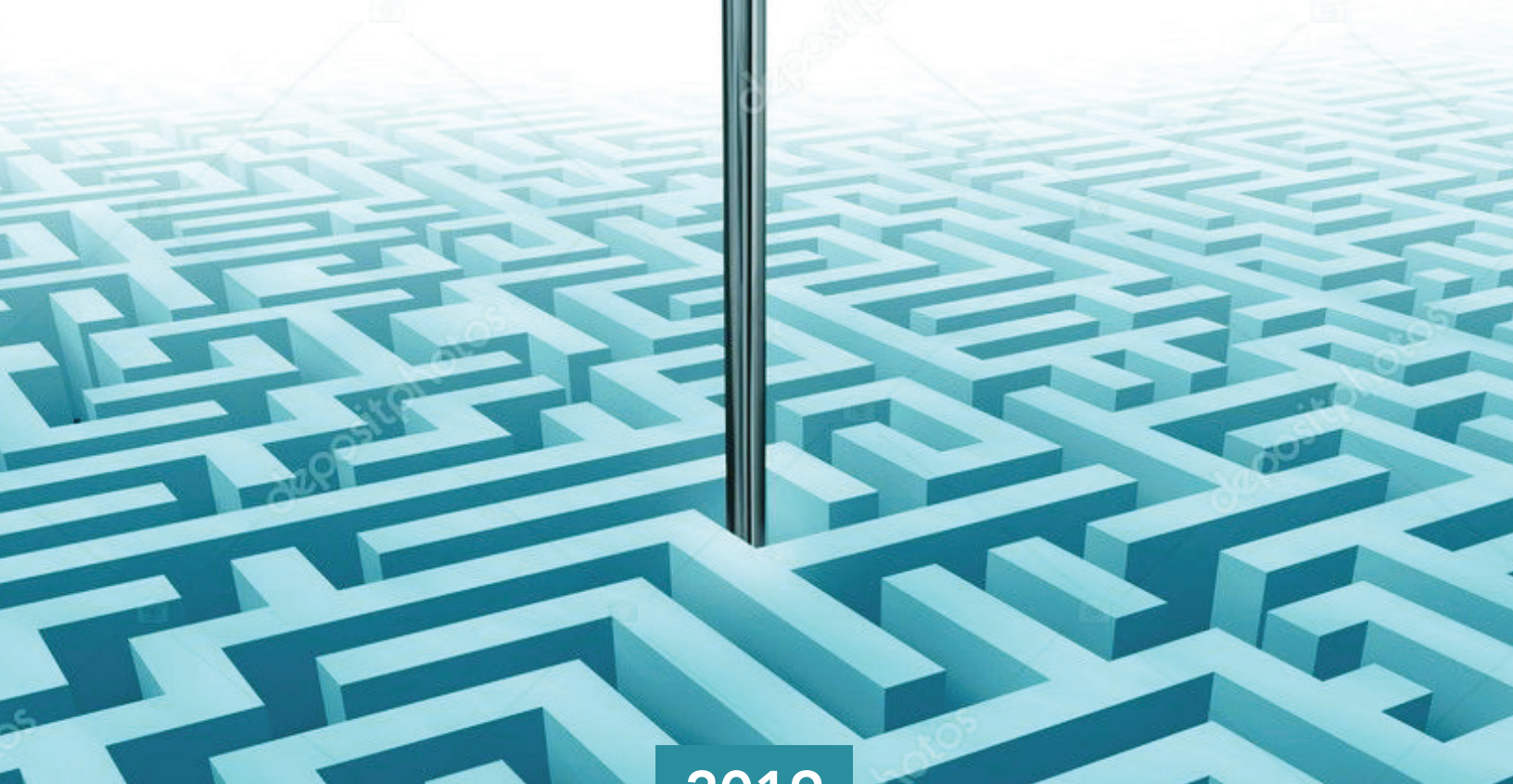
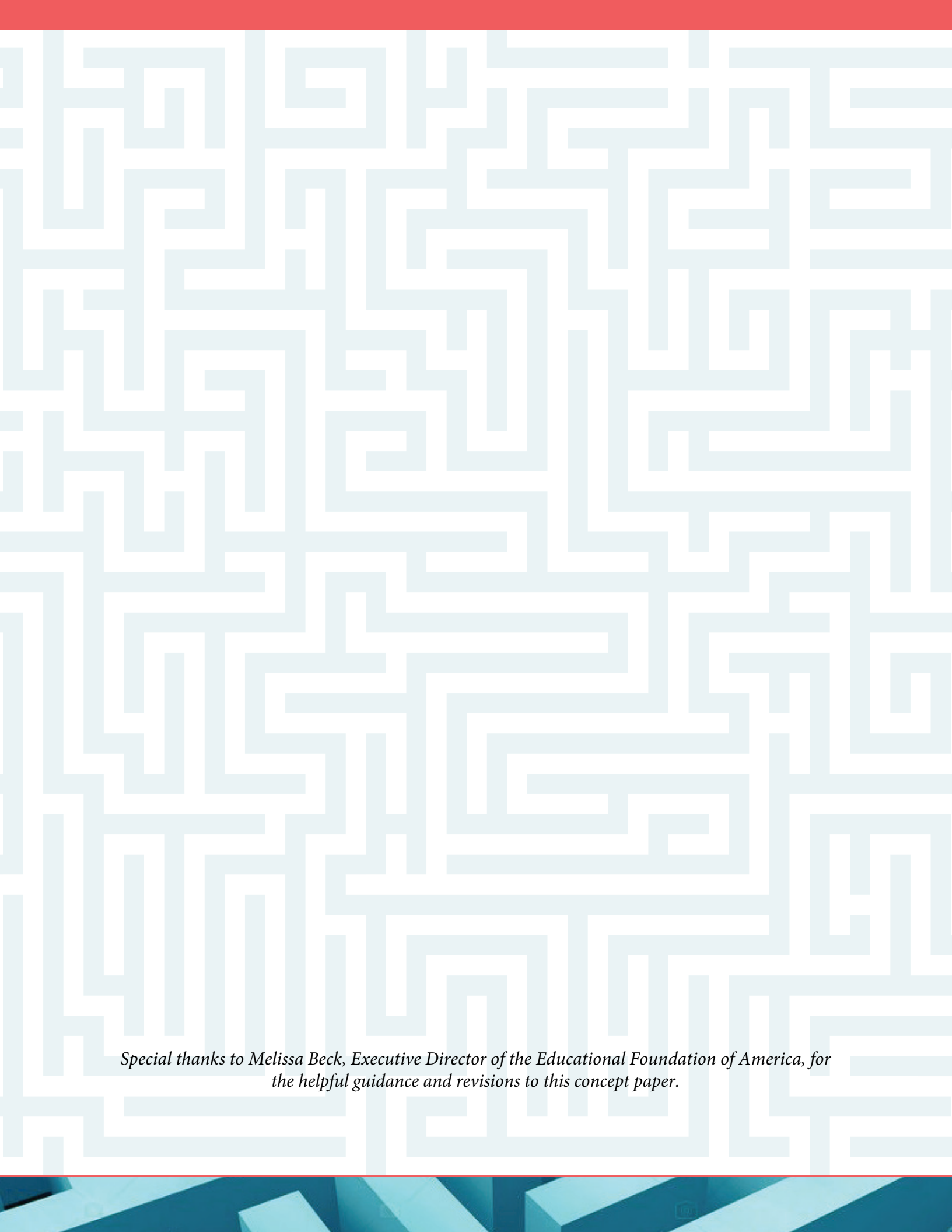


