

2005

Metro: Strategic Planning & Positioning

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EDLD 511
Strategic Planning & Positioning

Professors Pat Libby & Paul Van Dolah

Olivia Gil-Guevara, Wendy Morris, Fred Speece, Meg Storer



Mission

METRO (Methodist Effort to Reach Out) is an outreach agency of the United Methodist Church (UMC) which provides direct social services and supports community development.

METRO seeks to assist local churches to expand their capacity to become more actively involved in the lives of their neighborhoods.

METRO believes that as it carries out its mission churches will again become vibrant centers of community life, thereby fostering the growth and development of local leaders.



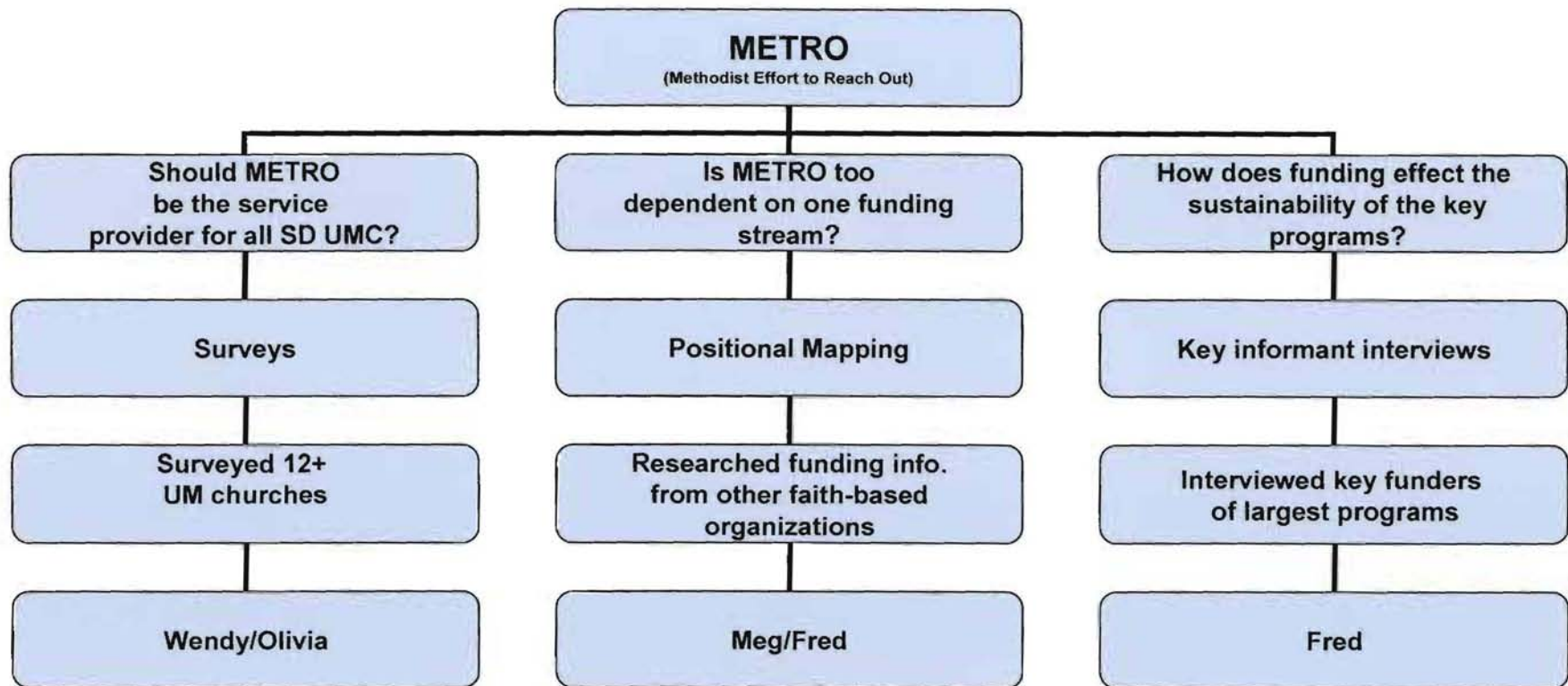
Strategic Planning Team

Olivia Gil-Guevara

Wendy Morris

Fred Speece

Meg Storer

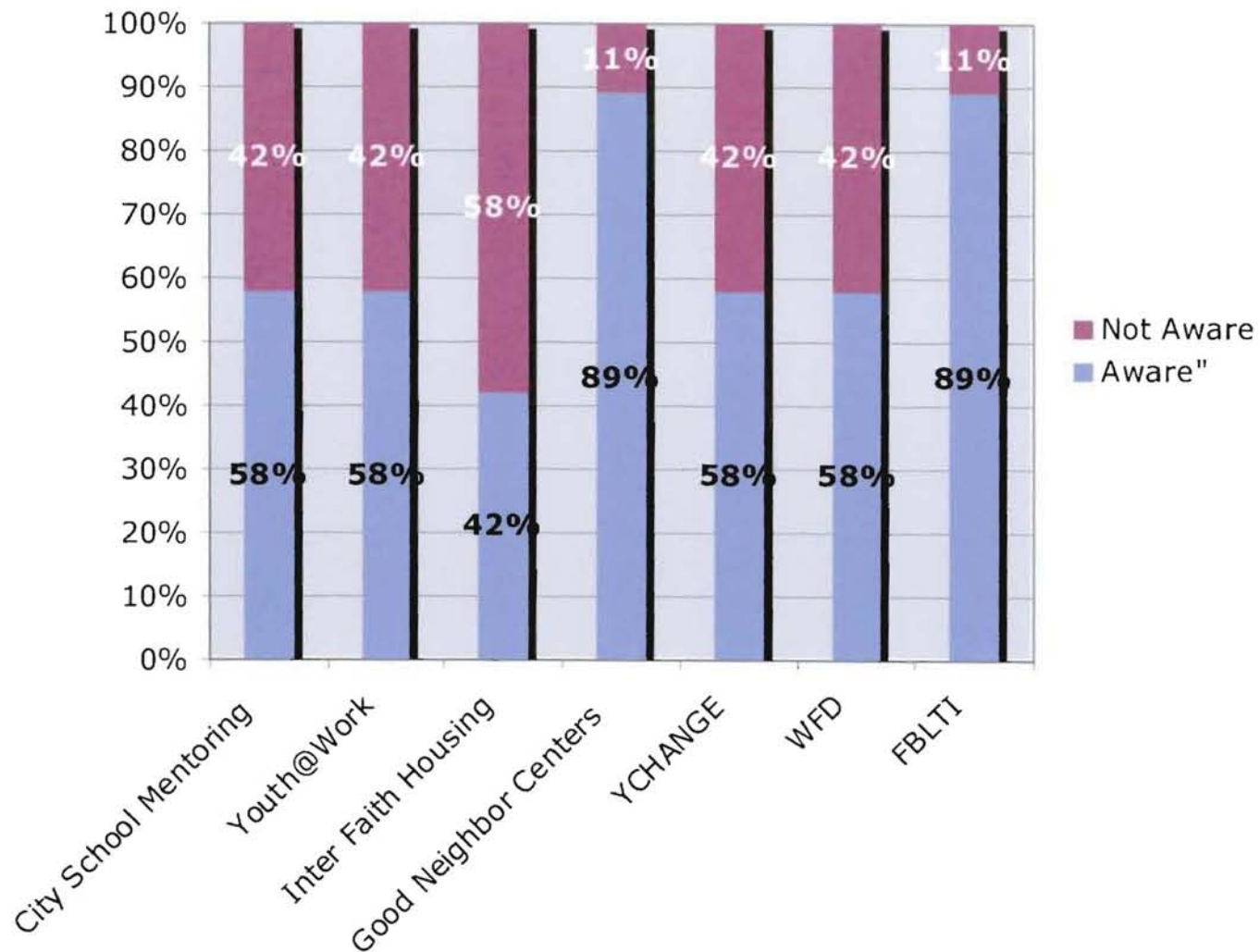




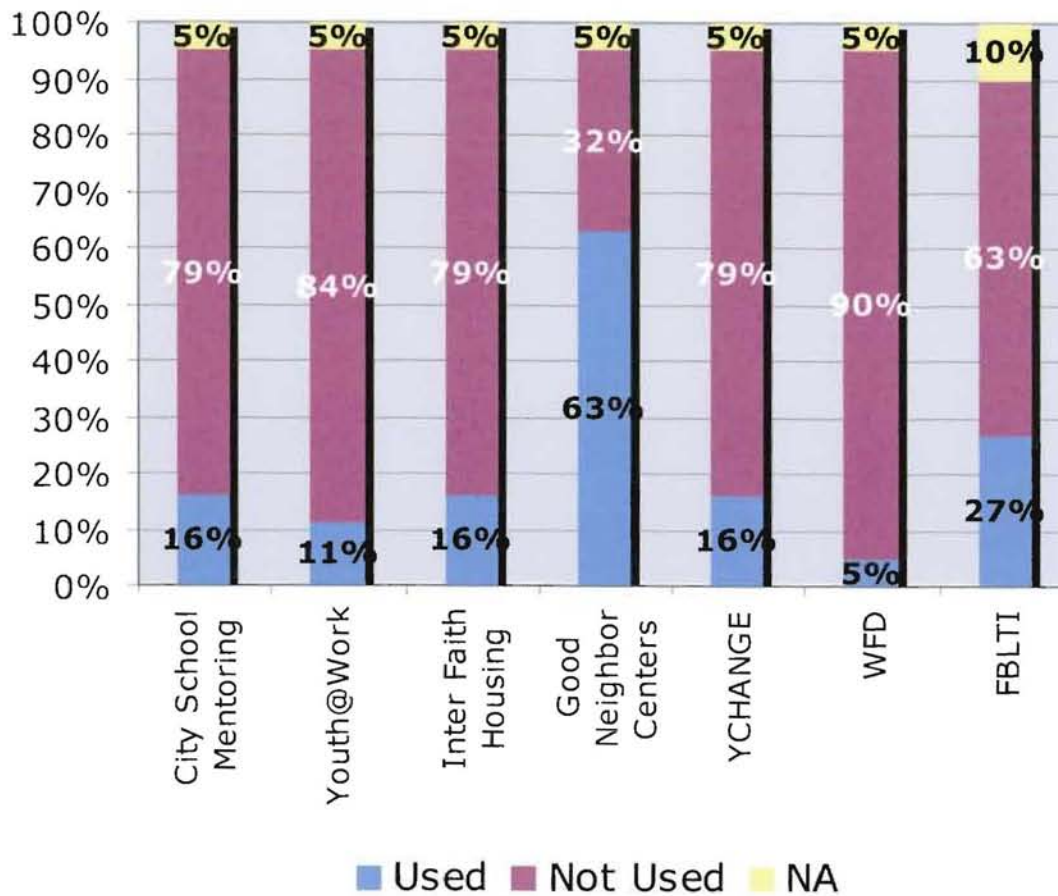
Survey Key Questions

- Are you aware of METRO programs and services?
- Do you utilize METRO's programs and services?
- If you do not utilize METRO's programs and services – why not?
- Do you believe your congregation offers overlapping services?
- Is your congregation interested in collaboration?
- Would your congregation be willing to fund METRO programs?

