

Examples of Excellence Presented at 2016 Best Practices Workshop

Jewish Board of Family and Children's Services

<https://jewishboard.org>

The Jewish Board of Family and Children's Services strengthens families and communities throughout New York City by helping individuals realize their potential and live as independently as possible.

Year Founded: 1874 | **Budget:** \$250,000,000 | **FT Staff:** 1,899 | **PT Staff:** 1,048

Volunteers: 1,112 | **Board Members:** 53

CEO: David Rivel | **Board of Trustees Vice President & Chair of Executive Committee:** Steven L. Fasman

Overall Management Focus on Results and Impact

- Staff uses dashboards and data to guide decision-making, organization health, strategic commitments and program investments
- Deep use of outcomes management for program process and client outcomes, and to inform staff training
- Dedicated Outcomes Department helps each program area select one or two specific client items to track
- Outcomes Department serves as a link between programming and administration and is separate from Compliance Department
- Engage in open self-reflection about areas of improvement

Governance Structure Moves the Organization Forward

- Board asks "what are our clients telling us?"
- Board members serve on one "program" committee and one "business" committee as a way of engaging in both mission and finance
- New board members assigned a board mentor
- Engage non-board members (clients, former clients and community members with "lived experience") on some board committees to bring community voices to the "policy and planning table"
- Mergers & Acquisitions Taskforce assesses new opportunities, vetting them based on mission alignment
- In the second year of a major acquisition, board focused on organizational culture shifts and ensuring that new staff are fully integrated and feel a part of a single organization
- Rotate members of board Development Committee to keep fundraising ideas fresh
- Succession planning and scouting for the board – clear pipeline and grooming through task committees that serve as breeding grounds for permanent committees

Financial Management is Strong, Transparent and Accountable

- Bottom-up budgeting is transparent and involves all levels of staff following annual budget trainings that ensure common understanding
- Budgets are managed through dashboards, include analysis of projected receivables, and ensure inter-department accountability
- Strong focus on program profitability, risk management, working capital needs and availability
- Board is aware of challenges related to managing government funding and financing and is highly engaged in financial oversight and planning for sustainability
 - Board asks scenario questions to develop contingency plans
- Weekly meetings of senior leadership with the board's Executive Committee to oversee integration of acquired organization and ensure financial stability during the transition
- Project 5-year gap created by government funding

- Conduct internal audits to test internal controls

Organization is Diverse and Inclusive

- Dedicated in-house team provides training in cultural competency, racial bias, and structural racism
- Confronting Structural Racism initiative engages staff affinity groups in each borough in examining and confronting racism and exploring how these issues impact services
- Passed board resolution to increase diversity of board
- Provide services in more than 20 different languages across the 5 boroughs
- Proactive discussion of diversity as a lens through which services and programs are offered
- Clients are engaged in developing their own recovery plans
- Regularly revisit core values

Human Resources are Valued and Developed

- Multiple channels for staff feedback, including an annual survey and CEO town hall meetings in all 5 boroughs
- Annual staff satisfaction survey data is shared organization-wide and is integrated into planning (e.g. feedback from staff survey led to creation of career pathway and expanded access to insurance)
- Annual employee-centered evaluation process incorporates tangible goal-setting for the following year and helps supervisors make decisions around merit-based increases
- CEO attends all new staff orientations
- CEO visits one program site each week
- Staff submit questions to HR and senior leadership and receive response in 48 hours
- Training and learning happens across different departments – not just the responsibility of the organization

Use of Information Technology Systems Improves Efficiency and Advances Mission

- Use business intelligence software to increase access to critical organizational and programming goals (e.g. staff vacancies and program usage) and to synthesize and present data coming in and out of multiple systems
- Use learning management system for self-directed staff training
- Thoughtful integration of platforms and software by testing and checking on the ground
- Chief Information Officer role ensures technology is part of organizational strategy
- Organization is moving from descriptive statistics to prescriptive analysis

Communications are Strategic, Effective, and Build Brand

- Thoughtful communications strategy tied to mission, outcomes and impact
 - Client stories focused on hope and recovery
- Effectively highlight programmatic efforts and client successes through integrated messaging across multiple platforms
- Prioritized social media outreach to “aggressively” build audience through paid and organic tactics
- Dedicated staff track digital media metrics to shape future communications
 - Quarterly reports on these metrics
- Created “electronic suggestion box” for staff to provide feedback
- Collaborative practice of sharing stories and experiences with other agencies and positioning senior staff as thought leaders in the field to heighten visibility
- Strong internal communications across senior leadership – there is nothing that only the CEO knows
- As the largest human services organization, feels responsibility to advocate for the field

Fundraising and Resource Development are Strategic, Donor-Center, and Effective

- Concrete plan to fill gap between expenses and government revenues through donations and endowment
- Track monetary impact of investments in new development position and technology
- Focus on developing individual donors beyond the board

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Neighbors Link

www.neighborslink.org

Neighbors Link strengthens the whole community through the healthy integration of immigrants.

