**PLAN A. ADDITIONAL WEBSITE COPY**

“To fill in the space underneath the Services and Organization section, we propose including text about what Plan A does for the services and organizations listed on the page in the colored boxes.”

**{{{HERE IS A LIST OF ORGANIZATION/CLIENT TYPES IN CASE THIS IS USEFUL}}}**

Advocacy

Arts

Botanic gardens

Business improvement

Camps

Cemeteries

Charitable giving

Charter Schools

Colleges

Community development

Community centers

Consortiums

Corporate giving

Disease research

Faith-based

Federated charities

Foundations

Healthcare

Homelessness

Housing

Human service

Hunger

Independent Schools

Museums

Parks

Performing arts

Public space

Relief

Religious communities

Universities

Volunteerism

Women’s

**{{{HERE IS A LIST OF SERVICES WE WILL OFFER}}}**

Strategic and Business Planning

* Long-range strategic planning: Plan A guides the development of long-range plans (3-5 years) for clients beginning with a vision statement for the client’s future, then developing a series of strategic goals, objectives and tactics to realize the vision carefully calibrated to a timeline and metrics.
* Tactical business planning: Plan A guides the development of step-by-step plans to realize complex organizational initiatives that may include a change in direction or focus, or the addition of a new facility or program.
* Financial planning: Plan A guides the development of multi-year financial forecasts including detailed expense projections, realistic and actionable plans for developing the financial resources to meet expenses, and recommended investments in capacity building, especially in the area of resource development.
* Scaling: Plan A guides the development of strategies for clients who are planning to expand the programs or services that they offer, or their geographic region, now commonly known as “scaling.”
* Mergers and acquisitions: Plan A designs and guides comprehensive plans for nonprofits that are in the process of merging with or acquiring another nonprofit, and facilitates the entire merger process.

Governance and Leadership Development

* Board assessment and development: Plan A assesses the performance of a nonprofit’s board against generally accepted benchmarks for best practices and makes recommendations to improve board performance; Plan A also guides the board development process to install new membership or leadership.
* Retreat/meeting design and facilitation: Plan A designs organizational retreats and planning meetings and serves as an independent facilitator.
* Executive coaching: Plan A works closely with nonprofit leaders to strengthen performance and provide objective and experience-based advice on matters including governance, staff management, planning, financial management, organizational structure and more.
* Executive and board succession planning: Plan A works with the board and executive leadership of nonprofits to develop succession plans for both, and coaches and trains incoming and future leaders to prepare them for new responsibilities.

Management and Organizational Change

* Organizational assessment and development: Plan A assesses the capacity and function of an organization’s operations, management culture, supervisory and staffing structure, and performance, and recommends approaches to improve efficiency and impact.
* Program development and evaluation: Plan A guides the development of functional, implementable, tactical plans to launch or expand programs within a framework that enables organizations to evaluate and demonstrate long-term impact and efficient use of resources.
* Diversity and gender audits: Plan A assesses an organization’s practices, policies, performance, and culture with regard to gender equity and/or other areas of equal opportunity, and recommends approaches to ensure that every employee and client feels that the organization provides an inclusive workplace and services. Plan A develops custom diversity trainings to help management and staff to build an inclusive organization.
* Environmental scans: Plan A conducts scans of comparable organizations in a given field to help clients benchmark best practices and uncover alternative models to improve long-term impact.
* Strategic partnership development: Plan A negotiates strategic partnership agreements between organizations, facilitating conversations between boards and staff leadership, drafting the Memorandum of Understanding, and helping to set financial terms.

Resource development

* Feasibility studies: Plan A studies the feasibility of conducting fundraising campaigns for nonprofits; as a result, clients are able to set realistic fundraising goals, and can identify potential campaign leadership.
* Development audits: Plan A assesses the performance of a nonprofit’s fundraising efforts including both board and staff activities against generally accepted benchmarks for best practices and makes recommendations to improve performance. Plan A also guides the process of designing new fundraising programs, installing new staff, and setting appropriate goals.
* Fundraising planning: Plan A works with nonprofits to match organizational goals and aspirations (i.e. those set in a strategic plan) to realistic and actionable fundraising plans that secure the financial resources necessary to sustain the nonprofit long term, as well.
* Philanthropic visioning and counsel: Plan A works with foundations and philanthropies to design their philanthropic agendas, determine the focus for their giving platform, the specific programs through which they will distribute grants, and the measurable goals they hope to achieve.

