



**Sustainable Strategy Program
Summary Report
May 14, 2014**

Introduction

Outcomes from the Sustainable Strategy Program (SSP) were as diverse as the five agencies involved. This report will explain what each participating organization does, why they participated in the SSP, what goals they have accomplished so far, and why they would recommend the SSP to other nonprofit organizations.

Agency A

Agency A is one of the nation's largest lesbian, gay, bisexual, and transgender organizations. As the largest participant organization, with an annual budget over \$22 million, Agency A wanted to focus on its future viability by examining its size and identifying ways to expand Affordable Care Act services.

Having completed a strategic planning process in 2010, the SSP allowed Agency A to hone in on two specific goals: address potential space constraints and examine ways to meet patient needs. Since participating, the organization has more concentration and plans to open a bigger location to increase clinic space. Overall, Agency A learned that despite its large size, it need not do everything, and instead can rely on other agencies to provide certain services.

According to the Associate Medical Director at Agency A, the SSP was "a great opportunity to get attention from someone so adept in the world of organizational change." The SSP encouraged participants to think outside the box and ask questions of funders and colleagues. "As a result of the SSP, in the future our leaders will be stronger and will think more strategically about how we do business and how our daily decisions affect our long term goals," the Associate Medical Director said.

Agency B

Agency B helps community members of all ages embrace a healthy lifestyle by providing positive alternatives to medical, physical, and social ills. Agency B participated in the SSP to plan and implement changes to accommodate the population they serve, and to address their economic stability and service expansion.



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Upon completion of the SSP, Agency B rendered a new working mission and vision. The organization also developed three new strategies: to provide workforce development, improve its medical services, and develop a youth violence prevention program. SSHC has deferred implementation of the strategies due to emergency circumstances.

Agency C

Agency C focuses on culturally appropriate HIV/AIDS prevention and direct service programs for those affected by HIV in a cultural Chicago community. Agency C entered the SSP to examine its vision statement, to engage multiple levels of management, and to develop goals to support their fiscal and operational needs.

The SSP helped identify three new strategies for implementation: expand hours of operation, expand mental health services, and add STD testing to its lines of business. Since participating in the SSP, Agency C changed its overall organizational structure to increase operational hours by hiring a billing consultant and a new Director of Prevention Programs, and replacing a senior staff member. In addition, Agency C now offers Certified Alcohol and Drug Counseling (CADC) services to the community, and is training staff on STD testing.

For Agency C's Executive Director, "The SSP was a phenomenal experience on a number of levels." The SSP not only gave nonprofits the tools to pull together a sophisticated outline for a business strategy, it also created a space for likeminded organizations to provide feedback to other organization's strategies and proposals. "I only wish it had been longer," the Executive Director said. In one year, Agency C predicts that it will have a better idea of how to manage its finances, as well as "have the tools to function as an effective team."

Agency D

Agency D is a statewide organization focused on the sexual health, rights, and identities of youth. Its network of empowered youth and adults work to transform public consciousness and increase the capacity healthcare systems. While the organization completed a strategic planning process in 2012, it wanted to develop a clear set of strategies to ensure its fiscal stability through uncertain variables.

Participation in the SSP helped Agency D find other income streams beyond foundations and government grants. It developed three new strategies: merchandise an educational card game, boost individual fundraising, and launch a summer camp. Since the SSP, Agency D has sold over 20 copies of its game, has designed an individual donor program set to launch in June, and plans to launch a summer camp with a sexual education drama troupe.

According to Agency D's Executive Director, "The main lesson of the SSP was the balance between risk and opportunity." The organization is now less risk averse and

open to applying innovative business practices to the nonprofit sector. “Agency D will be stronger in a year as a result of the SSP due to our ongoing advisory relationship with Mark Light”, says the Executive Director. The Executive Director calls the SSP, “a great mix of inspiration and skill building,” and plans to implement its own SSP for other adolescent health organizations across greater Illinois.

