



# Strategic Plan 2022

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Facilitation and Lead Consultant

D.J. Thompson

Nonprofit Consultant

[djthompson@okcnp.org](mailto:djthompson@okcnp.org)

Cassie Pastor

Programs Coordinator

[cpastor@okcnp.org](mailto:cpastor@okcnp.org)





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Photo provided courtesy of the NSO website



## Introduction and Purpose

In the summer of 2021, the leadership of Neighborhood Services Organization (NSO) engaged the Oklahoma Center for Nonprofits (OKCNP) to facilitate, guide, and help develop a three-year strategic plan for the organization. The strategic planning committee, President & CEO, Stacey Ninness, and Executive Assistant to the CEO, Linn Probasco, met virtually with the OKCNP consultant on several occasions to have preliminary discussions and plan for an all-day retreat of the board of directors in the spring of 2022. Nine (9) stakeholder focus groups were hosted beginning in February of 2022. The results of those focus groups were provided in a report prior to the planning retreat. On April 5, 2022 the board members and some leadership staff of NSO attended a facilitated session with OKCNP Nonprofit Consultant D.J. Thompson and OKCNP Programs Coordinator Cassie Pastor to begin the development and construction of the strategic plan.

## Using this Document / Plan

This document is intended to provide focus for the leadership of NSO over the next three (3) years and will likely influence strategic initiatives for the next three (3) to five (5) years. It is meant to be succinct, concise, and useable by the board and staff who will monitor the progress of implementing the plan and maintain focus on the items listed within. The strategic plan, if implemented and measured against performance, will provide vision, focus, action items, accountability, and a model for continuous improvement in the expected outcomes of the organization.

A strategic plan is created to be a “living and breathing” document that guides the decision-making process of the organization with the ability to be flexible and adaptable

“Thank you to NSO for helping me. Before I came here I really had nothing and now I am learning how to live on my own. I really like it here and am going to keep doing the programs.”

— *Braden – Resident of the Carolyn Williams Center.*



as conditions warrant. A key component to successful execution of this strategic plan is an active, participating, and accountable board and staff leadership who will commit to evaluating all decisions through the lens of this strategic plan. Regular review and evaluation of the goals and objectives of this strategic plan are vital to successful completion.

The contents of this document includes the summary of the nine (9) focus groups, as well as details from the strategic planning meeting held on April 5, 2022. Although relevant, some of the detail that is included is for reference purposes and documentation of “where we are” so that reflection on those items can be made in the future.

The final pages of this plan include an “Action Document.” This Action Document lists specific Action Steps that emerged through the strategic planning process. It includes the information from conversations and notes from the planning meeting on April 5<sup>th</sup>, as well as consultant additions. The columns in this section should be utilized by staff and the board to assign individuals or committees to complete tasks and set a timeline for each. Additional sections and Strategic Initiatives or goals can also be added to this document by NSO. The Action Document is designed to ensure NSO has a tangible and easy to use resource to assist with keeping the strategic plan on track and functional at all times.

## Focus Group Summary

As a part of the strategic planning process, NSO conducted nine (9) focus groups. A significant amount of detailed information was collected and provided in a summary report to the NSO board of directors at the retreat on April 5<sup>th</sup>. The “Key Findings” section of that report is provided below in addition to a summary of information about NSO as a workplace.

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### Focus Group Summary

Provided to the NSO Board of Directors

April 5, 2022

#### Introduction and Background

In the fall of 2021 NSO engaged the Oklahoma Center for Nonprofits in a strategic planning process. An important part of that process was conducting several focus groups with NSO stakeholder groups. The following is a summary of the nine (9) focus groups that were conducted among funders, staff, board members, community partners, and volunteers.

#### Key Findings

1. The name, NSO / Neighborhood Services Organization, is not well recognized in the community or among those not closely associated with the organization.
2. Although all groups felt like NSO is excellent at what they do, there is question and concern that NSO as an organization is trying to do too much and that if the programming was more focused, or programs were abandoned and given to other organizations/agencies, NSO could better prioritize their core programs. Participants would rather see more concentration and enhancement on current programming than expanding into new program areas.
3. The programs that NSO provides are not recognized as NSO programs. It is difficult to see ties between the programs or why NSO is the organization that administers all of them. The services are tied to the provider or the name of the facility but that the connection to NSO as the parent organization is often unrecognized.
4. Stacey Ninness is the face of the organization and many community members and partners associate her with NSO when asked. There is worry among all groups about the succession plan for the President & CEO, particularly filling the gap that will be created if Stacey moves on. A formal succession plan and the development of current staff and development of positions such as a COO, VP or similar leadership positions that create a structure of depth are needed.
5. NSO is very well respected in the community.

