



Neighborhood Service Organization

Celebrating 60 Years of Service and Impact

**Board Meeting
Strategic Plan
June 28, 2016**

Generative Strategic Planning

Process

- Identify the major issues confronting the organization - Staff
- Develop background information to guide the conversation - Staff
- Develop the key strategic questions to be answered - Staff
- Determine strategic direction – Board
- Develop specific strategies and tactics – Staff
- Seek Board approval - Board





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Mission, Core Values & Vision

Mission, Values & Vision

Mission

Changing lives through the power of choice.

Core Values

Neighborhood Service Organization was established by visionary leaders, who believed in simple guiding principles:

- ❖ Access
- ❖ Collaboration
- ❖ Respect
- ❖ Compassion
- ❖ Commitment
- ❖ Quality
- ❖ Integrity

10 Year Vision

With disciplined planning and thoughtful execution, NSO has had a significant impact on changing lives.

NSO promotes self-sufficiency, provides integrated behavioral health care, homeless recovery services, and community and real estate development. Comprehensive, integrated services are offered at locations throughout Detroit, Wayne and Oakland Counties. Strong collaborative relationships with like-minded partners create a system that addresses a wide range of needs.

Community development activities serve to revitalize neighborhoods. The highly successful Bell Building, completed and fully operational since 2013, has been replicated throughout the United States as a model of innovation and integrated services.

NSO is financially strong, with revenue generated from public and private funds and fee-based services. Community members and corporations provide significant charitable gifts to show their support of NSO's meaningful work and positive results.

Dedicated and committed staff, Board and volunteers work passionately and cooperatively to achieve the organization's vision. The professional environment is dynamic, energizing and spirited. People feel they are making a difference in the lives of individuals, families, and communities.

NSO is nationally recognized for its expertise and innovative service offerings. As a result, NSO positively impacts issues of social justice and public policy.



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Generative Strategic Planning Initiatives

Initiatives

- A. Organizational Identity & Branding
- B. Organizational Culture & Leadership Development
- C. Financial Stability
- D. Growth and Opportunities
- E. Governance

Generative Strategic Planning

Staff Committee

- Sheilah Clay, CEO (ex-officio member of each subcommittee)
- William Weld-Wallis, COO
- Allyson Farquhar-Boyle, CFO
- Dr. Richard Marcolini, Medical Director
- Sandy Harvey, VP of Talent Management and Corporate Development
- Gloria Reid, Finance Director
- Brad Bishop, IT Director
- Omari Taylor, Senior Director of Corporate Development
- Dr. Christopher Parks, Director of Integrated Health
- Tricia Verrill, Organizational Development Specialist
- Jessica Leigh Goergen, PI Director
- Julie Herzig, Reimbursement Director
- Tia Cobb, Director of Homeless Recovery Services
- Anne Akinfenwa, Director of Life Choices
- Frank McGhee, Program Director of Youth Initiatives Project
- Reginald Williams, Program Director of YouthLink and ParentLink
- Sheila Salters, Life Choices Adult Program Director
- Genie Craven, Contract Manager
- Shawndia North, Human Resource Generalist
- Denise Figurski, Volunteer and Special Events Manager
- Kenya James,
- Susan Pierson-DiTomasso,

A. Organizational Identity & Branding

Initiatives

1. Organize NSO around major functions, i.e. homelessness, youth, adult .
 - Create centralized functions, i.e. intake, OT, nursing, psychiatry
 - Have staff provide services across functions and populations.
 - Create a system to measure and increase referrals between NSO functions and services, and develop an internal referral outcome measure.
 - Develop a referral process for interdepartmental programs.
2. Embrace a branded house marketing approach, all functions under the NSO name, i.e. NSO Life Choices, NSO Homeless Services, NSO Behavioral Health.
 - Create a consistent branding strategy, maximizing a tag line, logo, and messaging.
 - Implement a branding strategy to increase public awareness of our name, outcomes, and services.
 - Implement an internal marketing campaign to have all staff recognize and support the “One Team: One Mission” message.
 - Implement an NSO Brand Study to determine brand awareness in the community and among local charitable givers.
 - Website Redesign with Donor Database Integration.
 - Implement a unified décor at all NSO locations (wall paint color, signage, approved logo, etc.).
3. Identify and establish a large community goal to ignite our branding efforts, i.e. ending homelessness in Detroit, youth employment
 - NSO serve as a convener in identifying a large community goal.
 - Collaborate with other community partners on large fundraising campaigns during awareness months.