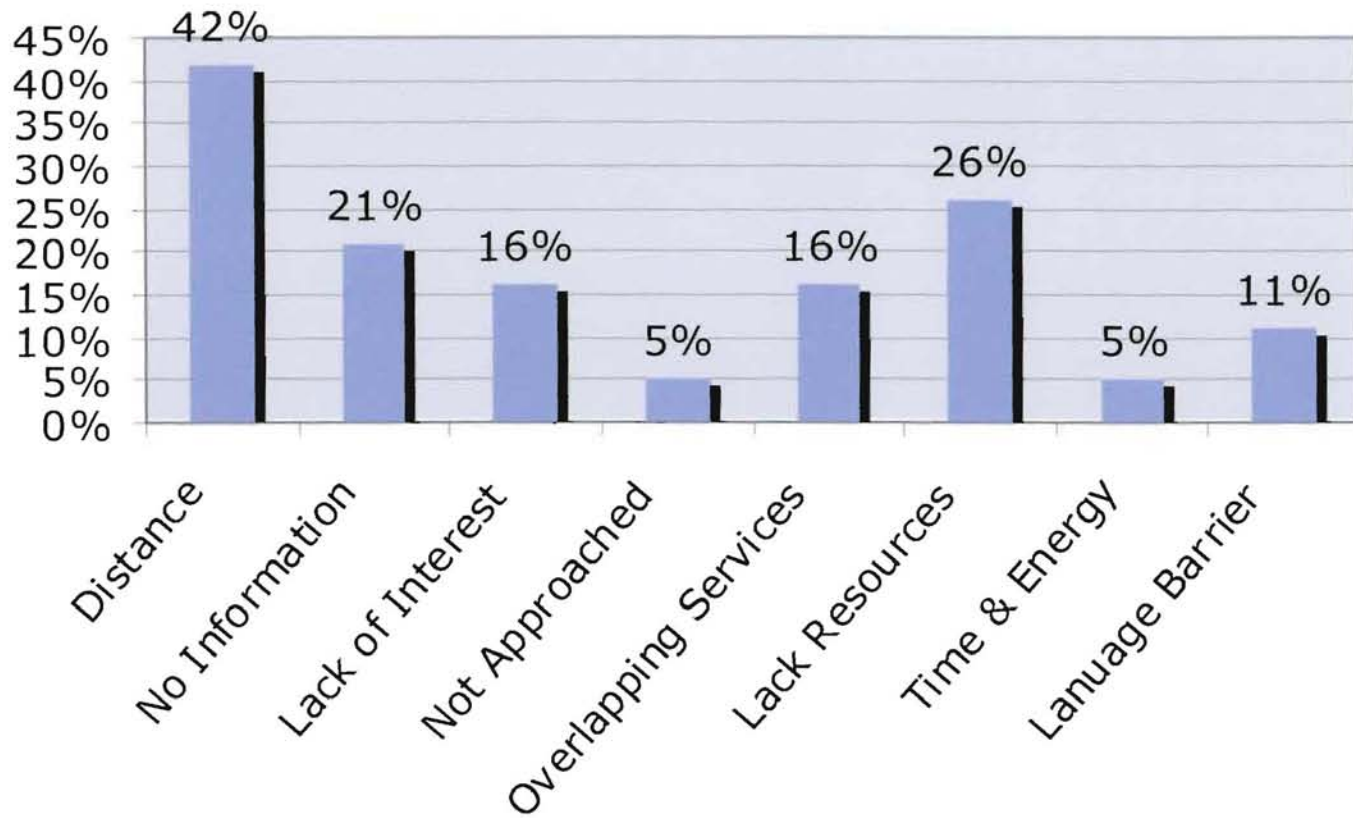
Awareness of METRO's Programs & Services



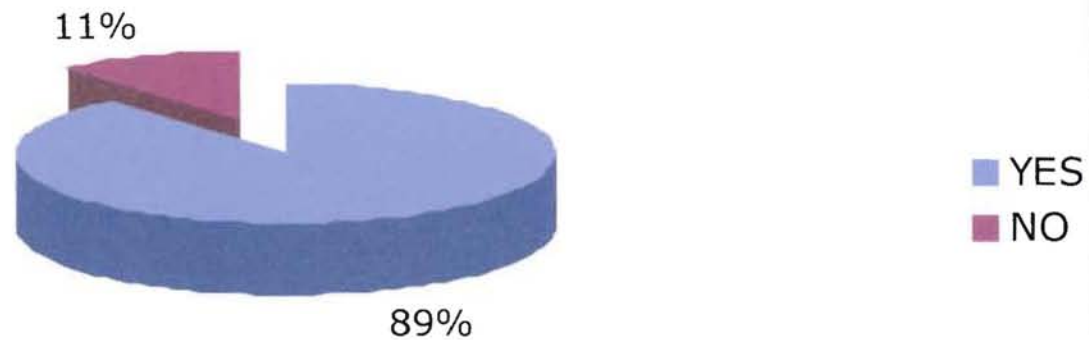
Use of METRO's Programs by other UMC in San Diego



