



Organization Coaching – WNC Nonprofit Pathways

Report Prepared for Children First/Communities in Schools
May 14, 2018

Introduction

We are pleased to submit this summary of the Organization Coaching session that was conducted on May 4, 2018 for Children First/Communities in Schools (CF/CIS). Our hope is that this information will support you in your efforts to strengthen your infrastructure and organization as you further develop your impact in your community.

I. Purpose

Nonprofit organizations are under increased expectations for effectiveness and outcomes, and having strong internal capacities is key to sustainability and success. The purpose of Organization Coaching is to help leaders identify and commit to the top priorities for increasing the capacity of your nonprofit.

This is a confidential engagement. The organization participating in the training may choose to share some or all of this report, as appropriate, with stakeholders beyond the board and staff. (Note – If grant support is sought from Pathways funding partners, they want to see this report to get greater insight into the needs of your organization and the focus of your future capacity building efforts.)

II. Approach

Judy Futch and Althea Gonzalez served as the facilitators on this project. The steps of the Organization Coaching included:

- In advance of the coaching engagement, organization leaders reviewed the Summary Core Capacity Assessment Tool (CCAT) Results Report and discussed the Lifecycle Placement, Core Capacity and Sub-Capacity Scores, and Organizational Culture.
- Also in advance of the meeting, a background conversation was held with the Natasha Adwaters, Executive Director, including review of an Infrastructure Checklist to determine what essential documents and practices are currently in place and what gaps exist. Additionally, a phone conversation was held with Shawn Henderson, Board President.
- The Organization Coaching session was held and included the following agenda items:
 1. Discussion of questions about the Assessment Results Report;
 2. Discussion of insights from the Assessment Results Report and the Infrastructure Checklist and strengths/challenges and opportunities/ideas for improvement;
 3. Development of key themes and insights for building internal capacity; and
 4. Development of top priorities for improvement.

- Those attending were:
Board of Directors:
Stacey Bailey, Board Secretary; Sallie Broach; Yuki Damerville; Shawn Henderson, Board President; Jon Miles, Board Past-President; Jennifer Nicolini, MD; Cecilia Rawlins, President-Elect; and Jennifer Reed
Staff members:
Natasha Adwaters, Executive Director; Greg Borom, Director of Advocacy; Kate Frost, Resource Development Director; and Audra Morrow, Director of Community Supports
A record of the group discussion was prepared. (See Section III)

III. Discussion and Prioritization

Below are comments from the group discussion. The comments have been grouped to differentiate between the **Strengths, Challenges, Opportunities, or Comments**, as defined by participants. We note that the number of challenges and opportunities may naturally be greater since this is a service based on strengthening the organization. This should not appear as a negative for the organization but is to be commended as a step toward capacity building to increase your impact in the community.

Strengths, Challenges, Opportunities, and Observations/Comments
<p><u>Life Cycle Results</u></p> <p><i>Placement on Life Cycle:</i> According to the CCAT Results Report, Children First/Communities in Schools is doing well in Core Program and Infrastructure Development, showing a solid base upon which to build for Impact Expansion.</p> <p><i>Comments re: Placement on Life Cycle:</i></p> <ul style="list-style-type: none"> • Agreement with the tool’s assessment; we’re going up the life cycle curve and are not in decline. We are well established and have gone through significant changes. • Rate of growth needs to be checked and supported with infrastructure for greater impact. <p><i>Strengths</i></p> <ul style="list-style-type: none"> • When we filled out the tool (<i>early Fall, 2017</i>), there was uncertainty because of Executive Director transition. Now with a new Executive Director in place, we are in the process of redefining who we are. <p><i>Challenges</i></p> <ul style="list-style-type: none"> • Moving on two parallel tracks. Some aspects, such as Advocacy and the Learning Centers are in the impact expansion phase. Other aspects of the organization are still in the infrastructure development phase. <p><i>Opportunities</i></p> <ul style="list-style-type: none"> • Need to work on name recognition and community understanding.

