Charity Check-In
January 19th, 2023
Summary of Activities

Organizational Barriers and Challenges

In preparation for the Charity Check-In, participants were encouraged to review a set of organizational reflection/self-assessment questions. For reference, those questions are listed following the responses. During the Check-In, attendees then came together and identified the issues and challenges that are preventing them from achieving their fullest potential in each of the areas. The issues and challenges are summarized below. *Note: there were no responses to question #8 (evaluation activities) in the data collected.*

1. **Vision, Mission, Values**

     Our missions may be too vague, and sometimes may not supported by funders if they do not align with their priorities.

     Our missions can be inherited (from national or provincial branches) and may not be specific to our local identity; our priorities can be dictated by external sources. We don't have the funding to hire a facilitator to help us develop the right vision, mission, and values for our organizations.

     We cannot achieve our vision and mission because we don't have enough funding or human resources (paid or volunteer.) Staff burnout can also hold us back from achieving our goals.

     We need direct support to effectively communicate our vision, mission and values to the community, our staff, our board, volunteers, and stakeholders. Beyond communication, we need help getting their actual buy-in, commitment, and investment; so that they can help us achieve our vision and mission.

2. **Governance Structure**

     We need help recruiting engaged board members who represent the diversity of the community / stakeholders that we serve; including establishing effective succession planning and ensuring the consistency and stability of our governance structure.

     Once we get the right board members in place, we need support to help board members understand their roles and responsibilities; and to assist them to develop the capacity / expertise they need to accomplish our vision, mission, and goals.

     We also need help to develop and maintain the proper organizational structure as our organizations evolve; moving our boards from operational to governance orientations.

3. **Planning**

     Some of us don't have a strategic plan; our strategy is to survive. The delivery of our services takes priority over planning. We don't have the time or resources to plan, including funding for an outside facilitator.

     There can be too much bureaucratic overhead involved in planning. Some of us need an infrastructure to support strategic planning, including the involvement of board and front-line staff.

When we do have a strategic plan in place, we may not have the other plans to support it, including operational workplans, succession plans, and so on. We may also have challenges in getting new members to buy into existing plans and to match our plans with revenue streams and the emerging needs of the organization – our plans need to be fluid.

4. Program and Service Delivery

Our demand for service is up and donations are down; we don't have the funds to deliver all of the services and programs that people need, including on evenings and weekends, through outreach, and via self-help support. We need support to develop large scale collaborations to deliver programs and services and to obtain input from our stakeholder groups.

5. Revenue Mix

We need help to secure multi-year core funding for our programs and services; and unrestricted funding for our operational / administrative needs. Our operational (non-program and services) funding requirements include administration, capacity building, professional development, volunteer recruitment and support, and facilities.

We are competing with the private sector for resources and face economic uncertainties including a potential recession, tight labour market, and increased competition for funding and people. We need to be able to pay competitive wages to retain our staff. We need support to build our capacity in the areas of effective and efficient grant writing, fund development to diversify our revenue sources, and building case statements for support that demonstrate the return on investment (ROI) in our organization.

6. Infrastructure

Our information technology infrastructure is ancient, which is a huge time suck. We don't have funding for IT or IT admin, and we also don't have the capacity to focus on building our IT infrastructure. When we can get funds for this area of our operations, they are generally one-time and not enough for long term investments.

We need help with fund development and revenue diversification, marketing and communications, policies and procedures, and human resources management. We need more information and capacity to understand our risk management needs.

7. Facilities

We don't have adequate space for our programs, staff, and storage; and we are dependent on free / low cost locations. There is a lack of space in general to meet our needs, including commercial space. We need help to properly maintain our buildings and facilities.

Organizational Assessment / Self Reflection Questions

1. **Evaluate your organization's vision, mission, and values.**
   - Does the vision describe what you are working to achieve, is it inspiring and communicated widely?
   - Does your mission statement describe how you will achieve the vision, and does it provide clear guidance and to what your organization does and does not do?
   - Are your values clearly defined and used to guide decision making and actions throughout your organization?
   - Do your board and staff regularly refer to vision, mission and values when planning, designing programs and services, making difficult decisions?

2. **Reflect on your current governance structure.**
   - What does your current governance structure look like?
   - Does it align with your organization's current stage of development?
   - Does your board identify as a policy/governance board, or an operational board, or somewhere in between?
   - How engaged or involved is the board in the organization (attendance and participation at meetings, in committees, events, responsiveness to communication, etc.)
   - Is the board actively involved in their own recruitment and succession planning?
   - Does the board represent the community being served?

