



Strategic Plan Summary

2017-2020

December 2017

Introduction

In completing this Strategic Plan, Bridge continues a long-standing tradition of undergoing thoughtful and formalized planning processes every several years. This plan provides clarity of purpose and a framework for action that will guide our activities through the remainder of this decade to the end of 2020.

As we began to lay out the process and sequence of activities in the fall of 2016, we were fortunate to be in a position of financial strength and stability of both board and staff to take a more deliberative and creative approach than in past Strategic Planning cycles. We were also fortunate to have received Technical Assistance funding from the Community Memorial Foundation to subsidize the engagement of our consultant, David Schreier and Associates, for assistance through the entire process. We are grateful to CMF and to David for their support, and are confident that the end-product provides greater consensus and commitment from our stakeholders, greater critical thinking, and greater clarity than we could have achieved on our own.

At the outset, we formed a Strategic Planning Steering Committee composed of both board and staff members to come to agreement on the process to be followed, and make decisions at critical points along the way. It was in this planning phase that we agreed that the full engagement in the process by our external stakeholders would garner insight, consensus and ultimately more commitment to the plan.

Bridge staff and board members, divided into four staff-led groups, developed a set of strategic initiatives that were then tested for validity and reaction from a wide set of organization stakeholders. Stakeholder voices were heard via one-on-one interviews, small group sessions, or on-line survey. Stakeholders were found not only to have a deep and abiding respect for, and loyalty to, Bridge Communities, but also an impressive knowledge and understanding of its programs and services.

What the stakeholders shared – which reinforced some of the thinking that had emerged from the board and staff – was that Bridge’s core programs are at a high standard, and yield very strong results. There was therefore a shared recognition that Bridge risks diluting its success if we expand too far or too fast. This internal and external discernment process focused our attention on measured growth for the organization with a pace that would not denigrate existing programming but rather would enhance and strengthen it.

The final plan contains four Strategic Initiatives, detailed in this Executive Summary, that build on a track record of existing programs, but extends them in ways that will allow Bridge to serve additional persons more effectively. Detailed action plans and timetables, along with documentation from all the major steps of the process and key research we frequently utilize in planning, are included in a comprehensive bound volume available upon request.

Key Developments During the 2013 to 2017 Period

Over the past five years Bridge has largely fulfilled the goals of its previous strategic plan, plus undertaken new initiatives not specifically contemplated in that plan.

- Created two new campuses in South East Naperville and Glen Ellyn, each with 23 apartments and a Learning Resource Center. The total apartments in the portfolio now exceed 140 vs. the stated goal of 135 in the last Strategic Plan, despite the unanticipated loss of 10 scattered site apartments for transitional housing as Bridge withdrew its application for federal grant supporting these apartments.
- Contributed Revenue has grown 50% from \$1.6 million to \$2.4 million in this period, even as all forms of government operating revenue declined from over \$200,000 to less than \$100,000 annually. Similarly, total operating revenue has grown from about \$2.7 million to \$4.1 million.
- Balance Sheet Comparison:



	<u>2013</u>	<u>2017</u>
Operating Cash	9,000	925,000
Endowment	1,046,000	2,327,000
Total Assets	11,933,000	15,508,000
Net Assets	9,277,000	12,496,000

- Developed a new technology platform for the capture of all client data, and tracking of client progress against 12 factors supporting family self-sufficiency at exit of program. In 2017, Bridge secured a multi-year, \$600,000 grant to fully leverage our technology investment, create an internal program evaluation function, and complete case studies on the short and long term impact of our programs on the families we have served.
- Greatly expanded services provided to children that had been limited to tutoring and Learning Resource Center activities to now include full developmental assessments, therapy, advocacy in the public schools, and parenting workshops and home-visits. Two full-time professional staff members were hired to deliver and coordinate these services.
- In 2015, Bridge entered into a collaboration with a private real estate developer/philanthropist to master lease four of the buildings currently in its portfolio (28 total apartments), as an attractive financing alternative to using its own cash and/or lending to acquire buildings. The partnership has met the programmatic and financial hurdles set by both parties. While continuing to acquire and rehab buildings with the remaining proceeds from the highly successful Investing in Homes + Hope Capital and Endowment Campaign, concluded in 2015. Bridge anticipates it will continue to use this particular relationship and financing method to expand its housing portfolio on existing campuses and potentially new campuses.