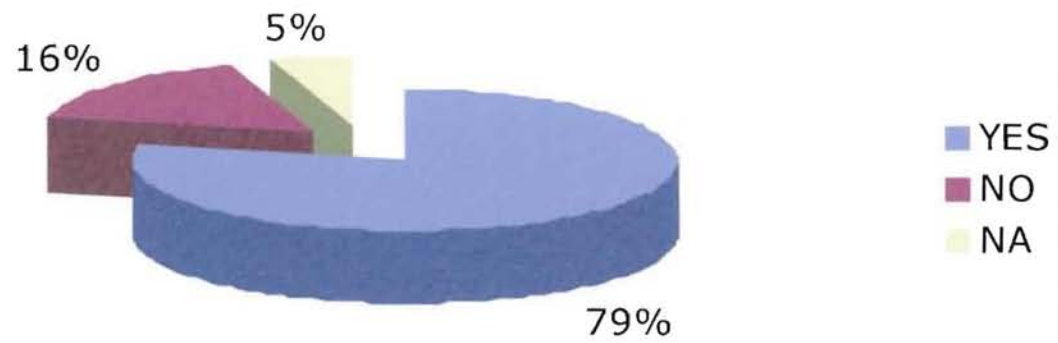
Barriers to Accessing METRO Programs



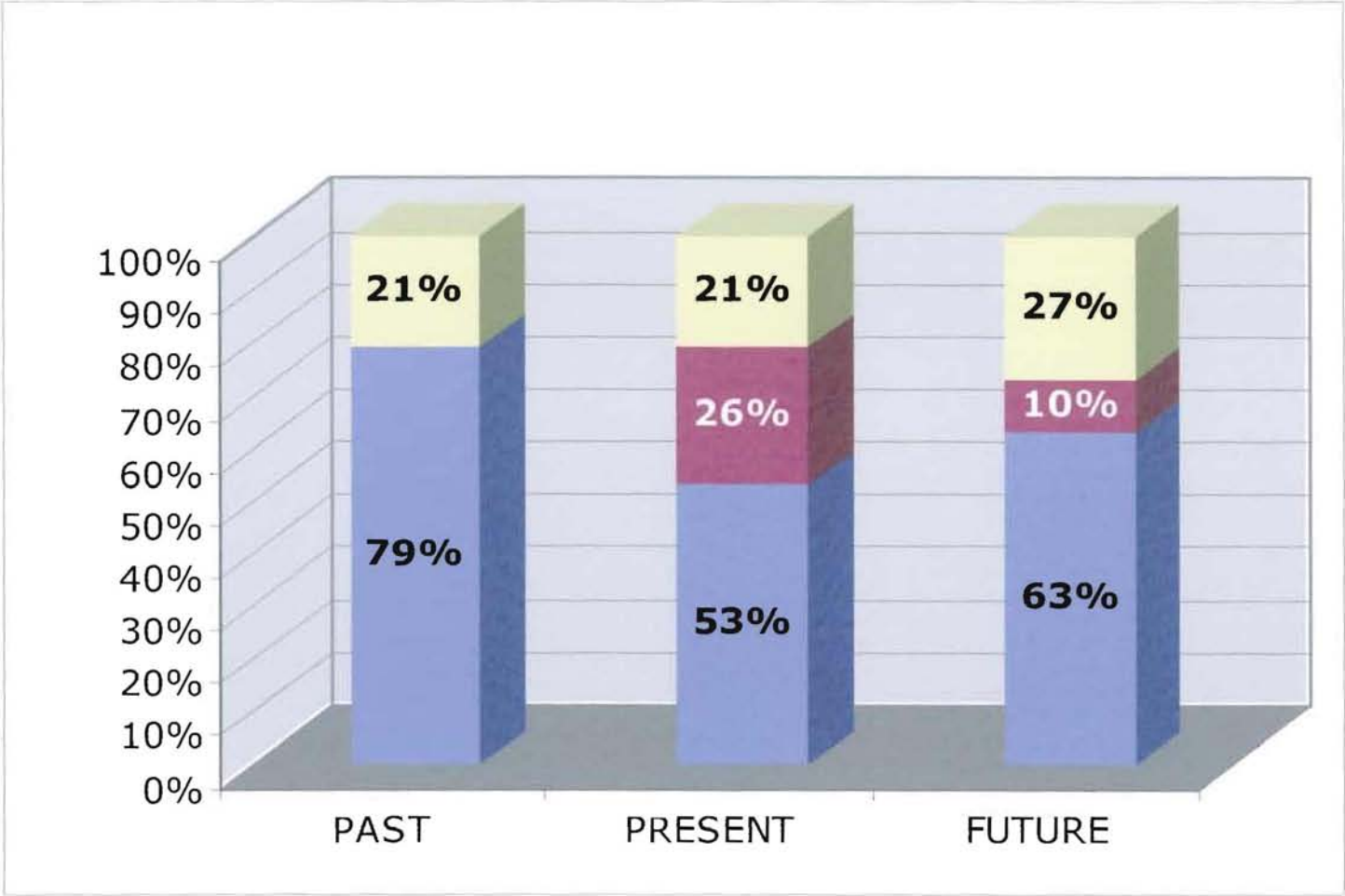
San Diego UMC with Overlapping Services



Interest in Collaboration



METRO Funding



■ Contributions ■ Government Grants ■ Program Services



Positional Mapping between Agencies

Catholic Charities

St. Vincent DePaul Village, Inc.