Agency E

Agency E is well known throughout Chicagoland, but its HIV Program wants to have a stronger identity. With hopes of becoming a permanent resource for persons living with HIV/AIDS in Chicago, Agency E’s HIV Program participated in the SSP to increase staff capacity and cohesion, and develop their role in the community.

Participation in the SSP helped reignite Agency E’s vision for the future. It developed three new strategies: hire community health navigators, increase clinic hours, and provide comprehensive wellness center programming. Since the SSP, the organization received a grant to fund one community health worker, applied for two grants to hire an additional nurse to increase its clinic hours, and plans to try out a wellness program with staff before integrating it into patient care.

Upon completion of the program, Agency E now has the tools to figure out what they do well, to minimize their struggles, and to communicate more effectively in management meetings. According to the Senior Epidemiologist at Agency E, “Our staff is more involved now because we don’t keep our goals a secret.” In the future, Agency E will be more vocal in the community about their objectives and will work to get on the map as a top place for HIV treatment. The organization believes every nonprofit should be required to complete the SSP program, as it is an “organizational baptism for increasing capacity and achieving one’s goals.”

Appendix A – Study Data

Q1. In your application for the Sustainable Strategy Program, your organization's objectives were to _____. Please talk about whether the SSP met any of these strategies.

Agency	Related Strategy	Response
Agency A	Identify and monopolize opportunities inherent within the ACA.	Yes
	Effective program planning to achieve service expansion	Yes
	Right sizing of the organization to ensure long term financial viability and programmatic success	Yes
Agency C	Develop policies, goals, and plans to support the organization's fiscal, human capital, and operational needs long-term	<i>No, the SSP didn't address this, but this wasn't really the goal of the program.</i>
	Critically examine the vision statement and ensure alignment with current trends	<i>Yes, we did some really intense work around reshaping the mission and vision and making sure there was an organizational framework in place.</i>
	Engage multiple levels of management in a strategic process that increases the agency's ability to maintain access to services and continuity of care	<i>Yes, one of the nice features of SSP is that Mark allowed us to come back and meet with our whole team to brainstorm and such so we were able to engage everyone. That part of the program worked out real well.</i>
	Allow newer managers an opportunity to evaluate the applicability of the mission statement to current programs and services	<i>Yes, the SSP allowed everyone to get involved.</i>
Agency D	Cultivate some strategies to ensure our stability and fiscal solvency through uncertain variables	<i>SSP helped us find other income streams beyond foundations and government grants. We've implemented several earned income strategies that we wouldn't have otherwise.</i>
Agency E	Cohesion amongst staff	<i>SSP allowed us to step back and look at the big picture. It also gave us the tools to figure out what we're doing well and gave us permission to say goodbye to things we don't do as well.</i>
	Increasing staff capacity	<i>Our management meetings have improved from a communication and connection standpoint. We've made measureable progress as a team. SSP "GAVE US WINGS TO FLY!"</i>
	Role outside of the community	<i>More than anything SSP taught us to not make our goals a secret--to put ourselves out there. We are now getting on the map as a top place for HIV treatment and receiving accolades.</i>

Q2 & Q3. What strategies came out of your participation in the SSP? Where are you with each of them? What progress have you made?

