



**Charting our Future:
Strategic Plan, Fiscal Years 2021 – 2023**

Our Mission. The NECC's focus is on helping families and individuals achieve their wellness, recreational, learning, and cultural goals while being part of a diverse, welcoming community.

Our Values. Caring. Inclusiveness. Respect. Sustainability. Transparency. Non-Profit.

Eighteen months ago, we set out to build on our successful 15-year history and craft a thoughtful strategy for our next three years. We initially began by thinking we needed to answer the big facility question: Do we stay and repair our old, historic building? Do we move and build out an existing facility? Do we build a new building from scratch?

Then we paused. Instead of pushing for an answer that was facility-based, we decided to shift to explore and answer fundamental questions about ourselves as an organization: Who are we? Who do we want to be? Who do we serve? How do we do what we do? What are we good at? What are our weaknesses? Is our operating model the right one?

While interrupted and delayed by COVID, we persisted. We surveyed members, met with partners, interviewed Board members, evaluated trends, assessed numbers, studied demographics, and more.

We are excited about our new Strategic Plan. This document will guide our work programmatically and operationally from 2021 - 2023. This work is critically important for us at this time, regardless of the answer to our long-term facility question.

Programmatically robust and community based. Champion and embed equity. Be a fundraising organization. Inspiring communications and marketing. Excellence in governance. Taken together, accomplishing these goals will make us a stronger organization that is better-positioned for our future.

We invite you to read, support, and engage with us to make our strategic plan a success.



**Charting our Future:
Strategic Plan, Fiscal Years 2021 – 2023**

Background

The story of Northeast Community Center (NECC) is widely viewed as a home-grown success. Faced with the imminent closure of a historic property owned and operated as a fitness center by the YMCA, neighbors and supporters sprang into action. They organized, advocated, and fundraised. They formed a 501(c)3 organization, built a Board, bought the building, hired staff, developed programming, and sold memberships. Only 15 years later, NECC serves 3,000 people annually, operates two facilities, employs 15 staff and instructors, has a \$1 million budget, and has built \$750,000 in reserves.

Clearly, an extraordinary amount of planning has been at the core of this impressive success. That said, NECC has never engaged in a formal, enterprise-wide strategic planning process.

As membership and program participation has grown, NECC has grappled with the physical constraints of its building. Leasing an auxiliary space nearby has helped to relieve those pressures, but not solve them long term. Additionally, extensive and expensive capital improvements needed in its 100-year-old historic headquarters building present practical and financial challenges. Taken together, these two factors (space constraints and expensive capital needs) led the Board to begin discussing two possible scenarios: 1) stay in the building and make extensive capital improvements; or 2) buy and rehab, or build, a building nearby.

After consideration, the Board and Executive Director decided to take a step back, pivot from being building-driven to organization-driven, and engage in an organization wide strategic planning process. A solid strategic plan could help inform decisions about facilities, they decided, rather than a facilities plan driving the organization. Strengthening NECC would only help position it for success with whatever long-term decision it made about facilities.

The Board engaged Thomas Bruner with [Bruner Strategies, LLC](#) to facilitate and staff the strategic planning process.

This report provides context and background intended to accompany the strategic plan document itself.

Components & Informational Sources ---

The following components and information sources guided and informed NECC's strategic planning process.

Board Meetings. Five Board meetings included strategic planning as an agenda item, and included work sessions devoted to: 1) planning process, components and timeline; 2) areas of inquiry for key informant interviews, focus groups, and member survey; 3) strengths, weaknesses, opportunities and threats (SWOT) analysis; 4) exploration of Board readiness for fundraising; and 5) discussion of governance vs. management.

Organizational Review. Organizational structure, staffing configurations, programs and services, member demographics, community partnerships, and volunteerism were reviewed for the past 1-3 years, depending on availability of data.

Financial Review. Revenue, expenses, membership, and program participant trends were reviewed for the past 3-5 years, depending on availability of data.

Key Informant Interviews. Individual interviews were conducted with 14 stakeholders, including ten Board members and 4 staff.

