



Strategic Plan

2018 – 2019 Operational Objectives

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Introduction

This document is the result of a series of meetings conducted with the leadership team of Berks Coalition to End Homelessness (BCEH) in February through July 2018. During these meetings, the participants:

1. analyzed the state of Berks Coalition to End Homelessness — its strengths and weaknesses — as it exists today;
2. defined the community environment — its opportunities and threats — now and into the future;
3. identified the key issues facing Berks Coalition to End Homelessness;
4. created a mission statement (including a mission for membership support) and vision statement for Berks Coalition to End Homelessness;
5. defined the long-range strategies to achieve its vision and fulfill its mission;
6. established the *Critical Measures of Success* that will be used to evaluate the organization's progress as it moves through its strategic plan; and
7. targeted the specific, short-term actions to be taken to implement the long-range strategies and assigned accountability to the appropriate individuals within the organization.

The results are as follows.

Strategic Assessment

Strengths

The strengths of BCEH, as identified by its leadership team, fall into six categories:

1. Our staff and board of directors
2. Our mission and organizational structure
3. Our membership
4. Our funding
5. Our relationships
6. Our facilities

More specifically,

Our staff and board of directors

- Our staff is committed and dedicated to BCEH and to its mission to help end homelessness.
- We have added a staff position for Coordinated Entry.
- Our staff is knowledgeable and a good resource for our members.
- Our board members have considerable experience in the fight to end homelessness.

Our mission and organizational structure

- We are passionate about ending homelessness.
- We have a strong foundation to build upon.
- We are a 501(c)3 incorporated organization.
- We are recognized as the only CoC in Berks County for HUD funding.
- We have established a Friend of the Homeless Foundation to give direct support to individuals and families.
- We are able to help homeless individuals find jobs.
- We are financially sound.
- We are the lead agency that does data collection on the homeless in Berks County.
- We have a good reputation for the work that we do, both locally and outside of the county.
- Homelessness in Berks County is a recognized issue that needs to be addressed.

Our membership

- Our member organizations care.
- Our members share their resources and expertise.
- We have gathered many nonprofit organizations to be members to address issues of the homeless.
- The BCEH has become the central resource hub on the fight to end homelessness and how to help.
- Our member agencies include more than just HUD-funded agencies.

Our funding

- We have started to tap into the generosity of Berks County for support.
- We are helping to address a nationally recognized need.
- We have been able to help in the city, even when the city is financially distressed.
- We are the main source for HUD funding to the local agencies.

Our relationships

- We have a strong relationship with our city and county governments.
- We are involved with the local school districts and the BCIU.
- We are a partner agency of the United Way.

Our facilities

- We are in the process of acquiring our facility and now have a good location for our operations.
- We are acquiring sites to help house the homeless.
- The addition of facilities has helped our balance sheet.

Weaknesses

The weaknesses of BCEH, as identified by its leadership team, fall into four categories:

1. Our funding and fundraising
2. Our programs
3. Our communications
4. Our organizational structure

More specifically,

Our funding and fundraising

- We lack the funds and funding to meet the need.
- We are dependent on HUD funding and have not diversified our funding streams.
- HUD funding dictates our operations.
- We are not able to redirect HUD funding to meet new needs.
- Funding for new programs from HUD is currently not available.
- We do not have a pool of money for non-HUD programs.
- We are not able to raise local funds to support non-HUD programs.
- We do not have a program for fundraising or the system to distribute donated income to our members.
- We do not friendraise well.

Our programs

- We have few services and programs that address youth homelessness.
- We do not have an expanded landlord education program.
- At times, we are not innovative in how we address the problem.
- We do not have adequate programs for the prevention of homelessness.
- We do not meet the needs of the homeless outside of the city.
- The homeless population is transient, and that makes it difficult to meet their needs.

- We have discontinued our legislative breakfast.
- We have limited staff to grow our programs.

Our communications

- Our member and non-member agencies do not know how to access the resources of BCEH.
- We do not tell our story and mission well.
- The public does not understand who we are and what we do.
- There is a perception that BCEH is political in how it distributes its funds.

Our organizational structure

- Our governance may not be the best for the organization.
- We do not fully understand the problem and the why of homelessness.
- There are agencies that are not members and should be.

