

NVCN Strategic Business Plan | 2019-2020

Using this document: Pages 1 and 2 list the prioritized actions by pillar based on Trustee input. Pages 3 through 16 list all of the items identified by the Trustees in the planning spreadsheet. Click on Pillar title to go the entire list of inputs.

Strategies / Goals / Initiatives	2019	2020
<p style="text-align: center;">Program Membership: (1) Strengthen the National Network</p> <p style="text-align: center;">Committee: Paula, Jim</p> <p>Develop NVCN as a robust Membership Model, a tried and tested method of volunteer caregiving that was founded in 1984 by the Robert Wood Johnson Faith in Action Program and now represented in every State in the Union</p> <p>Meet or exceed goals by Board, 120 in 2017, 200 in 2018 **Offered free membership for COVID-19</p> <p>Increase Educational Opportunities. Increase Communications Develop Ambassadors Strengthen communication between NVCN and Membership Continue to develop membership toolbox Seek member feedback on value/utility of current membership benefits, and gap(s) if any? Develop "licensed/template" (fee-based?) programs with support docs on the website (e.g., caregiver canines, hospital to home, sentimental journey, dementia friendly relief volunteer, etc) Rough draft of templates developed</p> <p>**Shop & Drop online system</p>	<p>*5/19</p> <p>AUG19</p>	<p>MAR20</p>
<p style="text-align: center;">Administrative Functions: (2) Present an Efficient, Effective Operation</p> <p style="text-align: center;">Committee: Jay, Carl, Judy</p> <p>Design an administrative infrastructure that offers a virtual presence for central operations that are automated and successful with minimal staffing afforded by the annual budget which is currently based on Membership fees.</p>		

<p>Set up working committees again...define scope..., i.e. search committee, governance committee, finance committee, development committee, etc, based on the functional Pillars from 2017.</p> <p>**Roundtable meetings for COVID-19 working well</p> <p>We need meetings that are M-F for those who do not want to participate on a Saturday.</p> <p>Reconcile various addresses on 990s, Determination Letter, Insurance, etc... to one location.</p> <p>Review and revise by-laws to meet the vision of NVCN as it is developing.</p> <p>Address leadership issues, board composition.</p> <p>Fully empower Ambassadors to implement their strategic plan (e.g., education programs, Walk the Block event).</p> <p>Book all F2F Board meetings to coincide with mini-conferences/national conference plans. Note priority states such as MN, PA.</p> <p>**Under review with an eye on moving toward a virtual conference format in fall 2020</p>		<p>MAR20</p> <p>!!!</p>
<p><u>Fundraising: (3) Create a Sustainable Business Model</u></p> <p>Committee: Tom, Paula</p> <p>Explore options and adopt methodologies for expanding revenue streams beyond annual membership fees to include Foundation, Corporate, Government and Individual fundraising.</p> <p>Develop a fundraising strategy.</p> <p>Development Fundraising Strategy/Collect and Analyze Year Two of Data Points.</p>		
<p><u>Marketing: (4) Build the Volunteer Caregiving Brand</u></p> <p>Committee: Jim, Matie</p>		