6. Follow through and communication with referring organizations and partners after they send a client to NSO needs improvement.
7. Most view NSO as a leader in the nonprofit sector and as having the influence to lead discussions and change in areas such as legislative advocacy and community needs assessments, as well as better coordination of service providers and finding solutions to coordinated databases.
8. The Dental Clinic and all aspects of Housing emerged as the predominant services provided by NSO that are valued across focus groups. It was felt that the WIC programs may need to be further evaluated to ensure that it aligns with the NSO mission and that measurable impact is achieved.
9. Volunteers expressed a dedication and passion for serving the clients of NSO but there was some dissatisfaction with communication and a lack of clear coordination. Volunteers would like to see a strong and knowledgeable volunteer coordinator at NSO. A volunteer manual with policies and procedures is recommended.

Overall, the staff were very satisfied with working at NSO and considered it to be a positive workplace and culture. They appreciated the immense support during COVID for their own mental health needs, and the consideration for their physical health by NSO leadership. Leadership is warm and caring and demonstrates a true concern for every person that works there.

NSO is a family-friendly environment that promotes work-life balance. Although every employee expressed satisfaction with feeling appreciated and valued, they also expressed that the workplace is hectic and there is constant crisis management internally. There is a culture of being reactive instead of proactive.



## Strategic Planning Session & Context

The NSO strategic planning session was held at the Devon Boathouse located at 608 Riversport Dr. in Oklahoma City from 9:00 am – 4:00 pm. Those in attendance included Board Chair, Paige Ross, board members Joyce Alfred, Glynis Andrews, Andrea Baird, Brian Bakeman, Linda Brinkworth, Kati Christ, David Dirkschneider, Ed Doney, Shirley Franklin, Heather Howerton, Jenny Koetter, Victor McCullough, Tyler Larsen, Trey Petty, Angela Powell, Harri Williams, and NSO President/CEO, Stacey Ninness, NSO CFO, Ken Stephens and Executive Assistant to the President/CEO, Linn Probasco.

The attendees engaged in productive discussions and started the process of identifying their vision for the organization over the next 3 to 5 years. Key areas of importance that emerged from the full day of work included:

1. Creating mission and vision clarity;
2. Fund development efforts and increasing revenue;
3. Creating focus around messaging and marketing efforts for the organization;
4. Staffing needs and organizational culture;
5. Board development and communications;
6. Focus on specific programs and functions based on capacity levels;
7. Creating metrics and collecting data to show impact on participants;
8. Defining the geographic reach and service area.

The results of the retreat that are explained throughout this document will show that the NSO leadership established their priorities and created goals in alignment with their overall vision for the organization.

## SOAR Analysis

The NSO retreat attendees engaged in an essential activity to further the strategic planning process – a SOAR analysis (Strengths, Opportunities, Aspirations and Results). The SOAR analysis activity was chosen for NSO over a more traditional SWOT analysis because of the high levels of engagement and long-standing history, and the experience that the organization’s leadership has. The SOAR analysis takes a more action oriented approach to look at the potential of a well-established organization than the SWOT exercise. In addition to the SOAR analysis participants shared the internal and external concerns were for the upcoming years. All specific items that were identified by the participants on April 5<sup>th</sup> are listed below for reference.

<b>STRENGTHS</b> What are we most proud of? What makes us unique? What do we do that provides value? What can we build upon?	<b>OPPORTUNITIES</b> What are stakeholders asking for? What are possible new sources of support or resources? What are our needs?	<b>ASPIRATIONS</b> What do we care deeply about? What is core to our values? Thinking about strengths and opportunities, who should become?	<b>RESULTS</b> What measures would indicate we're on track to achieving our goals? What resources are needed to implement our most vital projects? What are ways we can track and celebrate our accomplishments? How do we know we're succeeding?
Financial decisions	Additional Housing	From transitional to stability in life; connecting and tracking outcomes	Are there funds available?
Assets	Enhance Board Engagement	Provide additional housing	Are we graduating successful clients from our programs? Outcomes. Report to board.
Current leadership; President / CEO Stacey Ninness	Improved housing (current facilities)	Sharing hope with the marginalized; create self-esteem	Dental clinic at full capacity = success
Ability to serve where needed; we meet people where they are; flexible.	Additional Partnerships / collaborating with other nonprofits	Realize potential of everyone / Building confidence	Aging clients and age specific need resources (there are many extra considerations for aging clients)
Long history as an organization	New donors – Individuals vs. companies/groups	Be a more well-known provider of resources and services	Data collection (Ctrax)
Strong partnerships; great partnerships	Dental Clinic expansion	Increased bandwidth in staff and housing (land) to support growing needs	Dashboard reports showing measures of success
Diverse funding base	Subsidized housing	Preventative community education (life skills, financial literacy, etc.)	Capital Campaign for housing
Lasting legacy; long history	Purchasing adjacent properties	Ongoing support and check-ins for former clients	Celebrate graduations from programs
We are community leaders; we have a voice at the table.	Life skill excellence at Carolyn Williams	Advocates with City and County elected officials for client population	Testimonials from clients (current and past)
Demonstrate the Oklahoma Standard and spirit	Mental Health facility / expansion	Being difference makers; how do we prove that? We provide transformative services.	Reach out to clients after they complete programs / track impact and outcomes
Proud and appreciative of staff	Partnering with other religious organizations / other than just Christian faith	We're client centered	Human capital to expand follow up services
Serve a diverse group of clients; and large # of people	Housing for men with kids	Have strong financial health / growth in financial base and abilities to do more	Identification as a "great employer: in Oklahoma or US
Great stories to tell	Visibility of board with staff members	Care more about funders	Brand awareness in community
Strong board composition	Data to stakeholders – NSO needs, our growth, etc.	Care about outcomes	Growth of major donor base (GSL) - \$5K and up.



