



# NEIGHBORHOOD SERVICES ORGANIZATION

## THREE-YEAR STRATEGIC PLAN 2019-2022

## CONTENTS

Introduction.....	3
CEO Strategic Planning Vision.....	4-5
Executive Committee.....	6
Finance Committee.....	7
Governance Committee.....	8-9
Donor Development Committee.....	10-11
Programs & Services Committee.....	12-13
Building & Grounds Committee.....	14-15

## **INTRODUCTION**

The NSO board and staff leadership team seeks to establish a three-year rolling strategic plan with annual accomplishment deadlines. Each year, the past year will be dropped off and one year will be added to the end of the rolling three-year plan.

The NSO Executive Committee is charged with presenting the board of directors with an action plan and vision, in partnership with the NSO CEO, that sets the new plan in motion, primarily through assignments made to various board committees, as illustrated in this new plan.

## **CEO STRATEGIC PLANNING VISION**

**The CEO envisions land acquisition in the immediate area close to NSO HQ to guarantee parking and establish an in-kind donations warehouse.**

### **Parking/Donation Station Twofer**

- NSO is vulnerable when it comes to being able to provide a guarantee of parking to its dental clients and staff, volunteers and guests.
- The church-owned lot north of NSO is currently used for dental clinic client and overflow guest parking, but the owner can cut NSO off with only 30 day's notice.
- Area parking needs will only grow larger once Scissortail Park soccer fields are added to the large easement area on SW 10<sup>th</sup>, lower park estimated completion date of 2022. There will be no parking for the lower park, according to Myriad Gardens.
- Property values in the area have accelerated because of Scissortail Park.

### **Donation Station**

- A Donation Station would have multiple purposes.
- A place to accept used and new in-kind gifts NSO receives for client programs, ranging from furniture to beds and from household products to clothing; NSO uses in-kind collections as a donor touchpoint for new donors. NSO is averaging 2 to 3 requests each week.
- General storage - NSO currently spends nearly \$600 per month, for 510 SQF, on offsite storage rental fees.
- A place to store NSO's multiple vehicle fleet (indoors) for safekeeping purposes.
- A program to provide NSO clients with employment opportunities that include receiving, categorizing and inventorying merchandise. This program could work in tandem with our new Paul Milburn Job Readiness Center.
- A place to host large volunteer groups for projects, and the potential to expand our staff offices.
- NSO's Finance Committee has already met with our banker and we have been approved for \$675,000, for land acquisition.

**The CEO envisions expanding dental clinic operations to Tulsa, based on one or more requests that NSO come to Tulsa by leading Tulsa leaders.**

**Tulsa Low-Cost Dental Clinic Feasibility Study**

NSO has been invited to open a low-cost dental clinic in Tulsa. There is no similar program. While the prospect of opening a clinic is enticing, there are multiple things to consider. What is proposed is a feasibility study that includes:

- Documenting community needs – interviews with leading civic leaders, particularly those in government, health and dentistry.
- Estimating the cost of operations – rent, salaries, built-out, equipment, insurance, etc.
- Securing pledges from area foundations/corporations/individuals that they would help front the costs of opening and maintaining the project for the foreseeable future
- I have discussed the study with our grant writer, Dana at Sharpshooter Communications; she is ready and very capable to provide NSO with a comprehensive study. She has indicated that a robust study would be \$50,000, but is willing to work with whatever budget that the agency approves.

**Housing expansion:**

This needs to be on our minds as we look to the future of the organization, staff has been working hard to review deeds and start discussions with the City with regards to our affordability period.

## **NSO Strategic Plan - Executive Committee**

- **Develop a comprehensive strategic planning framework**
  - Bring in an outside consultant to assist.
- **Risk assessment/program exposure contingency protocol**
  - Define risk assessment and program exposure.
  - Determine how it applies to NSO.
  - Review how other nonprofit organizations deal with risk assessment and program exposure.
  - Encourage open discussion among board committees for input.
  - With staff assistance, create a protocol that encourages a proactive stance.
  - Commercial Insurance Review, in partnership with the Finance Committee (April - renewal month).
  
- **Develop dashboard for measuring and tracking key Indicators of organization performance that will be presented at each board meeting**

## NSO Strategic Plan – Finance Committee

- **Endowment Contribution Increase**
  - Develop a strategy to further the growth of NSO's Endowment.
    - **Action step** – Continue to set increasing target amounts for Kirkpatrick Endowment match.
  
- **Expansion Plans**
  - Develop tailored solutions to expand NSO's services.
    - **Action step** – Develop preferred recommendation for financings with debt or capital campaign.
    - Collaborate with Building and Grounds for clarity on funding needs.
  
- **Financial Policies**
  - Review existing policies to identify gaps in policy guidance.
  - Create new policies for existing gaps including, but not limited to:
    - Vendor Procurement
  - Annual review of Accounting Controls.
  - Annual review of Core Functions.
  - Annual review of NSO insurance program.
  
