

Examples of Excellence Presented at 2015 Best Practices Workshop

New York Common Pantry

www.nycommonpantry.org

New York Common Pantry is dedicated to reducing hunger throughout New York City while promoting dignity and self-sufficiency.

Year Founded: 1980 | **Budget:** \$5,021,817 | **FT Staff:** 39 | **PT Staff:** 8 | **Volunteers:** 14,423 | **Board Members:** 22
Executive Director: Stephen Grimaldi | **Board Chair:** Michael Fitzsimons, Chairman and CEO, DeskNet

Overall Management Focus on Results

- Strategic planning process grounded by an agency assessment – and led to programmatic and organizational changes
- Obtain continual customer feedback through staff engagement with participants and an annual Satisfaction Survey
 - Feedback and survey results inform management of services and help maintain a positive culture of customer service for clients
- Four management reports are regularly prepared and shared internally and with key funders
 - Return on Investment report, case management tracking, monthly financial statements, and Frequency Report
- Clearly use data evaluations to improve programs, and continue to analyze data to make further improvements (e.g. Choice Pantry and Live Healthy! programs) and increase efficiencies
 - Innovative integration of technology and outcomes to enhance services to clients
 - Philosophy that good data in equals good data out
- Expansion to new sites is being done with a strategic eye towards what has worked in the past

Governance Structure that Moves the Organization Forward

- Volunteer spirit permeates the board culture – board offers hands-on help in programs at the Pantry
- Purposeful and deliberate process of board strengthening and restructuring as outlined in the strategic plan
 - Reducing the number of board members
 - Regular assessment of performance
 - Increasing give/get expectations
 - Creating an Advisory Council to maintain engagement of those unable to meet give/get requirement
- Board Nominating Committee uses written rubric of required and preferred qualifications to guide how board candidates are considered
- Developed a rigorous onboarding and engagement program for new and existing board members
- Board chair holds the position for 3 years and succession planning begins mid-term to identify potential successors
- Executive Director submits self-evaluation and board reviews progress using a tool based on seven key management areas

Strong, Transparent and Accountable Financial Management

- Six months of reserves, planning to increase to one year
- Conservative and strategic approach to program expansion – decisions start at the service level
- Integrated accounting and fundraising database allows tracking and review of donations and expenses
- Financial health assessed by asking 3 key questions:
 - Does the organization have the resources it needs to pursue its mission?
 - Does the organization enjoy continued support from its community?
 - Does the organization do everything possible to steward its resources and assure appropriate use?

Diversity and Culturally Competent Organizational Practices

- Staff relatively diverse and reflective of population served
 - Hiring focuses on diversity and language to ensure participants feel comfortable and can be served
 - Responsive to changing client demographics (e.g. hired a Chinese-speaking case manager to address growth of Chinese client base)
- Strong gender diversity on board; actively working on improving board's ethnic and racial diversity
- Staff are trained to be sensitive to ethnic, racial, cultural, gender, sexual orientation, religious and immigrant related issues; all front-line staff complete "Working with Diverse Populations" training course; senior staff, volunteer associate, and board vice-chair are also trained on diversity
- Committed to offering culturally sensitive food choices

Enlightened Use of Human Resources

- Foster leadership by focusing on "three P's"
 - Prepare: staff are encouraged to take on responsibilities and initiatives, and seek professional development
 - Predict: anticipate vacancies by conducting regular position assessments
 - Promote: clear focus on promoting from within
- Formal job descriptions are provided for all staff and are followed up with regular supervision and feedback sessions, including individual, departmental, and all-staff meetings, all part of an extensive annual review process
- Decentralization of leadership/shared leadership model helps prepare for planned and unplanned succession needs
 - Creation of Deputy Executive Director position and three additional Director-level positions
- Annual staff appreciation breakfast where board waits on staff; annual volunteer appreciation events

Appropriate and Reliable Information Technology Systems

- Implementation of Choice Pantry model for online ordering has led to cost savings and encourages pantry members to become active participants in their food selection
- Share database models with partnering organizations to improve overall sector output
 - Data has helped influence broader community of food providers
- Benefits tracker tool records results of screening by case managers and shows what benefits are available to individuals
 - Tool also shows benefit saturation level over time to help determine adequate staffing
- Expanded web-based software to include a new mobile services program, allowing NYCP's food and benefits system to be replicated by other providers in the area

