

CENTER FOR SIOUXLAND

Strategic Planning

November 23, 2019

The Board and key Staff of the Center for Siouxland met to discuss the future direction of the organization. Through the day the group discussed several areas including accomplishments, concerns, opportunities, and barriers in the areas of awareness, fundraising, staffing, and Board engagement. Both Board and Staff were able to participate in pre-planning day interviews/questionnaires to assist in setting the course for the day.

The plan is being set forth to concentrate on fiscal years 2020 and 2021. And while it covers key areas, it also includes continued areas for further work.

Area 1: Vision/Mission Statement (This will require additional work as we did not discuss)

In beginning to craft this document, I went to the website to seek a mission statement, what shows is the following three statements around key themes: Helping People, Empowering Lives, and Building Futures.

Helping People. Our programs help people find, manage, and grow resources. We help families meet their immediate needs while building a foundation for a more secure future.

Empowering Lives. Through education, financial case management, and counseling our expert staff empower people to meet their basic budget obligations, build assets, and take control of their financial lives.

Building Futures. Center for Siouxland maximizes the power of volunteerism to meet community needs and improve quality of life. We provide rewarding personal development opportunities throughout the community for residents who want to make a difference.

Recommendation 1: The creation of a shortened mission statement based on the vision of the organization.

Sample Vision: All Siouxland families are empowered and secure in their futures both in the home and work.

Sample Mission: The Center for Siouxland exists to help people in building a better future by empowering them to make better financial, budgetary, and housing decisions.

Area 2: Bylaws

Recommendation 2: Bylaws seem to be quite outdated and will require some work to update. I suggest one or 2 Board members to work with B Newhouse on updating.

Key Goal Areas

Goal 1: Awareness of The Center

Goal 2: Future of Bridges West

Goal 3: Plan for Diversifying Revenue

Goal 4: Staff

Goal 5: Board Knowledge and Engagement

GOAL 1: Awareness of The Center

All agree that The Center for Siouxland does incredible work, however, we also agree that messaging, awareness, and marketing could be stronger.

- Develop a stronger social media and web strategy (Nate will follow up with folks at BCU)
- Work together with local bankers to develop success stories as it relates to consumer credit counseling. The idea is to share IMPACT.
- Build relationships with large employers outreaching to Human Resources about services that can assist their employees, i.e., consumer credit counseling, housing, and tax services.
- Outreach to high schools and colleges to build a better understanding by young people regarding credit.
- Invest in lunch 'n learns.
- Distribute flyers for tax services.
- Determine whether a name change is needed, if not, seek an acronym or tagline that makes The Center more visible.
- Develop faces for the community that tell the story.

GOAL 2: Future of Bridges West

As of 2022, The Center for Siouxland will have decisions to make related to the future of Bridges West. Options include:

1. Sell the building
2. Keep it the same
3. Partner with an investor
4. Become a Section 8 housing provider

Currently, HUD provides approximately \$136,000 and the state provides \$46,000. Several organizations in Siouxland are impacted by coordinated entry. Out of a rich discussion, Board and Staff agreed to use 2020 to develop an advocacy strategy to present to HUD given the conflict in the original purpose and HUD's rules.

- The Center takes the lead to bring together other organizations impacted by this rule and facilitates a coalition and position to take with HUD. The goal is to impact rules around coordinate entry.
- If unsuccessful with regulatory changes, use 2021 to determine plans for replacing funding coming from HUD and state to independently support Bridges West.

GOAL 3: Plan for Diversifying Revenue

As we look at the revenue pie chart of the organization, The Center is too heavily reliant on government funding. Consideration needs to be given as to diversifying funding streams.

- Suggest that you create an endowment with part of your reserves giving the community a reason to give (and a place). Best practice is to keep your reserves at no greater than 6 months. People have gotten very good at researching organizations before making contributions.
- Consider creating some name funds that are restricted funds for your high impact programs such CCC, Bridges West, Rep Payee, and Tax program.
- Consider a Heroes program that allows someone to adopt a person who is in your system. There are a lot of ways to do this.
- Develop a new fundraiser that is beyond your Whiskey, Wine, and Brew. Also consider making Whiskey, Wine and Brew the name of your fundraiser as it likely draws better than Homeless to Home Sweet Home.

Recommendation: Put in place a Board give and get policy. It is important for all kinds of reasons that every Board member is making an individual contribution so that you are showing that all Board members are giving something.

Recommendation: Consider hiring a fundraiser who is not the grants person.



GOAL 4: Staff

Staff are critical to the success of The Center for Siouxland so while we want to remain prudent in the number of staff that we have and overhead, investing in staff is important.

Recommendation: Reduce the number of direct reports that Jonette has by restructuring the team so that essentially Jonette has Finance, Grants, and 2 Program people reporting to her.

Recommendation: Consider hiring a fundraiser who is not writing grants (two different skill sets).

Recommendation: Establish a succession plan.

Recommendation: Establish salary ranges for each position.

Recommendation: Staff retention is key to the work of The Center for Siouxland, I strongly urge you to review compensation of current employees as indications are that they have not kept up with nonprofit trends for raises. New staff coming in are likely to start at higher salaries which means they may be making the same as those who have tenure.

GOAL 5: Board Knowledge and Engagement

The Board needs to have a stronger understanding of The Center's programs and the impact on those being served. With a stronger understanding, members will become stronger/better advocates in the community and will be able to tell the impact story.

- Board members visit The Center on a more regular basis (outside of Board meetings) to see what really goes on and how programming is executed
- On your next visit, plan and pick a program to observe staff serving the clients. Don't rely on dashboards to tell the human story.
- Go with Jonette on potential donor calls. Become The Center's best salespeople.