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empowering nonprofits - transforming communities



STRATEGIC PLAN | 2016-2021



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INTRODUCTION

We are proud to present the Nonprofit Partnership's Strategic Plan for 2016-2021. Since our inception in 1993, we have become a place of support for those committed to the nonprofit sector. Over the years, thousands of nonprofit professionals, board members, volunteers and staff have received the resources that they needed to be successful and thrive.

We know that the key to success as a nonprofit organization lies in its strategic focus. This is especially true given a number of factors, including:

Competition – as of April 2015 there were more than 1.5 million U.S. nonprofits. A 2010 report from the Weingart Foundation showed that the number of nonprofits in LA County had doubled since 1995.

Impact – in order to achieve significant impact the strategic nonprofit must concentrate its efforts.

Case Statement – the ability to logically and persuasively present the nonprofit's "case" to potential volunteers, donors, and funders means that clear strategic focus is imperative.

Leveraging and Coalitions – no single organization acting alone will ever have as much impact as the sum total of the synergy created by targeted coalition and partnership building with other organizations.

Change – ours is an exponentially changing society and the successful nonprofit must be able to make a compelling argument for change, both internally as an organizational system and externally as it expresses itself in its offerings.

These factors and many others have motivated the Nonprofit Partnership to undertake a concerted process of discussion, debate, and deliberation with the overarching goal of crafting a comprehensive Strategic Plan document to guide the organization within the years 2016 to 2021. The following document represents the collective wisdom of the Board of Directors, the Executive Director, staff, and the stakeholders of the Nonprofit Partnership.



Rose DelGaudio
Board President



Linda Alexander
Executive Director

BACKGROUND

In late September 2014, the staff of The Nonprofit Partnership embarked upon a fact finding mission in a quest to better understand who we were, where we have been, what the best research indicated, where our field and the nonprofit sector was headed, what was the community need(s), and what were the best practices in order to prepare for the organization's strategic planning process slated to begin in the Spring of 2015.

DATA COLLECTION

A significant amount of data was collected prior to the commencement of the strategic planning process in order to fully inform deliberations and decisions. This data collection process included assessment from approximately 160 individuals through the following methods:

Key Informant Interviews – Twelve interviews were conducted by staff with a range of individuals, including current and past board members, funders, strategic partners, and elected officials and their staff.

Focus Groups – Five focus group sessions were held with affiliate consultants, roundtable participants for executive directors and development directors, with non-members and one with staff. Attendance ranged between six and ten participants for an estimated participation of 35-45 individuals.

Surveys – Surveys were collected from current and lapsed members, nonmember organizational representatives, and affiliate consultants who were unable to attend the focus group. A total of 127 individuals responded to the three surveys.

In addition, staff took an operations assessment and the consultant team of Community Works Consulting and TurningWest did their own organizational appraisal through conversations, observation, and review of documents provided such as audits, the Nonprofit Partnership's Economic Impact Report, and more.

Staff gathered data from numerous sources including research, articles, reports, interviews, focus groups, surveys, as well as internal data and resources. All of this work culminated, in partnership with the Strategic Plan Consultants, and with the comprehensive assessments and staff recommendations.

The Strategic Planning Committee and Board of Directors began to prepare for the strategic planning process in April 2015. Through the course of several committee meetings, a half-day facilitated staff retreat, a full-day facilitated Board retreat and dedicated board meetings, the Strategic Planning Committee proposed the recommendations found within this document.

It is important to note that the recommendations are the result of nine months and countless hours of dedicated work as well as a genuine desire to help shepherd the organization to its brightest and most sustainable future. With the adoption of these recommendations, we believe that the organization will strengthen its operational core, become more fiscally sound, and enhance its reputation while having a greater impact on nonprofit organizations, individuals, and the sector as a whole.

TOUCHSTONE REQUIREMENTS

The Touchstone Requirements (criteria and standard) will be the lynchpin of all decision-making for the Nonprofit Partnership. Anything that does not meet the Touchstone Requirements will not be considered for action or implementation. Three questions form the basis of these requirements:

- Does it Meet our Mission?
- Does it Address Constituency Need?
- Is it Financially Viable?

Together these questions are the standard against which all goals, strategies, and tactics will be measured before inclusion in this strategic plan and will frame all of our decision making for the future.