Good technology advancement	Success stories	Provide opportunities for clients after our services end; preventative care after NSO.	Clients paying it forward after successful outcomes
Loyal donors	Addressing client recidivism	Have a donation station	Board representation from former clients
Diverse services; large, low cost dental clinic; WIC clinic, permanent supportive housing	After care / permanent housing and keeping clients successful after they leave transition programming	Achieve 0% effective homeless rate	Communicating stories more effectively.
Connection between Church and community	Cultivate more individual gifts	Provide wrap-around services.	Top of mind awareness in community. People know NSO. "You should know NSO"
United Women of Faith support	Transportation of clients and donations	Jesus Christ = incarnating organically (this is a natural core value; embody first	The # of clients declined for services will decrease compared to the # served.
Staff are experts in their field		Bring in services for men with kids.	Increase ability and length of time we're able to track former clients and do check-ins or assist them to keep them successful in life.
Relationship based care			Turnaround time for housing referral list shortens
			Plans to address the aging facilities and need for expansion
			Staff engagement and satisfaction (not overworked and have balance); Retention

Internal Concerns		External Concerns	
Not enough staff	Staff turnover	Lack of affordable housing and increasing homelessness rates	Declining state health (ranked at bottom in most categories)
Financial resources	Facilities – aging and not enough / maintenance	Division within Methodist Church	Inadequate behavioral health resources with an increasing need
Board pipeline / board development / recruitment / nomination process and expertise	Informational Technology deficiencies	Highest rate of incarcerated women for non-violent crimes	Lack of City and County advocacy for changing root causes of homelessness.
Lack of a donation facility / storage	Brand recognition	Lack of brand awareness	Lack of large individual donor support
No leadership succession plan	Parking availability at offices and sites	Parking locations at sites	Increasing property values vs housing needs vs neighbors
Staff development and training opportunities	Lack of volunteers / more needed	Inflation & economic volatility	Instability of families; dysfunction
Staff retention	Aging clients and their specific needs	Low wages in OK	Lack of personal financial education

Communication among committees and in general with board / volunteers	Staff appreciation	Churches turning inward	People are more individualistic
Communication with officials from United Methodist Church		“False hope options” (explained as things other than faith)	Labor shortages

## Consultant Analysis

NSO is a well-established non-profit with a long history in central Oklahoma. This history, and the recent years of excellent leadership and success that have been built, give NSO great potential as they take next steps toward building an even more sustainable and durable organization. By creating this plan and following the steps within, as well as considering other recommendations and additional work that may be necessary, the organization will achieve goals and see significant progress and success in the next 3-5 years.

Like many nonprofits, NSO has had to consider changes to their business model and continuation of services during and following the COVID-19 pandemic that began in 2020. Because the organization's programs focus heavily on the in-person interaction of clients and staff, living in shared residential facilities, and healthcare needs such as dental care and children's services, having limited availability to provide those or participate in other in-person activities could have been detrimental. However, organizational leadership and staff seem to have adjusted many of the programs and adapted well at times even increasing service levels when other organizations couldn't. Because of the unknowns of the pandemic and possible future outbreaks or similar situations, it is recommended that leadership continue to explore ideas to engage program participants virtually and leverage the new found way of communicating and being "together" as a tool for meeting the needs of the clients they serve.

