

# **Cassie Sorenson Consulting**

## **Audit Report**

**For**



**Rescue Mission of El Paso**

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## Methodology:

Any report is only as good as the research done by the writer before reaching their conclusions. This report is the result of interviews, observations of staff interactions, attendance and observation at both a staff meeting and a board meeting, and extensive research on the organization. This included a review of the last four years' IRS 990 Reports and the Mission's written materials. In total, sixteen individuals were interviewed: one client, the Executive Director, two Board Members, three Executive Level staff, one intern, and eight additional staff. As these interviews were conducted the interviewer asked multiple questions directed toward the areas of expertise of those interviewed. The questions concerned the organizations strengths, areas of concern or needing improvement, suggestions for how to improve and a bit about the background of each individual. A list of specific concerns and suggestions from the interviews are included in the Appendix B and C.

# Introduction

The Rescue Mission of El Paso (Mission) is doing an amazing work. Part of the amazement is the depth and breadth of what the Mission has done with so little. I heard staff and board describe this time at the Mission to be a time where they were moving from being a “Mom and Pop” Mission to a new level. What is interesting is that the Mission has significant indicators that they were indeed a “Mom and Pop” mission, yet at the same time they are significantly ahead of where much larger missions are in other ways.

Many missions struggle with fraternization between male and female clients. They struggle while at the same time making staff choices that feed into the problem. Many missions only allow men to case manage, counsel and work with men and vice versa with women. The Mission has not adopted this policy and is setting a great example for the clients they serve by modeling healthy relationships between men and women through staffing.

Many missions struggle to do more than track their clients on paper, using programs such as Excel to monitor statistics. They often duplicate efforts by tracking some things online for their area Continuum of Care but not tracking online for themselves. The Mission is tracking their clients online and keeping client records online. There may be room for improvement in monitoring outcomes but a huge first step is already in place.

A key attitude that often is present in “Mom and Pop” organizations is an attitude of everyone pitching in to get the job done. It doesn’t matter whose job it may or may not be — if it needs done let’s get it done. This is a great attitude to have in staff. It’s also important not to lose this attitude as the Mission grows. While documentation of job descriptions, policies and procedures, guidelines, etc... will be encouraged this “get it done” attitude needs to be protected and fostered.

The purchase of RMEP property has catapulted the mission out of the “Mom and Pop” arena and into a whole new level of operations. In the initial proposal the topics to be analyzed and reported on were staffing and programming. You will find in this report three additional items were added: social enterprise, sustainability, and timelines. These items have been added because the growth spurt/sudden influx of money and property has left the mission vulnerable. The influx of income has caused the Mission to build and grow. That same influx of income and the growth it produced may lead to a budget that can’t be supported by the annual income — which has decreased due to the much publicized purchase.

# EXECUTIVE SUMMARY

The right people, organizational improvement, and better/intentional and planned fundraising best summarize the findings in this report. The key points in the following pages are bullet pointed below for a quick overview. All analysis and in depth explanations for these bullet points can be found in the continuing pages of the report.

## Organizational/Staffing:

A new and workable Organizational Chart needs to be created and followed.

Empty positions on the new Organizational Chart need filled:

Vice President of Administration

Vice President of Finance

Marketing Director

Receptionist

Director of Operations

Marketing Assistant

2 Additional Social Service Counselors

Employment Training and Placement Coordinator

Hallelujah Barbecue and Catering Manager

Job Descriptions should be created for each position. Chief Executive Officer to Maintenance Man.

The Mission and Vision Statement should be updated.

A Strategic Plan needs to be created and adopted.

A SWOT (Strength, Weaknesses, Opportunities and Threat) Analysis should be completed on several aspects of the Mission.

All similar duties should be assigned to specific departments if not also to specific employees.

## Development:

An Annual Development Plan should be created and adopted.

All Donor Perfect processing centralized in the Development Department

Thank you receipts/letters personalized to ask and sent to and received by donors within a week of gift receipt.

A plan put in place to regularly acquire new donors.

An effort made to gather key information on all donors: Phone numbers and email addresses.

Major Donor's identified and a moves management plan developed.

Any further growth and/or a Capital Campaign should be on hold indefinitely until the annual giving covers the annual budget. The remainder of the income from the sale of the property should go to bridge the gap until the annual giving meets the annual budget.

# Analysis

## **Staffing**

The most glaring issue here is that there is no organizational chart, no job descriptions, no annual performance evaluations and no hiring policies or procedures. Much of the frustration currently, which will only increase as the size of the staff grows, is that there are no clear lines of authority. This affects the staff as they work with each other and as they work with the clients. If the staff feel free to ignore their immediate supervisor, it is no wonder the clients feel free to ignore the staff in favor of going over their heads to the Director. I heard from many people, even Blake, that sometimes he fails to follow the unwritten organizational structure. In reality this is a systemic problem arising in part from people feeling free to go to Blake. It has become a deeply embedded cultural issue as staff and clients feel free to go to other staff as well as to Blake.

Without an organizational chart and job descriptions, titles are often misleading. Actual duties often include more than would normally be covered by the title, or don't cover all that would be indicated by the title. Juana is the best example of both cases. Her accepted title is Assistant Director and as such it seems that most of her duties fall within Programming and Operations. Yet she enters all the donor information into Donor Perfect, a job that would usually fall to the Finance or Development/Marketing Departments. On the other end of the spectrum is that while she is basically in charge of all programming and operations, she still doesn't speak into any hiring or performance evaluation decisions.

## **Programming**

The Mission's programs seem to be fairly understandable to the staff. The Relapse Prevention Program is the most organized. All other programs seem to be individualized and there doesn't seem to be any set standards. This currently doesn't seem to be a real issue as the staff know what the individual goals are and work hard to help the clients meet them. As you are growing, there will be a need to develop and measure outcomes. Without established outcomes for each program it will be difficult, if not impossible, to show the impact the Mission's services are making in the clients lives.