Lutheran Social Services of Southern California

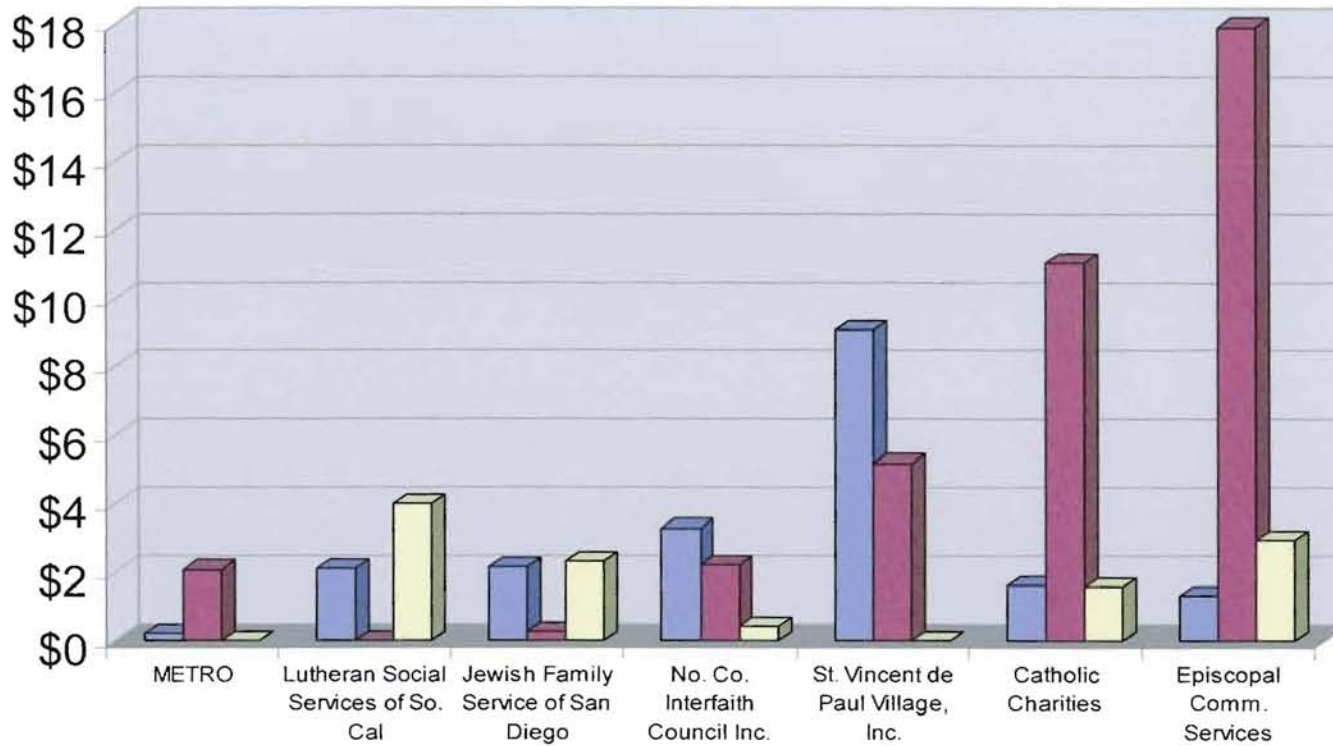
Episcopal Community Services

Jewish Family Service of San Diego

North County Interfaith Council, Inc.

