

BronxWorks
www.bronxworks.org

BronxWorks helps individuals and families in the Bronx improve their economic and social well-being. From toddlers to seniors, BronxWorks feeds, shelters, teaches, and supports its neighbors to build a stronger community.

Budget: \$36,817,024

Staff: Full-Time: 406 Part-Time: 167 Volunteers: 100

Interim Executive Director & General Counsel: Eileen Torres

Board Chair: David McLean

Overall Management Focus on Results

- Mission statement makes clear what the organization's core purpose is and what difference it is trying to make, where and for whom.
- Uses service indicators and performance targets cited in contracts and grants to measure program-specific results, plus goals and targets identified by the board to assess overall organizational performance, ensuring connection to mission.
- Assesses relevance of potential foundation grants or government RFPs, including indicators of mission alignment, fit with current programs, impact on infrastructure, and nature of funding.
- Assesses true cost of proposed or existing programs and impact on overall operations and administrative infrastructure (human resources, finances, etc.).
- Implemented a peer review process that enables programs to conduct internal audits of case files and other client records.
- Dedicates five staff members to quality assurance, including quality control analysts for case management programs and a coordinator for the entire organization.
- Coordinates referrals internally.
- Tracks demographic changes in communities served and adapts accordingly.
- Holds an annual staff meeting to review accomplishments and new goals.

Governance Structure That Moves the Organization Forward

- Engaged board strategically uses its skills and resources to help the organization.
- Uses a highly structured committee system.
- Program Committee works with staff to assess viability of programs: both financial feasibility of new programs as well as sustainability of existing programs.
- Visiting Committee allows board members to visit program sites before some board meetings.
- Strong integration of board committees with staff; board members attend agency events and staff meetings, and a true dialogue exists.
- Board's internal evaluation process reviews finances, assesses program performance, reviews administrative operations based on goals set by the executive director and senior staff, and includes formal reviews from external parties (program and financial audits).
- Executive director's performance reviewed annually.
- Board report cards note attendance, donation levels and fundraising support.
- Organization asks funders to make board nominee referrals.

Strong, Transparent and Accountable Financial Management

- Budget development considers 3-year revenue and expenditure patterns, and takes a bottom-up approach.
- All programs are carefully monitored; those running deficits for 3 consecutive months receive particular attention, ensuring timely corrective action.
- Strong analysis of RFPs, assessing potential impact on finances and on staff resources.
- Generates and builds reserves despite the constraints of public funding.

Inclusive, Diverse and Responsive Organizational Practices

- Staff demographics strongly aligned with service population.
- All staff provided with annual cultural competency training.
- Translation tool in website allows visitors to read in 50 different languages.
- Regularly tracks changing demographics in all service areas.
- Cultural preferences factored in food service, resulting in increased program attendance.

Enlightened Use of Human Resources

- Executive director conducts orientation breakfast for employees every two months, acculturating them to the organization, belief in the mission, and important personnel practices.
- Biweekly newsletter for staff.
- New hires receive performance reviews after 6 months, annually thereafter.
- Training Director facilitates in-house training, and coordinates external training.
- Strong commitment to developing staff capacities at all levels (30 internal promotions within past year).
- Offers extensive training and professional development opportunities, including programs at Baruch and Columbia, mandatory ethics and cultural competency training, IT workshops, and training to help staff pass MSW license exam.
- Uses exit interviews and trend analysis of what is said in exit interviews.
- Planning around leadership transition emphasizes transparency and communication.

Appropriate and Reliable Information Technology Systems

- Strategic planning committee for technology maps the organization's future IT needs.
- Full time computer instructor trains staff in software applications, and also trains clients.
- Department heads and caseworkers in the field equipped with smart phones to remain in constant contact.

Regular and Effective Communications and Use of Communications Technology

- Strong internal communication with staff, including bi-weekly e-newsletter and printed memoranda distributed with paystubs.
- Actively communicate mission to staff members, especially during orientation of new hires.
- Collected a series of stories and produced a video that tells the story of all services provided to commemorate a milestone anniversary.
- Successfully renamed and rebranded to reflect their values.
- Internal “branding police officer” enforces branding guidelines.
- Uses website to deliver services both internally (as a tool for internal referrals) and externally (as a resource for people seeking information).