Strengths, Challenges, Opportunities, and Observations/Comments

Adaptive Capacity

Strengths

- Strong collaborative and networking with partners including national Community in Schools, Asheville City and Buncombe County Schools, Asheville Housing Authority, and Asheville City and Buncombe County Government.
- Strong advocacy program provides increased public awareness, unusual for a public service organization.
- Success Equation serves as a screening tool and helps to determine advocacy approach for community and strong recognition in community.
- Staff leaders have autonomy and think together as a full staff.
- Advocacy focus increases adaptability; staff able to sign onto initiatives quickly and Board supports the initiatives.

Challenges

- Balancing the community's expectations vs. CF/CIS capacity.
- Making sure services are unduplicated and coordinated with other partners in order to increase program leverage.
- Need to shift from looking at outputs to addressing outcomes.

Opportunities

- Development of deeper collaboration with some community partners including United Way of Asheville and Buncombe County.
- At present, Board doesn't devote resources to program evaluation; it's a big commitment and would be very effective for program development and program revisions plus marketing.

Leadership Capacity

Strengths

- Strong Executive Director who succeeded previous strong Executive Director.
- Staff leadership - Advocacy, Community Support, Executive, and Resource Development - have good working relationships with each other and rest of staff; they keep the big picture in mind.
- CF/CIS is known for its strong, active Board.
- Building a strong staff pipeline.
- Organization mission and impact is strong, need to share with community more proactively.

- Strong organizational commitment to racial equity; CF/CIS want to be champions of equity.

Challenges

- Board volunteers are stretched thin with multiple tasks; may affect meeting attendance.
- CF/CIS is a complex organization that is difficult to market and for the community to understand.

Opportunities

- Evaluate shifting from monthly Board meetings to bi-monthly meetings because of the additional pressure on staff for Board meeting preparation.
- Board recruitment to ensure that Board is representative of the community that CF/CIS serves; reaching out beyond the people that the Board knows.
- May need to think out-of-the-box to get more parent voices at the Board level.
- Communicate what CF/CIS does to the community; build on the Community Impact Team evaluation and revisit the issue of the organization's name.
- Board Fund Development Committee continue to connect with various donors to elicit support.

Management Capacity

Strengths

- Organization does focus on work/life balance for staff; flexibility is part of leadership team.
- Board has focused on the issue of compensation to impact staff retention.
- Focus on staff development both personally and professionally.

Challenges

- Staff compensation and lack of benefits causes turnover in staff; need to invest in staff.
- Staff manages and juggles a variety of responsibilities.
- One of the Success Equation's teams was focused on communication and this team is not meeting regularly.

Opportunities

- Need to assess if the work load is manageable for staff. May need to restructure, because a program can be one person balancing a lot of responsibilities.
- Conduct an annual compensation review and use more national data

Technical/Operations Capacity

Strengths

- Board is stepping up with fund development to make more community connections.

Challenges

- Program evaluations need to be developed to better inform decision-making.
- Office and program staff is inadequate; lack of space is beginning to impact program effectiveness.
- First impression of offices can be a lasting impression; need to consider how CF/CIS wants to be portrayed by its facilities.
- Since CF/CIS is grant-dependent, every fourth year is a challenge to continue the program past its three-year grant funding; challenge is increasing individual donors to cover the program inception.
- Takes time to develop relationships with larger donors.
- Program evaluations are a vicious cycle. We need to prove impact of programs with data; yet don't have technology or adequate tools. Program growth is being held back
- Technology is a challenge including access at various sites, firewalls at school sites and no ability to control. Creates a ripple effect on staff efficiency and morale. Once staff are behind in documentation due to technology issues, it may take several days to catch up due to workload. This adds to staff stress.

Opportunities

- Telling the CF/CIS story to the community.
- Now meeting CIS standards, opportunity to develop outcomes to be better aligned with standards.
- Move to project-based funding, create scenarios to communicate opportunities for donor investment. This will help donors see and support the vision of the organization.
- Develop strategies for specific budget items so donors can support initiatives.
- Increase number of individual donors.
- Develop more specific fund development roles for Board members to fulfill.
- Since some Board members have conflict of interests with fund development, we need to recruit more board members who do not have institutional conflicts.

Organization Culture Capacity

Strengths

- Organization's mission is the foundation of the culture.
- Mindful and respectful of all people involved with CF/CIS; staff and Board reflect that value.

