

**Moving Forward:
A Plan for Thames River and Martin House
to Conquer Funding Challenges By 2022**

Summary notes from June 28, 2017 Board Retreat

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□ Issues of Concern in 2017

- Funding: current imbalance of funding sources; volume of funding; skill base/knowledge/connections internally and on Board to raise money
- External Relationships: Have the right connections in the right places -- State, Federal, local level
- Operational Stability
- Thames River: Change in strategic direction -- taking only youth, families 18-25 with children
- Facilities:

Martin House -- State Lease up in 4 years, financial , how to sustain, model shifting to more independent situation

Thames River -- debt coming due, resources to maintain, update building
- Sustaining Human Side: energy of people doing the work, incentivizing, making "whole" (from budget cuts, etc.)
- Process of Board: Is it working? 1 or 2 Boards? 1 Board, targeted committees?
- Attention on homelessness issue elsewhere, e.g. addition, etc. ; reduction in chronic homelessness

Selected for Primary Attention: FUNDING

FUNDING

□ Lessons Learned From Past -- Good and Bad:

- Grant writing losses -- analysis shows big towns/large organizations have better track record, possibly because of influence/lobbying/relationships; need to improve relationships, more finely target grants, spread story
- Networking -- not enough being done with power leaders, opinion leaders, need to increase stature in communities we serve
- Done good planning so continue! Weathered the recession, keeping up; "can we do better?"
- "Pennywise and pound foolish" at times; possible grantwriter? (pros and cons)
- Lack of presence in community; pr needed
- "Awesome" good staff!!!
- Don't miss opportunities
- Concentrated revenue stream in a few areas -- dangerous!

	Small Grants/ Foundations	State	Federal	United Way	Individual Contributions
Thames River*		25%	25%		
Martin House*		50%		25%	

**Verify and fill in chart for complete, accurate picture.*

- **Environmental Scan:** (What is happening externally that could impact any plan of action and should be planned for)

Martin House

- Lease is up in 4 years
- Building decay
- Obsolete program model? Move to mixed use model?
- Tightening/uncertain funding
- Succession planning for ED & Board members
- Additions -- Opioid issues distracting from homelessness issue
- Politics in Flux
- Demographics in flux
- Positive: Not reliant on billable services

Thames River

- Boiler
- Age of Building -- need new roof, need windows
- Positive: do own building
- Children's issues
- Focus on 18-24 year olds

Goal: STABILIZE, INCREASE FUNDING

- ❑ Martin House & Thames River: Get to one year of operating reserves by 2022 (year 5)

- ❑ Thames River: To stabilize house in order to:
 - Pay off debt by summer 2018
 - Build toward having 1 year reserve
 - Make employees whole (raises, benefits, etc.)
 - Gain buy-in of stakeholders

- ❑ Martin House
 - Achieve adequate (define) funding to serve population
 - Spread out funding sources to reduce uncertainty, enhance planning
 - Achieve 1 year reserve by 2022
 - Contingency plan for building and program model

<u>Martin House:</u>	<u>Thames River:</u>
<ul style="list-style-type: none">❑ <u>Target Audiences:</u><ul style="list-style-type: none">● Legislators/policy makers *● Additional Foundations, Municipalities/public officials/etc.● Movers and Shakers/Opinion leaders*● Media*● Homeless & Mental Health Interest Communities● Old, Rich people with no children*● Financial advisors/lawyers, estate planners*● Business community/hospitals*● Educational Community● Client Families*	<ul style="list-style-type: none">❑ <u>Priority Target Audiences:</u><ul style="list-style-type: none">● Business Community● Movers and Shakers● Rich, Old People● Legislators

* **PRIORITY AUDIENCES**

Goal: Thames River & Martin House: Get to one year of operating reserves by 2022 (year 5)

Thames River

- Stabilize financial house
- Pay off debt by summer 2018
- Build toward having 1 year reserve
- Make employees whole (raises, benefits, etc.)
- Gain buy-in of stakeholders

Martin House

- Achieve adequate (define) funding to serve population
- Spread out funding sources to reduce uncertainty, enhance planning
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Thames River Action Plan

Target Audience	Activities	Timeline	Assignment	Other
Business Community/ Movers and Shakers/	Create a target list of key opinion leaders and businesses in the region who should know about & value Thames River			
	Build a data base on these contacts that identifies how they are connected with each other and potentially TR, contact opportunities, feedback;			
	Set up schedule for outreach; manage schedule			
	Recruit at least two (2) as Board members (preferably strategic thinkers)			
	Consider and prepare any outreach materials that might be needed; produce			
	Create giving opportunity to begin/encourage giving behavior, cement connection			
	Establish Advisory Committee (non-Board member) for one-on-one counsel only; bring together only for appreciation, honoring unless special need			
Chambers of Commerce	Set schedule for attendance by ED, Board members beyond Laura			
	Feed names to movers and shakers list (above)			
	Seek Chamber support (if do fundraisers, etc. for local institutions)			
	Brainstorm targeted messaging to incorporate into presentation related to current events; prepare presentation, schedule and give			

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Target Audience	Activities	Timeline	Assignment	Other
Rich Old People	Build a list of potentials (gather from high end giving lists e.g. arts, culture, etc. and business/movers and shakers)			
	Create data base of potentials to track contacts, giving, feedback			
	Identify their connections, opinion leaders to find common interests			
	Build and implement individual outreach/education plan			
Financial Advisors/Estate Attorneys	Build list and create database; identify opinion leaders;			
	Build and implement individual outreach/education plan (including messaging and materials)			
In Addition (not audience specific)	Have targeted discussion re pros and cons of a capital campaign			
	Go through identified issues not financial related and discuss one at each Board meeting; continue to revisit until resolved; add new issues as they arise			
	Consider marketing/pr function to add to organization (shared?) or a strong pr/marketing board member; also grant writer			

Martin House Action Plan

Target Audience	Activities	Timeline	Assignment	Other
Legislators/policymakers/local government	Build list of key leaders and connections to them;			
	Set up database to track contacts, input, feedback			
	Hold legislative breakfast at beginning of new session			
	Start one-on-one meetings to inform, educate			
	Consider a legislative "summit" to discuss overall issue of homelessness			
	Prepare materials that can be education, leave behind			
Business Community/Movers and Shakers/Hospitals	Identify key businesses and recruit 2 board members with strategic experience and money (Electric Boat, Pfizer, Siemens, Foxwood, NPU, Eversource, etc.)			
	Create advisory committee (for one-on-one counsel only); gather only for thank you's and honors			
Chambers of Commerce	ED and Board members rotate attending with Laura;			
	Create presentation targeted to their issues, interests			
	Apply for funds, funding opportunities			

Target Audience	Activities	Timeline	Assignment	Other
Old Rich People	Build list of financial advisors and estate lawyers			
	Build list of large donors based on giving elsewhere (arts, hunger, etc.)			
	Create database to track and manage contacts			
	Contact regularly with educational information; seek small donation to start giving process			
	Consider special funding campaign just from this group			
Media (social and traditional)	Identify key sources for targeted audiences			
	Conduct outreach to media sources; invite on tour, educate on issues			
	Send regular newsworthy info; post on social media regularly; involve in activities as much as possible including legislator visits			
Other Actions Not Audience based	Consider effectiveness of one Board for two organizations; consider separate work committees			
	Consider marketing/pr function to add to organization (shared?) or a strong pr/marketing board member			
	Consider pros and cons of an independent grant writer			