Although NSO has done an excellent job, made significant strides and the current leadership has worked to gain recognition and respect among donors and community partners, there is still much work that can be done here as NSO acquires more human capital. It will take a dynamic and dedicated board and staff to further contribute to the desired sustainability and intended progress outlined in this plan. Developing strategies and processes to intentionally manage growth are critical to continuing to provide the best possible services with the best possible outcomes. Growth should, of course, also be closely associated with financial strength. NSO must continue to build development (fundraising) efforts to steward and expand its donor base, particularly through major gifts and growing individual donors. Developing a comprehensive development plan will help focus efforts and drive success with specific goals and timelines.

Growth also has the ability to challenge leadership and staff in all areas. NSO does exceptional work for sometimes difficult populations that have many needs and can require intricate and time consuming care. Linkage to transformative outcomes should help guide growth decisions. Ensuring the implementation of metrics, measurement processes and regular systems of evaluation for all programs and the organization as a whole is important. Any current systems of measurement should be revisited and revised as needed, or a system developed if one is not in place, and that system made a part of the regular operating procedures on an on-going basis.

The NSO mission, and the stories that take place within that mission, are compelling. Storytelling will continue to be critical in connecting the public to the life-altering and community-impacting services NSO provides. Leveraging the mission and the lives affected should be a key component in the development of a marketing plan. Creating clarity around branding and messaging should also be a priority to create association of program services with the organization. Creating this identity will facilitate fund development and community connection and outreach efforts as well.

Board and staff leadership will need to be consistently aware of staff needs, potential burnout, roadblocks to mission accomplishment and the need for development of internal leadership and succession planning for the near future. As with all business sectors staff retention has to be a priority over the next few years. Retaining and finding strong employees is difficult right now; even more so than in the past. It is recommended that NSO focus on sustaining a great workplace culture and devote resources toward those efforts.

Creating strong, active committees that consist of additional community members other than members of the board of directors for NSO will be an asset to the organization and another key to achieving the goals within this plan. NSO is in good position to strengthen and empower committee work and expand their responsibilities to enhance the leadership of the board. Utilizing the committees to create a finite development plan, an analysis and plan for property and facilities, and a strategic marketing plan, all with oversight of implementation and accountability measures, should prove to be beneficial and also help in many aspects of creating a sustainable organization for the future.

At times it is necessary to not only consider enhancements to programming of an organization but also to consider abandoning programs that are not core to the mission and that may be utilizing limited resources for purposes less impactful or valuable. Participants at this retreat identified the Rental Assistance program as good mission work and a fulfillment of a need by a major funding source – United Way of Central Oklahoma (UWCO). NSO deeply respects their partnership with UWCO and wants to help meet needs identified in the community. However, the Rental Assistance program is not “fully” funded by UWCO and is creating a significant burden on NSO staff and resources that could be redirected and utilized in the furtherance of other programming and services. Continuance of this program under the current circumstances and at the same level of funding from UWCO, should be considered carefully by the NSO board and leadership moving forward.

It is recommended that NSO start with the Action Document included with this strategic plan first. Other actions and tasks, as well as assigning specific people with target dates for completion and accountability for those assignments will be necessary to successfully reach goals. The Action Document may be adapted by leadership to move dates or make changes to meet the needs of the organization to reach the goals. Be sure to document and celebrate successes along the way!

What is a “Goal Champion?” Within the Action Document you will see a section for each Strategic Initiative that lists the goal champions. As a reminder, in the retreat on April 5<sup>th</sup>, all attendees were asked to assign themselves accountability for at least one initiative area (goal); becoming the champions to ensure that strategic initiative, and the goals within, are pushed forward and maintain priority at the board level. This is a board responsibility and staff are not included as goal champions. Being a Goal Champion does not infer that individual is a good fit or must serve on a committee or taskforce.



## Strategic Initiatives

During this planning process, several areas of importance emerged (listed on page 7) and then were further combined into common themes, or “strategic initiatives” which inform the goals, direction, and actions that support the context for the strategic plan. The strategic initiatives identified for this strategic plan are as follows:

### 1. Mission Alignment and Revision

Members of the board and leadership staff had healthy discussion about the current mission statement for the organization and the significance and perception of specific words within that statement. Having a well-defined mission that is utilized to drive all activities and direction is critical to success and long-term sustainability. Step one of this retreat was to clarify and refine the mission of NSO. Participants reflected and evaluated the “why” of the organization (why it exists and the purpose) and “why” they provide the services that they do. Key words of importance included:

Safety	Hope	Breaking Cycle of Poverty
Security	Encouraging	Transforming
Empowering	Independence	Dignity
Neighbors	Inspiring	
Food	Vulnerable	
Basic Needs	Christ	



