

Ascencia 2019 – 2024 Strategic Plan

Ascencia is a non-profit organization whose mission is to lift people out of homelessness, one person, one family at a time. We envision a community where people in need can find services, resources, and safe, affordable housing. Ascencia has provided housing and services to homeless individuals and families since 2006, when it was founded as PATH Achieve Glendale. In 2012, Ascencia was named Organization of the Year by the Glendale Chamber of Commerce. That year Ascencia also launched its first ever capital campaign Advancing Ascencia. In 2018, Ascencia was named the California Nonprofit of the year in recognition of its operating model.

As a result of this success and recognition, and the growing need in our community, the focus of the 2019 – 2024 Strategic Plan will be to expand our successful model to have a greater impact on clients in need. The vision statement for this strategic plan states that we are focusing on client impact expansion in order to provide more homeless individuals and families with best value oriented programs and services.

In order to support this expansion, we have identified 4 pillars of the strategic plan. The 4 pillars are as follows:

<ul style="list-style-type: none"> ➤ Financial Sustainability <ul style="list-style-type: none"> • Sue S. / Ron B. 	<ul style="list-style-type: none"> ➤ Management Infrastructure <ul style="list-style-type: none"> • Kim G. / Laura D.
<ul style="list-style-type: none"> ➤ Board Development <ul style="list-style-type: none"> • David B. / Ron B. 	<ul style="list-style-type: none"> ➤ Client Impact Expansion <ul style="list-style-type: none"> • Kristine N. / Laura D.



The main goal of each pillar is as follows:

- 1. Financial Sustainability:** to grow sustainable revenue by diversifying funding sources and increasing donors.
- 2. Board Development:** to strive for professional and leadership development of our board members, to create Ascencia ambassadors, and to ensure continuity.
- 3. Management Infrastructure:** to focus on professional and leadership development, training, efficiency, and technology to strengthen our current foundation.
- 4. Client Impact Expansion:** to grow value oriented programs using the Ascencia model to create more housing and services to lift more families and individuals out of homelessness.

Organizational goals and action plans have been identified for each pillar by the Board, senior leadership, and staff based on the organizational needs and prioritization. Please note this plan was revised due to delays caused by the pandemic and Board approved January 12, 2021.”

Pillar #1: Financial Sustainability: to grow sustainable revenue by diversifying funding sources and increasing donors.

Goals:

1. Raise 1MM in additional revenue in the next 5 years.
2. Attract 15 new major donors in the next 5 years.

GOAL 1: Raise 1MM in additional revenue in the next 5 years.

Objective 1: Fundraising efforts will raise \$900,000 gross total)

- Project Description: Identify annual fundraising efforts and events according to a strategic calendar that works with development and staff, board, and committees to ensure that one event does not interfere or overlap with other fundraising, community information events, staff processes, etc. - that impact the balance of paid staff and volunteers and board members.
- Project Lead: Development Director with Development Committee
- Timeframe/Deadline: Annual calendar of events
- Resources and Budget needed: Event Coordinator, staff and Board member time
- Measures of Success: Money raised and new donors

Objective 2: Board Contributions that will raise \$33,333 gross annually (\$166,665 gross total) [\$33,333 / # of board members] = \$ individual board member contribution

- Project Description: Set a clear expectation for Board members to generate a certain amount of money each year as part of the Give and Get initiative.
- This expectation will be explained to board members during the orientation process.
- Project Lead: Board President, Nominations Committee Chair, and Executive Director
- Timeframe/Deadline: Annually
- Resources and Budgets needed: Staff and Board member time. Give or get.
- Measures of Success: Money raised annually

Objective 3: Raise an additional \$50,000 in Foundation Grants in the next 5 years

- Project Description: Apply for additional foundation grants that will raise an annual amount of \$10,000 per year or \$50,000/5 in additional revenue in five years.
- Identify foundations and application deadlines.
- Project Lead: Development Director
- Timeframe/Deadline: Annually
- Resources and Budget needed: Staff time, Grant Writing in-house, consultant, or Elevate
- Measures of Success: Funds raised annually

Goal 2: Attract 15 new major donors in the next 5 years that will generate \$150,000 gross income (\$10,000 each donor)

Objective 1: Cultivate relationships with new major donors throughout the year (\$10,000 each donor) to total 15 new major donors over next 5 years.

- Project Description: Allow staff time and resources to go out in the community to create and develop these relationships.
- Project Lead: Development Director
- Timeframe/Deadline: Annually
- Resources and Budget needed: Staff and board member's time.
- Measures of Success: Additional funds raised annually in increments of \$10,000 to total \$150,00 in 5 years.

Pillar #2: Board Development: to strive for professional and leadership development of our board members to create Ascencia ambassadors and to ensure continuity.

Goals:

1. Have 23 active Board Members at all times
2. Develop a comprehensive orientation and training program
3. Develop a Succession Plan

Goal 1: Have 23 active Board Members at all times

Objective 1: Identify Board Member Mix Needed/Desired

- Project Description: Identify the gaps in talent in our existing Board. Clearly identify the skills/talents needed to help in the recruitment process that everyone agrees with. Create a job description with position title, summary of role, and skills needed/desired.
- Project Lead: Executive Director and Nominations Committee Chair
- Timeframe/Deadline: Oct 1, 2019
- Resources and Budget needed: Public Relations expense and Board member time
- Measures of Success: Updating the matrix to show the type of prospects we need as membership changes.