Opportunities

The opportunities facing BCEH as it moves forward fall into six categories:

1. Communication and awareness opportunities
2. Relationship opportunities
3. Membership opportunities
4. Operational opportunities
5. Program and services opportunities
6. Funding opportunities

More specifically,

Communication and awareness opportunities

- Become the thought leader in our community on homeless issues.
- Use our resources and our collective voice to address homelessness in our community.
- Promote our mission and our good works.
- Educate individuals and groups about the need and encourage them to become a part of BCEH.
- Increase our advocacy, both in the state and nationally.
- Improve our website and our use of social media.
- Promote our coordinated entry program and the 2-1-1 system.

Relationship opportunities

- Develop a relationship with the landlord community.
- Reach out to local colleges to get students involved in the fight against homelessness.
- Improve our relationships with organizations outside of the city that serve the homeless.
- Develop a relationship with other area homeless coalitions to improve our operations and understand best practices.

Membership opportunities

- Identify and solicit more agencies to become members.
- Review and update our dues structure for membership.
- Establish and promote the value of BCEH membership.
- Clarify the definition of BCEH membership and better communicate it to members.

Operational opportunities

- Develop a process to distribute donated funds to our members.
- Review and revise our governance structure, if necessary.
- Improve our staff training and development.
- Develop and publish a Coalition Community Calendar.
- Define volunteer opportunities to help support BCEH.

Program and services opportunities

- Identify an underserved homeless population on which we will focus programming and services.
- Grow our housing program for families and individuals.
- Develop a mentoring program between our members.
- Help train our member agencies with grant identification and grant writing.

Funding opportunities

- Promote the Friend of the Homeless Foundation to grow the income and identify individuals who will receive support.
- Understand the strengths of each of our member agencies and identify funding opportunities for programs that use those strengths.
- Develop a community-based fundraising effort to fund non-HUD programs.
- Develop a friendraising program.
- Better use our resources of homeless data for grant requests.

Threats

The threats currently facing BCEH fall into two basic categories:

1. Those threats primarily within our control
2. Those threats primarily outside of our control

More specifically,

Those threats primarily within our control

- The community may not understand our mission and purpose and may not support our growth.
- We might not change our governance or operational structure to meet the changes in our communities and fulfill our mission.
- We may not be able to increase our income to fund the need.
- We may try to be everything to everyone and will lose our focus and purpose.

Those threats primarily outside of our control

- Growth of the homeless population through an influx of individuals and families from outside of Berks will tax our limited resources.
- HUD funding could be reduced and/or discontinued.
- Bad press from one of our member agencies could reflect badly on BCEH.

Key Issues

Based on the identification and analysis of the current strengths and weaknesses and potential opportunities and threats as detailed previously, we have concluded that the following key issues must be addressed in BCEH's long-range plan.

- How do we increase the community's awareness of our mission and the coalition?
- How do we address the changing needs of individuals, agencies, and/or programs?
- What is the best governance and administrative structure for the organization?
- How do we use local data and national initiatives to target the use of our limited resources?
- What is our current funding allocation system, and what is the best allocation system for us?
- How do we increase funding and resources from governmental funding streams, as well as from outside the governmental funding streams?
- How do we maintain and ensure the revenue needed to fund our administrative and overhead costs?
- How do we identify and target the segment of homelessness that we want to address?
- What are the methods to move BCEH developmental programming from the coalition to our member agencies?
- How do we answer the questions about what we want to be and what we want to do?
- How do we maintain the resources needed to meet the needs of our members and sustain the coalition?

Mission Statement

The mission of Berks Coalition to End Homelessness is:

The Berks Coalition to End Homelessness develops and implements strategies, coordinates resources, and targets efforts toward ending homelessness in Berks County.

Mission for Membership Support

- *Provide evaluation and guidance to governmental-related funding for homeless services.*
- *Connect agencies that are doing similar work.*
- *Provide information about what other coalition member agencies are doing.*
- *Consult with local governments about the specific needs of the homeless population in Berks County.*
- *Respond to needs presented by members by utilizing the professional skills held within our membership.*

Vision Statement

In 2018, as the leadership of Berks Coalition to End Homelessness begins its planning activities, it has created the following vision of the outcomes of its efforts.

