



Finding our own North Star

NJHSA Executive Conference
November 2018

Agenda

- Overview
- Recap of Sunday's conversation
- Finding our own North Star – JEVS as Case Study
- The North Star Self-Assessment
- From Assessment to Action
- Debrief and Wrap-up



Finding Our North Star: JEVS Human Services Case Study

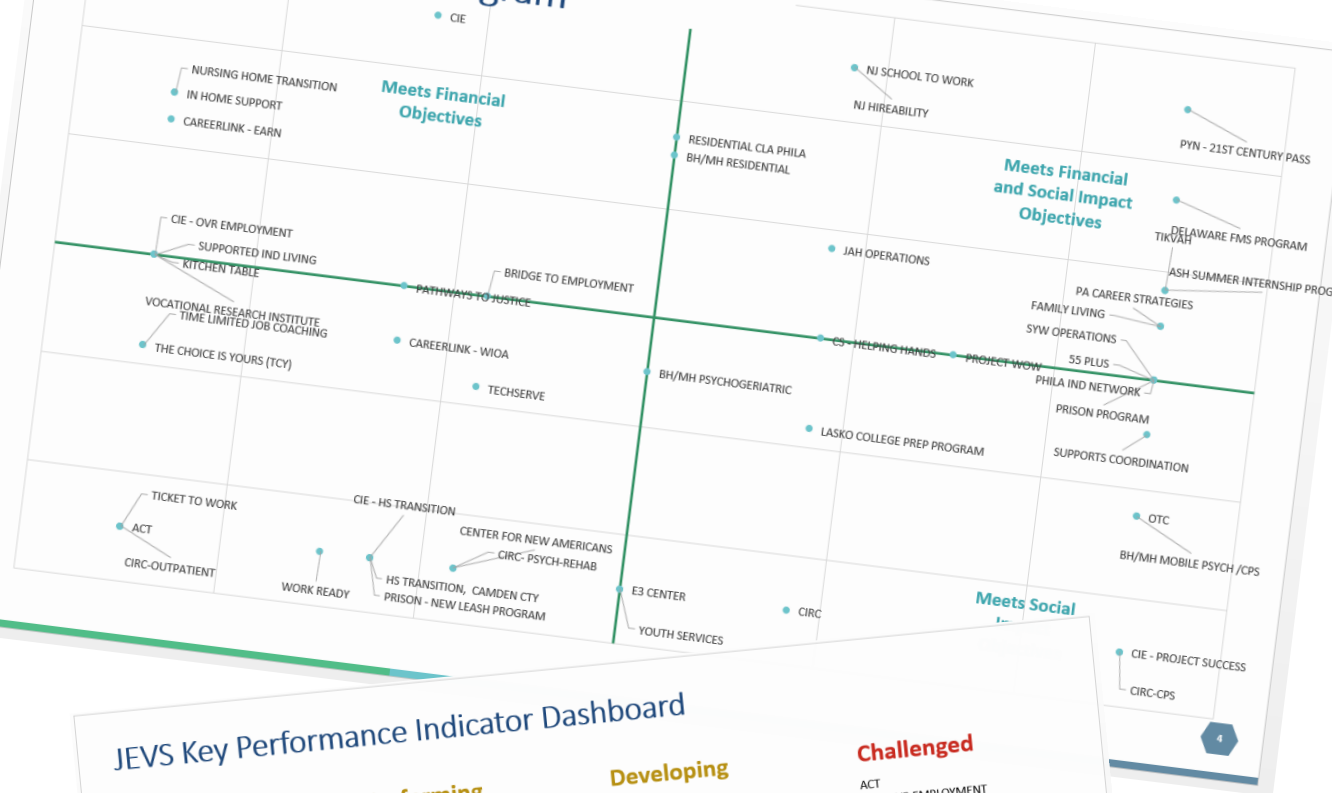


North Star Initiatives: JEVS' Self Assessment



	JEVS Grade
Commitment to Outcomes	B-
Capacity for Innovation	B
Partnerships and Networks	C
Financial Management	B+

KPI Performance By Program



Strengths

- Rudimentary work on **social impact measurement** and dashboards underway
- Dedicated assessment and evaluation **staffer** recently hired
- Organization has committed resources to support a handful of **3rd party evaluations**

Challenges

- **Focus remains on OUTPUTS**; cultural change needed for IMPACT
- **Business model** for sustainable social impact and assessment activities not yet clear
- Still building **management capacity** to use social impact feedback as a management tool

JEVS Key Performance Indicator Dashboard

High Performing

RESIDENTIAL CLA PHILA
TIKVAH
S5 PLUS
NJ HIREABILITY
NJ SCHOOL TO WORK
PA CAREER STRATEGIES
PRISON PROGRAM
ASH SUMMER INTERNSHIP PROGRAM
CIE - PROJECT SUCCESS
DELAWARE FMS PROGRAM
PYN - 21ST CENTURY PASS