Regular and Effective Communications and Use of Communications Technology

- Rebranding effort has been very successful, leading to media placements and new individual and corporate donors
- Communications driven by thorough data collection and a commitment to transparency
 - Organization's progress on annual goals set under its Measuring Impact and Effectiveness Policy is publicly and prominently displayed on the website
- Communications are guided by an annual plan developed and managed by the Development Department
- Emphasis on two-way communications through participant surveys, verbal interactions, and print materials

Effective, Ethical Fundraising and Resource Development

- Emphasis on proper staffing for fundraising has had concrete results
- Annual fundraising plan with goals for each revenue stream is staff initiated and approved by the board
- Creation of a major donors group, "Bread and Butter"
- Leverage volunteers as donors
 - Presentations by senior management to all new corporate volunteer groups
- Matrix of 8 categories for engagement of corporate partners
- Diversified funding streams through increase of government funding (90% of funding has traditionally come from private sources)
- 100% Board giving

Examples of Excellence Presented at 2015 Best Practices Workshop

America Needs You

www.americaneedsyou.org

America Needs You (ANY) fights for economic mobility for ambitious, first generation college students. ANY does this by providing transformative mentorship and intensive career development.

Year Founded: 2009 | **Budget:** \$3,250,173 | **FT Staff:** 20 | **Volunteers:** 500 | **Board Members:** 21
CEO: Kimberly A. Harris | **Board Member:** Daron Green, President, Silver Tide Management

Overall Management Focus on Results

- Senior staff sets organizational goals at annual retreat based on evaluation of prior year's goals and performance
 - Weekly staff discussions on progress towards goal achievement contribute to annual retreat agenda
- Third party evaluation for strategic planning – critical in increasing credibility of results and encouraging funding
- Very strong reliance on feedback to impact practices; data from program partners is regularly harvested and used in real time to improve programming
 - Survey fellows and mentors at various time intervals provides an opportunity to determine how relationships develop over time, and a chance to change things along the way if they are not working
 - Survey participants at different stages of the program—quarterly while enrolled in program and annually after graduation to track short and long term goals
- Data and metrics are an organizational imperative and a focus for all areas of management
- SMART goals approach used at all levels of the organization
 - Strategic plan broken down into organizational priorities that trickle down to individual goals

Governance Structure that Moves the Organization Forward

- Board annually reviews CEO and senior staff
- Board conducts annual salary research for senior positions
- Young Leadership Board committed to outreach and fundraising
- *Ad hoc* “Expansion Committee” to reflect strategic organizational agenda
- Commitment to “passion maintenance” on the board
 - Board engages in programmatic aspects of the organization, offering internship opportunities for participants and workshop engagement
 - Board prospects required to attend a fellows program
- *Pro bono* General Counsel reviews board member compliance with written policies
- Expansion sites (NJ & IL) have advisory boards governed by Local Board Governance Guidelines, including their role relative to the fiduciary board.
 - Young Leadership Boards in each site support fundraising and program initiatives.
- Strategic recruitment of board members, e.g. search for media professional to help guide communications strategy
- Executive Committee conducts annual evaluation of board members
 - Board members provide feedback via survey
- Create opportunities for board members to build community outside of the board room

Strong, Transparent and Accountable Financial Management

- Key financial milestones and targets reported to the board in CEO's weekly email updates
- Monthly financial reports posted on shared drive and accessible to all staff
- Maintains 5 months of operating liquid reserves
 - Developed monthly liquidity analysis
- Develops upside and downside budget scenarios
- Budget re-projections are completed mid-year and change is monitored during the second half of the year
- Director of Finance and Technology works closely with the development team – nice blending of finance and fundraising
 - Development team prepares detailed revenue projections based on current and prospective funders as well as market trends
 - Development team provides a weekly revenue status report