There also seems to be some disconnects in the staffing with the clients. The Chaplain doesn't seem to interact individually with all the clients. Another disconnect was with the Job Coordinator. In chatting with her she felt there were few clients to justify her spending any additional time to build up

the Job Coordinator's role. She systematically explained to me how the percentage of clients able to work was so small that her job was almost unnecessary. In understanding what Flo's role is currently, then taking into consideration the size of the new Mission it is clear that Job Search is an area which will need expansion.

## **Sustainability**

The Mission is in a place where everything needs to be more intentional. You have already recognized the need for this as is evidenced by your new Employee Handbook. The two areas that are the biggest concern are organizationally and in donor development and marketing.

As the Mission has grown you have hired as needed. You've seen needs and decided to meet them. This sensitivity to the needs of those you serve is admirable. There is a flexibility to an organization when it is small. As you grow, this flexibility, which is an asset now, will gradually lead to instability.

The second and most important issue you have with sustainability is developing a donor base that will support the new budget, as well as the future growth projects and opportunities that develop. Your donations are down. This is due to several issues: the publicity around the thirteen million dollar buy-out of your property, your donors currently get thank you letters/receipts two to three weeks after the donations are received, etc... You have little significant/intentional means of acquiring new donors to replace the natural attrition that occurs. You have major donors somewhat identified. You need to better identify these donors and put a plan in place to develop them. You have developed and completed a successful special event which is a great starting point. There must be a more systematic way to raise funds if you are to meet your new budgets successfully and raise more to continue to build the upcoming phases you have planned.

# Conclusions and Suggestions

## **Staffing:**

Appendix C has the Organizational Chart I would recommend. It is also color coded to lay out what positions should be hired at what place in the development of the staffing going forward. There are some key positions you will need to hire in the next three months in order to have them trained and knowledgeable by the date you move into your new facilities. There will need to be some close observation/supervision to make sure the new positions are being trained and that the staff are following the new Organizational Chart. The culture of the organization is such that having an Organizational Chart will be great but actually having it work will, pardon the pun, take work. Blake will have to trust the new Vice President of Administration (VP of Admin). In going over the suggested Organizational Chart with Blake he stated that this position, VP of Admin, could ruin the whole Mission. Blake is absolutely right. Of all the staff suggestions made this is the make or break position.

All future hiring decisions should be done by a team. The team should include the direct supervisor and any other supervisors up to and including the VP of that area. The team may narrow the candidates to the final three and include Blake at that point. At some point in the future, I'd recommend the final candidate be presented to Blake to talk with and sign off on unless he has concerns. The hiring process needs to include an application, a list of standard interview questions to be used in a prescreening phone call or email, a Job Description, a standardized set of interview questions for the initial personal interview, and then a personalized list of questions for when the candidates are narrowed down to the final three.

There are four positions for the administration that really need to be hired in the next few months. The VP of Admin, Vice President of Finance (VP of Finance), Marketing Assistant, and Receptionist. You already have a skilled Vice President of Development (VP of Development) in Megan. Changing her title will make it clear she is in charge of all fundraising — including Major Donor Development, Volunteers, Public Relations, Special Events, etc... In order to adequately cover the width and breadth of these responsibilities the VP of Development needs an Assistant immediately. The Receptionist position is an immediate need so that Megan can train this person and move fully into her original role.

Hiring the VP of Finances and the VP of Administration is the most critical. These two must have the ability to deal honestly with Blake on authority issues. Both of these positions will call for someone who can respect Blake but confront him when he jumps over them into day to day decision making. I believe all VP Candidates should be interviewed by Blake and Megan and the two should have to agree on the final candidate. It was a consideration if a Board Member should be included on the hiring team but determined that would be counter intuitive. The new hires need to be able to address Blake if he jumps lines of authority but they must not be under the assumption that if they can't work something out with him they have a direct line to the Board. It would be advisable for the final candidates to be given this report to read over so they understand clearly the transition the Mission is in and their role in making it successful. Blake has allowed Megan, as his Administrative Assistant, to screen some of the people coming to him. He's been comfortable having her make counter suggestions to some of the things he has always done himself in the past. This has brought some relief to the rest of the staff as well as to Blake. The new hires need to be someone Blake can implicitly trust as he does Megan. Whoever is hired needs to be clear that they lead from the second chair and be gifted at doing so. This is needed for all the VP positions.

There needs to be Job Descriptions drawn up for every position you have in the Mission. This will include drawing up Job Descriptions for the vocational positions. Appendix D is a Job Description Template.

Blake has a passion for the Mission and for its growth that is an amazing asset. Blake is visionary. This needs to be valued and cultivated. Blake is also a world class spokesperson for the Mission. While these are two of his strongest gifts they aren't his only gifts. He can't be pigeon-holed into doing just these things. The day to day activity and the impact it has on those you serve are the fuel for his gifts. He needs to be able to have a role in the day-to-day. This can be accomplished by having the final approval of the decisions his VPs are making. This will allow him to fuel his passion and at the same time use his insights and wisdom to their best advantage.

The majority of the additional changes that need to be made should be made after the VPs are hired. Juana has thought over the concept of choosing between the operational aspect and the programming aspect of her jobs. She has shared that she understands the need for the reorganization. She has also expressed a desire to continue to work with the Programming aspects versus the Operational. The key with Juana throughout the whole process will be to maintain sensitivity to the natural feeling of being demoted. Juana has a wonderful spirit and has a deep

passion to do what is best for the Mission. Being able to walk through the process to choose her more natural choice/interest and the affirmation of her value to the Mission must continue to be a part of the process.

Jade expressed a deep sense of purpose when working with the children, with the Program clients on the weekends, and with Volunteers. As you move into larger facilities where mothers and families will be more willing to come and stay, Jade would be a natural for developing and working the children and families. Having a Family Coordinator who can develop programming for the children and parents and who could bring in or network for parenting classes and other moms type programs would be a natural fit. It would also eliminate the confusion between her and Brooke about the kitchen. Another possibility with Jade would be to have her move into the role of Volunteer Coordinator. Jade is one of the few employees who have really lost engagement in her position. During her interview she seemed unable to envision where she would most like to be. She was just stuck in her current frustration. As she observes changes she may be better able to identify what she would love to do. Jade may currently be disengaged but she still has a passion and love for the Mission and may reengage if she sees past her frustration by seeing a new opportunity.