ORGANIZATIONAL NAVIGATOR PROGRAM



2019




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SUPPORT CENTER ORGANIZATIONAL NAVIGATOR PROGRAM

Nonprofits are facing a particularly volatile policy environment, including a rapidly changing and hostile federal landscape, uncertainty at the local level, and multiple stressors on the communities they serve. While the full implications of the 2017 tax bill are yet unknown, it will likely present new challenges to long-standing government—nonprofit partnerships and disincentivize donors who give relatively small annual amounts to nonprofits.

Against this backdrop, the work of nonprofit organizations—including the provision of direct social services, advocacy efforts, and community organizing—has never been more urgent. Moreover, the capacity needs of these organizations aren't just episodic. They require a holistic look at all facets of organizational capacity, including management, finance, and programming. In this highly pressured climate, it is essential that nonprofits build the internal organizational capacity that will sustain their work through the instability of the current moment and beyond. Support Center's mission is to empower nonprofit leaders and social enterprises to transform their leadership and management and accelerate positive social change. Our key priorities, outlined in our strategic plan, include building communities of practice to drive long-term change for our nonprofit partners; empowering nonprofits through an integrated



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capacity-building platform to promote long-term organizational transformation; and harnessing the power of our community's people and resources to drive social change.

The organizational navigator program—an approach that pairs organizations with a seasoned nonprofit executive to serve in an advisory role—is a key development in Support Center's evolution, shifting from transactional project-based consulting work to longer-term transformational relationships.

ABOUT OUR APPROACH

Support Center brings over four decades of experience working with nonprofit organizations to build leadership and organizational capacity. While we believe that these consultancies and trainings are critical, we know that even if we deliver high-quality engagements—whether it's a six-month strategic planning process or an organizational assessment—challenges remain to manage, monitor, and evaluate this work over the long term. We also know that organizations struggle to collect and maintain up-to-date evidence in a variety of areas, including program effectiveness and organizational capacity.

Support Center's navigator program matches experts in nonprofit management, fundraising, and operations with organizations seeking to strengthen their internal capacity. Navigators serve as organizational coaches, supporting and mentoring nonprofits in key phases of their organizational life cycle: **start-ups**, **growing organizations**, and **organizations in transition**.

Support Center's navigators are veteran nonprofit professionals who bring decades of experience in the areas of governance, leadership, and management, with average experience of over 30 years (see Appendix A for bios). Each navigator was carefully selected by a team of Support Center staff from our pool of talented partners—trained interim executives, affiliate consultants, and organizational collaborators.

