

FINANCIAL SUCCESS

FOCUS ON BUDGETING, FUNDRAISING AND LONG-TERM FINANCIAL SOUNDNESS
FULFILLING BELIEFS V AND VIII OF THE WELLSRING CULTURAL CREED

<u>INITIATIVES / RATIONALE</u>	<u>ACCOUNTABILITY / TIMELINE</u>
<p>1</p> <p>Define Depreciation Fund policies</p> <ul style="list-style-type: none"> To identify and prioritize capital improvement needs (vehicles, building maintenance, etc.) To ensure all facility operations continue without interruption 	<p>Finance/Facilities Committee, Marketing/Fund Development Committee, Executive Director and associated staff members by December 2020</p>
<p>2</p> <p>Create a Planned Giving Program and corresponding repository of funds raised (goal: \$1,000,000)</p> <ul style="list-style-type: none"> To self-generate money toward sustaining agency operations To direct current “cash on hand” to a more fulfilling purpose To grow Moody/Pierson Legacy Society 	<p>Finance/Facilities Committee by December 2018</p>
<p>3</p> <p>Adopt environmentally responsible practices</p> <ul style="list-style-type: none"> To reduce costs associated with waste, utilities and paper To streamline Board processes by eliminating paper To incorporate on-site recycling program with Republic Services 	<p>Staff members and Board of Directors (in full) will implement efforts beginning in 2017 and continuing efforts through 2020</p>
<p>4</p> <p>Diversify funding streams</p> <ul style="list-style-type: none"> To reduce foundation support from ~50% To increase corporate sponsorships To increase individual giving To increase congregational support 	<p>Executive Director, Fundraising Manager, Marketing/Events Specialist and Board of Directors (in full) will continue implementing efforts through 2020</p>

INTERNAL AGENCY SYSTEMS

FOCUS ON STAFF, ORGANIZATIONAL EFFECTIVENESS, DEVELOPMENT AND FACILITIES
FULLFILLING BELIEFS III AND IV OF THE WELLSPRING CULTURAL CREED

INITIATIVES / RATIONALE

ACCOUNTABILITY / TIMELINE

Update organizational structure

- To update job descriptions of current positions
- To incorporate new administrative support positions
- To accommodate the growth of the agency

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Board President and Executive Director within the first quarter of 2018.

Solidify succession planning for Program Directors and associated staff members

- To ensure program success through times of transition

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Executive Director and Personnel Committee by mid-2019

Expand Board Development Committee's responsibilities to include development and post-term engagement

- To update Board by-laws to include Past-President as a new office position within the Executive Committee
- To capture Board members terming off the Board in a Trustees Group
- To ensure agency success through times of transition

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Board Development and Executive Committee by June 2018

Create a Risk Assessment / Risk Management Plan

- To reduce liability during times of crisis
- To establish a communication plan during times of crisis
- To provide a training platform for current and future staff me

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Personnel Committee by early May 2018 for the approval by the Board at the May 2018 Board meeting

INTERNAL AGENCY SYSTEMS

FOCUS ON STAFF, ORGANIZATIONAL EFFECTIVENESS, DEVELOPMENT AND FACILITIES
FULFILLING BELIEFS III AND IV OF THE WELLSPRING CULTURAL CREED

INITIATIVES / RATIONALE

ACCOUNTABILITY / TIMELINE

Contract with an IT (information technology) provider

- To establish 21st century technology improvements to increase effectiveness within administrative operations
- To encourage innovation of Program Directors within direct service processes

Executive Director by December 2017 with a Board-approved IT line item for the 2018 budget in January 2018

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Explore expanded benefits for employees

- To remain competitive in our hiring practices
- To compensate employees respectfully
- To ensure job satisfaction
- To encourage lasting employment

Executive Committee (including) Past President by December 2019

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HISTORY AND FAITH

FOCUS ON HONORING OUR ROOTS AND CREATING LEGACY
FULFILLING BELIEFS II III & IV OF THE WELLSPRING CULTURAL CREED

INITIATIVES / RATIONALE

ACCOUNTABILITY / TIMELINE

Host an annual Recognition Banquet (volunteers, congregations, Board members, donors and Staff) on an annual basis.