The Job Search Coordinator really needs to become the Employment Training and Placement Coordinator. This position needs to oversee the Vocational Training of the clients. The person also needs to work with the clients that will be going on disability to help them find ways to volunteer in the community. This will be a full time position if done correctly and fully. The Employment Training and Placement Coordinator's position will require coordination with multiple internal staff and developing relationships with businesses in the community. This position will become one of the main faces the business community needs to see, trust, and desire working with.

An Operations Director also needs to be hired or promoted from within. This needs to be done in the near future. Having this person in place will help Juana make the move to working solely with the program. It will also help the staff make the leap to answering to someone other than Juana. Bobby was a suggestion as his heart is to be placed where he may best be used. The only potential concern in promoting Bobby will be if Juana will be able to really let go of Operations if a former subordinate is in the lead role. All the maintenance and staff, the kitchen staff, and the van drivers should be moved under this person. I would also suggest that the employees kept from the wood working shop be moved into the maintenance department.

The Social Enterprises will also need their own Managers. These positions don't need to be hired immediately but should be hired before the Restaurant opens or the catering becomes a heavier load and before the Thrift Store opens. At some point the main cook for the Social Enterprise and the Kitchen at the Mission need to become different people. Some of the staff could be shared but I would recommend that eventually the two are completely separate. The Program clients who are doing vocational training may end up at either the kitchen or the restaurant but in the future the paid staff should work in one place or the other. You will need to do this for ease with the accounting of it all as well as for the workload and organizational structure.

Lastly, I would suggest setting up a staff training program. Today's younger staff feels that training is the best way for them to learn on the job and to be prepared to advance. Providing training also lets the staff members know you value them. I would suggest creating a Training Manual that includes how much training you expect at each level, suggested places to train, and what costs will and won't be covered. This may seem like an issue for an organization of greater size but that is who you are becoming.

Lastly, Appendix E is a sample of a Staff Training Schedule. You need to search the choices you have for training in your area and/or online and determine such a Staff Training Schedule for yourselves.

### **Programming:**

There is little documentation about the various programs. Five basic Programs seemed to stand out during the tour and throughout the interviews:

Emergency Shelter: Individual Plans with no set length of stay.

Relapse Prevention Program: 13 week length

Job Search Program: A part of both the Emergency Shelter and Relapse Prevention Programs

Respite Care: No set stay limit

Permanent Supportive Housing: No set stay limit

This summary may not be accurate but it's the best summary that could be derived from the paperwork and through the interviews. There is a significant amount of documentation that needs to occur. The documentation needs to occur both about the program, for the program and program clients, and for the staff who work with the programs. The intake information is currently being taken

by one person with two forms being filled out. The longer form is for the documentation for your Continuum of Care and has the in depth information your social workers use. The short form is for the information that will be disseminated to other staff. It would a timesaver and eliminate some duplication to streamline the two forms into one with the first page containing all the information that well get disseminated to the additional staff thus avoiding two forms and significant duplication. Beyond this though there is a mountain of documentation that should occur.

Documentation for the staff should include check off lists for regular operations: Intake, Program Application, Program Requirements, Graduation criteria, etc... One of the concerns that frequently came up was that the information needed from the bed sheets was often missing or inaccurate. While a check off sheet wouldn't assist with the accuracy it would assist with making sure all the information was included. It would also set the bar on what was the minimum and standard for all the procedures the various check off sheets would cover.

Documentation for the Program itself would be the admittance/application procedures documented. The rules, guidelines, policies, and procedures all written out and signed off on by the clients, with a copy going to them and a copy kept in their file. This same documentation should also be kept in a Program Manual that the staff keep handy for reference. This manual should also be kept online in a shared file.

The vocational training will need to be developed. The individual documentation would include personality tests, Strengthfinders Test, a personal interest questionnaire, work history, and an educational history. For the program itself there would need to be rules, guidelines, policies and procedures. There would also need to be Job descriptions, and vocational performance reviews. All program clients should be assigned a vocational training assignment. The number of hours they work can be determined based on the number of classes, hours of case management, and hours of outside counseling/services they need/attend. The number of hours spent on their vocational training assignments should never exceed the number of hours they spend in classes. Each vocational training assignment should have a job description that they will be evaluated on one or two times a month. The supervisors of all vocational training positions should be trained on how to supervise and evaluate the program clients. You may want to require a certain level of evaluation scoring before graduation can be approved/reached. This vocational training can become a tool that the Employment Training and Placement Coordinator can promote when reaching out to the business community to build

bridges for the client's future employment. Appendix H is a sample Vocational Job Performance Evaluation.

### **Social Enterprise**

You have experience in running a social enterprise. As you venture into a new type of social enterprise you will want to take the time to coordinate with the program. Your social enterprise will eventually bring income into the Mission. The goals of the social enterprise need to be clearly laid out in advance. Making an income for the Mission should clearly be one of the goals, but vocational training that leads to future employment for the clients should also be one of the goals. The Mission needs to clearly lay out the process by which the social enterprise will first become self-sustaining and then money making. You need to set the priority for the social enterprise. Victory Mission in Springfield, Missouri shared that their initial goal of vocational training soon morphed into accredited training which took them in a direction they had never imagined. The focus became more about accreditation and income and less about vocational training that helped the Mission's clients.

There were two social enterprise concepts mentioned. The first is basically already in place to some degree: the Hallelujah Barbecue and Catering. There is no question that Blake and Brooke can make BBQ and sides that are outstanding! The timing was a concern for some. Starting this while in transition may feel too hurried or too much to be accomplishing at one time. This may be true for some Missions but doesn't seem to be the case at Rescue Mission of El Paso. There is already a mindset for social enterprise since you had the furniture business for several years, so the understanding of the need for structure is already there. A second reason for going ahead with the BBQ and catering now is that you are garnishing publicity and relationships at this point with the sale of the property and move. Thus it is a way to get free publicity that you may not be able to garnish if you wait until a later time. Lastly, and to some degree, the most important of all is that the Hallelujah BBQ and Catering are something that fuel Blake's passion. As you transition to a new organizational structure, it is wise to make the transition as easy as possible for all concerned. The Board's regard for Blake can be seen in how they want to value his strengths — and this is decidedly one of his strengths.