<p>Capitalize on the messages and imaging that are common to the core of values practiced by Volunteer Caregiving Organizations across the nation and present a united front to all audiences served.</p> <p>Design stronger marketing program to convey current NVCN benefits. This is not getting across as strong as it needs to be.</p> <p>Align Corporate Sponsorship opportunities with "licensed/template" (fee-based?) programs with support docs on the website (e.g., caregiver canines, hospital to home, sentimental journey, dementia friendly relief volunteer, etc)</p> <p>Book all F2F Board meetings to coincide with mini-conferences/national conference plans</p>		
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1) Program Membership: Strengthen the National Network	Resp.	2019	2020
<p>1A:</p> <p>Goals</p> <p>1) At this time, ensure that all NVCN Goals align to support program membership development. <i>(BOT, Quarterly Review)</i></p>	BOT		
<p>1B:</p> <p>Refined "STROBE" Membership Package that features Support (e.g., from the board), Tangibles (e.g., membership cert, TY letter), Resources (online library), Opportunity (networking/google group), Branding/Marketing (social media and messaging) and Excellence (Recognition/Seal of Distinction)</p> <p>1) Review Excellence Awards and plan for them in the budget accordingly.</p> <p>2) Coordinate marketing materials to ensure consistency and continuity in branding and messaging</p>			
<p>1C:</p> <p>Recruit, Retain and Renew from a base of 650 prospective members that have identified themselves to NVCN.</p> <p>PRIORITY: Strengthen communication between NVCN and Membership</p> <p>1) Set Membership Targets</p> <p>1a) PRIORITY: Meet or exceed goals by Board, 120 in 2017, 200 in 2018 Increase Educational Opportunities. Increase Communications Develop Ambassadors</p> <p>1b) PRIORITY: Design stronger marketing program to convey current NVCN benefits. This is not getting across as strong as it needs to. We need to get on the phone!</p> <p>1c) Market to your membership by using what they've asked (keep using their language). Must show them that you are delivering what they need.</p> <p>1d) Be bold, unique, positive, helpful (use strong, descriptive language that communicates this)</p>			

<p>2) Communicate via email the 2018-2019 pricing and renewal structure to members/prospective members 2a) Extend Give or Take 35 into 2019 to build membership (none, maybe one of the sign ups have taken advantage of the discount)</p> <p>3) Introduce the STROBE membership package and toolbox to members and prospective members</p> <p>4) Ensure that members and non-members are receiving access to appropriate tools and that their organization is represented accurately on the interactive map 4a) Develop tools for membership feedback (quick to access, keep it simple)</p> <p>5) Develop a nationwide Ambassador Program that will allow the formation of statewide coalitions, networking among program directors and efficient outreach/ communication by NVCN</p> <p>6) Develop membership recognition materials</p>			
<p>1D:</p> <p>Maintain a library of online resources that are valuable -and user-friendly to members and non-members</p> <p>PRIORITY: Continue to develop membership toolbox</p> <p>1) Review website to ensure complete files and accurate updates are made and that it is user- friendly 1.4a.1) Optimize website for key word search</p> <p>2) Continue to develop educational tools</p> <p>3) Service Learning Initiatives: Consider 2019-2020 activities that build on recent efforts 3a) Consider next steps with TX State Service Learning; Build on the idea of a phone app for volunteers</p> <p>4) Work with NASUAD to integrate the "Got Two Hours" Volunteer Campaign into the Instagram Campaign</p> <p>5) Online Volunteer Training: We also have an Online Volunteer Training that we have envisioned making more accessible and a unifying opportunity. This particular toolbox would have Certificates of Completion, NVCN Thank You cards for presentation to local program volunteers. Lots of opportunity here to enhance materials available to our members.</p> <p>6) Fund Development template with sources common for like members</p> <p>7) Detailed volunteer recruitment plan for members to adapt</p>	<p>Jenna/Am bassadors</p>		

<p>8) Resource-suggested grants with timeline and donor information, tips & dates</p> <p>9) Facts sheet with the needs of seniors, objectives and outcomes</p> <p>10) Ask members to submit their most used tools for membership toolbox</p> <p>11) Identify & share best practices, current trends & latest technology</p> <p>12) PRIORITY: Seek member feedback on value/utility of current membership benefits, and gap(s) if any?</p> <p>13) Align licenses/template programs with Corporate Fundraising Themes that can be advanced through partnerships with individual and regional member programs</p> <p>1) PRIORITY: Develop and promote "licensed/template" (fee-based?) programs with support docs on the website (e.g., caregiver canines, hospital to home, sentimental journey, dementia friendly relief volunteer, etc... (Matrie)</p> <p>1a) Hospital Homecoming Program (Dignity Health/Archstone)</p> <p>1b) Corporate Outreach for Sustainability</p> <p>1c) Economic Solutions (NCOA)</p> <p>1d) Aging Mastery Program (NCOA)</p> <p>1e) Caregiver Canines</p> <p>Note: A 50-50 split of the \$50 licensing fee and annual renewal of \$25 needs to be revisited in an MOU between NVCN and Caregiver Volunteers of Central Jersey</p>	Matrie	8/19	
<p>1E:</p> <p>Expand membership opportunities to include individuals and related organizations that would benefit from being a part of the national network.</p> <p>1) Develop certification program (consider starting with the Online Volunteer Training module)</p> <p>2) FEMA (Tamara Theiler) would like to work with us on Emergency Planning for the programs. We are discussing funding sources that would support any adjustments that need to be made at the program level. They would like to coordinate with a small Working Group of program officers.</p> <p>3) Once a robust membership is established that defines the national network of programs, develop membership enrollment packages that would appeal to partner programs/community organizations that work with member programs.</p>			