Distinction between the Vision statement and the Mission statement were clarified and defined and key concepts were agreed upon by the participants. A new mission statement was discussed. The board brainstormed ideas keying in on “neighbors, housing programs, dental, nutrition, 100 years of organization meeting the needs of community, dignity, vulnerable...” to showcase the broad scope of our organization’s services. A beginning proposal included the following phrase: *“Empowering our neighbors by encouraging independence, building confidence and inspiring hope.”*

The Vision Statement for NSO was not fully reviewed and currently reads as follows: *“To bring Christ’s love to the homeless and working poor and empower them to break the cycle of poverty.”* Based on discussion and comments received by participants, it is recommended the Mission and Vision Statements be further evaluated for the current and future state of the organization and its services.

### 2. Awareness and Marketing/Branding

There is definitely a recognized need to evaluate public awareness of NSO. Aligning marketing efforts should be a priority. A detailed marketing plan developed by the Marketing

Committee and then approved and supported by the full board of directors and staff is recommended. The Marketing Plan should include measurable goals around fund development and engagement and should tie to other goals within this strategic plan.

Examples of goals might be:

- Increasing individual donors to NSO by 10% / 50 individuals by 12/31/2023.
- Increasing the average gift of each individual donor by 8% over the next three years.

### **3. Fund Development**

NSO maintains a steady revenue stream and juggles large numbers and types of donors. To enable the organization to move to the next level in the provision of programming, additional funding sources need to be developed and more staff need to be hired. Creating capacity to raise those funds and then effectively utilizing them will need to be considered in the new Development Plan. The current President/CEO has excellent relationship building and fundraising skills, so supporting her efforts in that regard with additional staff and board member engagement will be important to scaling up for NSO. Focusing on budgeting for critical staff positions and then creating a development plan with new ways of approaching fundraising and expanded funding options will be the key to reaching next levels of success.

### **4. Housing Programs and Facilities**

The most well-known service NSO provides is the Housing programs. Housing for NSO currently consists of several different locations that house different populations and provide a variety of services based on needs of the residents. All housing programs, including the properties where they sit and the buildings/structures where they are housed, should be a primary focus in the next 3-5 years. There is considerable work to be done in this area but based on focus group feedback, as well as board and staff discussion, this is an area where NSO can make a significant impact on Oklahoma and their participants in coming years.

### **5. Executive and Leadership Succession Planning**

It will be imperative for the board of directors to create a succession plan for the President & CEO and other staff leadership as an immediate priority.

### **6. Staffing and Capacity**

A review of the current staff organizational structure, job descriptions and time audits could help staff gain some assurance and create definite expectations regarding their positions in a post-COVID workplace. This evaluation could also serve as a tool for determining what additional positions are the most critical for staffing needs and guide goals for fundraising and the Property and Facilities Taskforce. These activities could help alleviate stress and burnout and promote plans for staff retention, which should be a continued priority for NSO.



Not all priorities that emerged throughout the strategic planning process are listed in the Action Document at this point. NSO leadership should consider creating additional goals and work to support all priorities in the next three to five years.



## ACTION DOCUMENT

### Strategic Initiative 1: Mission Alignment and Revision

**Strategic Objective 1:** Create a clear purpose that drives the organization’s work and values for the next 3-5 years.

**Goals:**

1. Clarify, update and establish the mission statement for NSO.
2. Publicize the mission statement, so it is visible and easily found and identified.
3. Utilize the new mission statement to guide all decisions and activities of NSO.

**Goal Champions:** All Board Members

**Action Steps:**

Task	Target Date	By Who	✓ Complete / Completion Date	Notes / Comments
1. Conduct additional Mission and Vision Statement Board Session	<b>10/31/2022</b>	Marketing Committee	Board Approved: <input type="checkbox"/> __/__/__	
2. Have discussion to develop and decide mission statement and approve for use. Board of Directors must formally approve the new Mission Statement.	<b>6/30/2023</b>	Strategic Planning Committee		
3. Utilize Mission Statement in all communications.	Ongoing	Board and Staff		
2a. Put new mission statement on web site.	<b>7/31/2023</b>	_____ (name)	<input type="checkbox"/> __/__/__	
2b. Ensure mission statement is used and updated on all social media.	<b>7/31/2023</b>	_____ (name)	<input type="checkbox"/> __/__/__	
2c. Ensure mission statement is on all printed materials, email, and is visible in the NSO offices.	<b>7/31/2023</b>	_____ (name)	<input type="checkbox"/> __/__/__	