B. Organizational Culture & Leadership Development

Initiatives

1. Build a culture of leadership development including career planning, developing bench strength, and a leadership pipeline.
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- a) Determine the necessary infrastructure (i.e. budget, staff) to support leadership development.
 - Determine the resources required for leadership development, i.e. time, money, staff.
 - Create and launch a comprehensive leadership development series (including activities) throughout NSO.
 - Formalize and communicate the NSO internship process
 - Evaluate and revise the new performance management system. (ADP)
 - Create a high potential leadership pipeline program at NSO to engage stellar team members in training and activities for professional development.
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- b) Develop and implement strategies to impart the NSO culture and values throughout all staff, i.e. "One Team: One Mission."
 - Create a welcoming environment for new staff, i.e. lunch buddy on 1st day.
 - Develop and implement process for experienced staff to play a role in mentoring and coaching new staff
 - Create cross departmental learning opportunities and activities to learn about other areas within NSO
 - Monthly NSO lunch and learns (Ground Rounds at each unit with informational tour of each site)
 - Encourage participation in our STAR program, peer recognition.

C. Financial Stability

Initiatives

1. Create an impact/forecasting report, including revenue by grant, number of clients, number of staff, timeframe, percent/amount of administrative costs, impact/outcomes, and estimate of money saved through the delivery of our services (i.e. early intervention).
 - Identify key metrics that are applicable across units and grants.
 - Identify outcomes measures/benchmarks that NSO can use (from health systems, FQHCs, other providers, etc.).
 - Determine what data are needed to be collected, by whom, and how
 - Identify how IT systems/data systems will collaborate to generate a report.
 - Develop and identify ways to measure impact and calculate cost savings or estimate of costs avoided/not increased.
 - Draft format of the impact report/dashboard.
 - Develop a target all-in cost per service and cost per consumer.
 - Develop a forecast report that will generate from and enhance the information provided by the impact report.
 - Reorganize and right-size by unit and corporate office to eliminate operating deficit and position NSO for bundled rate and shared risk/savings reimbursements.
 - Identify targeted fund balance reduction to use for operating deficits during period of transition and develop plan to increase fund balance after this period.
 - Develop strategy to increase overall operating income to levels that support additional debt capacity for planned projects.

D. Growth and Opportunities

Initiatives

1. Create an internal “think tank” to identify, analyze, nurture and launch new ideas and services.
 - Determine the infrastructure requirements to launch new offerings, including staffing, investment needs.
 - Conduct competitive analysis of major offerings, including not-for-profit and commercial organizations; identify new opportunities and integrate best practices.
 - Explore which current NSO services could be expanded into new markets: public and commercial, including...
 - ✓ Current services which could be expanded, i.e. homelessness with children and families.
 - ✓ New services, i.e. housing and support services for youth aging out of foster care.
 - ✓ Intellectual properties, i.e. Training for Emergency Services, schools and Churches on Mental Illness, Homelessness, Youth Engagement, Integrated Healthcare.
 - ✓ NSO Property/Business opportunities, i.e. convert the Bell building garage into a bike repair shop to generate revenue for NSO, provide workforce development training and employ consumers.

D. Growth and Opportunities

Initiatives

2. Prepare for the potential elimination of PIHP's and Community Mental Health Authorities.
 - Clarify the NSO value proposition.
 - ✓ Evaluate all services that NSO does to identify what the value added components are.
 - ✓ Develop metrics that support the value added components that can be marketed to funders.
 - Identify and initiate relationships with future payers.
 - ✓ Get on Medicaid and other healthcare products Provider Panels with each of the Market Insurance companies.
 - ✓ Identify service delivery changes that can be made to better position NSO for future funding models.
 - ✓ Identify and evaluate potential new partnerships that would benefit NSO in the changing environment.
 - ✓ Identify steps needed to grow and diversify services outside of NSO's traditional funding sources.
 - ✓ Engage in advocacy efforts in order to shape policy to benefit NSO and its consumers.
 - ✓ Identify policy areas in which NSO needs to be involved.
 - ✓ Develop an ongoing mechanism that helps to identify key issues and determines how to allocate resources.

E. Governance

Initiatives

1. The Executive Committee to formalize and manage the CEO succession process.
 - Outline the process and timeframe.
 - CEO to develop a draft job description and identify potential internal candidates.
 - Executive Committee to finalize job description and work with a search firm to identify external candidates.
 - Define the interview and selection process.
 - Define the transition plan, including the overlap between the current and future CEO, transitioning of major relationships.
 - Ensure openness and transparency.
2. Expand Board members involvement in the mission of NSO.
 - Maximize each Board member's specific skills and expertise in serving NSO.