

Tampa Bay Health Collaborative
Allegany Franciscan Ministries
St. Petersburg College

Organizational Self-Assessment Results

For: Alpha House of Tampa

November 2011

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Tampa Bay Health Collaborative, Allegany Franciscan Ministries, and St. Petersburg College are pleased to have offered local organizations access to this online organizational self-assessment. This assessment will provide information for you to use in building the capacity of your organization to meet your mission. Adapted from the Finance Project (<http://www.financeproject.org/>), it asks about vision, results orientation, strategic financing, community support, key champions, adaptability, and leadership.

Twelve participants from your organization completed the assessment: 8 board members and 4 staff members, including the Executive Director. For each of the areas listed above, respondents from your organization rated both their perception of your organization's progress on a number of indicators and the relative importance of those indicators. The table below provides a summary of the ratings; the highest is always true (followed by usually, somewhat, rarely, and not at all). The final column identifies the areas respondents rated as most important to address right now.

Capacity Area	Ratings	Identified as important
Vision	always true	
Results Orientation	somewhat-always true	
Strategic Financing Orientation	usually-always true	Second most important
Broad-based Community Support	somewhat-always true	Most important
Key Champions	somewhat-always true	
Adaptability	somewhat-always true	
Leadership	varied responses	

Respondents from Alpha House of Tampa rated the organization highest on Vision and Strategic Financing Orientation and lower on Leadership. Respondents identified Broad-based Community Support as most important to the organization, and Strategic Financing Orientation as second most important. They are correct that building Broad-based Community Support is a key foundation for Strategic Financing. Comments suggest that new leadership is addressing some of these challenges; one respondent noted that having data to tell the story would be beneficial in developing key support. Respondents report that the board has undergone training; to truly build a fundraising board takes time and patience. It may be helpful to take lower rated indicators within

the priority areas, such as *packaging data in user-friendly formats and communicating them* and tackling those.

The next section provides aggregate results, by indicator, for each area (vision, key champions, etc.). Open-ended comments are also provided.

Element One: Vision

How well has your organization developed a clear vision and can articulate that vision including core values, mission and the organization's unique contribution?

	Not at all true	Rarely true	Somewhat true	Usually true	Always true
Our organization has a clear vision shared by board, staff, and other stakeholders, such as volunteers and partners.	0.0% (0)	0.0% (0)	25.0% (3)	16.7% (2)	58.3% (7)
Our organization's leaders (board and staff) inspire commitment to, and pursuit of, that vision.	0.0% (0)	0.0% (0)	16.7% (2)	16.7% (2)	66.7% (8)
Our organization communicates our core values and why we exist.	0.0% (0)	0.0% (0)	8.3% (1)	41.7% (5)	50.0% (6)
The people at our organization are committed to the vision.	0.0% (0)	0.0% (0)	0.0% (0)	25.0% (3)	75.0% (9)
Our organization understands our unique contribution - what we are best at.	0.0% (0)	0.0% (0)	16.7% (2)	16.7% (2)	66.7% (8)

Element Two: Results Orientation

These questions relate to your organization's practice of rigorously assembling evidence - quantitative or qualitative - to track performance and whether the organization uses that information to improve their work over time.

The implementation of a results orientation requires the use of data, information, measurement, best practices, and experience. Results assist in the measurement of organizational effectiveness and can provide program leaders and potential funders with a powerful tool for communication.

	Not at all true	Rarely true	Somewhat true	Usually true	Always true
Our organization has identified and can articulate our impact on the community.	0.0% (0)	8.3% (1)	25.0% (3)	16.7% (2)	50.0% (6)
Our organization has identified and uses indicators and performance measures to track superior performance.	0.0% (0)	8.3% (1)	16.7% (2)	33.3% (4)	41.7% (5)
Performance measures are used to plan work and budget resources.	0.0% (0)	8.3% (1)	41.7% (5)	25.0% (3)	25.0% (3)
At our organization, we examine data to find ways to improve service delivery.	0.0% (0)	8.3% (1)	25.0% (3)	41.7% (5)	25.0% (3)
At our organization, we implement improvements, including changing or discontinuing programs as necessary.	0.0% (0)	8.3% (1)	16.7% (2)	41.7% (5)	33.3% (4)

Element Three: Strategic Financing Orientation

These questions relate to whether your organization has identified a variety of resource strategies - time, money, and brand - to support the organization; whether the organization has a plan to pursue those strategies; and if the organization is following that plan.