THANK YOU

To the people and organizations who made this possible with their generous financial and/or pro bono support:

- Union Bank Foundation
- St Mary Medical Foundation
- Munzer Foundation
- Don Knabe, Los Angeles County Supervisor
- Community Works Consulting (Carol A. Hass)
- TurningWest (Dr. Steven Goodwin)

To the staff and Board of the Nonprofit Partnership who understand the value of intentional planning and committed themselves to this process.

To the Strategic Planning Committee for their hard work and dedication to developing this five-year plan that will guide our future work in our efforts to support the success of the nonprofit sector and a thriving community:

- Rose DelGaudio-Board President
- Veronica Garcia Davalos
- David Gonzalez
- Lillian Lew
- Linda Alexander
- Samara Ashley
- Deborah Goldfarb
- Usama Kahf
- Heather Moro

And lastly, to everyone who took time to participate in this process and give their valued input. We could not have developed the plan without you.

ORGANIZATIONAL REFINEMENTS

In terms of the organization itself, there are five overarching refinements that the Nonprofit Partnership needs to attend to before diving deeper into its concrete strategies and goals.

REFINEMENT 1 Name Change

This proposed name change refocuses the organization on **who** we serve as opposed to **where** we are located.

The Nonprofit Partnership

At its inception, the Nonprofit Partnership was conceived as a service organization to the nonprofits located within the city of Long Beach. Over the course of time, the organization was called upon to serve nonprofits in a larger area than simply the city limits of Long Beach. Currently, a full third (1/3) of the Nonprofit Partnership's membership are located outside of Long Beach. This change in our name better reflects whom the organization strives to serve while helping build its reputation as a regional capacity builder. It will also assist in the organization's ability to broaden its impact and reach in the sector. Furthermore, our culture has a decided preference for shorter names that drives idiomatic speech to abbreviate names. Dropping the words "Long Beach" simply reflects this cultural hypocorism that reflects the reality that "the Nonprofit Partnership" is the name most people will use to specify our organization.

Finally, this change in name will increase clarity of our purpose when communicating to the nonprofit sector, to funders, to elected officials, and to key stakeholders thus helping the organization to establish a broader reputation in the field and gain financial sustainability.

REFINEMENT 2 Retain Service Reach & Aim for Slow Growth

Service area recommitment: Long Beach, Gateway Cities and the South Bay

While the Nonprofit Partnership will not turn away any nonprofit organization seeking our services, we believe it wise to continue to concentrate our energies on our current service area. We believe that this will be the best means of building a stronger financial foundation. This service area is home to more than 850 nonprofit organizations. From this geographical focal point we plan to slowly grow and expand our service area with an intense drive to retain our values and quality of service.

REFINEMENT 3

Establish Values Mission Vision

Values Statement

Everyday each of us draws upon hundreds of important values to guide our thoughts and actions. This is also true in an organization setting. Amongst these hundreds of values however, are generally five to eight core values that are foundational to maintaining the essence of the organization's culture. Values are highly correlated with productivity and they are formative in shaping and maintaining the organization's focus by channeling its behavior in predetermined ways.

Core values are primary culture embedding mechanisms and as such they drive cohesive organizational behavior. They inform team members how to succeed within the organization and what superior work looks like. Organizations that are managed by values (see *Managing by Values* by Kenneth Blanchard) are often the organizations that are most productive, most profitable, and are among the companies voted best places to work. Functionally, this entails praising or sanctioning that is explicitly tied to the values of the organization. The effective operationalization of the organization's core values significantly strengthens the organization's culture and raises its esprit de corps.

It is a sign of a very highly aligned organization wherein participants at every level are able to articulate the values of the organization clearly. Continual emphasis of organizational core values reinforces a healthy culture and forms the organization's growth in a singular direction. With the above understanding in mind, The Nonprofit Partnership enshrines the following as its core organization culture values:

Collaboration: Working together with our stakeholders, partners, and constituents to create synergy that leads to greater things.

Innovation: Taking risks, finding creative solutions, embracing and driving change - advancing forward every day in big and small ways.

Excellence: Utilizing skills and resources to rise above expectations through collaboration, creativity, flexibility, and perseverance.

Responsiveness: Delivering timely, knowledgeable, and positive experiences.

Inclusiveness: Creating an environment where people, ideas, resources, skills, and values are leveraged by embracing diversity.

MISSION STATEMENT

To build the capacity of nonprofits so they can make positive change in their communities.

Our organizational mission statement is a clear and powerful expression of what business we are in. We intend this succinct mission statement to become our guide and in so doing prevent us from mission creep thus diluting our effectiveness. We will use this mission statement to communicate to outsiders so that they can immediately understand what the Nonprofit Partnership does. Our hope is that this mission statement will be memorized and readily repeated by all members of the organization.