3. **Think about your planning activities.**
   - Do you regularly engage in strategic planning? Are the board and staff involved in the planning process? Do you use the plan to guide activities and decisions? Do you measure your results / achievements against the goals described in the plan?
   - Do staff use annual workplans to deliver on the strategic plan?
   - Does the board have it's own plan with activities to support the strategic plan?
   - Do you use program plans and/or project plans? Do you use these plans to seek program or project funding?
   - Do you have a fund development/revenue diversification plan?
   - Do you have plans for marketing/communications, public relations, and advocacy?

4. **Identify how your work gets done – who delivers the programs and services?**
   - Board.
   - Staff.
   - Volunteers.
   - Partnerships and collaborations.
   - Is the work overly dependent on any one person or group?
   - Do you have backup and succession plans in place?

5. **Where does your money come from? Are you happy with your current revenue mix?**
   - Fee for service projects and programs.
   - Operating grants.
   - Capital grants.
   - Sponsors.
   - Donors.
   - Social Enterprise.
   - Advertising.
   - Other.

6. **Does your operational infrastructure meet your needs now? What do you need to do so that your infrastructure will meet your needs three years from now?**
   - Bookkeeping.
   - Accounting.
   - Information Technology (software, hardware, networks, internet.)
   - Marketing and Communications and Brand Awareness.
   - Human Resource Management System.
   - Policies, procedures, processes.
   - Risk Management (including insurance, safety, risk matrix.)
   - Fund Development.

7. **Do you have the right facilities to support your work?**
   - Space for staff.
   - Volunteers.
   - Delivering programs and services.
   - Storage.
   - Hosting meetings and events.
   - Is the environment healthy for staff and the people you serve?

8. **What evaluation activities do you undertake?**
   - Evaluating your progress towards your strategic plan.
   - Evaluating programs and projects.
   - Evaluating to meet the requirements of funders.
   - Do you use evaluation data to make program or practice improvements?
   - Do you use evaluation data to make changes to strategy?
   - Do you hate the word evaluation and wish that you didn't have to think about it?

Flipping Orthodoxies

Orthodoxies are deeply held beliefs about how things are done that often go unstated and unquestioned. Through interviews with nearly 200 leaders in community philanthropy and more than a dozen interactive workshops and user feedback sessions, the *What's Next for Community Philanthropy* research team (MONITOR INSTITUTE - A part of Deloitte Consulting LLP) identified and refined a list of orthodoxies in community philanthropy.

These orthodoxies touch on many of the deep-seated, unstated assumptions that community philanthropy organizations make about the different roles that they play in their communities. These orthodoxies may represent cornerstone values and beliefs about how work gets done that are worth holding on to. But in many cases, these assumptions, when left unquestioned, can get in the way of progress.

For our Charity Check-In, CFSOS reviewed the list of orthodoxies and selected/adapted fourteen for consideration by participants:

1. CFSOS should be neutral.
2. CFSOS should spread its support across many charities.
3. Charities should be able to give honest feedback to CFSOS.
4. Charities should seek advice and support from CFSOS.
5. CFSOS should treat all charities equally.
6. CFSOS should respects the knowledge, expertise, and wisdom of the charities it serves.
7. CFSOS should take more risks, it currently does not take enough risk.
8. CFSOS should know the community's needs and issues.
9. CFSOS should lead and engage in social change.
10. CFSOS should respond quickly to community needs.
11. The community should come to CFSOS, not vice versa.
12. CFSOS should serve charities and should not push them.
13. Charities should push/challenge the CFSOS.
14. CFSOS should encourage and challenge others to collaborate to achieve community impact.

In small groups, participants discussed the following questions related to each orthodoxy:
1. Do you agree with the statement? Why/not?
2. Is the statement currently true? Explain?
3. Should the statement be changed? If so, how? Reword the statement so that it becomes an orthodoxy that CFSOS should aspire to.

Groups then selected the top picks that they thought were important to share, whether they were "as originally written" or "revised by the group." The top picks are summarized below; CFSOS will keep these in mind as we move forward with our planning.

Support

1. The community should come to CFSOS and vice versa; CFSOS should serve charities and act in an advisory capacity and charities should be free to consult with CFSOS.
2. CFSOS should spread its support within its identified priorities.
3. CFSOS should not spread themselves too thin; if the goal is to have the greatest community impact perhaps it should look at decreasing the number of charities supported.

Feedback

1. CFSOS should solicit (anonymous) feedback and it should be reciprocal.
2. Charities should feel comfortable to easily give honest feedback (anonymous or otherwise), advice and support to CFSOS; and CFSOS should reciprocate this to charities.

Neutrality / Equity / Equality

1. CFSOS should be philosophically neutral, fair, and transparent; we do need to understand what is meant by "neutral" and how this is measured.
2. CFSOS should engage all charities equally, equitably, and using an equity lens.