Developing a strategic financing orientation involves clearly identifying a variety of financing strategies that could support the organization and a plan to implement those strategies.

	Not at all true	Rarely true	Somewhat true	Usually true	Always true
Our organization knows how much funding is needed to sustain our work.	0.0% (0)	8.3% (1)	8.3% (1)	25.0% (3)	58.3% (7)
Our organization has identified diverse resources necessary to sustain our work (one-time, ongoing, public, private, federal, public-private partnerships, etc.).	8.3% (1)	0.0% (0)	8.3% (1)	58.3% (7)	25.0% (3)
Our organization has identified and is pursuing ways to ensure the most efficient use of existing funds.	0.0% (0)	8.3% (1)	0.0% (0)	50.0% (6)	41.7% (5)
Our organization has identified and is pursuing ways to increase the flexibility of existing funding.	8.3% (1)	0.0% (0)	25.0% (3)	33.3% (4)	33.3% (4)

Element Four: Broad-based Community Support

Have your leaders have taken steps to involve the community in their work and gain community support based on the organization's positive impact?

Broad-based community support includes identifying stakeholders in your community whose support is critical to achieving the mission. The organization involves the community in their work and gains support based on the organization's distinctive impact.

	Not at all true	Rarely true	Somewhat true	Usually true	Always true
Our organization has a plan to establish a desired identity and reputation within the community.	0.0% (0)	0.0% (0)	45.5% (5)	27.3% (3)	27.3% (3)
Our organization involves a diverse set of stakeholders - including volunteers and clients - in their work at many levels: policy, management, administrative, and service delivery.	9.1% (1)	18.2% (2)	9.1% (1)	27.3% (3)	36.4% (4)
Our organization collects quantitative and qualitative data to show the value of our work.	0.0% (0)	9.1% (1)	27.3% (3)	27.3% (3)	36.4% (4)
Our organization packages data in user-friendly formats and communicates them regularly to the community, key stakeholders, media, potential funders, and more.	0.0% (0)	18.2% (2)	36.4% (4)	27.3% (3)	18.2% (2)
People believe in our mission and our capacity to deliver on that mission.	0.0% (0)	0.0% (0)	9.1% (1)	18.2% (2)	72.7% (8)

Element Five: Key Champions

One of the tasks of an organization's leaders is to identify potential champions for the organization. They need to approach on an individual level and are following a plan to do so.

Key champions are leaders from business, faith-based institutions, government, and other sectors of the community who have power and influence and are willing to use their prestige to generate support and focus community resources and energy for an organization.

	Not at all true	Rarely true	Somewhat true	Usually true	Always true
Our organization has identified key senior decision makers at the community and state levels who can influence sustainability.	0.0% (0)	9.1% (1)	36.4% (4)	45.5% (5)	9.1% (1)
Our organization has designed and implemented a plan for tailored outreach to those key decision makers (including appropriate messengers and messages).	0.0% (0)	18.2% (2)	45.5% (5)	27.3% (3)	9.1% (1)
Our organization has also developed other, less formal ways to contact and keep other potential champions informed.	0.0% (0)	0.0% (0)	18.2% (2)	72.7% (8)	9.1% (1)
Our organization uses a variety of strategies to encourage peer community champions, such as collaborating with other organizations (public and nonprofit) in service delivery, planning, and financing.	0.0% (0)	9.1% (1)	18.2% (2)	36.4% (4)	36.4% (4)

Element Six: Adaptability to Changing Conditions

These questions determine how well an organization's leaders seek new opportunities for resource development and support and are able to respond to new opportunities as they arise.