Effective, Ethical Fundraising and Resource Development

- Leverages partnerships to bring in resources that help clients.
- Staff works together: development office meets regularly with program staff, and finance staff also intricately involved with mission-driven work.
- Increased private fundraising by 48% in the last two years.
- Strategic about fundraising: only goes after funding that is related to mission.

CSH

www.csh.org

CSH's mission is to advance solutions that use housing as a platform for services to improve the lives of the most vulnerable people, maximize public resources, and build strong, healthy communities across the country.

Budget: \$22,660,960

Staff: Full-Time: 92 Part-Time: 0 Volunteers: 0

President & CEO: Deborah De Santis

Board Member: Jeff Brodsky

Overall Management Focus on Results

- Clear mission translates into management plans around four “lines of business: identifying successful models for supportive housing; advocating with government to create such models; assisting local governments and providers in implanting such models; and funding successful programs.”
- Multi-year strategic planning is integrated into tactical planning (e.g., team and individual workplans, budgets, etc.).
- Has an impressive Measuring Success Program: extensive, interlocking systems in place to manage for results across many different program categories and operational areas.
- Community Scorecard used to inform new organizational directions by assessing community need and potential of organization to add value in communities with unmet needs.
- Created a Director of Metrics position.
- Puts time and thought into evaluation tools, testing assumptions, and making decisions based on metrics.
- Innovative use of financial metrics to connect to strategic goals.
- Organization remains in tune with changing landscape in affordable housing and services, health care, and supportive services.

Governance Structure That Moves the Organization Forward

- Board provides forward-looking guidance.
- Biannual board retreats are dedicated to organization's strategic positioning; one meeting per year is combined with a staff retreat.
- Board recruitment is aligned with governance needs and strategic priorities; organization is intentionally building board by examining gap analysis.
- Strong use of committee structure as a pipeline to groom top board leaders.
- Board contributes to organization's fund development efforts beyond 100% personal giving.
- Created a taskforce to review governance practices (e.g., revamping of Development Committee).
- Transparent use of metrics makes acceptance and buy-in very strong.

Strong, Transparent and Accountable Financial Management

- Executive team-developed strategic “guidelines and principles” used in budget development process.
- Budget process does not occur in a silo, but in conjunction and synched with annual work plan process.
- Very strong financial management (i.e., executive staff ensures that all regional budgets align with organization's strategic plan).
- Recognizes that demands are greater than budget; has regions make a case for additional funds.
- Everyone is involved in the budget process – everyone “owns it.”
- Focused on break-even budgeting (e.g., balance projects that are profitable with others that are of strategic importance but difficult to fundraise for).
- Aggressively manages balance sheet to ensure long-term health and stability: reduces costs of carrying loan funds, and manages the cost of capital.
- Good use of unrestricted funds for sustaining programs that are critical to realizing mission.
- Allowed for mid-budget course corrections due to changes in investments and lending activity.

2013 Examples of Excellence – Presented at Best Practices Workshop in November 21, 2013

- Assesses risk associated with new projects, discounting projected returns according to risk.
- Financial Management infrastructure enables regional managers to connect budget to strategic plan goals.
- Strategic move to social impact bonds (setting a model for communities and the industry).
- Budgets a moderate surplus each year.
- Instituted a \$100,000 “innovation fund” to underwrite worthy projects that are not otherwise funded.
- Committed to becoming more self-sufficient (improved by 6% in last 3 years).

Inclusive, Diverse and Responsive Organizational Practices

- Annual Community Scorecard assesses and responds to community needs.
- Uses Annual State of the Industry Survey to learn about the needs of the supportive housing industry; findings used to create new programs and tailor existing models to local needs.
- Defined recruitment policies and practices to support diversity and cultural competency.
- Actively pursues opportunities to subcontract with minority/women business enterprises.
- Partners with other social services organizations to tackle healthcare issues.