<p>4. Have mission statement visible and as a reference in all board meetings and when making decisions for NSO.</p> <p>3a. Ensure mission statement is on every board agenda.</p>	<p>Ongoing</p> <p>Next Board Meeting</p> <p>___/___/___</p>	<p>Board and Staff</p> <p>Board Chair &amp; Executive Dir.</p>	<p><input type="checkbox"/> ___/___/___</p>	<p>Big Decisions Made where Mission Statement was referenced as guide:</p> <ol style="list-style-type: none"> <li>1.</li> <li>2.</li> <li>3.</li> <li>4.</li> </ol>
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**Results and Outcomes:**

**Next Goal and Actions:**

## Strategic Initiative 2: Awareness, Marketing / Branding

**Strategic Objective 2:** To develop an aggressive and goal oriented Marketing Plan that will help NSO become a “top of mind” brand in the community, create identification of specific programs as provided by NSO, and generate awareness of the impact of those programs in the state of Oklahoma.

### Goals:

1. Fully engage the NSO Marketing Committee to represent the needs of this strategic plan, and create consistency of purpose and goals for that committee.
2. Develop a detailed marketing plan that articulates clear messaging of the NSO mission and services and includes specific activities and target dates of completion, as well as measurement and evaluation procedures to assess impact and success of the plan.
3. Increase marketing touch points and methods to enhance awareness, generate more engagement and increase funding for NSO.

**Goal Champions:** Chris, Paige, Linda B., Ed, Harri and Joyce.

### Action Steps:

Task	Target Date	By Who	✓ Complete / Completion Date	Notes / Comments
1. Solidify the Marketing Committee by confirming members.	<b>7/31/2022</b>	Committee Chair	<input type="checkbox"/> __/__/__	
1a. Review/revise a committee member job description and a committee charter that explains the purpose of the Marketing Committee with committee member expectations, roles and responsibilities.	<b>7/31/2022</b>	Committee and Staff	<input type="checkbox"/> __/__/__	Board Approval <input type="checkbox"/> __/__/__
1b. Consider additional members who are not board members but have expertise to serve on this committee.	__/__/__	Committee	<input type="checkbox"/> __/__/__	

<p>2. Draft a Marketing Plan (which includes a <u>Marketing budget</u>) with reasonable and measurable goals, target dates for activity and completion, who will be responsible for each activity and the intended outcomes.</p> <p>Examples provided were:</p> <ul style="list-style-type: none"> <li>• Consider marketing and advertising media buys</li> <li>• Identify the develop corporate volunteer opportunities at NSO</li> <li>• Evaluation of tag line with logo</li> <li>• Increase reach to donors and potential donors</li> <li>• Create consistency and regular and constant touches to public and targeted audiences through different media types</li> </ul> <p>2a. Review current plan (Amber’s plan) and utilize as a starting point.</p> <p>2b. Research necessary components and consult experts to build plan; gather data and client stories, and examine how to best tell the NSO story.</p> <p>2c. Present the Marketing Plan to the Board of Directors for final approval.</p>	<p><b>10/31/2022</b></p> <p>____/____/____</p> <p>____/____/____</p> <p>____/____/____</p> <p>____/____/____</p>	<p>Committee</p> <p>Committee</p> <p>Committee</p> <p>Committee</p>	<p><input type="checkbox"/> ____/____/____</p> <p><input type="checkbox"/> ____/____/____</p> <p><input type="checkbox"/> ____/____/____</p> <p><input type="checkbox"/> ____/____/____</p>	<p>Board Meeting:</p> <p>____/____/____</p>
<p>3. With the support of the full board and staff begin implementation and execution of the Marketing Plan.</p> <p>3a. Reports on progress, road blocks, and measurement of activities.</p>	<p>____/____/____</p> <p>Ongoing</p> <p>Ongoing / Board Meetings</p>	<p>Committee members, board members and staff.</p> <p>Committee Chair</p>	<p><input type="checkbox"/> ____/____/____</p>	

<p>3b. Committee and staff to work within the Marketing Plan to implement activities for attainment of goals.</p> <p>3c. Provide marketing and messaging strategies from the Marketing Plan to the Development Committee to ensure continuity.</p>	<p>Ongoing</p> <p>Monthly</p>	<p>Staff and Committee members Reports to Marketing Committee</p> <p>Committee Chair</p>		<p>Communication Frequency and Methods:</p>
<p>4.</p>	<p>__/__/__</p>		<p><input type="checkbox"/> __/__/__</p>	
<p>5.</p>	<p>__/__/__</p>		<p><input type="checkbox"/> __/__/__</p>	

**Results and Outcomes:**

**Next Goals and Actions:**

### Strategic Initiative 3: Fund Development

**Strategic Objective 3:** To increase revenue and create / continue building financial sustainability and organizational capacity.