VISION STATEMENT

Successful nonprofits supporting thriving communities.

A vision statement, in contrast to and not to be confused with, a mission statement, is a statement of what the future would look like if the Nonprofit Partnership were to accomplish our wildest dreams. In this statement we wish to paint a compelling, powerful picture of nonprofit organizations within our service area that have so maximized their societal impact that all our various communities are thriving. We understand that a great vision statement should lie just beyond the horizon in terms of its achievability but be palpable enough that it sparks the motivation to pursue it at all costs. It is our passion to make this vision a reality.

REFINEMENT 4
Depth and Breadth

In The Nonprofit Partnership's fulfillment of its mission to build nonprofit capacity, our approach to serving individual nonprofit organizations will vary based on many factors. The following diagrammatic model represents the depth and breadth of our focus on outreach and engagement by staff. This represents our understanding that there are limited resources available, but does not preclude any organization from accessing the programs and services they need. This model also meets the Threshold Requirements set forth by the Nonprofit Partnership.

Start-ups and Grassroots Organizations

(operating budgets up to \$125,000)

- Online Library & Resources
- Grassroots Group & Workshops
- Grant Programs when available

Grassroots to Small Organizations

(operating budgets from \$125,000 to \$500,000)

- Online Library & Resources
- Workshops
- Affinity Groups

Small Organizations

(operating budgets from \$500,000 - \$2,000,000)

- Online Library & Resources
- Affinity Groups
- Programs & Customized Support

Mid-Size Organizations

(operating budgets from \$2,000,000-\$10,000,000)

- Online Library & Resources
- Affinity Groups
- Programs & Customized Support

Large Organizations

(operating budgets over \$10,000,000)

- Online Library & Resources
- Affinity Groups
- Programs & Customized Support

THEORY OF CHANGE



THE THREE GEARS
of capacity building

Recognizing that in order to build strong, resilient nonprofit organizations, The Nonprofit Partnership chooses to focus on building capacity for **Individuals, Organizations, and the Sector** as a whole.

If the Nonprofit Partnership hopes to achieve its vision of “successful nonprofits building thriving communities” it must reveal its operational theory of change. We are convinced that in order to build strong and resilient nonprofit organizations we must channel our efforts and activities to support individual, organization, and sector growth.

This framework is consistent with “Reflect and Innovate: Capacity Building from the Consumers’ Perspectives”.¹ This study delineated outcome pathways focused on individual, organization, and sector efforts. By integrating activities across the individual-organization-sector spectrum, the Nonprofit Partnership focuses our program delivery on outcomes and impact in all three areas.

Internally, this strategic action will grant the Nonprofit Partnership staff more opportunities to collaborate, reduce cost, and increase effectiveness of program implementation. Externally, it will offer our nonprofit clients more opportunities for engagement with nonprofit experts, engagement with their peers, and engagement with nonprofit partners (i.e. elected officials, funders, etc.)

Capacity building, within each of the three gears of change, is what will deliver the Nonprofit Partnership to its desired state as expressed by its vision statement. The diagram below serves to give greater definition to precisely how The Nonprofit Partnership will go about increasing the capacity of nonprofits within our service area so that they can indeed build thriving communities. We intend to achieve our vision through convenings and networking, through strategic planning, by facilitating affinity groups, by offering facilitation and coaching, via workshops and educational courses, through our nonprofit leader’s institutes, and by customized support.

The Strategic Areas of Focus that follow drill down even further to specify goals and strategies to drive towards our vision.

¹ “Reflect and Innovate: Capacity Building from the Consumers’ Perspectives”
Special Service for Groups (SSG) 2013.

CAPACITY BUILDING SERVICES

Strategic Areas of Focus

Leading by Example

Individual Capacity Building

Organizational Capacity Building

Sector Capacity Building

Leading by Example

As a regional capacity builder, it becomes our responsibility to become a model organization that practices and embodies what we promote and teach every day. In short, this means that the Nonprofit Partnership must be the supreme exemplar of all that a “best-in-class” nonprofit entity should be.

To this end, the Nonprofit Partnership needs to be cutting edge - with the ability to implement new strategies and efforts as necessary. This will require us to be nimble in how we deliver our programs and services while at the same time maintaining a strong foundation firmly established by our values, mission, and vision. The Nonprofit Partnership has long provided “Best Practices” in a variety of ways and now it is time to more fully embody them.