Collaboration / Community Impact

1. CFSOS should encourage, promote, and challenge others to achieve community impact.
2. CFSOS should encourage collaboration, perhaps re-examining its process to build consensus versus competitive applications.

Risks

1. CFSOS should take more risks to support evolving community needs; it currently doesn't take enough; while also being financially prudent and accountable to donors. How do we (charities) know how much risk CFSOS takes? What is the definition of risk and who decided whether or not something has more/less risk?

Needs

1. Charities and CFSOS collaborate to understand the full spectrum of community needs.
2. CFSOS should know and understand the communities needs and issues by listening to and respecting the knowledge, expertise and wisdom of the charities it serves, and through continuous review and consultation.
3. CFSOS should respond to community needs within a reasonable timeframe and also be able to refer charities with an urgent need to potential resources. CFSOS should respond quickly to community needs; with emergency funding (true emergencies, not "failure to plan" situations.)

Social Change

1. CFSOS should facilitate, support, lead, engage and encourage social change.
2. CFSOS should not lead and engage in social change; because it cannot lead and remain neutral at the same time.

Big Sky Thinking–Our Sector & Organizations Three Years from Now

Check-In participants were asked to "think big" with respect to the ideal state of their organizations and the sector as a whole. The following is a summary of their thinking:

- We have fully operational strategic and business plans that enable us to fulfill all client needs; we are supported by community planning, systems thinking and all levels of government working together.

- We have stable, reliable, and guaranteed multi-year funding; we are compensated appropriately for our fee for service work.

- The community at large knows about our organizations, our vision, mission, impact and needs; they are interested in learning about the non-profit sector and our challenges. We are fully engaged with businesses and residents in diverse and meaningful relationships, which support our programs and services.

- Our work is supported by active and functional boards who are aligned with our vision and mission, management and leadership teams, and the right amount of competent full-time staff who are appropriately compensated, consistently recognized, and who we are able to retain over time. We have a complete volunteer management program and volunteers who are engaged in our work and organization.

- We have ample space that allows us to thrive, grow and expand: for our administration, program and service delivery, and storage needs. Our space is accessible to those we serve. Organizations are co-located, and we share space and resources, saving on these costs to invest elsewhere in our organizations.

- We build mutually beneficial partnerships and collaborations to eliminate silos and reduce duplication; we trust and support each other's organizations. We actively work together to provide more continuous services for the people we serve; we have community hubs and mobile services where people be connected with **all** the available services and have the opportunity for social engagement or other activities. We communicate regularly with each other and make organizational referrals throughout the sector to help each other solve problems.

- We come together for professional development to address our common training needs, we share skills and staff across organizations. Appropriate training is standardized and shared, i.e. volunteer training. We develop mentorship opportunities within the sector, and we network regularly with each other.

- We have a centralized hub/portal/book of resources to share information, needs, wants, projects, and so on.

CFSOS Support to Accomplish Big Sky Thinking

Participants were then asked to think about the role CFSOS could play in helping achieve the "Big Sky" scenarios outlined above. What could/should the Community Foundation do to help? The following are their ideas, organized into some broad categories:

1. **Listening / Sharing / Facilitating / Convening**
   CFSOS should continue to be accessible to charitable organizations and non-profits, and to ask community organizations what we need to create an overall non-profit voice for the sector. CFSOS should facilitate the sharing of information, ideas, needs, and resources through networking, community conversations, charity fairs, or other avenues. In addition, CFSOS should facilitate opportunities for connections, relationship building, collaborations and partnerships between organizations.

2. **Communicating / Promoting / Reporting**
   CFSOS should use a variety of communication tactics (social media, regular newsletters, storytelling, report cards/Vital Signs) to tell us and community what it does, what its fundraising targets are, and the impact it is having in the community. CFSOS should reach out to organizations that it does not fund, or that do not participate in the funding process.

3. **Capacity Building / Professional Development / Mentoring**
   CFSOS could provide group based professional development for organizations to attend; topics could include grant writing, strategic planning, board development, and so on. CFSOS could also hire experts to work with charities individually to develop their individual organizational capacity in a variety of areas, including goal setting, planning, community building. Finally, CFSOS could set up a mentorship program to facilitate mentoring between organizations and individuals.

4. **Funding**
   CFSOS should strive to provide multi-year funding, with clear requirements. It should clearly communicate how grants are awarded, with specific feedback for unsuccessful applicants. CFSOS could bring organizations together to collaborate on grant applications. It could also leverage close relationships with other funders to assist organizations to connect the dots and find opportunities. CFSOS could provide opportunities for donors to get to know organizations, and to develop partnerships with businesses who might be interested in providing discounts or in-kind contributions to organizations. Finally, CFSOS could consider changes to 100 Men/Women Who Care; making it larger and changing the competitive nature of the model.