Year Founded: 2001 | **Budget:** \$ 1,937,830 | **FT Staff:** 14 | **PT Staff:** 29
Volunteers: 380 | **Board Members:** 20
CEO: Carola Otero Bracco | **Board Chair:** Cynthia Brill, Esq.

Overall Management Focus on Results and Impact

- Partnered with outside researcher for longitudinal study and utilized results to guide replication strategy
- Provide employees with annual “Official Data Points” document to consistently convey organization-wide program results
- Data tracking is focused while still evolving; data drives organization at staff and board levels
- Program areas have work plans and goals that are developed annually
- Commitment to learning from data – use of pilots and feasibility studies
- Assess results by asking three questions: (1) How much did we do? (2) How well did we do it? (3) Is anyone better off?
- Strategic priorities tracked using red, yellow, green indicators and tied to CEO performance evaluation

Governance Structure Moves the Organization Forward

- Board members partner with staff to move projects forward
- Individual board members conduct self-assessments; summary report shared with full board
 - Metrics (engagement in committees, attendance, activity as ambassador) inform board activity
 - Board asks: “where are we, as a board, going?”
- Governance Committee is involved in recruitment, orientation, and committee assignments
 - Recruitment process includes skills matrix and comprehensive vetting to screen prospects
 - Asks: What is working? What isn’t? Who do we need?
- Strategic Planning Committee focuses on developing long term strategic plan and planning annual retreat
- Structured onboarding process for new board members includes meeting with CEO, Governance Committee Chair and director-level staff
- Robust onboarding manual allows new board members to hit the ground running before their first board meeting
- Annual review of committee charters
- CEO succession plan in place for short term, long term, and permanent departures

Financial Management is Strong, Transparent and Accountable

- Strive to be transparent and accountable through:
 - Quarterly year-end projections for management team and board
 - Emphasis on variance reporting
- Budgeting is tied to strategic plan, fundraising and program goals
- Budget process engages program staff who review monthly variance reports
- Sophisticated thinking through readiness for government funding; reviewed challenges and opportunities before pursuing
- Built up reserves to avoid cash flow problems

Organization is Diverse and Inclusive

- Concept in physical space design creates literal and figurative “Open-Door” policy
- Multiple opportunities to connect with and gather feedback from stakeholders through community meetings and established Client Leadership Council
- Direct service staff are bilingual
- Built relationships with 100 community partners from various sectors (government, healthcare, education, law enforcement)
- Focus on serving the whole community, including all who live there

Human Resources are Valued and Developed

- Cost-effective staff structure and human resources model
- Staff development and coaching fostered through leading team meetings and speaking engagements externally as well as at board meetings
- Short-term and long-term succession planning for the CEO has been shared with management team
- Dedicated volunteer manager engages volunteers, holds annual appreciation event
- Former employees remain committed to the organization post-transition, often as volunteers
- Emphasis on high level of customer service; everyone is welcomed and treated with respect

Use of Information Technology Systems Improves Efficiency and Advances Mission

- Use of attendance tracking in calling/texting students to encourage them to attend class
- Operations Coordinator oversees day to day IT operations and uses consulting firm and pro bono services to support IT efforts
- Innovative use of tablets to process client surveys resulting in improved response rate and staff time
- Dashboards allow for responsive programming and tracking of data

Communications are Strategic, Effective, and Build Brand

- Well-branded, tells strong stories through impact of program (example: “Portrait of a Neighbor”)
- Strategy to place multiple stories around same time frame (example: volunteer appreciation month featured high school volunteers in their local print or online media)
- Seek feedback from community members and adjust approaches accordingly
- Engaged in “multiple touch points” approach to different types and forms of media
- Communications and fundraising are integrated so that outreach to donors and potential donors is targeted and tailored

Fundraising and Resource Development are Strategic, Donor-Centered, and Effective

- Gradual move into government funding
- Diverse donor base with good donor retention rate
- Focused grant applications to maximize return
- Effective “Friends of Neighbors Link” volunteer/donor/ambassador program which organizes annual gala and other fundraising events
- Prioritize “Top 5” fundraising related tasks each month
- Individual donors are assigned a personal contact at the organization
- Organization-wide culture of philanthropy engages staff and board and is fostered by:
 - Providing board with tools to fundraise effectively
 - Training staff to present to funders on their areas of expertise

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Per Scholas

www.perscholas.org

Per Scholas opens doors to technology careers for individuals from often overlooked communities. We envision a future where individuals from any community can access well-paying career positions, and where talent is recognized and recruited from many diverse sources.