Agency	Strategies	Progress
Agency A	Put previously made strategic plan into play	<i>The SSP really helped us think about the next 12 months</i>
	Address space issues	<i>We now plan to open a bigger space that will allow us to move more admin there and give us more clinical space. In May we are also doing construction for 4 additional clinical rooms</i>
Agency C	Extend hours of operation	<i>We brought on a new Director of Prevention Programs that is working with our staff to increase our hours.</i>
	Extend services/offerings	<i>We are now offering CADC services to the community</i>
	Add STD testing	<i>We found a provider who is going to help us get our entire staff trained so they know how to do STD testing.</i>
Agency D	"Talk the Talk" educational game on sexual identity (income generator)	<i>We've produced the game and are selling 4/month for \$25/piece. We need to develop more strategies for how to sell the game in larger quantities. "Mark helped us see how an internal tool that was right under our nose could be leveraged to generate income."</i>
	Individual Donor Program	<i>Our ED attended a day-long workshop at the Donors Forum. "We have set up a donor lunch in July for a FY2015 phone-athon."</i>
	Summer Camp	<i>Not too far on this. Are proposing to merge with a nonprofit acting troupe which does sex education workshops and summer camps. Major potential to use the troupe to hold potential summer camps for IL youth</i>
Agency E	Community health navigators	<i>We applied for 4 grants for community health navigation and just received a grant to fund one worker, so we are making progress.</i>
	Provide wellness center comprehensive programming	<i>We've decided to try out this program with our staff first, then identify ways to go at it with our patients</i>
	Increase clinic hours and days open	<i>We applied for 2 grants to hire a Nurse Practitioner to increase our capacity and hours/days pending.</i>

Q4. What did you/your organization learn from participating in AFC's SSP? Lessons learned?

Agency A	<i>We learned to not be afraid of trying not to do everything. The SSP showed us that we can rely on other centers and agencies and don't have to do 14 different projects. We can do what we do well and if someone does something better or if something isn't financially smart for our organization than we don't have to do it.</i>
Agency C	<i>It allowed us to pull together a sophisticated outline for a business strategy for the agency.</i>
Agency D	<i>The main lesson we learned was the balance of risk and opportunity. We are definitely less risk averse now and take more calculated risks. It's important to take risks and evaluate....it's more about the innovation</i>
Agency E	<i>We learned to be able to do what we want to do we have to use approaches from the for-profit. SSP showed us examples of why and how businesses have been successful. We also learned to ask 'what do we do well?' and 'what do we do well that we necessarily do not want to focus on?' Who do we really want to be? SSP helped us get LASER BEAM FOCUSED. In addition, I learned the intensity of the process and that you have to be disciplined if you want it.</i>

Q5. What did you/your organization wish you had learned by participating?

Agency A	<i>We were the only health center that was a true health center, so it would've been more fruitful for us to have had some other agencies more like us. It would've been nice to brainstorm with other people as far as clinical operations are concerned.</i>
Agency C	<i>I wish we had the opportunity to continue to work on our SSP and spend a little more time with the group.</i>
Agency D	<i>The written pieces were too lengthy for us to complete in the time allotted. It would also have been nice to have made a complete business plan we could follow through on</i>
Agency E	<i>There is an assumption that we are adept at being managers, which isn't true. I wish we would've learned more elementary tools for managing (i.e. how to take an inventory, core managing principles, personality assessments, what it really takes)</i>

Q6. How would you/your organization summarize the experience/information gained from SSP in a few sentences?

Agency A	<i>It was an opportunity to get some time and attention from someone who is very knowledgeable in that world and has done a lot of work with organizational change. It was great because he understood what we are doing and has gone through lots of change and struggles.</i>
Agency C	<i>It was a great experience on a number of levels. It allowed us to take advantage of Mark's expertise, work through a facilitated planning process, and be in a room with colleagues that could provide instant feedback to our strategies and proposals.</i>
Agency D	<i>The SSP was a good mix of inspiration and skill building. It was a great opportunity for us to take a step back and think about where we are headed and how we want to get there. The SSP program was a delight for not only me, but for my staff and board members who participated. Mark's presentations were a never ending well of encouraging knowledge of possibilities in innovative business practices that could be applied in nonprofit contexts. He has an excellent mix of humor and deeply serious insight. I walked away from each session learning something new and feeling deeply inspired to approach my work a bit differently.</i>
Agency E	<i>The SSP we participated in was an ORGANIZATIONAL BAPTISM. It was a cleansing for organizations, and allowed us to look at our impurities and purge ourselves. Now we have tools to assess the status of our org and our impurities to better achieve our mission and vision.</i>

Q7. What did you LIKE about SSP?