As the BBQ and Catering is more than appropriate to continue developing, the thrift store is something that is more appropriate to hold off on until you are much more stabilized. A careful marketing analysis should be done before giving the concept serious consideration. Some markets are already very saturated and may not be able to sustain another competitor. Some markets are cash

cows waiting to be tapped. There is also as much variation in thrift stores as there are other commercial markets. The Mission will want to know what type of thrift store they will want to design and open. The Association of Gospel Rescue Missions has some wonderful resources for developing thrift stores.

Each social enterprise will require a manager and staff. The Mission's program residents should also be used in a secondary capacity. This will accomplish three things: vocational training, cost savings, and a pathway for the public into knowing more about the Mission. The staff will need to be trained not just in the particular social enterprise, BBQ/Catering or thrift store, but also in how to train and evaluate the program participants that are in vocational training.

### **Sustainability**

Structurally it is imperative to determine the growth pattern you intend to pursue so you can lay out a road map of how to get there. Putting an organizational chart into play that looks at future staffing as well as current and the immediate future is also key. Getting job descriptions written and in place for the current jobs, immediate openings, and future positions, is also important. As the Mission grows, the salaries and hourly rates of the staff need to be standardized within ranges. Often a culture will develop where those who are good at what they do still desire to move to another position because it pays more. While that can't be stopped altogether by establishing standardized ranges, you can move a staff member up the pay scale without promoting the person out of his or her strengths. The ranges don't have to be set in stone but should be the norm. You will also want to address any nepotism issues as I didn't see this addressed in the Employee Handbook. The flexibility that you don't want to lose can be continued as you develop policies and procedures that will guide the decisions that come up when unusual circumstances are encountered.

Organizationally, the Mission is at a point where major changes need to be made. Beyond the staffing changes mentioned earlier there needs to be major steps taken. There needs to be a vital and well used Mission Statement, Vision Statement, and Strategic Plan in place. The Strategic plan doesn't have to be set in cement. Careful evaluation of the direction you go in the future will help the organization function at its best. There are several different opinions of the development of a family shelter and a shelter to reach out to the chronically homeless should the Opportunity Center close, etc... Blake has some wonderful visions for the future. Combine that with intentional and thoughtful planning and you will have a healthy future.

Part of this Strategic Plan has to be a well thought out SWOT (Strengths, Weaknesses, Opportunities and Threats) Analysis. The closing, or downsizing, of the Opportunity Center would be a possible opportunity, yet does it fit in with your mission and vision? Will it bring in too much controversy, bad press, etc... It would be wise to walk through each of the programs you currently have with a SWOT Analysis to analyze the validity, purpose, strengths and weaknesses of these programs.

The last aspect of organizational sustainability that needs addressed is the development of outcome measurements. The Mission is doing a great work. Having stories of successes are wonderful and powerful. Being able to communicate outcomes versus outputs is becoming critical in both fundraising and in grant and foundation solicitation. As you head toward a Capital Campaign you will need to be able to share not just what you do, but the difference it makes. Incorporating something as simple as a 25 question Self Sufficiency Matrix would be a manageable start. This Self Sufficiency Matrix can be done at intake, and at exit and/or periodically throughout the program to share the outcomes that are being reached by all you do. This Self Sufficiency Matrix can also be a great tool in case planning. A sample can be seen in Appendix F.

The most important aspect of the report is really the financial sustainability of the Mission. The report contains many recommendations about new hires. Normally this wouldn't be a possibility due to finances. As you move to new and larger facilities and as you make the move to becoming more professional, organized, and intentional, you fortunately have the ability to make the hires.

While these hires can be brought on board now, further growth will need to be slowed down until your donations are brought up to the level to support the new budget. In all reality, it will be at least two to three years before you can really consider a capital campaign to finish off the second phase, short of the Hallelujah Barbecue.

The Development Department needs time to grow and organize. Thank you receipt letters need to be on a one week turnaround instead of the current three weeks. Along with speeding up the process you need to develop personalized thank you notes for the type of donation. New donors should be flagged, a special thank you sent along with additional information on the Ministry. Donors at a certain threshold should receive an Annual Report each year. You may want to send regular monthly donors an annual check book calendar, etc...

There needs to be an approved Annual Development Plan which includes methods for Acquiring new donors. Your 990s from 2011-2104 show a drop in giving. Some of the recent drop

may have been due to the publicity surrounding the purchase of your property. Even before that, you were dropping. A closer look of your donor base would verify that you, like all nonprofits, have a natural attrition rate. This natural attrition is due to death, and in your case, the military nature of your community.

You need to create and implement a Major Donor Development Plan. To date you don't do any Major Donor work. Literally, instead of using the rest of the purchase money as seed money for the second phase and a capital campaign, you need to use it to sustain the organization until the annual income is doing so. Once your donation income covers your budget, you can look at the second phase and capital campaign. Not only will you have a sustainable income but you will have the relationship with your donors to help your capital campaign to be a success.

### **Timeline**

There is some urgency as the move date is drawing closer daily. There are some things that need done as soon as possible — or sooner. The Vice President of Finance and the Vice President of Administration, the Marketing Assistant, and a Receptionist are hires that need to happen as soon as possible. While these need to happen soon, there also must be an adequate search done to make sure these individuals have the skills and abilities, that they will fit into the culture of the Mission and that they along with Blake and Megan will be well suited to each other in management styles, personalities, and have complementing, not competing, styles.

The new Director of Operations also needs to be hired or promoted as soon as possible but the VP of Administration should play a key role in this decision. While the temptation may be to think Bobby would be a good fit the final choice needs to have the input of the person who will ultimately be the supervisor. Again the person hired or promoted into the position must be a good fit with the Administration Team which will be the VP of Administration, Director of Programming (Juana), and the Director of Operations.

Another key new hire will be at least one if not two Social Workers/Case Managers. In interviewing the case managers it was clear that while Diego would love to do more case management, he is often overwhelmed with intakes and the data entry for the HMIS information. The number of beds is significantly increased at the new facility, meeting these numbers with quality will require these additional positions. These new positions can't wait to be hired until you are already in

the new building. They need hired at least two to three months before the move so they are already an integral part of the team.