The most successful initiatives are those whose leaders are adept at anticipating, influencing, and responding effectively to trends in their environment. An organization's ability to track, contribute to, and adapt to changing policy environments, as well as to position itself to respond to national, state, and local decision makers' priorities is critical to sustainability.

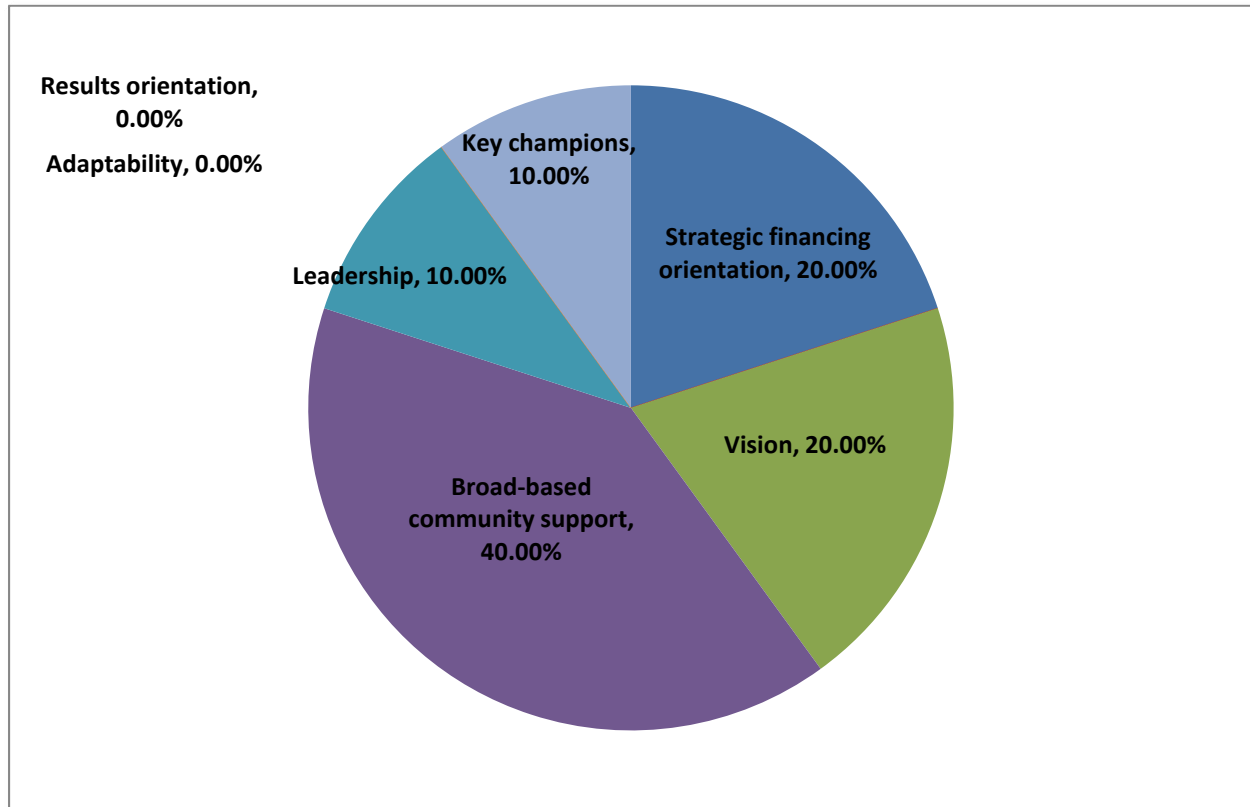
	Not at all true	Rarely true	Somewhat true	Usually true	Always true
Our organization routinely collects external information and uses it to adjust the strategic plan.	9.1% (1)	9.1% (1)	54.5% (6)	18.2% (2)	9.1% (1)
Our organization monitors changes in policy and the external environment to see how our organization fits.	9.1% (1)	0.0% (0)	36.4% (4)	36.4% (4)	18.2% (2)
Our organization's leaders have identified opportunities to participate in efforts to improve policies and the external environment.	9.1% (1)	18.2% (2)	18.2% (2)	27.3% (3)	27.3% (3)
Our organization has the decision-making tools it needs to respond to external and internal information.	0.0% (0)	0.0% (0)	36.4% (4)	45.5% (5)	18.2% (2)
Our organization uses external and internal information to build our capacity to achieve our mission.	0.0% (0)	9.1% (1)	18.2% (2)	54.5% (6)	18.2% (2)
Our organization continuously reviews and updates our strategic plan.	18.2% (2)	27.3% (3)	9.1% (1)	27.3% (3)	18.2% (2)