- **Debt Elimination Plan**
  - Monitor progress of paying off existing loan.
    - **Action step** – Develop goal for Centennial NSO Good Samaritan Awards Luncheon.
    - **Action step** – Develop goal for debt payment.

## NSO Strategic Plan – Governance Committee

- **Recruitment and orientation of new board members that support the vision and mission of the Strategic Plan for the Organization**
  - Maintain a list of prospective board members
    - **Action step** – Encourage board members to recommend those individuals whose gifts will advance the mission of NSO
  - Maintain a matrix that is used to define board member attributes that are desired when looking for prospective board members
    - **Action step** – Evaluate in ongoing manner; identify gaps in Board attributes, and target Board candidates accordingly
  - Determine ways to engage new board members and keep them interested in NSO
    - **Action step** – Continue to provide volunteer opportunities for new board members to act as ambassadors for NSO.
    - **Action step** – Encourage attendance at one Finance Committee meeting within the first year of board service.
  - Nomination form will give indications of areas board members find most appealing
    - **Action step** – Evaluate form in ongoing manner to ensure effectiveness in acquiring information
  
- **Measure board member effectiveness**
  - Evaluate board members and utilize feedback to improve board service effectiveness and promote value to potential board members
    - **Action step** – Conduct annual survey of first year board members and experienced NSO board members
  - Annually review matrix for determining individual board member effectiveness
    - Monitor attendance at called and special meetings
      - **Action step** – currently monitored
    - Introduction of others to the organization
      - **Action step** – Per Board of Directors Covenant each board member commits to actively participate in a minimum of two Good Samaritan Lunch & Learns per fiscal year by inviting potential guests to promote NSO awareness.
    - Financial contributions
      - **Action step** – currently monitored through donor database
    - Non-board-related volunteer participation
      - **Action step** – will be monitored by NSO Staff
    - Yearly Report Card
      - **Action step** – to be completed and sent at the end of the fiscal year



- **Action step** - Report card summary will be sent to Governance to ensure we are on track with objectives.
- **Action step** – Committee chairs will advise Governance Committee of any engagement concerns with a board member for follow up.
- Exit Interview
  - **Action step** – Conduct exit interviews with board members when service/term is ending
  - **Action step** – CEO to summarize exit interviews for presentation to Governance Committee; this will clarify what keeps board members interested and engaged. Implemented and ongoing.

## NSO Strategic Plan – Donor Development Committee

- **Raise private unrestricted contributions to help pay off dental clinic furnishing's debt of \$135,000 by 2020 through the following action steps:**
  - Monthly NSO Good Samaritan Lunch and Learns
  - Annual NSO Good Samaritan Awards Luncheon
  - Other direct mail or face-to-face solicitation efforts
  
- **Door-openers:**
  - Work with each board member to emphasize the importance of them introducing new donor and volunteer prospects to NSO throughout the year via tours, NSO Good Samaritan Lunch and Learns and NSO Good Samaritan Awards Luncheons.
    - **Action step** – Remind Board members that in accordance with the Board of Director's Covenant and Letter Agreement, they are required to actively participate in a minimum of two Good Samaritan Lunch and Learns per fiscal year by inviting potential guests to promote NSO awareness
  
- **Annual Review and Approval of Branding Guidelines:**
  - With staff assistance and input, define the NSO brand and activities necessary to improve brand awareness
  - Review the organization's branding protocol and share with the entire board for awareness-raising purposes
  
- **100 Year Celebration:**
  - With CEO input begin to strategize a plan for NSO's 100 year celebration
    - **Action step** - Evaluate annual luncheon to strategize plan for 100 year celebration (bigger and better...)
    - **Action step** – Centennial Project Committees will continue to meet on a regular basis to plan events and ongoing matters
    - **Action step** – Continue to receive input from Ed Crane (Fundraising Consultant)

- **Future NSO Land Expansion:**
  - Work in collaboration with Building & Grounds Committee and Finance Committee regarding securing funds for future land expansion
  
- **Donor Appreciation Expansion:**
  - Develop a Donor Matrix to establish levels of giving
  - Annual “Thank-a-thon” conducted by Board Members to acknowledge gratitude for donor contributions