The other key new hire will be the Hallelujah Barbecue and Catering Manager. Having Blake work directly with Brooke for the catering can easily lead to him becoming overly involved in the day-to-day operation of the kitchen. This manager will often be in a position to work across organizational boundaries and will need to be someone who is a bridge builder as well as a good Manager. Once you have moved into your new facilities and the Hallelujah Barbecue is getting ready to open, you need to hire a Cook. This cook will need trained by Brooke to do the catering and run the BBQ. At this point you will need enough help that the two food service aspects of the Mission will need to be split.

Two changes recommended to take place as soon as possible are the Chaplain's Position and the Job Search Coordinator. Your current chaplain is almost ready to retire and I think it would be best to bring on a new Chaplain once the VP of Admin is on board. While Flo may not be ready to retire, she clearly stated she has no desire to grow her current position. In fact she feels it's an obsolete position, yet this is an area that really needs development. The position will bring a new vitality to Employment Search and will benefit the Mission as a whole through the Vocational Aspect of what they will do. As new Job Descriptions are being designed, it is a great time to make this transition to new staff. It would be best if these two new staff members are on board before you are move into your new facilities.

The new staff and the new plans after the initial move all need to be tied into the Strategic Plan. This plan should be mapped out in the next six months. It should be done by the Executive Management Team and with the Director of Operations, Director of Programs, and possibly the Hallelujah Barbecue Manager. This Strategic Plan should be reviewed each year before the Annual Budget is adopted as it will help mold the budget. Appendix G is a graph of the suggested timeline.

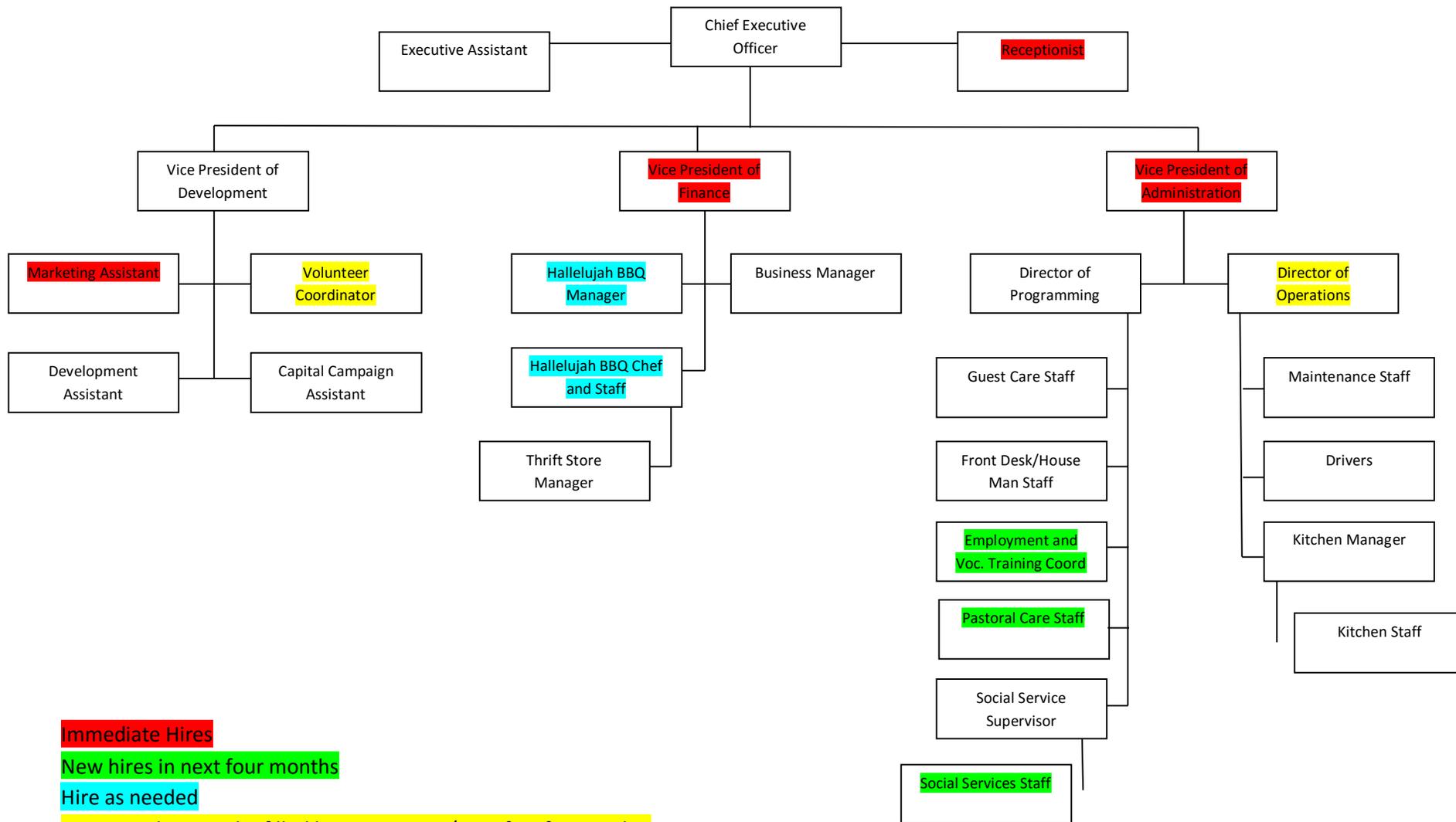
# Closing

Having an outside consultant come in and evaluate your organization is never a picnic. Truth be told, an outside consultant won't get everything right. All the analysis and recommendations need to go through the filter of your reality. Someone who swoops in for a few days gets a swooped view. With that disclaimer said, an outside view is often the most accurate as it's unbiased and realistic. The Rescue Mission of El Paso is in a wonderful position to go forward. Yet, if it goes forward in the manner it has been running in the past, it will be in great jeopardy. The Mission has a God-given opportunity to transform and become a premier Ministry within Rescue and within your community. James C. Collins in his book "Good to Great" is quoted as saying, "Good is the enemy of great. And that is one of the key reasons why we have so little that becomes great."