Element Seven: Leadership

Leadership - board and staff, managing staff, and re-energizing the organization have been shown to influence sustainability.

	Not at all true	Rarely true	Somewhat true	Usually true	Always true	I don't Know
Our board and staff leadership make the right decisions for the long-term sustainability of the organization and the achievement of our mission.	0.0% (0)	0.0% (0)	18.2% (2)	45.5% (5)	36.4% (4)	0.0% (0)
We have the right people at our organization: they are driven to make our organization the best.	0.0% (0)	0.0% (0)	0.0% (0)	45.5% (5)	54.5% (6)	0.0% (0)
We have people in the right positions at our organization.	0.0% (0)	0.0% (0)	0.0% (0)	63.6% (7)	36.4% (4)	0.0% (0)
The organization has created a professional development plan for its current and future staffing needs.	9.1% (1)	36.4% (4)	0.0% (0)	0.0% (0)	27.3% (3)	27.3% (3)
The organization has invested in ongoing professional development (conferences, seminars, classes, mentoring, etc.) for staff at all levels of the organization.	9.1% (1)	9.1% (1)	0.0% (0)	45.5% (5)	18.2% (2)	18.2% (2)
The organization has invested in leadership development for the board and executive staff.	0.0% (0)	9.1% (1)	9.1% (1)	18.2% (2)	54.5% (6)	9.1% (1)
Our leadership encourages persistent effort in the right direction.	0.0% (0)	0.0% (0)	9.1% (1)	36.4% (4)	54.5% (6)	0.0% (0)

Of the seven areas, which do you think is the MOST important to your organization right now?



Thinking about the area that you just identified, what do you do well in this area? What are the challenges in this area? What are your ideas for addressing those challenges?