Performing

CIE
SUPPORTS COORDINATION
LASKO COLLEGE PREP PROGRAM
IN HOME SUPPORT
CS - HELPING HANDS
SYW OPERATIONS
NURSING HOME TRANSITION
OTC
PHILA IND NETWORK
BH/MH RESIDENTIAL
FAMILY LIVING
PROJECT WOW

Developing

CIE - HS TRANSITION
YOUTH SERVICES
CAREERLINK - WIOA
E3 CENTER
PATHWAYS TO JUSTICE
SUPPORTED IND LIVING
TECHSERVE
CAREERLINK - EARN
BH/MH MOBILE PSYCH /CPS
BRIDGE TO EMPLOYMENT
CIRC
VOCATIONAL RESEARCH INSTITUTE
BH/MH PSYCHOGERIATRIC

Challenged

ACT
CIE - OVR EMPLOYMENT
CIRC-OUTPATIENT
TICKET TO WORK
CIRC- PSYCH-REHAB
THE CHOICE IS YOURS (TCY)
WORK READY
HS TRANSITION, CAMDEN CTY
PRISON - NEW LEASH PROGRAM
TIME LIMITED JOB COACHING
CENTER FOR NEW AMERICANS
CIRC-CPS
KITCHEN TABLE



(*) Uses computed financial KPIs for revenue and net excess after indirect

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Toward the
Big Ideas
that define JEVS



Strengths

- Actively engaged in developing field leading perspectives ("**Big Ideas**")
- Actively invest **resources** to gain new perspectives in learning by undertaking site visits and engaging consultants
- Dedicated **business development function** has worked to cultivate competitive intelligence
- Willing to take risks to **hire new talent** to drive innovation in new areas of work

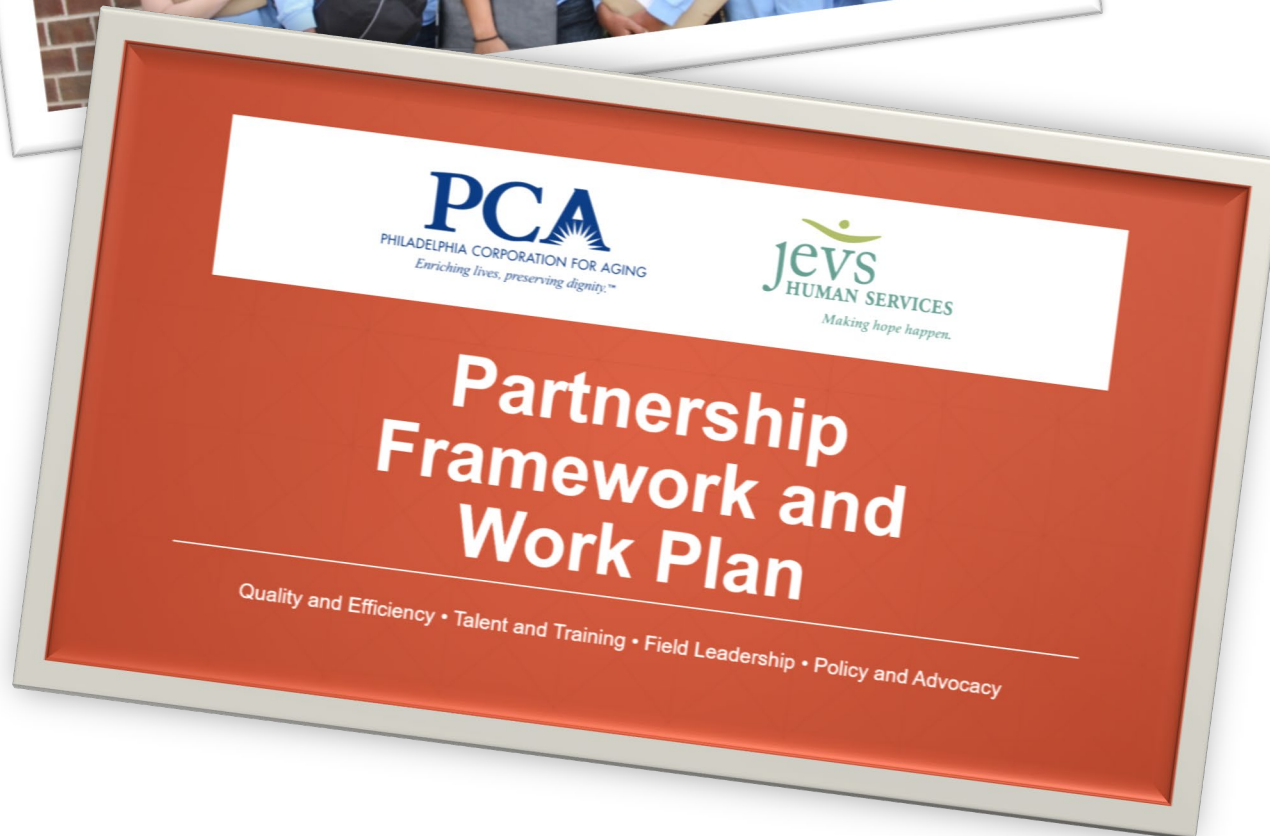
Challenges

- We sometimes pursue **too many new ideas** so that execution is uneven
- Innovation is very **unevenly distributed** in the organization