The Berks Coalition to End Homelessness is proud to be the leader in the fight to end homelessness in Berks County. The community recognizes our efforts and the important role we play. Our expertise in understanding the issues of the homeless has made us the thought leader on the solutions to end homelessness. The coalition is often sought after from communities outside of Berks County for our research and knowledge. The giving community of Berks County embraces our good work with their continued support. Local governments continue to fund us because we deliver value for their dollars. The homeless still need our support and help, but we have been able to declare that homelessness in Berks County is rare, brief, and non-recurring.

Long-Range Strategies

Based on the strategic assessment as detailed previously, Berks Coalition to End Homelessness has identified five overriding strategies it will implement in its efforts to fulfill its mission and achieve its vision.

Berks Coalition to End Homelessness will diversify its income sources in order to increase its revenue to better support the funding of homelessness programming.

Strategic Actions

- Reactivate our Allocation Committee.
- Review our current funding streams and update the program in order to secure the funding for the future.
- Develop a fundraising program for direct donor support.
- Identify foundations that support homelessness programs and apply for support.
- Expand our rental income.
- Explore new and additional grant opportunities.

Berks Coalition to End Homelessness will have a clearly defined and understood purpose and mission.

Strategic Actions

- Develop and publish a membership directory.
- Review and improve our website and printed materials to be sure it promotes our mission.
- Start a BCEH community breakfast that promotes our mission.

Berks Coalition to End Homelessness will have effective and efficient organizational governance and administrative systems.

Strategic Actions

- Complete the job descriptions for all staff positions and develop an organizational chart.
- Develop a cross-training program for our staff.
- Review our bylaws to be sure that they comply with all HUB requirements and meet the organizational needs of BCEH.
- Develop a board of directors' matrix for the skills, experience, and talents needed for the support of the organization.
- Develop a Governance Committee to review and improve our governance and board interaction.
- Develop a Finance Committee of the board of directors.
- Publish an annual report for BCEH.
- Develop a board of directors' orientation packet and training program.
- Start a board of directors' social activity to get to know each other better.
- Determine if the board of directors needs to meet more than quarterly.
- Review our board of directors' structure and improve our diversity.

Berks Coalition to End Homelessness will improve the community’s awareness of our mission, our organization, and the issues of homelessness.

Strategic Actions

- Identify a project that can help BCEH and apply to Leadership Berks for a project team to help.
- Develop and publish a coalition newsletter and calendar.
- Attend community events and activities to promote our organization.
- Restart our Legislative Breakfast.
- Better use social media to improve our community’s awareness of our mission and good work.
- Increase the community’s awareness of the 2-1-1 system.

Berks Coalition to End Homelessness will be the leader in assessing and understanding the needs of the homeless population in Berks County by developing innovative programs to address targeted homeless populations.

Strategic Actions

- Identify and attend seminars and conferences that address homelessness.
- Develop a system that tracks referral denials and at-risk individuals.
- Research what other coalitions and organizations are doing to assess the homeless population in their area.
- Review and improve our current assessment tools and processes.
- Explore additional assessment tools that can better assess our homeless population in Berks County.

Critical Measures of Success

In order to evaluate the effectiveness of and progress toward its long-range strategic plan, Berks Coalition to End Homelessness will measure and track the following *Critical Measures of Success*. The results will be reviewed by the leadership team on a regular basis.

- Income received by revenue source – quarterly
- Donated income by type – quarterly
- Grant income by grant source – annually
- Grant applied for – quarterly
- Review of the annual report on the current homeless situation in Berks County

2018 – 2019 Operational Objectives

During the first twelve to eighteen months (May 2018 to November 2019) of this strategic plan, Berks Coalition to End Homelessness will implement the following operational objectives:

- Reactivate our Allocation Committee. *Modesto/Peggy/Sarah/Sheila*
- Review our current funding streams and update the program in order to secure the funding for the future. *Jack/Carolyn B./Peggy/Modesto*
- Develop and publish a membership directory. *Jack/Tracey/Sarah*
- Review and improve our website and printed materials to be sure it promotes our mission. *Jack/Olivia*
- Complete the job descriptions for all staff positions and develop an organizational chart. *Jack*
- Review our bylaws to be sure that they comply with all HUB requirements and meet the organizational needs of BCEH. *Mary Kay/Sarah/Jack*
- Develop a board of directors’ matrix for the skills, experience, and talents needed for the support of the organization. *Peggy/Jack/Carol B.*
- Develop a Governance Committee to review and improve our governance and board interaction. *Peggy/Jack/Carol B.*
- Develop a Finance Committee of the board of directors. *Carolyn B./Modesto/Jack/Carol F.*
- Identify a project that can help BCEH and apply to Leadership Berks for a project team to help. *Jack/Intern*
- Develop and publish a coalition newsletter and calendar. *Jack/Staff*
- Identify and attend seminars and conferences that address homelessness. *Jack/Staff*