**{{{{HERE IS CONTENT FOR THE LIBRARY SECTION. WE EXPECT TO REGULARLY ADD TO THIS SECTION ALWAYS WITH A HEFTY PARAGRAPH AND USUALLY-BUT-NOT-ALWAYS WITH A LINK TO A PUBLISHED ARTICLE OR DOCUMENT}}}**

**Library**

The Library includes a selection of resources and considerations that have helped shape the thinking and work of Plan A in various sectors.

**Continuing Education: Enhanced Revenue at a Time of Spiraling Costs?**

From 1995 to 2005, college tuition spiraled upward by 36% at private schools and 51% at public schools; and costs continue to rise. At the same time, from 2005 - 2016, the growth of the adult population in higher education will increase by 20.5%, compared to 6% for traditional undergraduate students (under age 25). We believe that expanding and imagining new models of continuing and professional education will provide the critical revenue colleges need to slow the rising costs of undergraduate tuition and invest in other areas of an institution. This article provides a great overview of the field:

[Continuing Higher Education in America: A Profile](http://connection.ebscohost.com/c/articles/48382052/continuing-higher-education-america-profile)

**Fundraising for Social Enterprises**

In this article, written for UJA-Federation of New York’s “Power Your Mission” Conference, Theresa Schieber and Plan A’s Adam Gaynor address the critical role of traditional philanthropy in generating capital to launch and expand non-traditional revenue centers for non-profit organizations large and small.

[“Raising Impact Capital: Designing a Fundraising Strategy for Your Social Enterprise”](http://ejewishphilanthropy.com/raising-impact-capital-designing-a-fundraising-strategy-for-your-social-enterprise/)

**New York State Passes the “Nonprofit Revitalization Act”**

15% of New York State's workforce is employed in the non-profit sector, and New York City is home to some of the nation’s largest and oldest charities, but the State had not updated its laws governing the sector in over forty years. After an exhaustive study by the Charities Bureau, the State Legislature passed a reform bill that streamlines several management processes while strengthening nonprofit governance provisions. Read on for a summary of the bill.

[Summary of the Provisions of the Nonprofit Revitalization Act](http://uwnys.files.wordpress.com/2013/06/charities-bill-summary-memo-6-18-13.doc)

**The Brooklyn "Tech Triangle" and the Borough's Cultural Institutions**

The Brooklyn Navy Yard, Downtown, and DUMBO have exploded in the past few years with over 525 start-ups employing over 10,000 tech and creative professionals. NYU's investment in the Polytechnic Institute and Cornell/Technion's emerging campus on Roosevelt Island are additional harbingers of growth. All of these developments point to new opportunities for Brooklyn's artists, designers, and cultural institutions to expand their audiences and strategic partnerships. Read on for more about New York's creative economy:

[“Designing New York’s Future”](http://nycfuture.org/pdf/Designing_New_Yorks_Future.pdf)

**The Case for Gender Audits in the Jewish Communal Sector**

*“In the same year that the Jewish press has re-exposed gross inequalities in favor of men in the Jewish professional sector, there has been a growing movement by Jewish educators to attract and retain teen boys, whom many fear are dropping out of Jewish education at a higher rate than girls. In short, despite the fact that men dominate communal decision making, we are afraid that boys are disaffected!”* Read more by Plan A’s Adam Gaynor…

[“Pursuing Gender Equality: A Few Concrete Steps”](http://ejewishphilanthropy.com/pursuing-gender-equality-a-few-concrete-steps/)