**Goals:**

1. Fully engage the NSO Development Committee, develop membership on that committee to represent the needs of this strategic plan, and create consistency of purpose and goals for that committee.
2. Develop a formal fund development plan that includes targeting sources or individuals, cultivation touch points and who will be responsible or involved, due dates for submission of information or for renewal of the resource, the stewardship process that will take place, as well as measurement and evaluation procedures to assess impact and success of the plan.
3. Work within the Development Plan to create a budget and intentionality for creating capacity in areas of identified importance such as increasing staff, improving facilities and increasing marketing efforts.

**Goal Champions:** Heather, Paige and Victor.

**Action Steps:**

Task	Target Date	By Who	✓ Complete / Completion Date	Notes / Comments
1. Solidify the Fund Development (Donor Development) Committee by confirming members.	7/31/2022	Committee Chair	<input type="checkbox"/> __/__/__	
1a. Review/revise a committee member job description and a committee charter that explains the purpose of the Committee with committee member expectations, roles and responsibilities.	7/31/2022	Committee and Staff	<input type="checkbox"/> __/__/__	Board Approval <input type="checkbox"/> __/__/__
1b. Consider additional members who are not board members but have expertise to serve on this committee.	__/__/__	Committee	<input type="checkbox"/> __/__/__	

<p>2. Conduct research and gauge community interest, analyze current data, performance and capacity regarding fundraising.</p> <p>2a. Develop specific objectives for the purpose of the funds raised by prioritizing the needs of the organization utilizing information provided in the SP retreat as a starting point.</p> <ul style="list-style-type: none"> <li>• Potential capital campaign for facilities improvements and expansions;</li> <li>• Increase staff to alleviate exhaustion and burnout and current staff time constraints to do better;</li> <li>• Increase staff to serve more clients;</li> <li>• Extending NSO's ability to provide a continuum of care for clients;</li> <li>• Implementation and execution of marketing and branding strategies;</li> </ul>	<p><b>10/31/2022</b></p>	<p>Committee and staff</p>	<p><input type="checkbox"/> __/__/__</p>	
<p>3. Draft a Fund Development Plan with reasonable and measurable goals, target audiences and dates for activity and completion, who will be responsible for each activity, accountability measures for follow up, and the intended outcomes.</p> <ul style="list-style-type: none"> <li>• Increase engagement with potential donors;</li> <li>• Pursue a plan for obtaining major gifts;</li> <li>• Set expectations and quotas for individual</li> </ul>	<p><b>12/31/2022</b></p>	<p>Committee and leadership staff</p>	<p><input type="checkbox"/> __/__/__</p>	

<p>board members regarding donor engagement and cultivation of new donors;</p> <ul style="list-style-type: none"> <li>• Examine options for a capital campaign;</li> <li>• Increase individual donor base;</li> <li>• Increase amounts given by donors;</li> <li>• Include strong cultivation and stewardship pieces in plan (not just by CEO or staff).</li> </ul> <p>3a. Engage the full NSO board and utilize each member’s sphere of influence to establish the best person(s) and methods for cultivation.</p> <p>3b. Present the Fund Development Plan to the Board of Directors for final approval.</p>	<p><b>12/31/2022</b></p> <p><b>12/31/2022</b></p>	<p>Committee Chair</p> <p>Committee Chair</p>	<p><input type="checkbox"/> __/__/__</p> <p><input type="checkbox"/> __/__/__</p>	<p>Board Meeting:</p> <p>__/__/__</p>
<p>4. With the support of the full board and staff begin implementation and execution of the Development Plan.</p> <p>4a. Reports on progress, road blocks, and measurement of activities.</p> <p>4b. Board members and staff to work within the Fund Development Plan to implement new activities or opportunities for attainment of this goal.</p> <p>4c. Communication and coordination with the Marketing Committee to ensure continuity and use</p>	<p><b>1/1/2023 – Ongoing</b></p> <p>Ongoing Board Meetings</p> <p>Ongoing</p> <p>Monthly</p>	<p>Committee, board members and staff.</p> <p>Committee Chair</p> <p>Staff / Staff Reports to Development Committee</p> <p>Committee Chair</p>	<p><input type="checkbox"/> __/__/__</p> <p><input type="checkbox"/> __/__/__ Added to agendas</p>	<p>Communication Frequency and Methods:</p>