Context for the 2017-2020 Strategic Planning Cycle

Bridge Communities has an exceptionally experienced and highly skilled, senior management team and Board of Directors. A Bridge Communities hallmark is the organization culture that fosters longevity of both staff and Board members. Bridge enjoys an average of eight years of service from its senior management team, and from its Board, nearly five years even with term limits of eight years in place. Long tenure extends to the program staff, with several veteran members serving in the range of 10 – 15 years. Even within Bridge’s mentor and volunteer corps, it is not unusual to find people who have been in service to Bridge for at least 10 years and ranging up to 25.



The significant strides made in recent years are a testament to what a committed, highly-skilled and long-tenured group of people can achieve. These strides include exceeding housing capacity goals, strengthening our financial position, increasing and diversifying our fundraising streams and competencies, and enhancing program capacity through roll-out of new technology and children’s services. Thus we were in an ideal position to develop an innovative approach to strategic planning for the 2017 to 2020 cycle.

An important structure provided from the outset of the process was to establish filters that were used to evaluate the ideas generated internally or from external stakeholders. These included: a) fit with, and ability to enhance mission; b) ability to increase revenue, or at least be revenue neutral; c) ability to expand diversity (cultural, racial, ethnic, socio-economic); d) potential to expand number of partnerships and/or depth and scope of current partnerships.

The following key points were identified as important context for process decisions for the cycle.

- Specific emphasis should be placed on full inclusion of staff and board, and on directly involving our partners (Program Partners, Public Schools and Community Officials, Donors, Volunteers, and Collaborating Agencies) in gathering insight and building consensus. We felt that broad involvement in the process would build more awareness in our community, create greater ownership of the end product, and best position Bridge for financial support and partnership opportunities.
- Given the strength of Bridge’s staff and board, financial position, and reputation in the community, we saw the process as an opportunity to refine and enhance, not radically depart from, our current programming and organizational direction. The organization is not at a crossroads with respect to the need to substantially reshape its mission, vision, or core business model.
- However, there is openness to considering new and innovative approaches to strengthen and continuously improve how Bridge operates. Well-planned growth in housing and in

number of families served will be an important consideration, but with an emphasis on ensuring quality over quantity.

- Ongoing discussions internally and with external partners yielded the following areas for particular exploration: a) development of affordable housing as a social enterprise; b) expanding the geographic catchment area for transitional housing services; c) proactive outreach to extend programming to growing immigrant and minority communities, particularly Hispanic; d) service enhancements for adults and children, principally through partnerships.
- The enhancement of the Bridge brand was identified in the last strategic plan as a challenge and was adopted as a specific initiative. While strides have been made, this remains a significant opportunity for which a well-designed planning process could gather valuable community input.
- A platform for branding is the development of strong narratives and supporting metrics to illustrate the impact of our program on the families we currently serve, as well as those served in the past. The creation of a highly-professionalized internal program evaluation function, and building leading-edge program metrics and outcomes reporting systems will be key to continuous improvement of the program, but also open opportunities for Bridge to tap social impact investors who have a record of “paying for proven outcomes.”

Vision, Mission and Value Statements

As stated in the previous section, it was not part of our process to revisit the mission and vision in this planning cycle. However, for full context the language developed as part of our last cycle is included below:

Mission: The mission of Bridge Communities is to transition homeless families to self-sufficiency by working with partners to provide mentoring, housing, and supportive services.

Vision: Our vision is a community where all families are healthy, financially stable, and living in affordable housing.

Values: Each of our five core values apply to everyone involved in Bridge Communities – clients, mentors and other volunteers, Program Partners, donors, board members, staff and community.