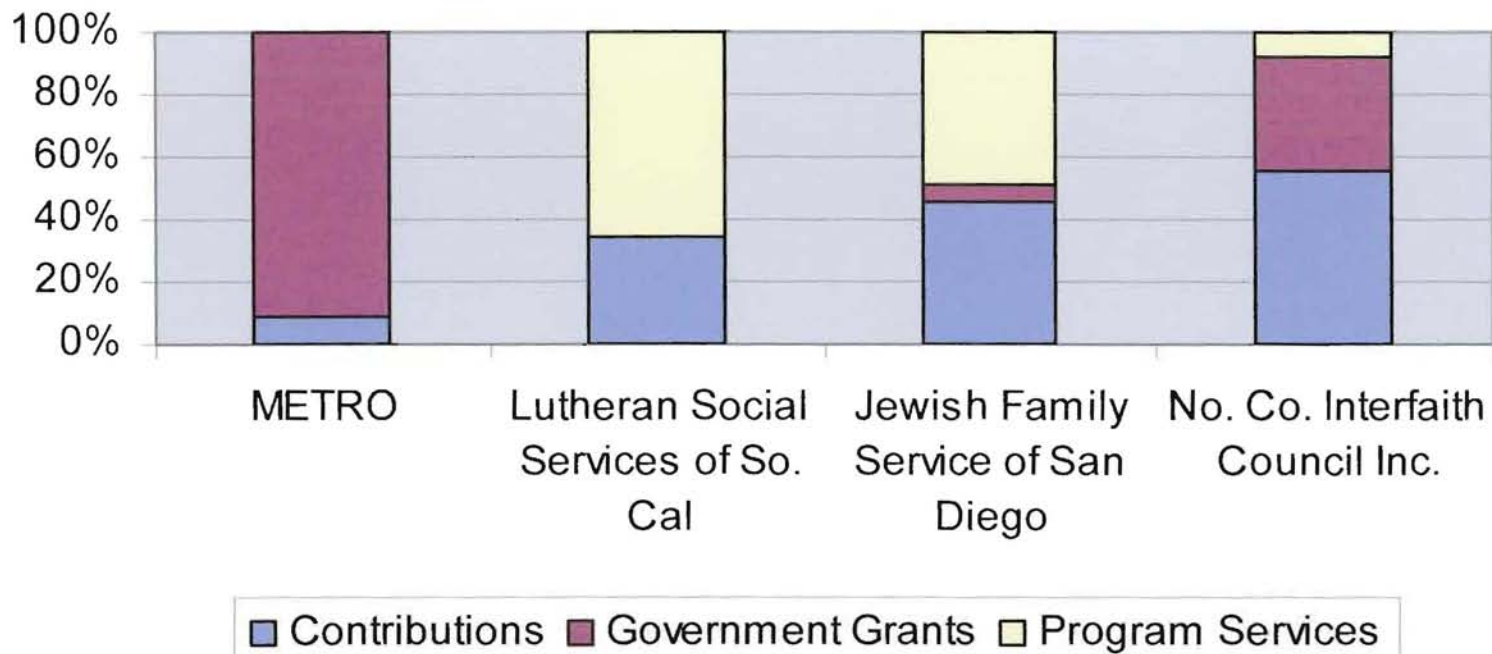
Funding Comparisons between Agencies

Millions

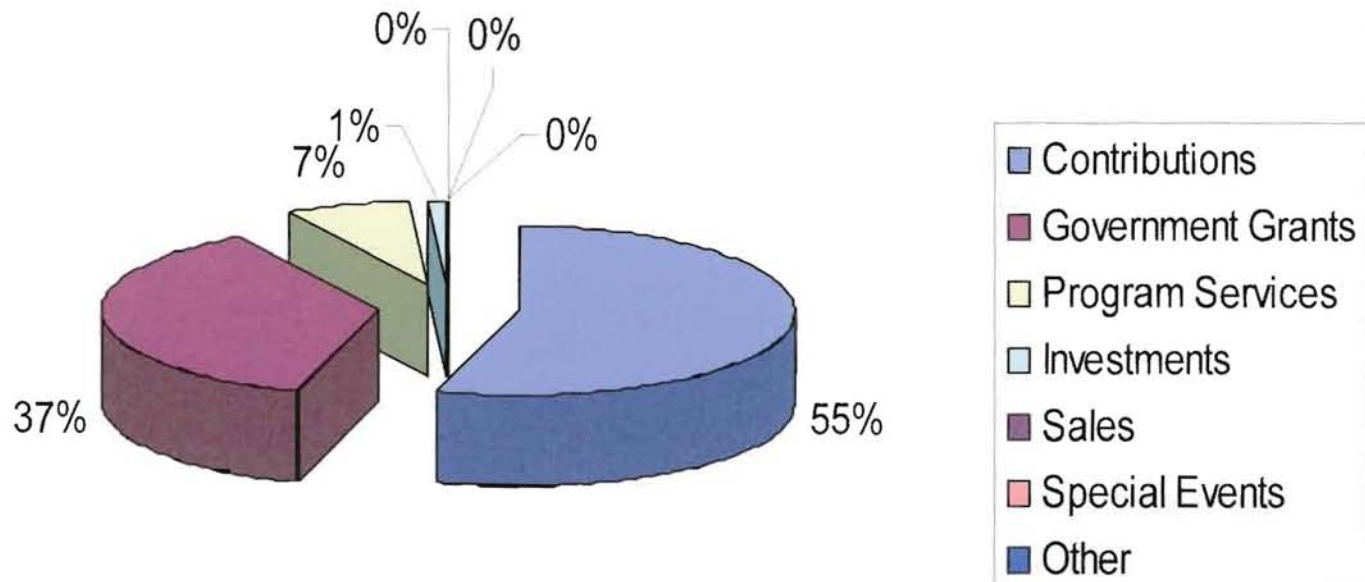


■ Contributions ■ Government Grants ■ Program Services