Appendix I is a list of services which I would be glad to offer to help your transition. No matter if you use further services you will continue in my thoughts and prayers. You should always feel free to call if you have any questions!

# Appendix A

## Organization Chart



# Appendix B

## ***Interview Concerns:***

No policies or procedures: Every little thing is a big thing – so too much stuff becomes Blake's to figure out.

Hiring is done without any input from anyone.

There is no Organizational Chart

Issues are avoided – leading to bitterness between staff

Trust is an issue – or actually the lack of trust.

- Trust between staff

- The staff trusting Blake

- Blake trusting his staff

There are no set outcomes for any aspect of the ministry.

- Seems like we are doing good but no way to show it

- When we do a capital campaign we'll need some way to show the impact we are having

Lack of staff training

Lack of consistency

Lack of accountability

No written policy for who the Mission will or won't pay for their ongoing education – It seems unfair.

# Appendix C

## ***Interview Suggestions:***

More detox beds in the community

Better screening for Drugs and Alcohol on the clients coming into the Mission

Procedures in place for things:

- Dogs/service animals

- Donation calls

- Donation pick-ups

Clear Job Descriptions

Blake meet with the staff more – on more than just building updates

Blake meets with direct reports weekly

A personal development tool in place

- To identify strengths and weaknesses

- To judge if you are improving

Insurance for Staff

Some additional financial analysis:

- ROI

- Cost per person

Better at collecting emails and such

Project budgets

Some form of Outcomes measurements

Need a staff member to do just intakes

Need a specific staff member to do HMIS Data Entry

More Training

A private area for intakes and interviews

Develop better working relationships with the local mental health provider

# Appendix D

## Job Description Template



Rescue Mission of El Paso

### Job Description

<b>Job title</b>	<i>Vice President of Administration</i>
<b>Reports to</b>	<i>Chief Executive Officer</i>

#### Job purpose

- Vice President of Administration will be an experienced manager who will generate a significant impact through strategic and operational direction of the Programming and Operations departments of the RMEP. This position will direct and develop director level department heads. This position will report directly to the Chief Executive Officer and will serve as a member of the Executive Management Team.

#### Duties and responsibilities

List the primary job duties and responsibilities using headings and then give examples of the types of activities under each heading. Using headings and giving examples of the types of activities to be done allows you to develop a flexible job description that encourages employee to ‘work outside the box’ and within reason, discourages “that’s not my job”.

- Identify between three and eight primary duties and responsibilities for the position
- List the primary duties and responsibilities in order of importance
- Begin each statement with an action verb
- Use the present tense of verbs
- Use gender neutral language such as s/he
- Use generic language such a photocopy instead of Xerox
- Where appropriate use qualifiers to clarify the task – where, when, why or how often – for example instead of “greet visitor to the office” use “greet visitors to the office in a professional and friendly manner”
- Avoid words that are open to interpretation – for example instead of “handle incoming mail” use “sort and distribute incoming mail”

## Qualifications

Education: The VP of Administration should have at least a minimum of a Bachelors degree in Social Work, Human Services, Non Profit Management or a related field.

Specialized Knowledge:

Skills and Abilities:

Experience:

Personal Characteristics

## Working conditions

If the job requires a person to work in special working conditions this should be stated in the job description. Special working conditions cover a range of circumstances from regular evening and weekend work, shift work, working outdoors, working with challenging clients, and so forth.

## Physical requirements

This position may require standing for long periods of time, the ability to lift up to 50 pounds and working with difficult clients.

## Direct reports

The Director of Programs and the Director of Operations are directly supervised by the VP of Administration.

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<b>Approved by:</b>	
<b>Date approved:</b>	
<b>Reviewed:</b>	

## Appendix E

### Staff Training Schedule

Type of Employee	Training Preferred	Hours Required Annually
Executive Level	Global Leadership Summit Annually AGRM Convention or Christian Leadership Alliance Convention Every other year	12 hours
Director Level	Global Leadership Summit AGRM Convention once every three years AGRM District Meeting National /Skill Path Seminars*	12 hours
Full Time Staff	Local Training AGRM District Meeting	12 hours
Part Time Staff	Local Training AGRM District Meeting	6 hours

\* An Annual all access registration allows Webinar access for an unlimited number of employees's as well as additional benefits and discounts.

# Appendix F

## Self Sufficiency Matrix

(Taken from: [www.mnhousing.gov/get/MHFA\\_010996](http://www.mnhousing.gov/get/MHFA_010996))