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Strengths

- We have executed on **one acquisition** in the last three years and have absorbed the operations of another nonprofit
- We have an **MOU with a partner/competitor** to share intelligence and work together on operational issues
- We have an active **pipeline** of merger, acquisition, and partnership opportunities

Challenges

- **Executing** on these opportunities feels clumsy and is extremely time consuming – we're not good at this yet



North Star Initiatives: JEVS' Self Assessment

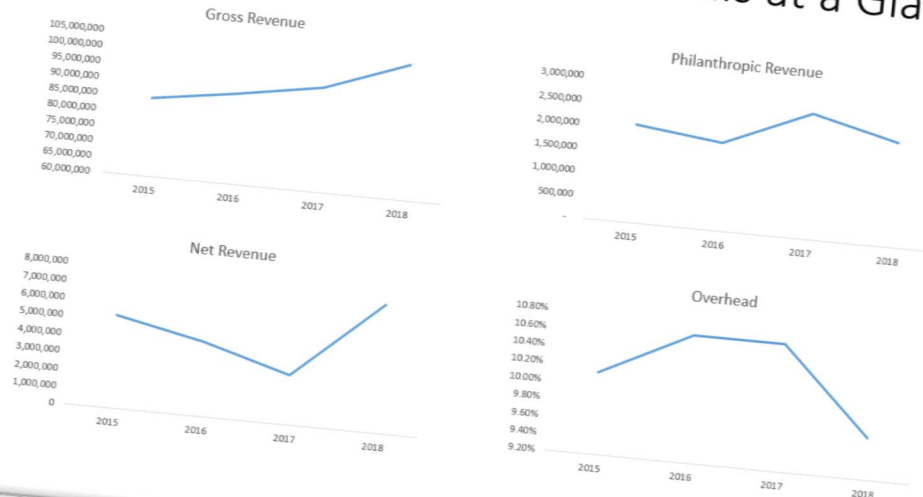
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Benchmarking JEVS

2014 Statistics (6/30/15)	JEVS	%tile of HHS NPs	%tile of Large NPs
Net Income / Revenues	3.0%	70 th	70 th
Operating Net Income / Revenues	0.7%	70 th	70 th
Philanthropy / Revenues	2.8%	40 th	60 th
Overhead (Indirect / Direct)	12%	50 th	70 th

	JEVS	Benchmark
Operating Surplus – All nonprofits (2014)	5.9%	4.3%
Unrestricted Net Assets – Months of Operating Costs (2014)	6.7	15.48

JEVS Human Services – Financials at a Glance







Strengths

- We have a **deep bench** of financial expertise on our board and strong financial systems
- The organization has a **strong balance sheet** and has a portfolio of programs that is financially sustainable today
- **Strong culture** for financial performance across all programs


Challenges

- Our financial performance is **dependent on one or two programs** operating with a net surplus
- We do not have a comprehensive view of **risk and risk management** for the organization

-  Yourself
-  Your board
-  Mgmt team
-  Your funders

North Star #1: Commitment to Outcomes

Establishing Social Impact Targets

1	2	3	4	5	
We do not track annual social impact objectives	Our reports to funders describe our annual social impact objectives	We establish social annual impact objectives <u>independently</u> of our funders	We use industry-recognized social impact indicators for annual goals 	We engage third-party evaluators to help us establish and track annual social impact goals.	
Action Plan:					

Tools/Management and Information Systems (MIS)

1	2	3	4	5	
We use MIS or ad hoc tools to manage service delivery data, but do not aggregate data for analysis	We periodically query our MIS for aggregated data for funders	We use aggregated MIS data for assessment at monthly or quarterly supervisory meetings.	We are readily able to aggregate data across data systems to conduct queries	We are readily able to aggregate data across data systems and have a plan for continuing investment in data tools.	
Action Plan:					

From Assessment to Action - Instructions

- Pick ONE of the North Star Recommendations
- Working on your own, think of 4-5 concrete action steps – across the component measures -- that your organization could take to move your organization to higher performance levels
- Think of 2-3 things that the Network could do to support members in doing this work



From Assessment to Action - Instructions

- Caucus by recommendation
- In these caucuses, share ideas you have for work at the organization level
- Discuss Network actions that could support this work
- Take pictures of your Design Forms and return the originals