Focus Groups. Approximately 50 people received 2-3 invitations to participate in one of two focus groups: 1) members and program participants, attended by 4 people; and 2) community partners, attended by 5 people.

Constituent Survey. A web-based survey was written for members, program participants, and community partners, and sent three times to approximately 1,000 people. 256 responses were received.

Leadership Work Sessions. The Board President, Executive Director and strategic planning consultant met as a group 8-10 times to review the planning process, and discuss emerging trends, lessons learned, thematic findings, and needed adjustments.

COVID-19 Interruption ---

As the strategic planning process was entering its final phase, the pandemic hit and radically altered the operations of NECC at every level. As the community went into lockdown, the organization shifted into crisis mode, and pivoted to ensuring its immediate, near-term, and long-term viability. In partnership with the Board President and Executive Director, a decision was made to cease further planning activity, create a plan based on the information already gathered, and begin to operationalize some of the key findings that had already emerged, namely: 1) Be Excellent in Governance; and 2) Become a Fundraising Organization.

Shift in Consultation Focus ---

When the final stages of strategic planning activity ceased, the Board President and Executive Director requested the consultant's support and guidance with immediate and near-term issues, including:

developing strategic communications with members and program participants; leveraging staff to create a steady stream of online content; developing the structure to support the Board's transition to governance from management; evaluating options for utilizing the Board's authorized use reserves for fundraising; and creating, recruiting and hiring the new position of Deputy Director, Development & Community Engagement.

Strategic Plan Format & Terminology _____

NECC's [strategic plan](#) exists on a google spreadsheet to allow for ease of access by multiple parties and editing and updating in real time. The plan includes five goals:

1. Programmatically Robust & Community Based
2. Champion & Embed Equity
3. Become a Fundraising Organization
4. Inspiring Communications & Marketing
5. Excellence in Governance

Each goal has associated strategies, tactics, outcome objectives, leads, and timelines to guide and facilitate phased implementation over three years.

A definition of terminology used in the strategic plan follows.

- *Goals.* A broad aim toward which our efforts are directed. What we are trying to achieve.
- *Strategies.* A plan of action designed to achieve our objectives. How we will pursue and reach our goals.
- *Tactics.* A specific action step required to deliver on a strategy. The group of actions we will take to fulfill the strategy.
- *Outcome Objectives.* Measurable outcomes we will see if and when we are successful. The specifics metrics behind we are trying to achieve.
- *Lead.* The person responsible for championing an area of work, coordinating activity, and tracking progress.
- *Timeline.* The phased implementation of components of the plan over time.

Goals & Strategies _____

Goal 1. Programmatically Robust & Community Based

NECC's programmatic offerings are relatively diverse and well-utilized, as evidenced by steady membership growth and strong participation rates. Programming tends to be fitness-based, and is geared toward older people or families with young children.

NECC operates through a traditional membership-based model, with people paying fees in exchange for access to services and programs. The organization has made arrangements to waive or reduce fees for people who are lower-income. In recent years, these scholarship funds have not been fully utilized. NECC provides onsite child care without charge for members and program participants.

While NECC service area encompasses 12 neighborhoods, inner Northeast Portland neighborhoods are most represented, including many with a higher-than average annual household income.

NECC is eager to expand its geographic reach, create programming that is more community-based and community-driven, focus on being a community center more than a fitness facility, and consider financial models other than traditional pay-to-play structures.

Strategies

- a. Extend our geographic service area to Cully and connecting neighborhoods
- b. Invite communities to identify their needs and help develop programs they find relevant and useful
- c. Adapt our membership and earned revenue models to allow for more equitable participation and engagement

Goal 2. Champion & Embed Equity

NECC's mission is to "help families and individuals achieve their wellness, recreational, learning, and cultural goals while being part of a diverse, welcoming community." Among its six organizational values are: "Inclusiveness. We value all members of the community. We endeavor to make the Northeast Community Center relevant to all." and "Respect. We value treating everyone with respect." The organization has developed program-specific partnerships with several culturally-specific organizations. Board and staff report valuing diversity, equity and inclusion, and an eagerness to advance those principles at NECC.