Domain	1	2	3	4	5	Score	Participant goal? (✓)
<b>Mobility</b>	No access to transportation, public or private; may have car that is inoperable.	Transportation is available, but unreliable, unpredictable, unaffordable; may have car but no insurance, license, etc.	Transportation is available and reliable, but limited and/or inconvenient; drivers are licensed and minimally insured.	Transportation is generally accessible to most basic travel needs.	Transportation is readily available and affordable; car is adequately insured.		
<b>Community Involvement</b>	Not applicable due to crisis situations; in "survival" mode.	Socially isolated and/or no social skills and/or lacks motivation to become involved.	Lacks knowledge of ways to become involved.	Some community involvement (advisory group, support group), but has barriers such as transportation, childcare issues.	Actively involved in community.		
<b>Parenting Skills</b>	There are safety concerns regarding parenting skills.	Parenting skills are minimal.	Parenting skills are apparent but not adequate.	Parenting skills are adequate.	Parenting skills are well developed.		
<b>Legal</b>	Current outstanding tickets or warrants.	Current charges/trial pending; noncompliance with probation/parole.	Fully compliant with probation/parole terms.	Has successfully completed probation/parole within past 12 months; no new charges filed.	No active criminal justice involvement in more than 12 months and/or no felony criminal history.		
<b>Mental Health</b>	Danger to self or others; recurring suicidal ideation; experiencing severe difficulty in day-to-day life due to psychological problems.	Recurrent mental health symptoms that may affect behavior, but not a danger to self/others; persistent problems with functioning due to mental health symptoms.	Mild symptoms may be present but are transient; only moderate difficulty in functioning due to mental health problems.	Minimal symptoms that are expectable responses to life stressors; only slight impairment in functioning.	Symptoms are absent or rare; good or superior functioning in wide range of activities; no more than every day problems or concerns.		
<b>Substance Abuse</b>	Meets criteria for severe abuse/dependence; resulting problems so severe that institutional living or hospitalization may be necessary.	Meets criteria for dependence; preoccupation with use and/or obtaining drugs/alcohol; withdrawal or withdrawal avoidance behaviors evident; use results in avoidance or neglect of essential life activities.	Use within last 6 months; evidence of persistent or recurrent social, occupational, emotional or physical problems related to use (such as disruptive behavior or housing problems); problems have persisted for at least one month.	Client has used during last 6 months, but no evidence of persistent or recurrent social, occupational, emotional, or physical problems related to use; no evidence of recurrent dangerous use.	No drug use/alcohol abuse in last 6 months.		
<b>Safety</b>	Home or residence is not safe; immediate level of lethality is extremely high; possible CPS involvement.	Safety is threatened/temporary protection is available; level of lethality is high.	Current level of safety is minimally adequate; ongoing safety planning is essential.	Environment is safe; however, future of such is uncertain; safety planning is important.	Environment is apparently safe and stable.		
<b>Disabilities</b>	In crisis - acute or chronic symptoms affecting housing, employment, social interactions, etc.	Vulnerable - sometimes or periodically has acute or chronic symptoms affecting housing, employment, social interactions, etc.	Safe - rarely has acute or chronic symptoms affecting housing, employment, social interactions, etc.	Building Capacity - asymptomatic - condition controlled by services or medication	Thriving - no identified disability.		
<b>Other: (Optional)</b>	In Crisis	Vulnerable	Safe	Building Capacity	Empowered		

Domain	1	2	3	4	5	Score	Participant goal? (✓)
<b>Housing</b>	Homeless or threatened with eviction.	In transitional, temporary or substandard housing; and/or current rent/mortgage payment is unaffordable (over 30% of income).	In stable housing that is safe but only marginally adequate.	Household is in safe, adequate subsidized housing.	Household is safe, adequate, unsubsidized housing.		
<b>Employment</b>	No job.	Temporary, part-time or seasonal; inadequate pay; no benefits.	Employed full time; inadequate pay; few or no benefits.	Employed full time with adequate pay and benefits.	Maintains permanent employment with adequate income and benefits.		
<b>Income</b>	No income.	Inadequate income and/or spontaneous or inappropriate spending.	Can meet basic needs with subsidy; appropriate spending.	Can meet basic needs and manage debt without assistance.	Income is sufficient, well managed; has discretionary income and is able to save.		
<b>Food</b>	No food or means to prepare it. Relies to a significant degree on other sources of free or low-cost food.	Household is on food stamps.	Can meet basic food needs, but requires occasional assistance.	Can meet basic food needs without assistance.	Can choose to purchase any food household desires.		
<b>Child Care</b>	Needs childcare, but none is available/accessible and/or child is not eligible.	Childcare is unreliable or unaffordable; inadequate supervision is a problem for childcare that is available.	Affordable subsidized childcare is available, but limited.	Reliable, affordable childcare is available, no need for subsidies.	Able to select quality childcare of choice.		
<b>Children's Education</b>	One or more school-aged children not enrolled in school.	One or more school-aged children enrolled in school, but not attending classes.	Enrolled in school, but one or more children only occasionally attending classes.	Enrolled in school and attending classes most of the time.	All school-aged children enrolled and attending on a regular basis.		
<b>Adult Education</b>	Literacy problems and/or no high school diploma/GED are serious barriers to employment.	Enrolled in literacy and/or GED program and/or has sufficient command of English to where language is not a barrier to employment.	Has high school diploma/GED.	Needs additional education/training to improve employment situation and/or to resolve literacy problems to where they are able to function effectively in society.	Has completed education/training needed to become employable. No literacy problems.		
<b>Health Care Coverage</b>	No medical coverage with immediate need.	No medical coverage and great difficulty accessing medical care when needed. Some household members may be in poor health.	Some members (e.g. Children) have medical coverage.	All members can get medical care when needed, but may strain budget.	All members are covered by affordable, adequate health insurance.		
<b>Life Skills</b>	Unable to meet basic needs such as hygiene, food, activities of daily living.	Can meet a few but not all needs of daily living without assistance.	Can meet most but not all daily living needs without assistance.	Able to meet all basic needs of daily living without assistance.	Able to provide beyond basic needs of daily living for self and family.		
<b>Family/Social Relations</b>	Lack of necessary support from family or friends; abuse (DV, child) is present or there is child neglect.	Family/friends may be supportive, but lack ability or resources to help; family members do not relate well with one another; potential for abuse or neglect.	Some support from family/friends; family members acknowledge and seek to change negative behaviors; are learning to communicate and support.	Strong support from family or friends. Household members support each other's efforts.	Has healthy/expanding support network; household is stable and communication is consistently open.		

# Appendix G

## Timeline

Activity/Time Frame	January - March 2016	April - June 2016	July - December 2016	January - June 2017	July - December 2017
Hiring	VP of Admin, VP of Finance, Marketing Assistant, start process for additional Social Service Staff. Decision about Volunteer Coordinator and Director of Operations.	Finalize decision on Director of Operations and Volunteer Coordinator. Put new Organizational Chart into practice.	Hire new kitchen staff who will eventually go to work at the Hallelujah BBQ	Hire new Hallelujah BBQ Manager (May have to do this earlier if the Restaurant opens earlier) Hire Development Assistant	Hire Capital Campaign Assistant
Organizational	Develop Job Descriptions, Hiring Procedures, Review the Mission Statement	Develop Strategic Plan, Create Vision Statement		Update Strategic Plan	
Programmatic	Develop Policies and Procedures as well as Guidelines for each Program. Create check off sheets for Intake, Exit, Graduation, Discipline, and referrals. Incorporate Self Sufficiency Matrix.	Take all paperwork and create a Program Manual that becomes the "Program Bible" so to speak.	In addition to the Program Manual have the original on a shared drive than can be accessed by all Programming, Staff and Executive Team. Have only key staff able to alter the files.	Annually review Program Manual to keep it up to date.	
Development	Have all Donor Perfect Duties moved to the Marketing Assistant. Get Megan and Marketing Assistant trained on Donor Perfect. Start to get quotes for the printing and mailing of the newsletter from outside sources. Create an Annual Development Plan that covers all Development Activities: mailings, acquisition, PR, Special Events, Major Donor Development, Volunteer Recognition Events, Open House/Dedication of new building, etc...		Learn who donors are and categorize by type of giving (Monthly, Holiday, Newsletter, Annual, Major, Middle Major, etc...) Develop/Design an Annual Report that will be based on 2015. Pictures, text and layout should be done by December	Gather actual statistics for Annual Report, get it printed and mailed out to the Major Donor's you've identified.	May be time to start do a Feasibility Study for the Capital Campaign Time to start to build the case for the capital campaign.