<p>3a) Once we've made a major dent in attracting VCOs, Identify peripheral programs and design benefits to support their membership (e.g., volunteer transportation, seniors centers, HOAs, etc.)</p> <p>4) Develop an individual donor package that would appeal to population segments such as students</p> <p>4a) Complete the elements for the Student Membership Leadership Track</p> <p>5) Welcome Wagon and/or FIA Orientation outside of active program directors and to supplement ambassador efforts. (possible board responsibility?)</p> <p>6) Appoint a team to help with new and struggling programs (this is its own challenge and too much to put on the ambassadors, active program directors/could be good for recent retirees)</p>			
<p>1F:</p> <p>National Conference</p> <p>1) AIRS Conference Proposal 2019-2020</p> <p>1a) Canvas membership for current needs before setting conference agenda</p> <p>1b) Provide opportunities for informal discussions between members</p> <p>1c) Secure professional marketing materials (table cover, retractable banners & signs)</p> <p>1d) Review AIRS proposal for a Sunday Summit that takes the place of the SCA joint conference. Steve Ewart/Ride Scheduler has already committed \$2500 to NVCN for this purpose.</p>			
<p>1G:</p> <p>FIA Working Group Recommendation</p> <p>1) Consider development of Delegates (as recommended by FIA Working Group) to serve as a Welcome Wagon, support new and struggling programs</p> <p>2) Develop a committee of past NVCN board members to work on special projects; Develop strategy to utilize former board members, founding members, former directors</p>			

<u>2) Administrative Functions: Present an Efficient, Effective Operation</u>	Resp	2019	2020
<p>2A:</p> <p>Set up process-oriented Administrative Support using the virtual office system, Teamwork and online database, Salesforce.</p> <p>1) Transition and train administrative assistant on website updates 2) Confirm general business operations for Mail Service, Phones, Email, Website, Work Assignments and Communication 3) Review Membership Application process (ensure that it is compliant with insurance and covered for liability purposes) 4) Google docs maintenance and organization</p>			
<p>2B:</p> <p>Organization Alignment</p> <p>1) Insurance Policy Review D&O Personal Umbrella policies EPLI with regard to contract labor</p> <p>2) Banking Update bank signatures Review Treasurer’s title to align with Chase criteria</p> <p>3) Determine a main address for NVCN and update records accordingly PRIORITY: Reconcile various addresses on 990s, Determination Letter, Insurance, etc... to one location Relocate mailing address to a commercial location (e.g., program office)</p>	<p>Inez/Jay</p> <p>Jay/Tammy</p> <p>BOT</p> <p>Tammy</p>	<p>1/19</p> <p>7/19</p> <p>3/19</p> <p>8/19</p>	
<p>2C:</p> <p>By-Laws</p>			

PRIORITY: Review and revise by-laws to meet the vision of NVCN as it is developing. Keep it nimble to respond to the dynamic needs.

- 1) Section 2.1 MEMBERSHIP CATEGORIES do not align with current strategies (VCO Membership, sponsorships and individual donors)
- 2) Also need to align this with how we are tracking in The MESS. Individuals are showing up as “VCO Memberships” which makes it confusing for staff to know who to list on the Locator Map.