Enlightened Use of Human Resources

- Strong emphasis on healthy work-life balance.
- Invests in staff development to build skills tied to strategic plan goals.
- Impressive 9-Box Performance Potential Matrix evaluates employee’s current performance and future potential.
- Senior staff undergoes training in feedback and accountability to ensure performance and staff accountability.
- Cross-training for staff provided via monthly knowledge-sharing calls.
- Performs careful succession planning for all positions critical for the achievement of strategic goals, including cultivation of internal candidates.
- Feedback obtained through annual staff surveys used to improve practices and address skill gaps.
- Peer review lunches allow staff to improve communications skills and allow staff across the country to connect and learn about their colleagues’ work.
- Cascading goals approach ensures strong, clearly communicated links between job descriptions, annual workplans, team workplans, and strategic goals.
- Culture is set at CEO level but permeates the entire organization.
- Staff performance is evaluated formally against individual workplans during performance reviews twice each year.
- Conducts extensive workforce planning to make sure it has the capacity (at board and staff levels) to meet future goals.

Appropriate and Reliable Information Technology Systems

- Provides full IT orientation for new employees.
- Uses video conferencing across national organization with regional offices.
- Has a cloud-based platform that allows staff to input and access data immediately.

Regular and Effective Communications and Use of Communications Technology

- Outside firm assessed organization’s communications strategies.
- Communications team guided by an annual work-planning process tied to strategic plan.
- Staff trained and provided with a brand book to ensure continuity and consistency in messaging and communications.
- Deliberate use of brand ambassadors.
- Solicits feedback from stakeholders – communication goes two ways.
- Very deliberate in analyzing communications, using data.
- Employs a local communications strategy with stakeholders on the ground.

Effective, Ethical Fundraising and Resource Development

- Creative and innovative strategic thinking (e.g. decisions made relative to specific projects, markets, audiences, etc.).
- Fund Development team guided by a fundraising plan developed annually to ensure that work and goals are driven by mission, strategic goals, and budget.
- Developed a 3-year revenue model as a roadmap for funding new strategic goals.
- Shifted to a centralized fund development approach (e.g., headquarters leads fundraising efforts for the entire organization), resulting in improved consistency of messaging and outreach to foundations and other funders.
- Fundraising strategy calls for diversification of resources and financial opportunities, financial flexibility, and identifying what is important.

The Children's Village
www.childrensvillage.org

The Children's Village works in partnership with families to help society's most vulnerable children so that they become educationally proficient, economically productive, and socially responsible members of their communities.

Budget: \$74,500,000 (Excluding related organizations, Harlem Dowling, Bridge Builders, Greenburgh Eleven and CVI)

Staff: Full-Time: 133 Part-Time: 733 Volunteers: 500

President & CEO: Dr. Jeremy C. Kohomban Board Chair: Paul Jenkel

Overall Management Focus on Results

- Mission drives programs, strategic direction and board/management decision-making.
- Mission reviewed biannually by the board to ensure that work and direction are aligned with mission.
- Proposed new programs are checked against mission.
- Quality Improvement unit includes staff from all levels of organization; tracks and collects data to inform practice and improve programs and performance.
- Conducts annual satisfaction surveys among staff and clients, leading to improvements in services provided and client communication.
- Uses researched service models with track record of success for interventions.
- Admission and discharge data used to analyze trends about who the organization is serving and where they go after they leave the organization; trends used to modify services offered.
- Dedicated Outcomes Committee ensures that all programs set measurable goals, regularly reviews process and outcome results, and asks questions of staff.
- Outcomes are compared to industry data and attempt to quantify social impact.
- "Social Impact" section of quarterly newsletter features outcomes on a different program in each issue.
- Development of strategic plan takes into account industry trends and data, client survey results, performance measures, and audits.
- Holds retreat attended by staff, volunteers and clients who brainstorm what is working, and what can be improved.