Year Founded: 1994 | **Budget:** \$8,420,614 | **FT Staff:** 75 | **PT Staff:** 2

Volunteers: 600 | **Board Members:** 23

CEO: Plinio Ayala | **Board Chairman:** Lewis E. Miller

Overall Management Focus on Results and Impact

- Ongoing evaluation occurs at staff and board levels of the organization Leverage multi-year data to evaluate and determine both program and organizational milestones
- Multi-year evaluations contribute to knowledge of factors supporting participant and program successes confirm longer-term impacts; assess program innovation and capacity opportunities
- Continuous focus on enhancing ability to improve effectiveness and organizational learning
 - Evaluation resulted in actionable insights and improved program supports
- Organization showed not only outputs, but its ladder of outcomes and impact that align with internal metrics

Governance Structure Moves the Organization Forward

- Board is active, connected to the work, and give constant feedback
- Evidence of thinking ahead, engagement, and momentum at board level, based on participation and methodology for choosing program sites
- Board recruitment efforts focused on adding specific geographic areas and areas of expertise
- Effective use of board committees and work groups encourages board members to provide valuable in-kind services and share expertise

Financial Management is Strong, Transparent and Accountable

- Practices indicate moderate risk tolerance
 - Start small with new projects
 - Effectively mitigating risk (e.g. national expansion of a core program)
- Ability to connect financial management, program planning and actual performance is one key to organization's success
- Inclusive and rigorous budget development process

Organization is Diverse and Inclusive

- Intentionally taking steps to further diversify the board
- Closely track composition of diversity in clients served and staff
- Working to implement programs to improve access for targeted populations like women and young adults
 - Two-thirds of top-level managers are women and/or people of color
- Talent management strategy strives to promote diversity and inclusion by intentionally recruiting from diverse sources, following a rigid recruitment process, and focusing on skills rather than experience in potential candidates
- Diverse by Design initiative – a conversation series with multiple stakeholders about building diversity in

the workforce – led to creation of a national working group that is hoping to inform policy and funding of workforce development

Human Resources are Valued and Developed

- Offers flexible work scheduling, telecommuting, and family leave options
- Challenging, supportive, collaborative and mission-driven workplace culture
- Clearly articulated 3-year human capital strategic plan with goal of improving talent management practices
- Partnered with a talent consulting firm to improve personnel management approach, launch a culture committee and embark on an organizational redesign
 - Result was increased internal capacity and development of a Talent Operations Strategy built on Sourcing, Development, Engagement and Culture
- Robust onboarding and off-boarding process includes both an in-person interview and an online survey
- Investment in employee engagement tool to measure, benchmark, celebrate, and improve upon employee commitment, connection and motivation

Use of Information Technology Systems Improves Efficiency and Advances Mission

- Technology permeates all areas of work to increase efficiency, track results, communicate, and help advance mission-related goals (e.g. match students with appropriate jobs)
 - Developed innovative Learning Management System to give students access to learning materials, lectures, presentations, exercises, and assignments
- Detailed metrics to rate technology tools and adoption of new platforms
- Use committee oversight to guide a for profit "enterprise" approach to technology usage
- Align technology to business goals and uses various analytics to ensure continuity, consistency and compliance
- Cross departmental Tech Oversight Committee created to embed technology throughout the organization
- Investment in interactive, tech-forward intranet that provides a resource hub for employees

Communications are Strategic, Effective, and Build Brand

- Ensure communications across platforms are coordinated, aligned with and in support of business strategy
- Use Student Ambassadors Program as way to identify strong examples of success, aligned with mission and goals; then use social media to amplify message on different platforms
- Stories and messaging reflect the impact the organization wants
- Board members and all staff receive message training to effectively and accurately reflect current message and values
- Strategic communications plan includes a Brand Book that goes beyond visual representation and is used to build capacity; focus is on language and messaging

Fundraising and Resource Development are Strategic, Donor-Centered, and Effective

- Performs regular analysis of potential funding opportunities
- Clear identification of four fundraising priorities, including shift away from over-reliance on foundation support and seeking expansion corporate funding opportunities
- Attention to nurturing of multifaceted corporate sponsorships—volunteer, hiring potential, and fiscal support