2D:

Support Volunteer and Donor Groups

- 1) All players (board, staff, ambassadors, members) yearly identify priorities to use for current year (helps staff to stay on path),
- 2) Track areas that need further development throughout the year to prioritize and develop for following year

PRIORITY: Address leadership issues, board composition

3) Ambassadors

3a) align the Ambassadors Strategic Plan with the Master 2019-2020 Initiatives (Paula)

https://docs.google.com/document/d/1IFmLXDF8alr4M7PjCZCdsPlxWDJjG8EY_mPaQog3HJU/edit?usp=sharing

3b) Design educational programs for membership

3c) Ambassadors to review their respective States on the Locator Map to ensure full capture of every VCO

3d) PRIORITY: Fully empower Ambassadors to implement their strategic plan (e.g., education programs, Walk the Block event)

4) Board of Trustees

<p>5a) PRIORITY: Book all F2F Board meetings to coincide with mini-conferences/national conference plans. Note priority states such as MN, PA,</p> <p>5b) Review Board Orientation</p> <p>5c) Update strategic plan and set planning priorities yearly</p> <p>5d) Develop method to track strengths and weaknesses to us during strategic planning and while developing yearly planning priorities</p> <p>5e) PRIORITY: Need to set up committees again...define scope..., i.e. search committee, governance committee, finance committee, development committee, etc.</p> <p>5e.1) Redesign the Governance Committee for a more inclusive and strategic approach of the Board with a focus on corporate connections. Suggest more opportunities for candidates and trustees to make multiple connections in anticipation of an invitation.</p> <p>5) Create 2019 budget</p> <p>6a) Plan to increase cash position</p> <p>6b) As membership grows, the board will need to have a plan in place to provide ample staffing support. Public inquiries need also to be addressed as part of the hours required by staff.</p> <p>6) Elect Executive Leadership and appoint Executive Director (Judy would prefer that this position is no longer an “acting” position)</p>			
<p>2E:</p> <p>Set up FileMaker Pro to accommodate member programs, prospective member programs, media contacts, individual donors, corporate donors, foundations, community partners, etc.</p> <p>1) Perform a complete data scrub to ensure the integrity of the data consolidating all source data (excel spreadsheets,</p>	<p>Tammy</p>	<p>4/19</p>	

<p>FileMaker Pro, MailChimp, Vertical Response, Quickbooks) and using an adopted Style Guide</p> <ol style="list-style-type: none"> 2) Develop a strategic approach for tackling priority data needs 3) Complete transition of database from Google Sheet/The MESS to FileMaker Pro 			
<p>2F:</p> <p>Streamline operations by integrating an automated system with standardized fields between QuickBooks, FileMaker Pro, MailChimp</p> <ol style="list-style-type: none"> 1) Strategize member vs non-member welcome package 2) Coordinate updates to website and mailchimp with Membership Director 3) Finish Operational SOP's--as needed 			
<p>2G:</p> <p>Identify process for trouble-shooting and updating the NVCNetwork website. and select social media outlets</p> <ol style="list-style-type: none"> 1) Ensure that processes are in place for acknowledging donors, recognizing sponsors online and through social media 2) Address immediate issues with service/down periods and hack threats 3) Back-end website data pulls to identify new/renewal member sign ups and address user access issues 4) Updates to SobiPro to ensure interactive map is current 5) Develop wish list for donor-related information on the website, that includes Home Page Recognition for major donors, a prominent "Donate Now" button to PayPal (e.g., If this information was useful to you in finding support for your loved one, please consider making a tax-deductible donation to NVCN today!), 6) General information page about making a donation 			
<p>2F:</p> <p>Develop a sustainable leadership track for the Board of Trustees</p> <ol style="list-style-type: none"> 1) Set up committees of Trustees based on the 4 functional and planning pillars. These committees have the 			

responsibility to execute, manage and report the progress made against these plans.			
2G: Staffing 1) Review staffing needs to ensure ample support based on budget allowances.	Tammy	2/19	