- Verbal appreciation and encouragement is given regularly.
- Staff support each other, CF/CIS product and outcome are the staff.
- Staff is active, involved and seen in the community.
- Reflective organization at Board and staff level; willing to take the time to reflect and reprioritize.
- Values that are demonstrated: camaraderie, empowerment, humor, impactful with grace, kindness, open to change, open-minded, relationships, respect, steadfast, and systemic change.

Challenges

- Staff is stretched because of multiple responsibilities and workload.

Opportunities

- Restructure work to be more manageable with additional technology supports.

Themes/Insights/Main Story for Your Organization

Children First grew from the merger of two respected community organizations: Children First and Youth Services Action Group. In 2003, Children First merged with the local affiliate of Communities In Schools and in 2013 was awarded official designation as a Nationally Accredited Affiliate Organization for Communities In Schools.

CF/CIS has a strong advocacy focus and the organization often served as an incubator for direct services. CF/CIS developed two distinct yet complementary programs - direct service to low-income families and their children, and policy advocacy. The organization is recognized for its collaborative approach with other community organizations and volunteers and its leadership with policy advocacy.

During the last five years, CF/CIS has experienced a steep growth in program operations with expansion to support youth in four schools, provision of after-school support at public housing sites and support of families at the Emma Resource Center. CF/CIS provides services to over 4,400 children and 300 families annually. With the change in focus at the United Way of Asheville and Buncombe County, some community confusion has surfaced about the distinction in services of United Way and CF/CIS.

CF/CIS is challenged to communicate its vision and impact to the community, diversify its fund development to be more donor supported, and develop stronger evaluation systems to support its programming decisions and communication with the community. CF/CIS is at the end of its current strategic plan cycle and has had several recent leadership transitions. The Board and staff are prepared to “reprioritize and look at issues with fresh eyes.”

Priorities for Improvement – Capacity Building Plan		
The group brainstormed and prioritized a capacity building plan.		
Priority	Who leads	Timeline
<p>1. Develop new three-year strategic plan</p>	Executive Committee and Executive Director	Initiate Summer, 2018
<p>2. Analyze effectiveness of current marketing</p> <p>Additional activities brainstormed regarding marketing:</p> <ul style="list-style-type: none"> a. Refresh marketing materials with ability to tailor b. Clarify and streamline “what we do” messages c. Address issues of equity and inclusion in messaging d. Determine target market e. Re-create website 	<p>Kate, Natasha, Jodi</p> <p>Create an Ad Hoc Board Committee to support</p>	<p>Work has begun</p> <p>Report status to Board June, 2018</p>
<p>3. Analyze staff capacity to meet current commitments</p> <p>Additional activities brainstormed regarding staff capacity:</p> <ul style="list-style-type: none"> a. Review job descriptions and determine if staff are stretched too thin b. Establish and implement formal staff development and evaluation process c. Continue to assess staff compensation (wages and benefits) 	Senior Leadership Team provide information to Executive Committee	<p>Work has begun</p> <p>Report by August 1, 2018</p>
<p>4. Analyze development capacity in relationship to budget</p> <p>Additional activities brainstormed regarding fund development:</p> <ul style="list-style-type: none"> a. Seek ways to stabilize funding streams so that there is less ebb and flow b. Link resource allocations to outcomes and adapt if needed c. Create a fund development plan that addresses needs and community change, tie in with strategic plan 	Natasha, Kate initiate, support from Fund Development and Finance Committees	Budget is due July 1, 2018

Additional Priorities brainstormed included:

- **Board Development:** Focus on recruitment for increased donor outreach
- **Board-led Fundraising:** Set long-term budget targets to enable clear, focused messages for board-led fund raising
- **Facilities:** Assess and address infrastructure capacity to ensure efficient and effective operations including technology, office space and furnishings
- **Earned income:** Activate process of developing ideas for earned income

IV. Next Steps, Future Capacity Building and Evaluation

After you receive this report, **a Pathways representative will contact your organization’s lead staff member to schedule a conversation about what next steps you may take to help strengthen your organization** – through Pathways services or otherwise.

We hope your organization sees this as the beginning of important “capacity building” in key areas, which can help strengthen your group’s infrastructure as well as your service to the community.

Thank you for your participation and commitment to improving your organization’s capacity.

Please send any comments to contact@nonprofitpathways.org.