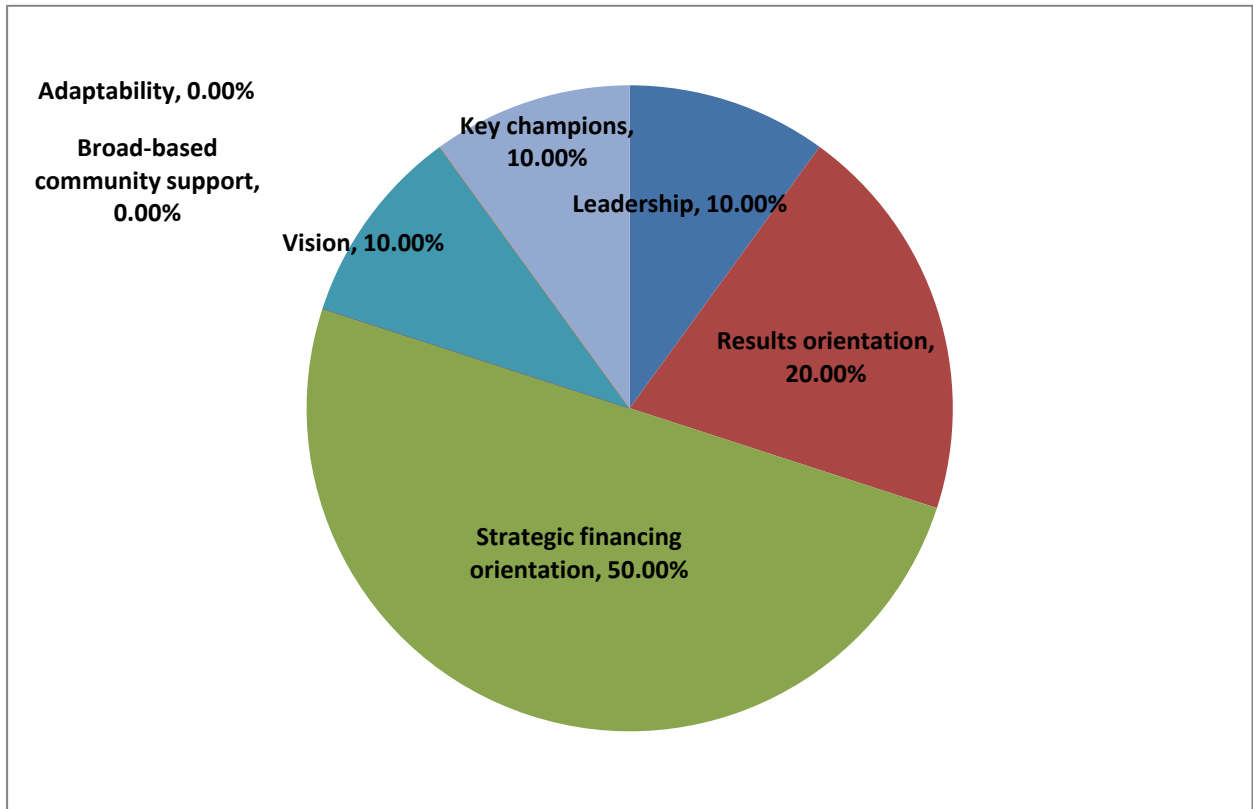
- I think that we are doing extremely well in this area now. With a new Executive Director that is making strides to raise our awareness in the community and find new ways of getting others involved with our mission. Our weakness here has been not enough outreach to others in the community and getting the name of Alpha out there. We have begun fixing these issues with more events directly related to the women we serve that require getting people involved in our community.
- WE HAVE SOME NEW PEOPLE IN LEADERSHIP ROLES THAT ARE DOING A FANTASTIC JOB

- Persistently increasing our outreach to community leaders and organizations. Challenges are finding the right contacts. Our ED is using her skills and the strengths of the board to pursue this
- As an established agency with 30 years of service to our clients and the community, we are at a crossroads where a clear vision for the future is needed.
- We appear to manage our funding and programs the best we can with what we have but often funding is a barrier, must develop more support for our agency within the community. Seek key stakeholders that will assist us in growing in all areas.
- One of our challenges is that even though we've been serving the community for 30 years and are the only licensed maternity home in Hillsborough County, we remain one of the County's best kept secrets. We are redesigning our website, reaching out more to our volunteers and donors, inviting targeted groups and individuals to come for tours, and initiating programs that involve the community. Our challenge is the limited number of staff we have to get all the work accomplished. We are looking at utilizing consultants to help us achieve our goals.
- We have been successfully meeting client needs for 30 years, yet many in the community do not even know we exist. Two things that sets us apart are 1) we are the only maternity home in our county and 2) when warranted, we are able to keep clients long enough to make a positive difference in them and their children. Many other programs only see clients 2-5 times for 30 minutes to an hour each time. We have them living here for many months and sometimes for over a year or more. We have all day long and also in the evenings to create a positive difference in them. They are not hanging out in the street and being subjected to negative conditions and harmful influences from others. We have not been as good as we should be at public relations as our recent PR audit clearly found. In an era of shrinking dollars for social services, we need more volunteers and more money so we can hire additional staff and have access to more highly trained professionals to service our clients. One problem we have had is that it has been difficult to follow up on our clients long term. They tend to be of lower socio-economic status and once they leave our facilities they may leave the area or relocate multiple times. They may not have a phone or a stable address. We need a better way to track clients post discharge. Armed with long-term data we will be 1) better able to adjust programs as warranted by the data and 2) better able to make our case to potential funders and to those in the community so that they can see the good we have done. We know that while our clients are here they usually make giant strides in education, psychological well-being, parenting, avoiding drug/alcohol abuse and employability. Babies born to our mothers are healthy and have excellent APGAR scores. Aside from the