3) Fundraising: Create a Sustainable Business Model	Resp	2019	2020
3A: Make the Case for supporting the Volunteer Caregiving Movement 1) PRIORITY: Develop a fundraising strategy 2) PRIORITY: Development Fundraising Strategy/Collect and Analyze Year Two of Data Points 2a) Review the 2017-2018 survey with an eye on housing this data in FileMaker Pro where it can be extracted and analyzed 3) Create a national profile that illustrates the impact of volunteer caregiving since 1984 in the United States 4) Coordinate the collection of individual program data that can be presented regionally, by state or nationally. 5) Build a three-year reserve 6) Yearly create a fund development plan & budget			
3B: Explore State Coalitions of Support that can be coordinated with the Membership efforts 1) Utilize Ambassador Program for outreach and coordination 2) Initial efforts have been launched in California, Minnesota, Pennsylvania, Arizona			
3C:			

<p>Consider Fundraising Themes that can be advanced through partnerships with individual and regional member programs</p> <p>2) PRIORITY: Develop and promote "licensed/template" (fee-based?) programs with support docs on the website (e.g., caregiver canines, hospital to home, sentimental journey, dementia friendly relief volunteer, etc... (Matrìe)</p> <p>1a) Hospital Homecoming Program (Dignity Health/Archstone) 1b) Corporate Outreach for Sustainability 1c) Economic Solutions (NCOA) 1d) Aging Mastery Program (NCOA) 1e) Caregiver Canines Note: A 50-50 split of the \$50 licensing fee and annual renewal of \$25 needs to be revisited in an MOU between NVCN and Caregiver Volunteers of Central Jersey</p>			
<p>3D: Develop Corporate Donor Base</p> <p>1) Obtain a list of former donors with giving history to use in developing a prospect list 2) Develop General Benefit Package for Corporate Sponsorships 3) Offer a special rate to member programs who want to use NVCN advertising channels 4) Discussion underway with Ventura County Community Foundation, Altarum, Texas State and Volunteer Doug Miller to explore a survey approach that may offer an opportunity for funding. 5) Leverage local program success for national benefit. For example, revisit Caregiver Canines and go for a national foundation that would help replicate this program at VCOs. It might be too late for the Canine program, but Hospital to Home should be presented to Humana, United Health, etc.</p>			
<p>3E: Develop Foundation Donor Base</p>			

<p>1) Obtain a list of former donors with giving history to use in developing a prospect list</p>			
<p>3F:</p> <p>Develop Individual Donor Base</p> <p>1) Obtain a list of former donors with giving history to use in developing a prospect list 2) Schedule regular appeal letters in the fall and spring via MailChimp 3) Launch Instagram Campaign in conjunction with the 35th Anniversary</p>			
<p>3G:</p> <p>Government</p> <p>1) Consider Government grant opportunities with caution 2) Identify a transportation liaison for the BOT</p>	<p>Tammy/AC L, AoA</p>	<p>6/19</p>	
<p>3F</p> <p>Develop a grant writing program</p> <p>1) Local programs to serve a fiscal sponsors with 15% admin fee for large regional or national grant projects. Build in a 15% Admin Fee (10% cut for the local program and a 5% cut for NVCN). 2) Plan for submitting major grants under a fiscal sponsor</p>			
<p>3G:</p> <p>Donor Stewardship</p> <p>1) Ensure that timely Acknowledgement Processes are in place 2) Ensure that Sponsor Benefits are being implemented in a timely manner</p>			
<p>3H)</p> <p>(See Membership 1D.13) Align licenses/template programs with Corporate Fundraising Themes that can be advanced through partnerships with individual and regional member programs</p> <p>3) PRIORITY: Develop and promote "licensed/template" (fee-based?) programs with support docs on the</p>			