Appendix

2018 – 2019 Operational Objectives
with action steps

2018 – 2019 Timeline

Critical Measures of Success Worksheet

Objective/action steps	Accountable person	Target date
1. Reactivate our Allocation Committee.	<i>Modesto/Peggy/Sarah/Sheila</i>	
1.1 Request commitments to serve on the committee from current board members.	Jack	6/18
1.2 Meet and discuss qualifications and commitment levels with Sarah and select committee members.	Jack	8/18
1.3 Identify and reach out to non-BOD individuals to complete committee.	Sarah	8/18
1.4 Get BOD approval of the committee membership.	Jack	8/18
1.5 Call first meeting to establish purpose, chair, quarterly meeting schedule, and agenda for the committee.	Jack	9/18
1.6 Review the Home4Good grant application	Allocation Committee	9/18
1.7 Develop an Allocation Committee charter.	Allocation Committee	1/19

Objective/action steps	Accountable person	Target date
2. Review our current funding streams and update the program in order to secure the funding for the future.	<i>Jack/Carolyn B./ Peggy/Modesto</i>	
2.1 Review and matriculate current funding streams, etc. by the Finance Committee (operation objective 9).	Finance Committee	12/18
2.2 Identify and target non-traditional funding streams, resources, grants, and opportunities.	Finance Committee	3/19
2.3 Review Leadership Berks' project (operational objective 10) and consider the financial feasibility and impact.	Finance Committee	5/19
2.4 Report to the BOD short- and mid-term goals, plan, and procedures.	Finance Committee	6/19

Objective/action steps	Accountable person	Target date
3. Develop and publish a membership directory.	<i>Jack/Tracey/Sarah</i>	
3.1 Establish the format for a membership directory.	Sarah/Karen	8/18
3.2 Collect information from member agencies for the directory.	Jack/Tracey/Karen	8/18
3.3 Follow-up with the agencies for any missing information.	Sarah/Karen	9/18
3.4 Determine what will be published in the directory and to whom it will be distributed.	Sarah/Karen	9/18
3.5 Publish both a paper and an electronic version of the directory.	Sarah	12/18
3.6 Annually update the directory and republish.	Sarah	Beginning 1/19

Objective/action steps	Accountable person	Target date
4. Review and improve our website and printed materials to be sure it promotes our mission.	<i>Jack/Olivia</i>	
4.1 Switch the website to the version created by Olivia.	Jack/Olivia	8/18
4.2 Create our website version to have interactive calendar capabilities.	Jack/Intern	10/18
4.3 Separate e-mail host from website host.	Jack	11/18
4.4 Review ideas, sample websites, website strategies, and social media communications for improvements to our web pages.	Jack/Staff	1/19
4.5 Update and introduce the improved final version of our website.	Jack	6/19

Objective/action steps	Accountable person	Target date
5. Complete the job descriptions for all staff positions and develop an organizational chart.	<i>Jack</i>	
5.1 Review current job descriptions with staff.	Jack	8/18
5.2 Request revisions and written input from staff, update job descriptions as necessary, develop an organizational chart.	Jack	10/18
5.3 Introduce the organizational chart and updated job descriptions to the Board of Directors.	Jack	1/19

Objective/action steps	Accountable person	Target date
6. Review our bylaws to be sure that they comply with all HUD requirements and meet the organizational needs of BCEH.	<i>Mary Kay/Sarah/Jack</i>	
6.1 Review HUD requirements with Mary Kay for guidance and understanding of any bylaw requirements.	Mary Kay/Sarah	8/18
6.2 Review recommendations from Mary Kay with the Governance Committee (Operational Objective 8).	Mary Kay/Sarah	10/18
6.3 Determine the organizational structure, committee structure, membership status, representation, and other bylaw needs of the organization.	Governance Committee	10/18
6.4 Review current bylaws and make changes as needed.	Governance Committee	1/19
6.5 Present revised bylaws to the Board of Directors for input.	Governance Committee	2/19
6.6 Make necessary revisions and prepare written bylaws for approval.	Governance Committee	4/19
6.7 Adopt bylaws.	BCEH	6/19