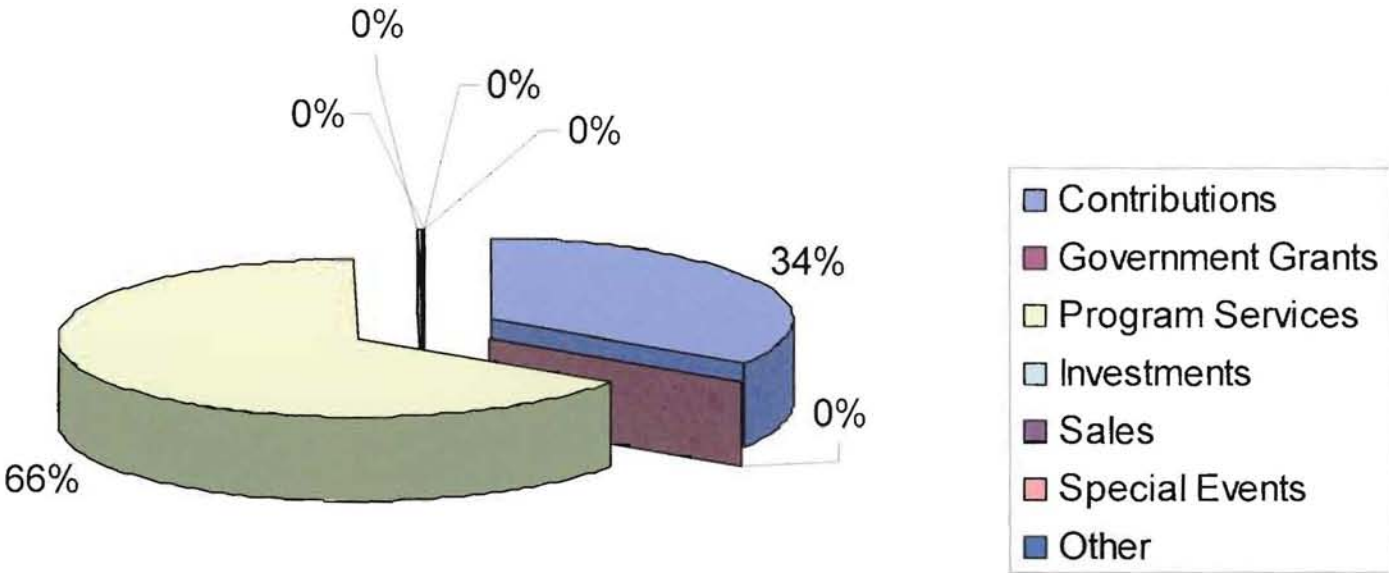
Funding Sources



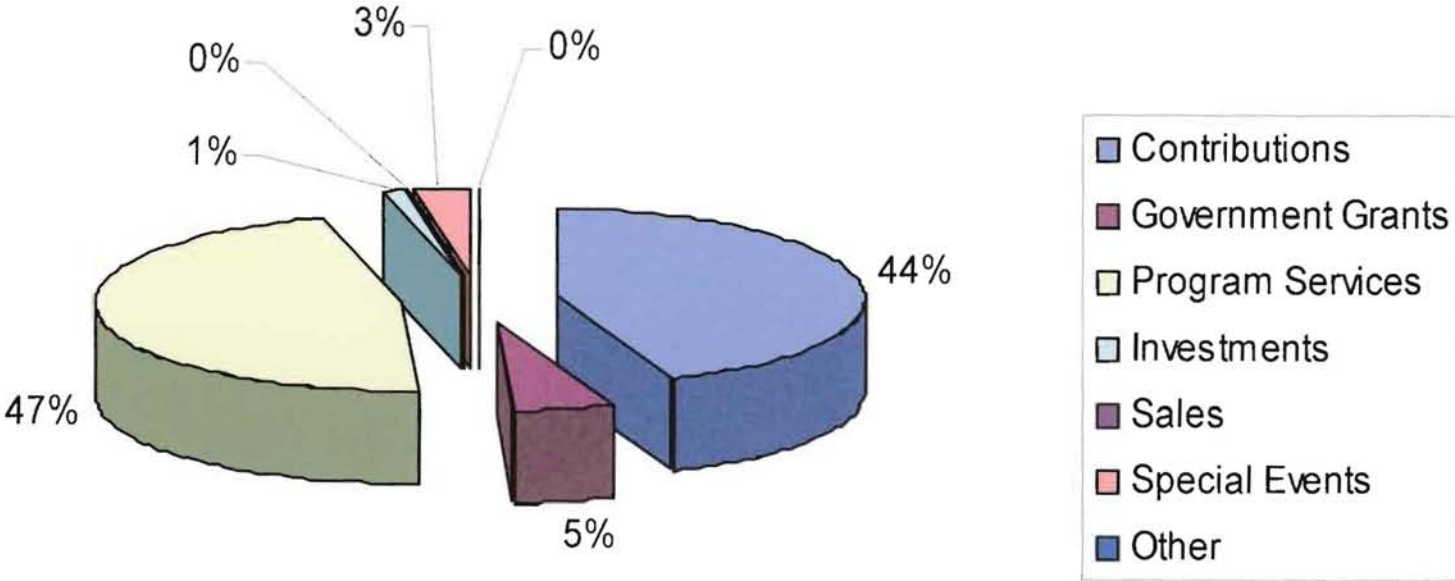
North County Interfaith Council, Inc. Funding