<p>of marketing and messaging strategies in fund development efforts per the Marketing Plan.</p>				
<p>5. Ensure regular communication and updates to full board of directors and utilize board members to establish points of contact and reduce duplication of asks and ensure board member engagement in the plan on an ongoing basis.</p>	<p>Ongoing – Board Meetings; electronic communication</p>	<p>Staff and Committee Chair</p>		
<p>6. Continue to enhance and grow The Leave a Legacy program.</p> <p>6a. Develop Annual Leave a Legacy Event.</p> <p>6b. Prospect new Legacy members, thru annual mailer.</p>				

**Results and Outcomes:**

**Next Goal and Actions:**

## Strategic Initiative 4: Housing Programs and Facilities

### **Strategic Objective 4:**

Conduct an in-depth analysis of all components of each housing program provided by NSO and create recommendations for improvement, changes, purchases, additions, expansion, budget requirements, staffing needs and operational policies.

### **Goals:**

1. Create a diverse and knowledgeable Property and Facilities Taskforce.
2. Consider and evaluate all opportunities associated with the current properties owned by NSO, the potential purchase of property for use, the sale of property, and investments into improvements and expansion of property.
3. Utilize research and expertise available, including past research and work conducted by NSO to drive goals and objectives of the taskforce.
4. Work with staff leadership and program professionals at NSO to ensure a needs assessment and feasibility study are conducted. What does the community need and what can build capacity internally to support facility or property changes?

**Goal Champions:** David, Paige, Jenny, Angela, Heather, Joyce, Trey, Linda B. and Glynis

### **Action Steps:**

Task	Target Date	By Who	✓ Complete / Completion Date	Notes / Comments
1. Create taskforce <u>and hold first meeting</u> . Build with membership that have a diverse set of experiences and backgrounds.	9/30/2022		<input type="checkbox"/> __/__/__	
1a. Create a taskforce member job description and a taskforce charter that explains the purpose of the taskforce and approximately how long it is expected to be active, with taskforce member expectations, roles and responsibilities.			<input type="checkbox"/> __/__/__	Board Approval <input type="checkbox"/> __/__/__

<p>2. Research and Evaluation Phase</p> <p>2a. Create a timeline and specific tasks for this phase of the project.</p>	<p><b>2023</b></p>	<p>___/___/___          timeline created by</p>	<p><input type="checkbox"/> ___/___/___          (timeline creation complete)</p>	
<p>3. Program Assessment and Feasibility Phase</p> <p>3a. Create a timeline and specific tasks for this phase of the project.</p>	<p><b>2024</b></p>	<p>___/___/___          timeline created by</p>	<p><input type="checkbox"/> ___/___/___          (timeline creation complete)</p>	
<p>4.</p>				
<p>5.</p>				

**Results and Outcomes:**

**Next Goal and Actions:**

## Strategic Initiative 5: Executive and Leadership Succession Planning

**Strategic Objective 5:** Build upon long-term sustainability of NSO by creating a comprehensive staff leadership succession plan.

**Goals:**

1. Create a succession plan for the chief executive position and includes developing other leadership positions within the organization.

**Goal Champions:** Executive Committee of the Board or other designated board team

**Action Steps:**

Task	Target Date	By Who	✓ Complete / Completion Date	Notes / Comments
1. Create a succession plan utilizing best practices and templates as a starting point while also considering NSO's long-term and short-term needs.  1a. Board approval of succession plan.  1b. Designate a future review schedule and responsible parties for the plan.	6/30/2023	<u>Stacey Ninness</u>		

**Results and Outcomes:**

**Next Goal and Actions:**

Ken (first immediate need)

## Strategic Initiative 6: Staffing and Capacity

**Strategic Objective 6:** Create organizational structure that will promote staff retention as well as increase staff capacity to support agency growth.

**Goals:**  
1. Develop organizational structure to support continued growth of the agency.

**Goal Champions:** Executive Committee of the Board or other designated board team

**Action Steps:**

Task	Target Date	By Who	✓ Complete / Completion Date	Notes / Comments
<p>1. Review current staff organizational structure to create definitive expectations regarding staff positions.</p> <p style="margin-left: 20px;">1a. Review staff retention efforts to identify areas of improvement.</p> <p style="margin-left: 20px;">1b. Annually review current marketing data to maintain competitive labor force compensation within the nonprofit sector.</p> <p style="margin-left: 20px;">1c. Develop tools for determining what additional staff are most critical to the sustainability of agency growth.</p> <p style="margin-left: 20px;">1d. Determine staff budgetary needs to meet agency expansion.</p>	<p><b>1a/c</b> <b>(12/31/2022)</b></p> <p><b>1b/d</b> <b>(6/30/2023)</b></p>	Stacey Ninness		

**Results and Outcomes:**

**Next Goal and Actions:**