Objective 2: Identify Board Member Prospects

- Project Description: Use our existing network to encourage referrals for potential prospects. Once a prospect has been identified, identify a plan to develop a relationship with person, bring them in for a tour, and invite this person to meetings so that they can begin to learn about the organization and their potential role. Assign a mentor for the prospect.
- Project Lead: Nominations Committee Chair
- Timeframe/Deadline: Oct 1, 2019
- Resources and Budget needed: Board member time
- Measures of Success: Establishing a plan that help recruit the right type of Board Member.

Objective 3: Develop Strategy Plan for Recruitment

- Project Description: Once a promising prospect has been identified, he or she is connected with the Nominations Committee Chair who will assess the person for the appropriateness of membership.
- Project Lead: Nominations Committee Chair
- Timeframe/Deadline: Oct 1, 2019
- Resources and Budget needed: Board member time
- Measures of Success: A balanced Board Matrix

Goal 2: Develop a comprehensive orientation and training program

Objective 1: Develop a comprehensive Orientation Program

- Project Description: This comprehensive orientation program will consist of an orientation packet with the following information: our history, mission, org structure, programs, bylaws, strategy plan, understand our clients (will have an opportunity to meet and interact with our clients), and fund sources chart.
- Project Lead: Nominations Committee Chair
- Timeframe/Deadline: Oct 1, 2019
- Resources and Budget needed: Board member time
- Measures of Success: A successful orientation program that new board members resonate with (will request feedback).

Objective 2: Develop an Ambassador Program for existing board members

- Project Description: The Ambassador Program will prepare Board Members to speak more confidently about our organization's history, mission, programs, achievements, etc., to help attract more donors.
- It will include training on things such as: creating an elevator speech, allowing board members opportunities to meet and interact with our clients (guest chef), participate in ride-alongs with our outreach teams, etc.
- Project Lead: Board
- Timeframe/Deadline: Oct 1, 2019
- Resources and Budget needed: Board and staff time
- Measures of Success: A successful orientation program that existing board members resonate with (will request feedback).

Goal 3: Develop a Succession Plan

- Project Description: To ensure continuity, identify what qualified Board members will take over each role in advance of the primary person's departure.
- Project Lead: Board President and Nominations Committee Chair
- Timeframe/Deadline: Oct 1, 2019
- Resources and Budget needed: Board member time
- Measures of Success: Key positions will have a replacement in place according to the agreed upon succession plan deadlines.

Pillar #3: Management Infrastructure: to focus on professional and leadership development, training, efficiency, and technology to strengthen our current foundation.

Goals:

1. Improve Staff Development and Satisfaction (staff survey)
2. Achieve and maintain a Retention Ratio of 10% improvement each year until we reach 10% better than average staff retention for the non-profit sector.
3. Successful Implementation of 3 Technology Systems
4. Achieve 100% compliance with all mandatory trainings by 2021

Goal 1: Improve Staff Development and Satisfaction (staff survey)

Objective 1: Create an Employee Satisfaction Annual Survey and decide on a scoring system.

- Project Description: Create an Employee Satisfaction Annual Survey that will touch on all important employee related topics such as training and development, compensation, work life balance, career development, etc. Create a scoring system and decide on a “healthy” score to measure our success.
- Project Lead: Operations Manager
- Timeframe/Deadline: Dec 1, 2019
- Resources and Budget needed: Access a cost-free survey via Paychex or Express Pros.
- Measures of Success: Average Satisfaction ratings of 80% or higher.

Goal 2: Achieve and maintain a Retention Ratio of 10% better than average retention for the non-profit sector by year 4.

Objective 1: Improve the employee onboarding experience

- Project Description: Establish an onboarding experience that is more seamless, efficient, and comprehensive so that new employees can take on their roles faster and better prepared.
- Project Lead: Operations Manager
- Timeframe/Deadline: Jun 30, 2022 (develop plan)
- Resources and Budget needed: Staff time
- Measures of Success: Employees reporting that they had a positive onboarding experience that prepared them to take on their new roles.

Objective 2: Develop a training program for each position

- Project Description: To ensure employees taking on new roles are meeting their full potential, with a training program developed for each position.
- Project Lead: Operations Manager
- Timeframe/Deadline: Sept 30, 2022
- Resources and Budget needed: Staff time and input from the Director of Programs
- Measures of Success: Employees communicating that they feel well trained and empowered in their roles.

Objective 3: Develop a cross training program

- Project Description: To ensure continuity, a cross training program will be developed. The purpose of this is in case one employee is on LOA, resigns, etc., another employee will be able to immediately jump into that position to keep things moving.
- A more detailed plan will be developed with time.
- Project Lead: Operations Manager
- Timeframe/Deadline: Jun 30, 2023 (develop plan)
- Resources and Budget needed: Ascencia Directors and Supervisory staff.
- Measures of Success: Employees communicating that they feel well cross-trained and would be comfortable performing in another position if needed.