Governance Structure That Moves the Organization Forward

- Compensation Committee conducts a dedicated and rigorous CEO Review process.
- Nominating Committee maintains a list of skills needed on the board, and regularly reviews individual board member performance, focusing on contributions, meeting attendance and committee participation.
- Strong committee structure has 10 working committees.
- Formal board succession policy added a second vice-chair position to ensure stability and continuity.
- "Junior board," which they call their Leadership Council, helps attract younger donors and additional corporate support; also intentionally cultivates future leaders, providing a pathway to the board, (each leader has a board mentor).
- Board agreed on strategic intent to share organization's management expertise with struggling partner organization.
- Board serves as a brain trust: critical, engaged, reflective, and thinking with staff on how to evolve the organization.

Strong, Transparent and Accountable Financial Management

- Budget dashboard is reviewed monthly to control costs and identify problems early in the budget year.
- Budget dashboard includes year to date comparisons, projection scenarios, contingencies and risks.
- Risk management dashboard quickly reviews risks and progress towards mitigating them.

2013 Examples of Excellence – Presented at Best Practices Workshop in November 21, 2013

- Finance staff goes out and meets with program staff; recognizes the importance of relationships with internal and external audiences.
- Proactively manages finances to address preventive maintenance issues on campus and with facilities.

Inclusive, Diverse and Responsive Organizational Practices

- Established core value related to cultural competency: “We value diversity and celebrate its power to enrich us all.”
- Prospective employees go through organizational values training program.
- Recruits prospective employees who are reflective of clients served by advertising in newspapers that serve minorities, conducting job fairs in minority communities, and providing recruitment incentives for staff.
- Undoing Racism Committee ensures all staff are treated fairly and equally.
- LGBTQ Committee is devoted to ensuring that the organization is a safe place for staff and clients regardless of sexual orientation.
- Community Advisory Committee keeps community informed of issues, advocates for the organization in the community, and advises management on community concerns and issues.
- Holds focus groups to see what different constituents are thinking and incorporate their ideas; responsive to community needs.

Enlightened Use of Human Resources

- Offers staff an extensive menu of professional development opportunities, including in-service trainings, online training platforms, outside conferences, coaching, feedback, and guest speakers.
- Scholarships available for study in related fields.
- All new hires participate in 10-day training.
- Employee handbook available in English and Spanish.
- Created a Junior Executive Program to develop emerging leaders.
- Annual performance reviews include professional goals, development plans and salary increases tied to performance; also skills surveys identify employees’ best function(s).
- Strong internal promotion rate.
- Every qualified internal candidate is given an interview, and if not selected for promotion, also given feedback.
- Formal succession policy reviewed annually by the Executive Team and board.
- Both long- and short-term succession plans for CEO, as well as every VP and manager.
- Strong culture of valuing employees: provide affordable staff housing; offer Shooting Star program to recognize exemplary performance (CEO sends personal Thank You note; recognized in newsletter); coordinate CEO luncheons with staff.
- Checklist for managers of new programs – Project Implementation Team (PIT) – to optimize time and resources.

Appropriate and Reliable Information Technology Systems

- Launched a training portal for staff, including training records and a library of training videos.
- Detailed IT policy protects clients, consumers, and staff.
- Internet-ready laptops or netbooks and cell phones provided to all staff working in the field.

Regular and Effective Communications and Use of Communications Technology

- Conducts quarterly community advisory meetings.
- A “listening organization:” uses mail, email, and phone surveys – as well as focus groups – to solicit feedback on communications efforts; feedback used to improve communications practices.
- Conducted a communications audit to review all marketing materials and ensure use of a consistent voice, message, and brand.

2013 Examples of Excellence – Presented at Best Practices Workshop in November 21, 2013

- Communications not just relegated to communications staff; everyone—staff and board—is involved.
- Developed a Results Card to communicate social impact, and results are profiled in newsletter, website, and annual report.

Effective, Ethical Fundraising and Resource Development

- Advancement Department and Development Committee set annual fundraising goals to be achieved through multiple fundraising strategies (e.g., annual appeal, special events, grant proposals, major gifts, and planned giving).
- Understands that fundraising is about engagement: CEO takes donors on tours, gets staff involved; uses organization's story and history to engage donors.
- Sends interim reports to foundations, whether required or not.
- Founding member of a planned giving collaboration designed to help set up and run planned giving programs more effectively; collaboration has allowed participating agencies to share expertise, time and resources.