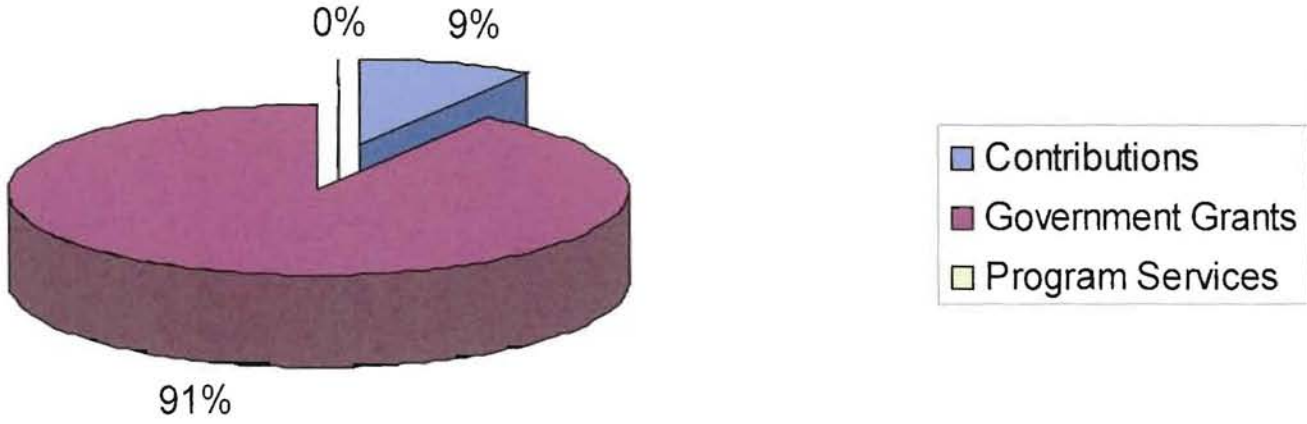
Lutheran Social Services of Southern CA



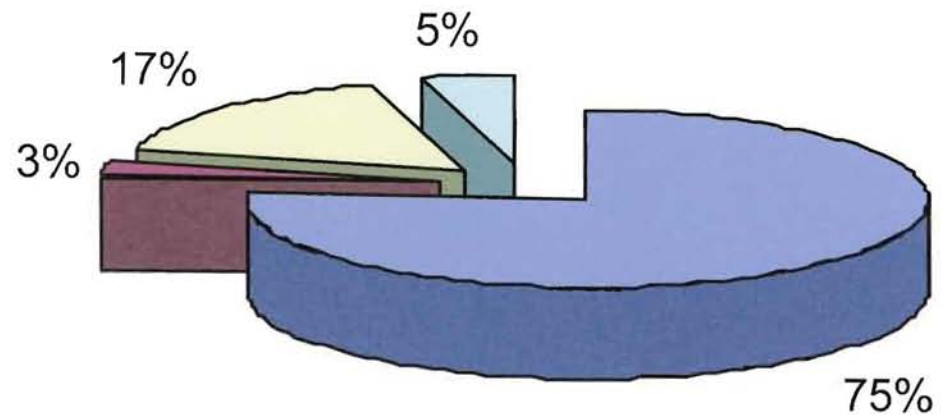
Jewish Family Services of SD Funding



METRO Funding



METRO 2003 Budget Chart



■ Staff Expenses

■ Client Support

■ Non-Personnel Operating Costs

■ Subcontract Services



Key Informant Interviews

- Y-Change provides 54% of METRO's Federal Funding
 - Sandra Waterhouse provided information
 - METRO is doing a satisfactory job but funder expects bigger things from METRO
 - Sandra Waterhouse indicated METRO needs to diversify and that she sends METRO regular grant notifications
- San Diego Youth @ Work provides 46% of Federal Funding
 - Kelly Henwood provided information
 - METRO is the largest recipient of this funding in San Diego
 - METRO needs to improve staff expertise to effectively manage contract requirements
 - Leadership has been non-responsive to inquiries

SWOT GRID	Opportunities	Threats
Strengths	<p><u>INVEST</u></p> <p>Increase staff/Board skills through training</p> <ul style="list-style-type: none"> ▪ Send Board to USD NP Board training in 2006 ▪ Seek funding to enlist staff in USD NP Program ▪ Utilize Board to connect with new funders ▪ Collaborate with SD UMC for web design ▪ Retain & train existing staff to broaden skills ▪ All SD UMC should have reps. on METRO Board 	<p><u>DEFEND</u></p> <ul style="list-style-type: none"> ▪ Staff – train to build skills for contract management ▪ Programs – seek out additional grants that can provide additional funding ▪ Board – utilize members to find additional funding relationships & resources
Weaknesses	<p><u>DECIDE</u></p> <p>Collaborate – Cultivate stronger partnerships</p> <ul style="list-style-type: none"> ▪ Seek out someone from existing SD UMC who may be able to serve as METRO internal liaison ▪ Seek out grants to increase staffing and funding 	<p><u>DAMAGE CONTROL/DIVEST</u></p> <p>Corrective Action</p> <ul style="list-style-type: none"> ▪ Meet with Board to develop plan for resolution ▪ Divest ED from some current responsibility to get back on track <p>Federal Funding</p> <ul style="list-style-type: none"> ▪ Begin seeking out new grants & funding sources ▪ Maintain funder expectations for current funds <p>Program Funding - % to Constituents</p> <ul style="list-style-type: none"> ▪ Look closely at staff expenses to see how funding can be redirected to programs



Conclusions

- **Should METRO be the service provider for the SD UMC?**
- **Is there reciprocity between METRO and the SD UMC?**

Yes:

Survey results showed that the SD UMC were willing to utilize METRO programs



Conclusions

- **Is METRO too dependent on one funding stream?**

Yes:

Research shows that METRO receives 91% of its revenue from federal government grants

How:

Work with Board of Directors to determine plan for diversification of funding sources, utilize Board contacts for networking purposes, communicate with SD UMC that are willing to provide funding to create more revenue, have special events, determine if related business income can be generated



Conclusions

- **Does METRO's current funding affect the sustainability of its key programs?**

Yes:

METRO is doing a good job of executing the funding provided. However, METRO needs a stronger leadership presence.

How:

METRO needs to improve communications with major funders. The expertise of staff managing contracts needs improvement as does the response of leadership to delivery orders.

METRO



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FAX: (619) 236-9944

906 North 47th Street
San Diego, CA 92102
Phone: (619) 264-0368
FAX: (619) 264-0806

www.metrosandiego.org

4/24/2006

Professor Pat Libby
USD Non Profit Management Program
5998 Alcala Park
San Diego, CA 92110

Dear Professor Libby,

This letter is to serve as a receipt from Metro United Methodist Urban Ministry for the incredible work accomplished by Olivia Gil-Guevara, Wendy Morris, Fred Speece and Meg Storer to forward the strategic plan of our organization.

In the last few years Metro has experienced tremendous growth and change. Approximately 8 years ago we had a staff of three, a budget under \$200,000 and two viable services to the community. During the last few years Metro has grown to employing 50 full time staff and received over \$ 11 million from multiple funding sources. The need for Metro to focus on strategic planning was a critical issue when the students began their work. The work accomplished by the students has been the backbone of our strategic plan and have served as a catalyst for intense discussions within the staff, board and stakeholders.

Metro is working slowly with staff, board and key community stakeholders to redefine our mission statement, refocus our vision statement and rethink our role in the community. The professional, thoughtful and well documented work of the USD students has had and will continue to have immeasurable impact on our organization for years to come.

I am so impressed by the quality of the students produced by this program I can't wait to hire as many as I can afford!

Thank you for your hard work, dedication and commitment to the non profit community.

Respectfully,



Rev. John Hughes, MSW
Executive Director

Helping Churches Help People