<p>website (e.g., caregiver canines, hospital to home, sentimental journey, dementia friendly relief volunteer, etc... (Matrìe)</p>			
<p>3F: Expand the Network</p> <ol style="list-style-type: none"> 1) Enlist the Board of Trustees and Staff in building the database with qualified prospects through robust friend-raising and fundraising efforts 2) Provide an easy process for trustees and staff to report contacts to the administrative assistant. 3) Set reminders as part of a Move Management System to ensure progress is made 			
<p>3G: Review Organization for Ethical Processes particularly with regard to donors, partners and processes.</p> <ol style="list-style-type: none"> 1) Adopt a Gift Acceptance Guideline that outlines various gift options, presents parameters to the board to ensure donors and partners align with NVCN values. (refer to: https://www.councilofnonprofits.org/tools-resources/ethical-fundraising) 2) Review criteria for identifying and forging national partnerships. Consider 990s, scope of influence 			
<p>3H: National Affinity Contracts</p> <ol style="list-style-type: none"> 1) Research and recommend national discount programs (e.g., Health Insurance, Program Insurance, background checks, etc) 			
<p>3I: National Conference</p> <ol style="list-style-type: none"> 1) Review AIRS proposal for a Sunday Summit that takes the place of the SCA joint conference. Steve Ewart/Ride 			

Scheduler has already committed \$2500 to NVCN for this purpose.			

4) Marketing: Build the Volunteer Caregiving Brand	Resp	2019	2020
<p>4A:</p> <p>1) Identify national partners that have a mutual interest and capacity for advancing the Volunteer Caregiving Movement, leveraging a coordinated effort for Development activities when possible. (note: Determine who NVCN should align with)</p> <p>4a.1) Area Agencies on Aging 4a.2) 2-11 4a.3) Hospital Association 4a.4) Meal on Wheels 4a.5) The Main Office fields a lot of calls from the American Cancer Society referring to local volunteer caregiving organizations for support networks and transportation</p> <p>2) Consider a regional approach that mirrors the regional maps of the national organizations with which NVCN aligns. Refer to Area Agencies on Aging/2-11 as reference points.</p> <p>3) (Continued from 2017-2019) Align with Like Minded National Players Determine Critical Interests</p>			
<p>4B:</p> <p>Branding</p> <p>1) Review branding and messaging for continuity and consistency in presentation throughout printed and online communications.</p> <p>2) Develop a Style Guide with an emphasis on Faith in Action as a common denominator</p>			

<ul style="list-style-type: none"> 3) Conduct this review for NVCN's internal and external communication 4) Conduct this review for partnership activities 5) Marketing/public awareness plan that can be adapted by membership agencies 6) Develop public awareness 7) Determine why members become part of NVCN 8) Brainstorm on who can be the face of NVCN 			
<p>4C:</p> <p>Messaging</p> <ul style="list-style-type: none"> 1) Refine the branding message to include the core values through more concise and targeted images and phrasing 2) Develop bulleted Talking Points for Trustees and Staff 3) Develop annual presentation: State of NVCN <ul style="list-style-type: none"> 3a) Publish an Annual Report; review corporate/individual benefits to ensure alignment with organizational goals 3b) Make a plan for producing an annual report as part of the 2019-2020 strategic plan 3c) Produce an annual report 4) Develop branding strategy <ul style="list-style-type: none"> 4a) Refer to Faith in Action branding document 4b) Ambassadors and Programs are rallying around the Faith in Action brand and view this as a core message that must be maintained and strengthened going forward. 4c) Review the Faith in Action trademark category (at the request of FIA Working Group) 			
<p>4D:</p> <p>Social Media</p> <ul style="list-style-type: none"> 1) Strategize cost-effective ways to expand Social Media with sensitivity to staff time and costs (e.g., Instagram, Facebook) 2) Build up social media program around Instagram campaign 	Michelle Garcia	1/2019	2020 library complete in 7/2019
<p>4E:</p> <p>Sponsorships</p>			

1) Support sponsorship development			
<p>4F:</p> <p>35th ANNIVERSARY</p> <ul style="list-style-type: none"> 1) Publicity to coincide with Walk the Block project 2) RWJF Founders Circle profiles. <ul style="list-style-type: none"> a) Leverage these contacts and consider the development of RWJF "Founders Circle." b) Consider Founders Circle (former RWJF board members) for current development and long-range planned giving program c) Consider Emeritus Circle as part of long-range planned giving program (\$1,200 annual minimum) to be consistent with the Trustee's Circle on the Individual Giving Levels 	Vilma	4/19	