housing Program

- Development of new employment partnerships

Improve Quality:

- Enhance training programs for staff and non-clubhouse organizations

- Adjust Employment Supports to Post-Pandemic Economy / Deepen Focus on Great Relationships with Employers

- Become more competitive / attractive employer for leaders in mental health field

- Incorporate New Technology to Leverage New Service Delivery Approaches

- Improve support of all young adult and older adult programs

- Language translation service/app or something that will allow us to reach out to people who speak other languages

- Develop stronger partnerships with other like organizations within our community

- Increase virtual literacy and expansion of virtual Clubhouse – virtual "side-by-side" work

Membership Expansion / Improved Experiences:

- Increase focus on mental health needs and adapted programming to attract racial/LGBTQ diversity

- Provide more services to youths for anxiety, depression & substance abuse

- Seek and develop relationships with new referral sources, particularly those serving BIPOC individuals

- Reach broader geographic communities

- Increase level of outreach to our community to increase referrals/ADA

Other

- Cease the opportunity to become leader in the anti-racist movement in the Clubhouse world

Opportunities: Administrative

System Leadership:

- Build a strong coalition of accredited clubhouses, leading the way in quality and outcomes

- Start impacting city on a legislative level – work with city councilors, mayor, etc. to make the city better, not just the Clubhouse

Board of Directors:

- Continue to expand, increase focus on recruiting from wealth market, diversity, employment, and partnership opportunities

- Increase engagement, expectations, accountability and role re: fundraising

- Increase Board connectivity to staff and members

- Strengthen Board/Clubhouse relationship so that the board understands the daily operations of our Clubhouse and can effectively operate AND the Clubhouse knows/trusts our board on a more personal level

Marketing / Branding / Communications / Visibility:

- Market cost benefit of services

- Improve brand awareness and overall visibility

- Develop robust communications and marketing program to improve brand awareness and visibility

- Showcase Executive Director, staff, members

- Leverage increase cultural awareness about mental health

- Increase social media presence beyond just Facebook and Instagram – communications and marketing

Facility:

- Better leverage utilization of Chandler House

- Building that conveys a sense of dignity and respect – an integrated and transparent plan that meets the needs of our building and sustains all of the great work we do

Staff:

- Develop recognition program

- Add administrative staff support for Executive Director

- Add dedicated development staff

- More sophisticated human resources services

Technology / Systems:

- Improve quality of donor database

- Improve training of and improve utilization of Salesforce

- Improve technological capabilities

Opportunities: Fiscal

Fund Raising / Development:

- Develop comprehensive, multi-year development plan to fund programs, operations and strategic plan priorities

- Expand individual / family, corporate and foundation funders

- Develop leadership and major donor strategy

- Develop special events strategy to engage donors and deepen pipeline of future supporters

- Launch planned giving program

- Grow endowment through outright support and deferred commitments (planned gifts)

- Increase Board's expectations and accountability re: fundraising

- Deepen Executive Director's time to focus on relationship management and revenue generation

Grants:

- Expand number of grants and areas for investment (i.e. housing, virtual services, etc.)

Government Funding:

- Seek expanded reimbursement / rate hike

- Build and maintain strong relationships with influencers and law makers to have a positive impact on legislation that addresses mental health/Clubhouse services

Threats

External:

- International Pandemic

- Economic Downturn and its Effect on Employment Opportunities

- Decrease in Government Funding

- Competition for Philanthropic Funding

- Reputational Risk

- Consolidating Industry: Mergers and Acquisitions

- Competition: Mental Health Services

- Policy and System Changes

- Losing the heart and values of the clubhouse model as new directors come into the global network from the medical field, and who bring a very clinical business model

- Negative perception in the community of what Clubhouse is and does

- Not being at the top of the "advocacy list" by legislators

External/Internal:

- Potential negative perception of Clubhouse in the Community (misunderstanding our intent/services/interventions) – Clubhouse language does not match what community understands (i.e. clinical language)

Internal:

- Continued staff turnover

- Continued volunteer and Board attrition

- Continued member attendance decrease

- Continued over-reliance on government funding

- Unknown future of on-site training opportunities

- Continued deterioration of Chandler House facility

- Challenges understanding and adapting to mental health needs of different racial, ethnic and cultural groups