## NSO Strategic Plan– Programs & Services Committee

- **Measuring Program Effectiveness**
  - Housing: C-Trax will provide information regarding completion rates of programs/services through our housing programs.
    - **Action step** - Board reviews data and results of C-Trax.
    - **Action step** - Develop periodic reports from staff housing meetings regarding reasons for client discharges to determine trends.
    - **Action step – Evaluate feasibility of the "Keeping in touch" (KIT) program.** This program will keep in touch with former clients for periodic updates.
  - Health Programs:
    - **Action step** - Develop and implement monthly Dashboard for NSO Health Programs which include:
      - WIC
      - WIC Outreach
      - Peer Support Counseling (WIC)
      - Summer Food Program (WIC)
      - Dental Clinic
      - Dental Outreach
- **Measuring NSO's Impact on Unmet Community Needs**
  - These are endeavors or actions NSO contributes to or facilitates in an effort to meet a specific emergent need in the community. Programs and Services will seek to measure the impact/outreach of these programs.
    - **Action Step** - Develop and implement monthly Dashboard of what data is currently available, what data could additionally be tracked, and what data should be tracked to monitor program outreach.
    - These programs Include:
      - Ice Angels assistance (including hygiene kits and donations of clothes and other goods)
      - Rental Assistance – Funding provided through United Way with a limited amount of funds available each year on a first come first serve basis
      - RAIN Lease – NSO leases property to RAIN for their programmatic needs.

- Walk-in Services – NSO provides food, clothes, and other goods including monetary bus passes and other resources to transient populations as they are available at various properties.
- **Reporting Program Effectiveness to Various Constituencies**
  - Information regarding completion rates of programs/services will be reported.
    - **Action step** - One sheet Dashboard (or similar tool) will be developed to mail to donors, grantors, and other non-profits relevant to NSO such as the Homeless Alliance. Dashboard will be developed to facilitate the priorities of NSO's Strategic Plan.
    - Dashboard will be included in the notebook given at the monthly luncheons, and at the Good Samaritan Award Luncheon.
- **Recognizing ongoing opportunities, threats, and advocacy that may impact clients and services.**
  - **Action step** - Utilize the United Way, Oklahoma Center for Nonprofits, and other resources to help track legislative issues or other relevant items that would impact delivery related to our programs.

## NSO Strategic Plan– Building & Grounds Committee

- **Mitigate risk associated with 30-day notice for loss of Little Flower parking access (year one)**
  - With staff assistance, pursue alternative parking concepts with adjacent property owners (e.g. – Crossbridge Community Church, Latino Community Development Agency, Wynn Construction, purchasing neighborhood houses, on street parking, etc.)
    - **Action step** – Pursue discussions with adjacent property owners and determine type of agreement that might be possible (purchase, first-right-of-refusal, leased parking spaces, restricted parking for overflow and/or NSO employee-only parking, etc.
    - **Action step** – Coordinate with other committees and staff regarding financial resources available for identified solutions
  
- **Evaluate and develop plans to accommodate receiving and storage of donated items (year one)**
  - With staff assistance, pursue concepts for creating an NSO donation station
    - **Action step** - Develop a general program of how a facility would be used, staffed (if necessary), and the needed size
    - **Action step** - Determine if the facility could potentially be integrated into a solution for the parking risk-mitigation issue or if it could be included into potential future uses of the vacant lot adjacent to the CWC
    - **Action step** – Coordinate with other committees and staff regarding financial resources available for identified solutions
  
- **Evaluate and develop plans for mission-related opportunities associated with vacant CWC lot (year three)**
  - With staff assistance, pursue ideas and concepts for utilizing the lot adjacent to CWC
    - **Action step** – Determine if increasing the number of units for the present CWC is the best use of the land or if it needs to be used for other needs. Preliminary architectural and cost estimating to construct additional living units for the CWC has already been done
    - **Action step** – Determine if there are constraints (i.e. – zoning, neighborhood objections, etc.) that would prevent using the land for

- our needs
- **Action step** – Determine if a storage facility could be constructed on the property as part of other uses.
- **Action step** – Coordinate with other committees and staff regarding financial resources available for identified solutions
- **Evaluate the potential of divesting NSO of Gatewood and Martha’s House and building a new complex (year one)**
  - With staff assistance, develop a preliminary study to determine whether the Gatewood and Martha’s House facilities should be replaced
    - **Action step** – Involve a design professional to determine the maintenance and renovation needs for the existing facilities and determine the cost/benefits of replacing the facilities.
    - **Action step** – Coordinate with other committees and staff regarding financial resources available for identified solutions
    - **Collaborate with Programs & Services Committee for internal feasibility study to determine need and demand.**
- **Annual review of staff’s facilities management and preventive maintenance plan (year one)**
  - Develop a plan to identify maintenance needs, schedules and anticipated costs for each NSO facility
    - **Action step** – Identify prototypical documents used by others (i.e. – facility management companies)
    - **Action step** – Survey existing facilities to establish existing conditions
    - **Action step** – Review past maintenance costs for last three years
    - **Action step** – Develop document for each NSO facility
- **Review staff’s written disaster plan for facility repair/replacement, data recovery, client relocation, etc. (year one)**
  - With staff assistance, develop contingency plans for physical disasters that would result in a temporary or permanent loss of an NSO facility (e.g. – fire, storm damage, etc.)
    - **Action step** – Initial meeting with staff to determine operational issues, potential solutions, and constraints from regulatory authorities, etc. for each different facility.

Evaluate and develop a plan in regards to Rain Property