- **Partnership:** We embrace partnership activities and thrive and survive on our partnerships. They are a way of life, and they have been since our inception, in all areas of activity. We work in collaboration with others who believe in our mission and embrace our vision and values, actively seeking and nurturing partnerships.
- **Empowerment:** We enable, encourage, and empower clients, volunteers and staff to make decisions and choose direction based upon their needs, abilities, and interests. Everyone participates at their fullest desire. We give people trust, encouragement, autonomy and resources to achieve or exceed their goals.
- **Integrity:** We maintain alignment between what we say and what we do. We have an uncompromising adherence to moral and ethical principles, embracing high standards of moral character and honesty.
- **Respect:** We hold every individual in esteem and honor while respecting their cultural backgrounds, input and ideas. We treat each other and all whom we encounter as we would wish to be treated, honoring each other, treating each other with dignity, and finding value in each person.
- **Hope:** We champion optimism for brighter futures. We provide an overarching hopeful atmosphere. Hope is the foundation of our work. Hope drives us. We provide our clients with hope for a better future for themselves and their children.



Key Strategic Initiatives

After completion of all phases of the Strategic Planning process, the initiatives summarized below were developed by the several teams and endorsed by the board and Bridge senior management.

1. Community Engagement

- Proactively engage corporations and community-based groups with the specific goals of expanding corporate philanthropy, event sponsorship, event hosting, while also expanding our volunteer opportunities.
- Increase diversity of our Program Partners and/or the funding to support Program Partners.
- Cultivate and create mutually beneficial employment relationships for employers and Bridge clients.
- To appeal to broader audiences create greater/deeper understanding of how Bridge accomplishes its mission through tailored and targeted messaging and branding methods.
- Establish volunteer projects in cooperation with Program and Development to enhance and expand our relationships with businesses, faith-communities, and service groups.
- Continue to develop Bridge’s distinctive competency in private giving with specific goal of increasing the number of donors making transformational gifts by 15% by 2020.
- Grow corporate and foundation fundraising to \$400,000 by 2020 through the development of highly targeted list of funders.



2. Expansion of Housing Portfolio, Housing Partners and Mission-Centered Uses

- Continue to expand current campuses and develop new campuses to meet demand for transitional housing and Pathways program housing, and to accommodate our emerging “Thrive-in-Place” strategy. (See *Strategic Initiative 3* below)
- Develop rationale for retaining or selling four “silo” buildings in the portfolio, and execute accordingly.
- Continue to develop partnerships with financiers and operators of affordable housing who will collaborate with Bridge to purchase and preserve housing at or near our campus locations.



3. Program Enhancements

- Identify services gaps in current programming for adults and children (such as child care, transportation support and legal services) that, if filled, would increase families’ potential to achieve self-sufficiency goals.
- Find solutions to fill gaps, either through leveraging strengths in forming and managing collaborations, or through expanding internally-provided services.
- Strengthen Program Partner relationships and skill sets through creation of best practice guides and methods, including a suite of training through technology tools using appropriate media for basic and advanced mentor training.
- Complete Intake Policy and Procedure revisions currently underway, with specific goals of expanding the pool of highly suitable candidate families, reducing intake time and housing vacancy rate, providing Program Partners with the most salient information for enrollment decisions and client management, and complying with Fair Housing Regulations.
- Complete program design for “Thrive-in-Place” strategy, which would allow transitional housing family graduates to remain at or near current campuses as affordable housing tenants to sustain family stability with continuity of schooling, employment, and community services.



4. Program Evaluation and Impact Measurement

- Seize the opportunity provided by the 2017 Major Grant to create a leading-edge, permanently-staffed program evaluation function.
- Related to this project, complete logic models for each facet of Bridge programming that clearly identify the services, outcomes, and measurement tools Bridge will use for monitoring of program effectiveness and continuous improvement. Design systems and protocols to collect, compile and report all relevant client information and metrics, and to periodically survey clients and mentors on quality of their experience.
- Complete case study report that provides conclusions on program effectiveness and rationale for changes in practices.



- Complete a survey of alumni clients and their children, and collect sufficient oral histories to enable completion of a report on long term impact of the core Bridge program on families.
- Disseminate above information using appropriate methods to funders and partners to expand funding and partner opportunities, and potentially to proliferate proven Bridge practices among agencies serving similar populations in locales outside the County.