- To honor all volunteers, some donors (Legacy Society), staff members and Board members
- To give recognition to supporting congregations
- To measure volunteer engagement (i.e. number of congregations present & number of annual volunteers)

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Marketing/Events Specialist & Executive Director February 2018

Increase congregational giving to 10% of total budget

- To continue to diversify funding streams
- To encourage greater financial participation of current supporting congregations and welcome new congregations

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Executive Director, Marketing/Events Specialist & Congregational Relations Committee by December 2020

Create an agency timeline from 1968

- To display Wellspring's fifty year history in a visual format
- To honor past leadership (long-term staff, Executive Directors and Board members)
- To obtain a new marketing tool for events/information fairs

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Fund Development and Marketing Committee and Marketing/Events Specialist by December 2018

PARTICIPANTS

FOCUS ON SERVICE TO CURRENT AND FUTURE CLIENTS, PROGRAMMING, SERVICES, ETC.

FULFILLING BELIEFS I AND II OF THE WELLSPRING CULTURAL CREED

	<u>INITIATIVES / RATIONALE</u>	<u>ACCOUNTABILITY / TIMELINE</u>
14	<p>Evaluate and implement key findings from the Older Adult Program formal evaluation with Bob Pitman</p> <ul style="list-style-type: none"> • To explore opportunities for program growth • To expand staffing at Wellspring to accommodate program growth • To increase innovation and plan for succession and turnover among program staff 	<p>Program and Evaluation Committee, Executive Director and Older Adult Program Director and staff members by December 2019</p>
15	<p>Evaluate and enhance the customer service experience across all programs</p> <ul style="list-style-type: none"> • To increase efficiency of program operations • To assess participant satisfaction • To evaluate current needs relative to current services 	<p>Program and Evaluation Committee, Executive Director and all Program Directors (ongoing)</p>
16	<p>Board and staff will continue to be disciplined and intentional in assessing new program opportunities and complete ongoing formal reviews of program performance as a continuation of Wellspring's Strategic Framework (Mike Stone, 2012)</p> <ul style="list-style-type: none"> • To ensure participants are being served in a timely manner with regard to preserving their dignity through streamlined processes • To ensure Wellspring is operating under best practices for all program areas 	<p>Program and Evaluation Committee, Executive Director and all Program Directors (ongoing)</p>
<i>PLEASE SEE ATTACHED 2012 STRATEGIC FRAMEWORK</i>		

COMMUNITY

FOCUS ON EXTERNAL RELATIONSHIPS, PARTNERSHIPS AND ADVOCACY.
FULFILLING BELIEFS VI AND VII OF THE WELLSPRING CULTURAL CREED

<u>INITIATIVES / RATIONALE</u>	<u>ACCOUNTABILITY / TIMELINE</u>
<p>Strive to achieve 5% corporate giving</p> <ul style="list-style-type: none"> To increase corporate support from 1% annually to 5% to match the national average To diversify funding streams 	<p>Marketing/Fund Development Committee and Marketing/Events Specialist and Executive Director by December 2020</p>
<p>Increase publicity of Wellspring and its direct service programs</p> <ul style="list-style-type: none"> To engage in six or more press releases each year to generate more publicity around direct service programs, special events and funding opportunities To introduce a broader audience to Wellspring's Mission 	<p>Marketing/Events Specialist and Executive Director by December 2018</p>
<p>Enhance within the community as an agency</p> <ul style="list-style-type: none"> To create an advocacy plan for the agency to have a presence in policies regarding relevant issues to our mission To increase collaboration opportunities 	<p>Executive Committee and Executive Director begin by June 2018</p>