Leading by Example means that the strength of the Nonprofit Partnership’s organizational structure becomes a singular priority. For our organization to effectively serve our constituents it must model the way for other organizations to follow. We will best serve our constituents when they see in us an organization that is engaged in the community, mission-driven, operationally sound, and financially strong.

The following goals and strategies further refine precisely how we intend to operationalize our Leading by Example strategic area of focus. These goals and strategies reflect what the Nonprofit Partnership will achieve within its own organization.

Goal: Create a High Performing Nonprofit Board of Directors

Strategy: Develop Core Competencies within our Board of Directors

Strategy: Develop Board Recruitment Strategy

Strategy: Sustain a Culture of Engagement

Goal: Promote the Nonprofit Partnership as a Model Organization

Strategy: Create an Annual Business Development Plan to increase our membership, revenue and community awareness

Strategy: Commit Appropriate Fund Annually

Goal: Create and Maintain a Culture of Fiscal Excellence

Strategy: Develop a Fund Development Culture

Strategy: Develop Optimal Income Streams

Strategy: Develop a Financial Management System that Supports Transparency and Thoughtful Decision Making

Goal: Commit to Cutting Edge Technology that Meets the Needs of the Nonprofit Community

Strategy: Create an Annual Technology Plan

Strategy: Commit Appropriate Fund Annually

Goal: Create a Culture of Ongoing Professional Development

Strategy: Develop Policies and Procedures to Outline Processes

Strategy: Commit Appropriate Fund Annually

Individual Capacity Building

The second strategic area of focus for the Nonprofit Partnership’s capacity building service lies within the realm of building up individual nonprofit leaders and future leaders. Herein we envision activities that support individual’s attainment of new or refined knowledge, skills, and abilities.

Goal: Increase the Knowledge, Skills and Abilities of Nonprofit Professionals & Volunteers

Strategy: Provide Accessible Online Information and Resources

Strategy: Build Core Competencies of Our Professionals & Volunteers

Strategy: Coaching and Mentoring

Goal: Build Nonprofit Leadership Capacity

Strategy: Provide Comprehensive Leadership Institutes

Strategy: Coaching and Mentoring

Goal: Improve Professional Networks

Strategy: Peer-to-Peer Support

Strategy: Salons and Events

Organizational Capacity Building

The third strategic area of focus designed to increase nonprofit capacity lies within the realm of organization development. Organization development seeks to enrich the soil out of which the programmatic offerings arise to impact society. Without improving the development of the organizational capacity there will be little impact from the services produced by nonprofits. The Nonprofit Partnership aims to assist nonprofit organizations with specific, goal-oriented organizational support that dramatically affects their ability to effect change in individuals and society at large. The 5 C’s of capacity building strategies are included in this strategic focus.

Goal: Promote Best Practices to Learn, Develop, and Implement

Strategy: Customized Support

Strategy: Core Capacity Building

Goal: Improve Relationships between Organizations

Strategy: Connecting

Strategy: Convening

Strategy: Communication

Sector Capacity Building

Finally, the Nonprofit Partnership is determined, building off of its work of Leading by Example, through Individual Capacity Building, and Organization Capacity Building to influence the entire Nonprofit Sector. This influence will occur through sector-oriented engagement opportunities for large-scale impact. Moving forward from 2016, The Nonprofit Partnership will bring on new activities such additional convenings and thought leadership opportunities to equip The Nonprofit Partnership with credibility, funding, and the network to strengthen nonprofits across the region.

Goal: Promote Best Practices to Learn, Develop, and Implement

Strategy: Customized Support

Strategy: Core Capacity Building

Goal: Improve Relationships between Organizations

Strategy: Connecting

Strategy: Convening

Strategy: Communication

CONCLUSION

This Strategic Plan is intended to guide the coordinated efforts of the Nonprofit Partnership's Board of Directors in partnership with the Executive Director and staff as, together, they work alongside their collective stakeholders. This will be a living document to guide every decision and action over the course of the period from 2016 to 2021. As the world shifts and our context changes, the Board, Executive Director, and stakeholders will return to this Strategic Plan to refine or redirect as necessary. To this end, the Board and the Executive Director intend to make a thorough assessment of this Strategic Plan at least annually.

The Nonprofit Partnership

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INDIVIDUALLY
WE ARE STRONG
BUT TOGETHER WE
MOVE MOUNTAINS

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