**Financial Management Resources for Nonprofits**

Many non-profit leaders come to the task without academic or professional training in financial management, an area of increasing importance to funders, both private and public. To help close this gap, The Wallace Foundation recently launched a website dedicated to providing free financial management resources and templates to non-profit organizations.  
[Resources for Nonprofit Financial Management](http://ejewishphilanthropy.com/strategy-is-culture-is-strategy/)

**Why Strategic Planning Doesn’t Necessarily Translate to Sound Decisions**

We agree with Richard Marker’s analysis that strong consulting practice does more than just fix a technical problem; if conducted well, high-quality consulting addresses the role that an organization’s culture plays in supporting or undermining transformative change. Read more:

[“Strategy is Culture”](http://ejewishphilanthropy.com/strategy-is-culture-is-strategy/)

**Debunking the Overhead Myth**

We are thrilled that the leaders of the country's three leading sources of information on nonprofits - GuideStar, Charity Navigator, and BBB Wise Giving Alliance - have jointly issued a statement challenging the myth that the percentage a nonprofit spends on overhead (administrative and fundraising expenses) is the most important measure of the organization’s impact, management, and transparency. From experience we know that at various points in the lifecycle of a nonprofit, increasing the percentage spent on overhead is critical to building the capacity to improve long-term impact. Read the letter:

[“The Overhead Myth”](http://overheadmythcom.b.presscdn.com/wp-content/uploads/2013/06/GS_OverheadMyth_Ltr_ONLINE.pdf)

**Program Evaluation: Burden or Benefit?**

The Foundation Center aptly states, “More and more foundations expect to see an evaluation component in the programs they fund.” In a time of limited resources, we have also seen that individual donors increasingly view their gifts as social “investments” and expect a social “return.” However, many nonprofits believe that program evaluations must be rigorous, empirical studies conducted by outside evaluators. In fact, many nonprofits already have the tools to conduct their own evaluations, and with a little coaching can gather and analyze the data that will help them to evaluate their work, broadcast their success, and leverage more resources to achieve their strategic goals.

**The Latest Fad: Social Impact Bonds**

*“The ‘social impact bond,’ also known as a ‘pay for success’ bond, is the latest — and most discussed — tool in a broader playbook philanthropists are using to blend business and charity to make a bigger difference. Sometimes known as impact investing, these approaches include providing low-interest loans to nonprofits, making equity investments in companies that tackle social problems and investing a portion of a foundation’s endowment in enterprises that produce measurable benefits to society and a financial return.”* Although a bold experiment, this approach is still unproven and raises a host of thorny issues. While we continue to monitor this landscape, here is a nice summary article on social impact bonds:

[“Getting Back More Than a Warm Feeling”](http://www.nytimes.com/2012/11/09/giving/investors-profit-by-giving-through-social-impact-bonds.html?pagewanted=all&_r=0)

**What Makes a Great Strategic Plan?**

Many of the strategic plans we see make great doorstops or bookends; they are fifty pages of dense text that require a doctorate to decipher! So when shopping for a consultant to facilitate your planning process, ask to see a sample plan. It should 1) be clearly stated and concise, with an aspirational but realistic vision for the next few years, 2) be easy to implement without an owner’s manual, 3) incorporate a realistic and affordable evaluation framework, 4) be directly tied to financial projections, 5) identify those responsible for implementing and reporting on specific initiatives, and 6) be flexible enough to make course corrections as evaluations are completed or an organization’s financial position changes. In this way, a strategic plan becomes a tactical document, rather than a pie-in-the-sky exercise that diverts everyone’s time from the work at hand.

**What is the Difference Between a Mission and Vision?**

Put simply, a mission is the business of a nonprofit or company, and usually includes the approach that the organization employs. A vision describes the future position of the organization; what it hopes to achieve through its work after a specific period of time. Defining the vision is a core step in strategic and business planning. It provides a waypoint from which to work backward; defining a vision spurs an organization to develop plans, allocate resources, and evaluate success over time calibrated to well-defined benchmarks.

[“Defining Mission, Vision, and Values”](http://www.philanthropyjournal.org/resources/managementleadership/defining-mission-vision-values)