Diversity and Culturally Competent Organizational Practices

- Staff demographics mirror program participants
- Strategically recruit board members for thought diversity
 - Creative tension used to elevate conversations and inform decision-making
- Hiring practices reflect a commitment to cultural sensitivity and inclusion
 - "Privilege Walk" and role-play activities during volunteer training to explore how language can unknowingly communicate privilege; professional development curriculum for students and volunteers focus on workplace communication and cultural diversity
- Surveys throughout the year ask students to rate staff and volunteers in areas related to inclusivity and cultural competence
- Dedicated student feedback session
- Leverage diversity of staff experience to solve problems

Enlightened Use of Human Resources

- Written personnel policies that are communicated to staff during the onboarding process and reviewed by General Counsel and Board
- Annual 360-degree performance evaluations for employees
 - Career path discussion is a component of annual performance review
 - Individual SMART goals are aligned with departmental and organizational goals, and are reviewed at weekly check-ins and annual review
 - New employees receive feedback at the conclusion of their 3-month introductory period
- Core values define organization's culture, provide framework for decision making, and are ingrained in HR policies and practices
 - Values: excellence, community, integrity, curiosity, accountability, data and results
- "Fun Wall" – personal photos and postcards are shared from program participants and mentors
- Commitment to professional development which aligns with the mission
 - Staff workshops and trainings on relevant topics, *pro bono* speakers
 - Staff micro-grants for professional development
 - Individualized career pathing
- Use exit interview data and feedback to inform organizational improvements, e.g. more structured onboarding process
 - Developed comprehensive Onboarding and Technology Guides to ensure a consistent onboarding process across teams and locations
- Staff meetings can be attended in person, by skype, or conference call to encourage collaboration across sites

Appropriate and Reliable Information Technology Systems

- All staff and interns sign a confidentiality agreement to safeguard program and donor information
- Uses technology to track communications with constituency

- Train staff to use technology effectively, including database
 - Worked with a consultant to customize the database for better integration with other web apps used to track participant information and survey results
- Technology Guide includes common IT practices, procedures, security measures and policies for shared resources
- Purchased server in 2014 – reflects awareness of IT needs due to expansion goals
- Google for Nonprofits used to promote a collaborative structure
 - Use of Google Groups for board communications

Regular and Effective Communications and Use of Communications Technology

- Embedded branding identity into all fundraising efforts
- Used *pro bono* resources to refine key messages
- Made social media a main means of communication based on feedback from stakeholders
- Surveys heavily used to evaluate impact
 - Surveys fellows and mentors regularly to assess quality of mentoring relationships and how they evolve to inform programming
- Social Media Committee of staff members
- Communications calendar lives as a Google Doc
- Intranet on Google Sites houses organizational resources
- Workshops conclude with open mic time for fellows/volunteers to share lessons learned and achievements
 - Also utilize team time for those who may not wish to speak in front of the large group
- Participant-led communications site for discussion on workshop topics

Effective, Ethical Fundraising and Resource Development

- Diversification of funding sources and strategies to appeal to different funders
- Recent focus on multi-year gifts
- 48 hour turnaround time for acknowledging gifts and handwritten notes for all \$1,000+ gifts
- Targeted outreach strategy for each donor category (foundations, corporations, individuals, etc.)
- Efficient use of in-kind support with volunteer speakers/coaches; space donations; business attire for fellows
- Focus on finding replacement funds for projected revenue that does not materialize
- Program participants trained to be ambassadors for the organization

Examples of Excellence Presented at 2015 Best Practices Workshop

BRC

www.brc.org

Helping people reclaim lives lost: BRC restores hope and dignity by offering opportunities for health and self-sufficiency.

