



Shively Area Ministries

Where our neighbors in crisis find help and hope.

STRATEGIC PLAN 2022-2025



Programs

Changing along with the community



Development

Maintain and cultivate for the future of fundraising



Processes

Strategic response for growth and safety



Mission:

"To respond in the spirit of Christ to persons in poverty and crisis by uniting the community for service."



**Shively Area Ministries Strategic Plan
2022-2025**

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Shively Area Ministries Strategic Plan 2022-2025

Mission

To respond in the spirit of Christ to persons in poverty and crisis by uniting the community for service.

Vision

To offer immediate care and reassurance to those in crisis and to offer hope through empowerment while striving for financial stability for clients and for the organization.

Core Values

- C - Compassion
- A - Availability
- R - Respect
- E - Empowerment

Current Landscape

The environment in which this plan has been developed is not stable. It is volatile and will continue to change in ways that seem evident and, likely, in ways that will surprise. It is important that Shively Area Ministries remains flexible and sustains the ability to withstand sudden shocks.

There are also major changes taking place in SAM's environment to which it must respond. The most relevant changes are detailed below as they apply to specific elements of this strategic plan, but they include changing demographics, more drug addiction and violence, greater need among SAM's clients, and more childhood trauma.

There are some things that SAM needs to work to protect - - primarily its relationships, financial stability, and compassion for its clients - - while maintaining service to clients and reacting to changing needs. SAM must also support its excellent staff and volunteers. It needs to ensure continued effective practices and policies for its programs and record keeping.

Assessment of the Current State of SAM

The strategic planning process assessed the current situation at SAM. A key conclusion is that Shively Area Ministries should continue all its existing programs. No current program is considered unnecessary or inefficient. SAM is a major contributor to the quality of life and the programs it offers are critical to maintaining a safety net in the community. SAM is financially solid. It has reserves and funds set aside for emergencies. It has a steady and varied income flow, but some sources of funds are less reliable or are declining and need either reinvigorated or supplemented with alternative sources. The COVID

pandemic changed essentially every procedure at SAM which allowed SAM to navigate that crisis, but now many of the procedures are problematic and do not reflect the changing circumstances that it faces. SAM's relationships with volunteers, churches, donors, clients, and the general community are the backbone of the organization and should be reinforced at every opportunity.

Program Relevant Community Observations

Shively and the broader 40216 zip code are experiencing significant demographic change. The community is growing more diverse in its racial and ethnic composition and seems to have a growing population of younger families. The number of people living in or near poverty is very high. At least among SAM's clients, there are many single people of all ages. The area is home to many facing addiction, violence, and mental illness and suffers from the resulting social disruptions. Specifically, many children are in some form of kinship care - - people raising children who are not theirs by birth and often without any formal sanction. Finally, among the consequences of rapid inflation is an increasing amount of need for SAM clients.

Programmatic Challenges

- 1) SAM does not have a program appropriate to meet the varied needs of those providing kinship care.
- 2) SAM does not have a program designed to meet the unique needs of singles.
- 3) SAM struggles to provide meaningful support for clients with rent or utility bills that are larger than we have generally been able to pay.
- 4) Many clients have their utilities shut off and have no clear path for getting them on.
- 5) Education and empowerment programs have specific audiences, but may not address some important needs of clients, and need to have alternative delivery systems.
- 6) Clients have trouble with transportation and our assistance is minimal.

Programmatic Strategic Responses

- 1) Develop the Relatives Raising Kids program to provide appropriate financial assistance, to have the expertise to refer clients to appropriate partners, and to create valuable education and empowerment programs.
- 2) Establish practices that enable staff to hear what the special needs of single are.
- 3) Increase the caps on various emergency assistance programs as funding becomes available.
- 4) Create a set of policies to help clients get utilities connected or provide deposits for renting.
- 5) Develop a more varied set of education and empowerment programs with varying delivery models, including online videos.
- 6) Increase the frequency and/or dollar amount of transportation assistance, as funding allows.

Programmatic Key Indicators and Activities

- 1) Develop a robust program to support relatives who are raising kids who are not their own, biologically.
 - a. Obtain grant support.

- b. Hire staff to initiate the program.
 - c. Establish policies for eligibility for program.
 - d. Establish policies for types of support available.
 - e. Develop extensive, up to date list of significant contacts, programs, and experts who can provide a variety of assistance to clients.
 - f. Provide appropriate E&E either by SAM or in partnership with others.
 - g. Make referrals and provide E&E content freely available online.
- 2) Identification of unique needs of singles, if any.
 - 3) Higher Payments for emergency assistance program
 - a. Fundraise targeted to that goal
 - b. Establish policies governing when the greater assistance is available
 - 4) New policy enabling support for new utility connections and rental deposits
 - 5) A more extensive education and empowerment program
 - a. More classes/sessions
 - b. New topics for E&E based on client need
 - c. Development of E&E video library available to clients
 - 6) Provide more transportation support
 - a. Seek a donor to support the program
 - b. Develop new policy regarding frequency or amount of transportation support

Development Relevant Observations

Shively Area Ministries maintains strong relationships with clients, volunteers, donors, churches, and community leaders. The pandemic has affected all those relationships and it is critical that attention is given to nurturing those ties. SAM has stable funding but there are some warning signs. Three funding programs provide regular income that can be used for operational expenses: the Annual Event, the Partners in Ministry program, and support from member churches. The Annual Event is a successful fundraiser (as well as relationship builder). As other organizations increasingly use the same model, though, it is more difficult to find sponsors so net revenues for the event have slowly but steadily declined. Partner churches do not provide the support one would expect. Many provide no resources and others make a token contribution. The PIM program has also been in a state of steady decline until the last couple of years where it has stabilized and started growing again. The pandemic accelerated changes that were already a growing part of the development world. The grant landscape has changed and will continue to change. Online giving, peer-to-peer fundraising, and the use of social media is increasingly important, and SAM has lagged in those areas.