# Appendix H

## Vocational Job Performance Evaluation

Vocational Job Performance Evaluation						
Name: _____						
Vocational Start Date: _____						
	(1 point) Unacceptable	(2 points) Below Average	(3 points) Average	(4 points) Above Average	(5 points) Excellent	Comments
Quality						
Productivity						
Job Knowledge						
Reliability						
Attendance						
Initiative						
Judgment						
<p><b>Note: Any "Unacceptable" or "Excellent" score needs a written explanation.</b></p> <p>Areas Program Participant are doing well: _____</p> <p>Areas that need improvement: _____</p> <p>Evaluation Comments: _____</p> <p>Program Participant Comments: _____</p> <p>Employment Education Specialist Comments: _____</p>						
Signature: _____		Date: _____		Overall Score: _____		

# Appendix I

## Future Services Offered

I have to admit that I've had a hard time maintaining a professional distance from the Mission. Your staff has such a heart for those they serve and for each other. Almost everyone I interviewed was excited and committed to the growth spurt you are going through. This transition from "Mom and Pop" to the next level won't be easy. There is a difference between simple and easy. For example it's simple to lose weight: you eat less and exercise more. Yet while it's simple it's certainly not easy. This transition you are going through actually isn't simple or easy. There are multiple levels of change in multiple areas of the Mission. These changes occur over a prolonged time frame and depend/build upon on each other. The changes also require some significant documentation at time where you don't have excess staff to accomplish this.

With all this in mind I have put together a list of additional ways I could assist. I would be honored to be an extended family member for a time. You may choose not to use me any further and while I'll miss the opportunity you will continue in my thoughts and prayers.

<b>Item:</b>	<b>Time Frame:</b>	<b>Cost:</b>
Develop the written Job Descriptions	Ongoing as needed	\$25.00 hr
Development of the Program Manual	Present through May	\$25.00 hour
Facilitate Strategic Planning Session (This would include a half day session with Programming staff, followed by a daylong session with the Executive Management Team)	March, April or May	\$1350 *
Staff Training on incorporating the Self Sufficiency Matrix for Outcomes (This could be incorporate with the Strategic Planning session to save on Transportation Costs)	May or June	\$1000 for a daylong session*

\*This includes my transportation costs

# Appendix J

## Benevon Information

A great model to use when working with donors is the Benevon Model. It operates from a mindset of prosperity not scarcity. The information below was taken from the following web. There is in depth, and expensive, training available through Benevon, but you can also develop a great understanding of the model and incorporate it after reading the books they sell about the program.



The Benevon Model is a mission-centered, four-step, circular process for raising sustainable funding from individual donors. When customized to your nonprofit organization and implemented over

time, your organization will systematically engage and develop lifelong relationships with donors who truly understand and support your work. This highly structured nonprofit fundraising system has been implemented successfully by over 4,500 nonprofit teams. (Visit our [Testimonials page](#) to read stories from organizations that have attended our workshops and implemented the Benevon Model.)

The Benevon Model is designed to get your organization off the annual fundraising treadmill and into the world of major gifts. We customize our step-by-step, proven system to the unique needs of your organization. Here's how it works:

### **Step One: The Point of Entry Event**

Potential donors get on the cycle by attending your **Point of Entry Event** at the invitation of a friend or colleague who serves as an Ambassador for your organization. This is a succinct, one-hour introductory event that educates and inspires guests with the facts and emotional appeal of the organization's work, focusing on your three overarching areas of impact and capturing each guest's name with permission.

### **Step Two: Follow up and involve**

Guests then receive a personal **Follow-Up Call** to solicit their feedback, see if they would like to become involved in any way, and ask if there is anyone else they'd like to invite to one of your future Point of Entry Events. Those guests who are interested in learning more about your organization are **involved and cultivated personally** in whatever way they prefer.

### **Bless and Release**

In the Follow-Up Call, Point of Entry guests who are not interested in learning more about your organization are let off the hook completely. This "Bless and Release" will pleasantly disarm people and, paradoxically, allow them to suggest others who would be interested in attending a future Point of Entry Event.

### **Step Three: Asking for money**

After a period of personalized cultivation based on each person's impact area of greatest interest, many of your Point of Entry guests will be ready to be asked for money. In the Benevon Model, asking can occur one-on-one or at a **Benevon Free One-Hour Ask Event**.

### **Free One-Hour Ask Event**

The Free One-Hour Ask Event is a signature Benevon event. After being cultivated extensively in the months before the event, guests are invited by their Ambassador to attend an inspiring, mission-focused free breakfast or lunch fundraising event. At the end of this event, guests are asked to join your organization's **Multiple-Year Giving Society** by making a gift of at least \$1,000 per year for the next five years. The Free One-Hour Ask Event differs from other, more traditional, fundraising events in that the guests will already have attended a Point of Entry, it is free to attend, and there is no obligation for guests to give.

### **Step Four: Introducing others; reconnecting existing donors**

Finally, donors are re-connected to the mission of your organization at program-related **Benevon Free Feel-Good Cultivation Events**, and are encouraged to **introduce others** to your organization by becoming Ambassadors and inviting them to your Point of Entry Events.