Year Founded: 1971 | **Budget:** \$67,016,000 | **FT Staff:** 773 | **PT Staff:** 10 | **Volunteers:** 1,343 | **Board Members:** 16
Executive Director: Muzzy Rosenblatt | **Board Chair:** Julie Salamon, Author

Overall Management Focus on Results

- Performance management meetings – two-day quarterly reviews by program directors and senior management to review performance data, progress, and priorities going forward
 - Board members regularly attend these meetings
- Data used to shape programming and create models that are being integrated into citywide policy reforms
- Rely heavily on data analytics to determine capacity and future direction
- Quarterly report to board on agency-wide and program specific progress
- Analytical management: strategic learning and adaptive management – “managing with data not to data”
 - Use of performance management data to identify emerging trends
- Encourage staff to drive the evaluation and goal-setting process builds a sense of ownership
- Large scale effort to explore what has contributed to past success and how to apply these strategies to grow
- All growth opportunities and strategic decisions are evaluated using a comprehensive 10-point checklist – maintains a consistent approach to evaluation that factors in financial risk, mission alignment, and benefits to the organization and clients

Governance Structure that Moves the Organization Forward

- Junior Board is a pipeline for new talent on the governing board in anticipation of a generational shift
- Landing Road affordable housing project—where the board participated in shaping the project’s financial model—provides a perfect example of board involvement in reaching stated goals
- Board willing to take measured risks
- Board has recently instituted an annual retreat to focus on the direction of the organization
 - Review of strategic opportunities identified the prior year
 - Establish strategic priorities and goals for the following year
- Annual process of self and collective evaluation of board performance using formal surveys
- Mission-driven board recruitment and cultivation process and resultant focus on active Board participation

Strong, Transparent and Accountable Financial Management

- Staff reviews financial performance weekly, and board does so quarterly
- Financial planning focuses on coordination and open communication between managers across the agency
 - Executive Director, CFO, and CPO meet weekly, including review of budget performance
- Strong system of internal controls and multilayer reviews and approval systems
- Intentional decision not to launch potentially profitable but risky ventures – thoughtful decision-making
- 5-year plan with projections under various scenarios for responsible growth and long term sustainability

Diversity and Culturally Competent Organizational Practices

- Organization conducts cultural competency trainings for new hires and annually thereafter
- Commitment to hiring staff with language skills to communicate with clients
 - Staff speaks over 15 languages
- Staff’s ethnic diversity reflects diversity of program participants

- Part of the Council of Urban Professionals – strategy to increase racial and ethnic diversity of the board by connecting with business people of diverse backgrounds
- Train staff to sensitively understand clients' adaptive behaviors
- Programs modified and enhanced to meet changing client needs
- Developed a set of organization-wide best practices for guiding culturally appropriate interactions with clients
 - Providing translation services
 - Integrating cultural norms into service planning

Enlightened Use of Human Resources

- Professional development opportunities and focus on internal promotions
 - Two-thirds of current senior managers were promoted into their current positions
 - Prepare direct care workers to take supervisory roles through training; employ formerly homeless people
- Lower staff turnover than industry standards
- Volunteers trained based on activities they'll be performing
- BRC connects staff in different programs to each other and to the mission
 - Over 300 staff participated in developing BRC's mission statement, logo and tagline
- Executive Director rotates among program staff meetings
 - Executive Director seeks feedback on BRC's performance and keeps staff informed
- Minimum hourly compensation 40% above New York State minimum wage
- Annual anonymous employee satisfaction survey focused on supervision, salary/benefits, work environment, and administrative support
- Intensive new employee orientation to ensure all staff understand agency mission and scope of services, as well as individual job responsibilities

Appropriate and Reliable Information Technology Systems

- Electronic health records management
- IT contractor assisted in creation of long-term strategic plan for IT initiatives
- Moved to Office 365 (cloud-based) to ensure business continuity and disaster recovery
- Organization is a leader in the broader community around Homeless Management and Information Systems

Regular and Effective Communications and Use of Communications Technology

- Communication based in listening
 - Established an agency-wide Consumer Advisory Board for participants and stakeholders to facilitate active dialogue with management on a quarterly basis
 - Annual consumer satisfaction survey
- Establishes regular formal and informal strategies for gathering feedback on services from target audiences, and identifies how this input will be considered and incorporated as appropriate
- Mission of board fundraising committee expanded to include communications, which then grew into a separate communications committee
- Recruited two new board members with communications expertise to inform external communications strategy

Effective, Ethical Fundraising and Resource Development

- Diversification of funding: efforts to build individual donor base and foundation support
- Strong engagement with donors on an individual level
- Landing Road model: sold a leasehold interest in their commercial retail space increase working capital, able to leverage new program related investments