Even so, NECC is overwhelmingly homogeneous in regards to race and ethnicity of its Board, staff, members, and donors. Board and staff generally lack relationships with, proximity to, and experience in operationalizing diversity, equity and inclusion.

Given its stated intention to advance diversity, equity and inclusion, NECC has the potential to become a champion of, and operationally embed, equity.

Strategies

- a. Further develop and implement an equity lens policy and framework that guides decision-making across the organization
- b. Operationally embed equity in policies, procedures and practices across the organization
- c. Elevate voices and leadership of people of color and gender-diverse across the organization
- d. Pursue, nourish & maintain mutually beneficial partnerships with culturally-specific organizations

Goal 3. Become a Fundraising Organization

NECC has a strong, dedicated base of members and program participants. The organization is viewed by many as "way more than a fitness center," and many people have stories about the value and importance of the NECC community in their lives. There is significant connectivity and warmth toward

the organization by members and participants, and between and among many members and participants. NECC' growth and retention in

NECC operates with 92% earned income, and raises only \$65,000. annually. While financially sound, the organization faces expensive capital needs as a result of owning and operating out of a 100-year-old historic building with significant deferred maintenance. No NECC staff have fundraising experience, the Board is largely inactive in fundraising, and the organization lacks information systems, processes, and procedures for identifying, cultivating, asking, and stewarding donors and funders. While there is socioeconomic diversity among members and participants, NECC's geographic service area includes neighborhoods with significantly higher than average annual household incomes and net worth.

Building on its successes and strengths, NECC is well-poised to become a fundraising organization.

Strategies

- a. Invest in contributed income-generating capacity by creating dedicated staffing, systems and processes for fundraising
- b. Increase Board engagement in fundraising, with 100% give at a level that is personally meaningful, and 100% get
- c. Retain and grow current donors through ongoing, personalized stewardship
- d. Grow contributed income through continual identification, cultivation and asks of individual, corporate and foundation prospects

Goal 4. Inspiring Communicate & Marketing

NECC is full of great stories – families who raised their children at NECC; seniors who remain healthy, independent, and connected because of NECC; friendships that have been forged at NECC; members who receive scholarships and financial assistance; program partnerships with other community providers; a local, independent community center that has succeeded financially; and many more.

That said, NECC's communications have tended to be internally focused, information-giving rather than interactive and engaging, largely transactional, and primarily about that "what" and not the "why". The organization has lacked a more strategic, nuanced, and segmented communications strategy. Similarly, NECC thinks little about proactively marketing to prospective members, participants, and donors.

Given the depth and richness of its history, stories, and program offerings, NECC is well-poised to communicate and market effectively.

Strategies

- a. Develop multi-channel communications plan that engages, inspires and informs current constituents
- b. Develop multi-channel marketing plan that inspires and engages prospective members, participants and partners
- c. Share stories with current and prospective audiences that reflect and amplify the voices of the broad community the NECC strives to serve

Goal 5. Excellence in Governance

NECC's Board has effectively stewarded the organization to growth and financial stability. Many key performance indicators of organizational health are significantly improved today as a result: membership and program participation has grown, financial reserves are healthy, and on old historic building has been thoughtfully maintained with cost-consciousness.

At the same time, the Board's focus and orientation tends toward management rather than governance, resulting in some lack of clarity about roles and responsibilities. It typically operates as a committee-of-the-whole rather than through committees, making it less efficient. While most members donate annually, the Board in aggregate does not fundraise. While some members are actively engaged, others are inactive other than attending Board meetings.

Building on its successes and strengths, NECC now has the opportunity to be excellent in governance.

Strategies.

- a. Transition Board to governance focus from management focus
- b. Increase Board productivity by creating a robust committee structure
- c. Increase levels of Board engagement individually and in aggregate
- d. Monitor performance toward strategic plan goals and outcomes

Attachments

- Strategic Plan (spreadsheet)
- Key Informant Interviews (unedited)
- Focus Groups comments (unedited)
- Strengths, Weaknesses, Opportunities, Threats (SWOT) Analysis
- Member-Participant-Partner Survey Responses
- Service Area Demographics
- Excellence in Governing presentation
- Board Job Description

