COVER PAGE

EXECUTIVE SUMMARY (1 person: Ben)

BACKGROUND (3 people: Ben, Soumyendu, Brody)

**Team notes{**

* Overview of HOTH as an organization
* Team and board makeup
* Services (patients vs family)
* Vision statement (another focus is mental health awareness)
* Client base (patients and family)
* History
* Current fundraising (Bingo, Trillium, real estate grant, self-sustainable housing)
* Financial status
* Last Endeavour engagement - limitations (system set-up and how to track clients)

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**Cleaned up{**

BACKGROUND

Home on the Hill (HOTH) was founded in 2011, becoming a registered charity in 2012. Based in Richmond Hill, Ontario, it was established to fill a critical gap in the healthcare system to support adults with serious mental illness and their families. Specifically, they address housing for these individuals as well as skill building, and educational/emotional support for the individuals and caregivers alike. HOTH is grounded in a vision of inclusive mental health care, seeing the value of an informed and family-centred support network.

Their services are across four focus areas:

* Supportive Housing: community-based, residential units within a single house for a safe and supported living environment. This is a proof-of-concept for potential long-term housing options which are self-sustaining and empower the residents. This includes a part-time chef to cook meals.
* Client Services: art expression, recreational therapy (20 clients), yoga, and workshops for life- and professional-skills all help to encourage social interaction and aid clients in building both competence and confidence.
* Family Support: cornerstone of the support-network for clients, thus also a crucial dimension of HOTH; includes caregiver groups and one-on-one peer support.
* Public Education: Their Robert Veltheer Lecture Series is held quarterly, aiming to inform and destigmatize the lives and experiences of the clients and families living with severe mental illnesses. Also a prominent part of marketing and community outreach.

Despite operating on a

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PROBLEM DEFINITION (2 people- Soumyendu, Christine)

* HOTH looking for a strategy for sustainable funding
* Current state: runway time, sources of funding
* Client barriers e.g., clients (patients) may be detracted by barriers $; social considerations

Financial volatility: cash squeeze from heavy reliance on fundraising events, grants, donations, and rental income

Resource constraints: small organization with only six board members, 5 part time staff, and one full time. This presents a challenge to maintain programming and run fundraising and implement marketing strategies.

Operation cost pressure: growth in operational expenses growing significantly from salaries, communication and education, and occupancy costs

PROJECT OBJECTIVES (2 people - Jimmy, Soumyendu)

* Fundraising strategy (short to medium/long term)

PROJECT APPROACH (3 people - Jimmy, Seemi, Brody)

Phase 1:

* Value proposition; positioning
* Community impact value

Phase 2:

* High level financial analysis (costs, sources of revenue, run rate)
* Revenue levers (pooling resources)
* Better understanding of the team's roles and responsibilities

Phase 3

* Recommendations

PROJECT DELIVERABLES (1 person - Jimmy, Seemi)

* Recommendations (options with pros and cons) - range of revenue (very broad numbers); types of channels/mediums
* Financial assessment of current state
* Timelines (cash flow)

PROJECT SCOPE (2 people: Ben, Seemi)

**Team notes{**

* IN SCOPE
  + Consider all types of fundraising options (grants, events, marketing channels)
  + An evaluation of current financials (run rate) + internal operations (team makeup/human resources)
  + Strategies that have/haven’t worked in the past
  + Comparative landscape (Allied Home)
* OUT OF SCOPE
  + Marketing (implementation, content, timelines)
  + IT support/social media
  + Brochure feedback
* ASSUMPTIONS
* CONSTRAINTS

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**Cleaned up{**

IN SCOPE

Evaluation of fundraising alternatives: grants, events (e.g. Bingo), donors, partnerships

Review of financial health: assessment of run rate, cost structures, and key revenue streams and levers

Analysis of internal operations: team structure, board roles and alignment, and resource capacity

Assessment of past fundraising strategies

Comparative landscape assessment: strategy and decisions from other similar organizations (Allied Home)

OUT OF SCOPE

Marketing content development or implementation

IT support such as website, social media, or eventbrite setup

Staff hiring, HR restructuring, or direction operations management

Grant writing or application support

PROJECT SCHEDULE (1 person)

* May: gathering of essential data; phase 1 complete; in-person visit
* June: mid-June midterm presentation have the financial assessment completed (phase 2-3)
* July: Phase 3 wrap up; slide building
* August: mid-August final presentation

COMMUNICATIONS PLAN (Seemi)

RESOURCE REQUIREMENTS (1 person) - complete pending client input

* CLIENT HUMAN RESOURCES AVAILABLE - discuss on Wed
  + Confirm name and titles
  + Other members available?
* CLIENT DOCUMENT RESOURCES AVAILABLE AND EXPECTED - discuss on Wed
* CONSULTING HOURS AVAILABLE

TEAM STRUCTURE, ROLES, RESPONSIBILITIES (1 person) - complete

* RESPONSIBILITIES OF THE CONSULTING TEAM
* RESPONSIBILITIES OF ENGAGEMENT MANAGER
* RESPONSIBILITIES OF CONSULTANT
* RESPONSIBILITIES OF PROJECT ADVISOR

CLIENT AGREEMENT

CHANGE REQUEST PROCEDURE

SIGN OFF ON STATEMENT OF WORK

PROJECT CONTRIBUTORS

ABOUT ENDEAVOUR

Next steps:

* Seemi to put placeholders based on how long the section is
* Before Wednesday meeting: nominate yourself for the different sections
* Seemi to share examples
* Wednesday - ask questions
* Complete sections by Saturday
* Send to review by David
* Wednesday - submit