Agency A	<i>Mark is amazing and funny and engaging and isn't afraid to push back on us. He makes us think outside the box in a lot of ways. I liked how the funders came in at the end. It was really helpful to get feedback from them outside of applying for a grant.</i>
Agency C	<i>I liked the written materials that supported Mark's lecture style. I liked the fluidity of the lectures, and the opportunity to brainstorm. It was great to examine a topic, have Mark present it, us talk about it within our organizations, and then give us context to work through it and figure it out.</i>
Agency D	<i>The supplemental support was really great. It was really helpful that there was a coaching component that involved not just one organizational representative, but the staff, and the board.</i>
Agency E	<i>I liked that we sat in a U-shape. I liked that it forced us to be vulnerable while providing a safe space for us to give feedback to other orgs. I liked how it forced people to take off their masks and KEEP IT REAL. I also liked going downtown for a day to get away from the office--it made it feel important. The video clips and exercises were also very effective. Mark taught to each different learning style and was extremely engaging.</i>

Q8. What did you NOT LIKE about SSP?

Agency A	<i>The person that applied for our organization didn't prepare our staff for the time and commitment, so I wish we would've been a bit more prepared---but this is nothing to do with Mark or the SSP.</i>
Agency C	<i>I wish it had been LONGER! But I'm in a NPO, so I know that the pot o'gold does have a bottom.</i>
Agency D	<i>Some of the organizations weren't as invested as others, so it sometimes created an 'uneven' dynamic, but it wasn't that bad</i>
Agency E	<i>I thought the food and the coffee was pretty bad--it left me wanting more. The fact that people kept coming back regardless of how bad the food was is a testament to how great Mark was at presenting! I think the use of cell phones and laptops could have been policed a bit better.</i>

Q9. What should I have asked you that I didn't?

Agency A	<i>Nothing, that was great!</i>
Agency C	<i>You were very thorough and let me get at the core of what we learned. I liked it. It refreshed my memory.</i>
Agency D	<i>Would you recommend this to other orgs? SSP inspired us to do something similar with allied organizations. We want a set number of orgs to work on similar topics over the course of a week. We've sent applications out to 6 (2 in southern IL, 2 in central IL, and 2 in suburban IL) and are hoping to go to each org for a day to see how things are done in different ways.</i>
Agency E	<i>Would you participate in this again? Overwhelmingly YES! I WOULD REQUIRE IT! It shouldn't be a competitive process to participate because every nonprofit needs to do this program. We're only going to achieve our goals when we're on the same footing. The SSP allowed us to increase our capacity and provided insights for how we can meet our financial objectives.</i>

Follow Up Questions

Q1. In what ways do you think your organization will have changed one year from now as a result of participating in the SSP?

Agency A	<i>We will think more strategically about HOW we do business and HOW our daily decisions affect our long-term goals. We will be more focused instead of trying to do everything mediocre, and do fewer things EXCELLENT.</i>
Agency C	<i>We will have in place a practice management component or have high-level conversation with another agency or agencies about deep collaboration, strategic alliance, or merger.</i>
Agency D	<i>Our organization will have changed one year from now in that we view our competitive advantage as creative communications and are able to use it as a means to leverage income generation for the organization.</i>
Agency E	<i>We will be more vocal in the community about our objectives and will work to get on the map as a top place for HIV treatment. We will also have an increased capacity to meet our financial objectives.</i>

Q2. What has your organization done since the conclusion of the SSP? (i.e. applied for grants, implemented new program, changed organizational structure)

Agency A	<i>We have finished our strategic plan, and started to think about collaborations further with other centers/orgs.</i>
Agency C	<i>We have changed the organizational structure, replaced a senior staff member, hired a billing consultant, and generated a lot of community interest in mental health services.</i>
Agency D	<i>We have produced, marketed and sold a game. We have also designed an individual donor program that will launch in June. Both of these are strategies that we named in the SSP program.</i>
Agency E	<i>We applied for 4 grants for community health navigation and just received a grant to fund one worker, so we are making progress. Also, we applied for 2 grants to hire a Nurse Practitioner to increase our capacity and hours/days pending.</i>

Q3. In what ways will your organization be stronger in one year as a result of the SSP?