Development Challenges

- 1) SAM's development programs need additional cohesion and focus.
- 2) SAM's relationships with supporters and allies have been weakened through the pandemic.
- 3) SAM's relationship with member churches (and other non-member churches) is not strong enough.
- 4) The PIM program requires constant recruitment and nurturing.
- 5) The Event does not produce as much revenue as it has in the past.
- 6) Traditional grant support may be less reliable.
- 7) SAM's online and social media presence is not sufficient.
- 8) SAM's online and peer-to-peer fundraising is not adequate.

Development Strategic Responses

- 1) Develop an overall plan and establish best practices for development.
- 2) Systematically reach out to partners and potential partners through Lunch and Learns, social media, invitations to visit SAM, event participation, and the like.
- 3) Use a multifaceted approach to building church relationships
- 4) Continue to nourish the Partners in Ministry program and use it to promote planned giving.
- 5) While recognizing its value goes beyond fundraising, evaluate the economics of the Event including considering whether to supplement revenues with auctions, raffles, etc.; ticket prices; sponsorships; and whether to include an “ask” at the event.
- 6) Continually review potential granting sources while working to maintain ties with existing grantors.
- 7) Update the SAM website on a regular basis and develop a social media plan, including the use of peer-to-peer fundraising.
- 8) Develop practices for peer-to-peer fundraising and enhance the ability of donors to make online donations.

Development Key Indicators and Activities

- 1) A strategic plan for guiding development.
- 2) Increase and diversify community contact.
 - a. Hold 4-6 Lunch and Learns annually.
 - b. Develop a routine for social media activity.
 - c. Host at least three new visitors a month.
 - d. Participate in activities of other local groups.
 - e. Seek opportunities to diversify partnerships.
- 3) Focus on building church network.
 - a. Delivery newsletters to member and non-member churches.
 - b. Host an open house for churches.
 - c. Systematically reach out to churches who are not member churches to expand network.
- 4) Focus on Partners in Ministry Program.
 - a. Develop a communication plan for Partners.
 - b. Target select Partners for increase in monthly donations and/or direct withdrawals.
 - c. Maximize matching fund opportunities.
 - d. Target select Partners for a planned giving appeal.
 - e. Solicit periodic donors with request to become partners.
- 5) Maximize the value of the annual event.
 - a. Consider whether to supplement revenues with auctions, raffles, etc.
 - b. Evaluate the price of dinner tickets.
 - c. Ensure sponsorship levels and freebies are appropriate.
 - d. Consider whether to include an “ask” at the event.
- 6) Increase the number and dollar amounts of grants, annually.
- 7) Improve digital impression of SAM.

- a. Website should be current both in terms of style and content.
 - b. Develop a broad social media plan for sharing SAM activities and events.
 - c. Develop a social media plan for fundraising.
- 8) Update online donation system.

Internal Practices and Processes Observations

SAM has appropriately taken pride in its stable and clear set of policies, practices, and procedures. COVID, though, changed every bit of client interaction. The systems created were efficient; in fact, they were too efficient in some ways. Understanding clients and client needs, individually and collectively, suffered as interactions with them were from afar, through email, texts, DocuSign, and the like. The appointment process for financial assistance, however, is not efficient. It is a source of frustration on the part of clients and staff. Even with that distance, and especially as SAM re-opens, there are more encounters with clients who are volatile, many of whom appear to be mental ill or under the influence. Given the volatility, the threats, and the likelihood that a substantial number of our clients come armed, there is legitimate concern about the safety and security of staff, volunteers, and clients. There has also been a notable jump in property crime at SAM. Finally, much more frequently than in the past, staff and volunteers struggle to communicate with clients who do not speak English. Spanish speakers are much most common, but SAM's clients speak a variety of languages.

Internal Practices and Processes Challenges

1. The financial assistance appointments process is inefficient and frustrating.
2. Language barriers prevents effective communication with many clients.
3. There are safety concerns for clients, volunteers, staff, and property.
4. SAM staff and volunteers lack racial and ethnic diversity.
5. Staff and volunteers increasingly deal with clients with mental illness and/or addiction issues.
6. The process for financial assistance needs updated post-COVID.

Internal Practices and Processes Strategic Response

1. SAM needs to perform a systematic review of the appointment process maintaining its commitment to fairness while adding elements of convenience and efficiency.
2. Develop practices that enable effective communication in Spanish – through third parties, volunteers, staff or with electronic devices - and basic communication in other languages.
3. Undertake a thorough, professional safety and security review of building and client interaction practices.
4. SAM needs to look to diversify its staff and volunteer base and provide Diversity, Equity, and Inclusion training to staff and volunteers.
5. Develop safety practices to protect clients, volunteers, and staff; have an active set of referrals for recovery and mental health counselling.
6. Develop and implement new practices for financial assistance that balance efficiency with meaningful communication.