humanitarian issues, this saves the taxpayers an enormous amount of money. If we were better able to get the word out about our successes and better able to know about more of our successes on a long term basis, we should be better able to gain broad-based community support. Such support could be very helpful when we have special needs.

- Very good with the public sector funders. Need more private sector support. Working to track clients who return to independent living.
- We have a wonderful mission, but have become somewhat complacent in looking for our big challenge. Perhaps should consider trying to significantly expand our reach and our services.

Of the seven areas, which do you think is the second most important to your organization right now?



Thinking about the area that you just identified, what do you do well in this area? What are the challenges in this area? What are your ideas for addressing those challenges?

- With a new Executive Director and lots of new faces in leadership roles, Alpha has been focusing on how to make these position better equipped to fulfill our mission. We have been focused recently on board training sessions and learning new ways of making the team better. I think one of the challenges that we face is that many of the board members are far removed from the actual "day to day" activities at Alpha. I think it would be important in the future for the board to spend time with the women we serve, whether it be a summer barbeque or Christmas party. Its important that we constantly be reminded of why we are here and the good that we are doing in these young women's lives.
- THE BENEVON MODEL HAS BEEN HELPFUL OVER THE YEARS

- Through the years, very well. Now is an extremely challenging time for NFPs. We will continue to provide stats for our ability to save the community resources and monies by our successes with women and children one family at a time
- We want to increase private funding to offset losses in government funding. However, private funding is also uncertain given the stagnant economy.
- We seem pretty clear about the services we are providing for the populations that we serve. We need to clarify our vision for moving forward. Again, funding is a challenge.
- We do very well at managing our money and not overspending. However, several of our buildings and vehicles are old and are in need of constant repair. We are continuously working on preventative maintenance and securing donated goods and service.
- We have managed to get a staff and Board that are very committed to our cause and work hard to support it. Now I believe we need to get more people on our Board who are in key positions in the community and either have themselves or have access to considerable financial resources. It is expensive to run residential program yet that is a core aspect of what we have to offer and our clients don't have anywhere else to live. In many cases, but for us, they would be pregnant and homeless or living with an abusive partner. Often we not only provide a home (temporary though it may be) but help clients get the education they never had, the respect they never had, the self-confidence they never had, the decent job they never had, the positive role models they never had, the emotional support they never had, the lessons in financial and life management they never had, the parenting skills they need, etc. We have had clients come in with no education and end up with college degrees and a good job and children who are raised successfully. But accomplishing this takes a well-trained staff, a sufficient number of staff, tuition money for clients, a good physical plant that has room for the children to play and room for the mothers to grow and develop, and treatment rooms, etc. We need to be able to pay staff competitive wages so we can keep them once the economy turns around. We need to be able to bring in appropriate people to lead programs for the clients on topics such as breast feeding, parenting, anger management, remaining drug-free, personal finance, job interviewing, personal grooming, dealing with difficult children, making a good impression, etc. We need vans to transport clients to a variety of things such as doctor appointments, libraries, etc. Having key champions and Board members with access to sources of funding for these various needs will assist us greatly in remaining sustainable and in meeting our goals for our clients. Additional revenues might also be able to be used to conduct longer term studies of more of our clients.

- For years we have compiled an enviable record of helping pregnant women in crisis deliver healthy babies, saving the city, county, etc. lots of money. The main challenge is keeping up with our moms and babies when they return to independent living to confirm that their time with us empowered them to lead promising lives when they're on their own.
- Have excellent finance staff and board treasurer. Need to plan for changes in revenue picture.