Objective 4: Hire 1 grant writer

- Project Description: A full time grant writer will be hired to help apply for additional grants and increase our revenue.
- A more detailed plan will be developed with time.
- Project Lead: Operations Manager and Executive Director
- Timeframe/Deadline: Jun 30, 2024 (hire grant writer)
- Resources and Budget needed: Sustainable funding to cover associated costs.
- Measures of Success: Hiring a successful grant writer by our deadline who will help us achieve our grant goals.

Objective 6: Increase DHS/ICMS PSH or an equivalent alternate by 12 caseloads between 2019 and 2024.

Project Description: Coordinate with DHS, PSH Housing Corporations, or alternate funder to add 12 Intensive Services Case Management caseloads or alternate equivalent services by 6/30/24.

- Project Lead: Director of Programs
- Timeframe/Deadline: 2-3 per year over 5 years to total 12 caseloads or equivalents.
- Resources and Budget Needed: Leased space in which to locate the Case Managers.
- Measures of Success: Successful addition of caseloads according to the timeline.

Goal 3: Successful Implementation of 3 Technology Systems

Objective 1: Successful Implementation of a new Phone System

- Project Description: Will need to identify our phone system needs, identify the new system that meets those needs and is within budget, and allow time for successful implementation and training.
- Project Lead: Operations Manager
- Timeframe/Deadline: Jun 30, 2022 (successful implementation)
- Resources and Budget needed: Need to explore cost-savings with a new phone system.
- Measures of Success: The successful implementation of a new phone system by our deadline that meets our needs and staff receives full training on.

Objective 2: Successful Implementation of a new Website that is ADA Compliant

- Project Description: Update Ascencia's website, hire a company to design the website that is within budget, and allow time for a successful implementation and training.
- Project Lead: Development Director and Operations Manager
- Timeframe/Deadline: Oct 1, 2021 (successful implementation)
- Resources and Budget needed: Need to raise \$10,000 and hire company to build it.
- Measures of Success: The successful implementation of a website by our deadline that meets our needs and is ADA compliant.

Objective 3: Successful Implementation of a new Computer Network

- Project Description: Will need to identify our network needs, identify the new system that meets those needs and is within budget, and allow time for implementation and training.
- Project Lead: Operations Manager
- Timeframe/Deadline: Oct 1, 2021 (successful implementation)
- Resources and Budget needed: Need to raise funds and work with vendor on implementation and staff training on our new network.
- Measures of Success: The successful implementation of a new network by our deadline that meets our needs and staff is fully trained on.

Goal 4: Achieve 100% compliance with all mandatory trainings by 2021

Objective 1: Develop a Compliance Training Schedule

- Project Description: Identify all trainings that need to be done, the frequency and deadlines. We will then create a schedule of when staff will take the trainings. This schedule will be updated frequently to ensure accuracy.
- Project Lead: Operations Manager and Director of Programs
- Timeframe/Deadline: Annual (schedule)
- Resources and Budget needed: Training Budget
- Measures of Success: The successful creation of a complete and comprehensive training schedule that is in compliance with applicable laws and regulations.

Objective 2: Implement Compliance Training for all employees based on Schedule

- Project Description: Based on the schedule created, organized, and updated, we will implement the training for all employees and ensure 100% compliance.
- Project Lead: Operations Manager
- Timeframe/Deadline: June 1, 2022
- Resources and Budget needed: Training Budget
- Measures of Success: Achieving 100% training compliance by 2022.

Pillar #4: Client Impact Expansion: to grow value oriented programs using the Ascencia model to create more housing and services to lift more families and individuals out of homelessness.

Goals:

1. Monitor and Assess Emerging Community Needs
2. Pillar #4: Client Impact Expansion: to grow value oriented programs using the Ascencia model to create more housing and services to lift more families and individuals out of homelessness.

Goal 1: Monitor and Assess Community Needs on an on-going basis

Objective 1: A Successful In-house needs Assessment

- Project Description: Determine community need for services.
- Project Lead: Director of Programs
- Timeframe/Deadline: Quarterly
- Resources and Budget needed:
- Measures of Success: Identification of opportunities for Ascencia to expand and provide services.

Goal 2: Expand services to 2-3 new areas by 2024

Objective 1: Identify opportunities for collaboration

- Project Description: Identify opportunities for collaboration in the areas that we are migrating into. These partnership will aid in our success.
- Project Lead: Executive Director
- Timeframe/Deadline: June 30, 2024
- Resources and Budget needed: A sustainable funding source.
- Measures of Success: Ascencia will be providing services in 2-3 new areas.

Objective 2: Identify Funding needs and sources

- Project Description: Identify the funds needed to cover the overhead for these new services and then identify sources available to receive these funds.
- Obtain funding for agency vehicles if necessary to provide new services .
- Dedicate 1-2 staff per new services area.
- Project Lead: Executive Director and Director of Programs
- Timeframe/Deadline: June 30, 2021
- Resources and Budget needed: Sustainable funding.
Measures of Success: Executed agreements, sub-agreements to perform new services.