Objective/action steps	Accountable person	Target date
7. Develop a board of directors' matrix for the skills, experience, and talents needed for the support of the organization.	<i>Peggy/Jack/Carol B.</i>	
7.1 Research providers and determine if a Board of Directors self-assessment needs to be conducted.	Carol/Jack/Peggy	1/19
7.2 Develop a matrix to evaluate the needs of BCEH and the skills of the current Board of Directors members.	Carol/Jack/Peggy	Beginning 2/19
7.3 Establish a list of the needs and the targeted talents to help identify potential new board recruits.	Carol/Jack/Peggy	3/19
7.4 Annually review the BOD and determine the new slate of nominees.	Governance Committee	Beginning 9/19

Objective/action steps	Accountable person	Target date
8. Develop a Governance Committee to review and improve our governance and board interaction.	<i>Peggy/Jack/Carol B.</i>	
8.1 Recruit committee membership and determine the chair.	Jack	9/18
8.2 Call the first meeting to establish meeting dates, objectives, and agenda.	Peggy/Jack/Carol	10/18
8.3 Review and update the bylaws of the organization (Operational Objective 6).	Governance Committee	Beginning 10/18
8.4 Review the Board of Directors membership and terms, identify potential new members for 2019, and nominate new BOD members.	Governance Committee	11/18
8.5 Determine if the Governance Committee or a different committee will be responsible for recruitment and nomination of BOD members.	Governance Committee	3/19

Objective/action steps	Accountable person	Target date
9. Develop a Finance Committee of the board of directors.	<i>Carolyn B./Modesto/Jack/ Carol F.</i>	
9.1 Recruit Carolyn B. to serve as Treasurer and get approval for her from the Board of Directors.	Jack	6/18
9.2 Review the monthly financials with the Treasurer.	Jack/Carol F.	Beginning 7/18
9.3 Identify and recruit members for the Finance Committee.	Jack	10/18
9.4 Call a meeting of the Finance Committee to establish meeting schedules, responsibilities, and agenda.	Carolyn B.	11/18
9.5 Review funding streams (Operational Objective 2).	Finance Committee	12/18
9.6 Review the accounting and audit procedures of BCEH and report to the BOD.	Finance Committee	1/19

Objective/action steps	Accountable person	Target date
10. Identify a project that can help BCEH and apply to Leadership Berks for a project team to help.	<i>Jack/Intern</i>	
10.1 Develop the first project idea and apply to Leadership Berks for support.	Jack	6/18
10.2 Receive project approval or rejection form Leadership Berks for the first project.	Jack	10/18
10.3 Develop a committee to assist the project team if we receive approval.	Jack	11/18
10.4 Meet as a committee/project team, as needed, to accomplish the project's goal.	Committee	2/19
10.5 Introduce the finalized project scope and details.	Committee	5/19
10.6 Develop a second project submission to Leadership Berks.	Committee	5/19

Objective/action steps	Accountable person	Target date
11. Develop and publish a coalition newsletter and calendar.	<i>Jack/Staff</i>	
11.1 Develop the format and publish the first edition of the quarterly coalition newsletter.	Staff	Beginning 8/18
11.2 Distribute the newsletter to coalition members, request submissions for future newsletters, and get items for the calendar.	Staff	Beginning 8/18
11.3 Get feedback, ideas, and suggestions for upcoming newsletters from staff and members.	Staff	12/18
11.4 Incorporate the newsletter and calendar into our website.	Staff/Intern	3/19
11.5 Explore the use of social media for the newsletters and calendar distribution.	Staff/Intern	6/19

Objective/action steps	Accountable person	Target date
12. Identify and attend seminars and conferences that address homelessness.	<i>Jack/Staff</i>	
12.1 Attend the National Conference to End Homelessness.	Jack/Sarah/Tracey	7/18
12.2 Establish the budget, needs, and target conferences for 2019.	Jack	11/18
12.3 Confirm the 2019 schedule for conferences and attendance.	Jack	12/18
12.4 Have the individuals attending the conference report to the staff on what was learned.	Jack	Beginning 12/18
12.5 Have the individuals attending the conference develop a summary report for the Board of Directors as to the conference information.	Jack	Beginning 1/19