Agency A	<i>Our leaders will be stronger and more poised for the healthcare landscape. We will have a better team as a result of the SSP that works together better.</i>
Agency C	<i>We will have a better idea of what it needs to do in terms of financial management. Also, we will have the tools to help them function as a team effectively.</i>
Agency D	<i>We will be stronger in a year because we will have implemented 2 of our three strategies and will have seen income from both. We are also stronger due to our ongoing advisory relationship with Mark Light.</i>
Agency E	<i>We will be measurably stronger as a team, and our management meetings will be stronger from a communication and connection standpoint as a result.</i>

Appendix B – Study Methodology

Summary

To learn more about the strategic outcomes and progress each participating organization made since participating in the Sustainable Strategy Program, a consultant from First Light Group conducted semi-structured interviews with a representative from each organization.

Interviews were conducted over the phone or in person, and lasted between 20 to 45 minutes. All interviews were voluntary and respondents could withdraw at any time. Each organizational representative answered a set of 9 questions about why they wanted to participate in the SSP, the strategies they cultivated during SSP, as well as any lessons learned or opinions about the overall experience.

The interviews were recorded for clarity and saved in a locked file. Subjects acknowledged that their responses were neither confidential nor anonymous, as the response data was for a final summary report. For a script of the semi-structured interview, please see Appendix A. For a detailed chart of interview responses, see Appendix B.

Follow up interviews were also conducted to further understand the ways the SSP will affect each organization in the future. Three follow up questions were emailed to all previous respondents and the responses were recorded in a chart. For a script of the follow up questions, see Appendix A. For a detailed chart of interview responses, see Appendix B.

Interview Script

Thank you very much for meeting/talking with me today. My name is Hillary Darville, and I am working with the First Light Group to understand your organization's outcomes from participation in the Aids Foundation of Chicago's Sustainable Strategy Program.

Before we begin, I want to tell you that I am the only consultant working on this project and I do not anticipate that this interview will have any risks or discomforts to you. The results of my interview will be summarized in a report I will share only with the AIDS Foundation of Chicago, and Dr. Mark Light. Upon their review, a final summary report will be presented to the Chicago Community Trust, who provided funding for the SSP.

After this project is concluded, I will destroy all my research information including my notes related to this interview. Finally, your participation is completely voluntary and you may withdraw at any time. Is this all acceptable to you? Do you have any questions before we start?

1. In your application for the Sustainable Strategy Program, ICAH's objective was to _____. Please talk about whether the SSP met any of these objectives?
2. What strategies came out of your participation in the SSP? (2-3)
3. Where are you with each of them? What progress have you made?
4. What did you/your organization learn from participating in AFC's SSP? Lessons learned?
5. What did you/your organization wish you had learned by participating?
6. "Testimonial": How would you/your organization *summarize* the experience/information gained from SSP in a few sentences?
7. What did you like about the SSP?
8. What didn't you like about the SSP?
9. What should I have asked you that I didn't?

Thank you for your time, I really appreciate it. We at First Light Group look forward to working together again to help "put your future within reach". Have a great day.

Follow Up Questions:

1. In what ways do you think your organization will have changed one year from now as a result of participating in the SSP?
2. What has your organization done since the conclusion of the SSP? (i.e. applied for grants, implemented new program, changed organizational structure)
3. In what ways will your organization be stronger in one year as a result of the SSP?