NAVIGATOR PROGRAM ELEMENTS

This unique program is anchored by a long-term approach that seeks to shift traditional and transactional project-based consulting work to enduring transformational relationships. We believe that this is how real, lasting organizational change is possible, and we expect each engagement to last a minimum of 24 months.

Each engagement in the navigator program begins with a baseline assessment known as the Impact Capacity Assessment, or iCAT. The iCAT, developed by a national team of capacity builders and researchers with Algorhythm, is an assessment and planning tool that helps nonprofits to better understand their organizational capacity. The assessment determines existing strengths and opportunities across a range of organizational functions, including fundraising, leading, learning, managing, overseeing and planning, and ensures that organizational coaching is tailored to the needs of each nonprofit.

Navigators work with organizations to develop and monitor a dashboard, using the results of the baseline assessment, that tracks key performance indicators (KPIs) and priorities over a sustained period of time. Navigators facilitate quarterly reviews of dashboard indicators to chart progress, celebrate success, and identify strategies for additional improvement. Organizations can use their dashboards to communicate this progress to their own stakeholders, including their boards, funders, and the communities they serve.

Our navigators think of this work as a blend of coaching, mentoring, and guiding. Navigators empower organizations to drive their own development and help groups to negotiate the tough decisions, prioritization, and deadlines that accompany any long-term change effort. Through their hour or two per week of guidance, navigators help to identify resources, make connections, and set priorities. We have already observed that staff, board, and key stakeholders report improved focus, decision-making, and results.

This program is designed to leverage navigators' knowledge and experience. In essence, navigators become evaluation and monitoring partners, helping organizations to remain focused on their key performance measures. The navigator program can also complement a project-based and time-limited strategic plan or organizational assessment, supporting the implementation and execution of the organizational changes that emerge in these processes.

Over the long term, we plan to share monthly updates of new resources with our community of partner organizations and marketing through funders, membership organizations, and other intermediaries. We believe that having an organizational navigator will come to represent a powerful resource to an organization, communicating their commitment to the use of key performance measures, organizational assessments, and an evidence-driven approach to their work.



BUILDING THE NAVIGATOR PROGRAM TO SUPPORT NONPROFIT EXCELLENCE

Support Center seeks philanthropic support to underwrite the navigator program on an annual basis. Specifically, we are seeking funding to accomplish two goals: (1) outreach and communications about the program itself; and (2) program implementation.

OUTREACH

Support Center has worked with nearly 500 unique organizations over the past five years on strategic plans, executive transitions, and customized trainings. Our outreach for the navigator program has begun with these organizations, as well as two dozen funding partners spanning government agencies, private foundations, community foundations, and corporations. Our funding partners are potential “investors” – for example, the Department of Youth and Community Development in New York City is investing in navigators for eight organizations.

The following activities will support communications and outreach for the program on an annual basis until sufficient numbers of organizations defray the costs. Support Center staff and related consultants will undertake the work.

| Activity | Success Measure | Impact |
|--|--|---|
| Outreach to 24 current funding partners of Support Center around candidates for the navigator program. | At least 12 one-on-one meetings established. | Seeking 18 organizations in the program by end of 2019. |
| Conduct quarterly informational sessions on the program. | At least 50 attendees across quarterly information sessions. | Prospect list of 24 organizations open to exploring the program. |
| Produce the first navigator “resource guide” – a compilation of tools, resources and supports developed by navigators through their work with organizations. | Completed dashboards for each organization as a management tool for EDs to use with senior staff, outside funders and the board. Board of Directors. | Organizations now have a framework and dashboards for reviewing key results helping them to focus and communicate impact internally and externally. |



PROGRAM

Support Center has identified an initial roster of ten veteran nonprofit professionals with decades of experience in governance, leadership, and management to serve as organizational navigators. Navigators spend roughly a half day per month, or an hour or two per week, offering guidance, navigational support, and executive-level assistance to an organization, meeting with executive directors, senior staff, and board members to address and monitor progress against key organizational performance measures distilled into a dashboard. We anticipate the following goals and measures of success.

| Activity | Success Measure | Impact |
|---|--|---|
| Identify organizations to pair with an organizational navigator for a 2-3 year time horizon. | Organizations paired with an experienced navigator. | Organizations now have embedded knowledge and expertise and are better positioned to monitor progress and respond to challenges. |
| Selected organizations complete an Impact Capacity Assessment ¹ or comparable assessment to identify strengths and opportunities for growth. | Organizations complete an organizational assessment | Organizations now have baseline information against which they can measure long-term progress. This gives them the ability to measure capacity and change in an evidence-based way. |
| Through discussions and assessment feedback, organizations will work with navigators to develop an organizational dashboard. | Completed dashboards for each organization as a management tool for EDs to use with senior staff, outside funders and the board. Board of Directors. | Organizations now have a framework and dashboards for reviewing key results helping them to focus and communicate impact internally and externally. |
| Navigators work with organizations to update dashboards on a quarterly basis. Support Center helps organizations to maintain this dashboard and monitor change over time. | Updated dashboards on a quarterly basis with evidence that staff, board and key stakeholders see improved results with this management tool. | In addition to the initial assessment, organizations now are using indicators to monitor progress and track change. Staff, board and key stakeholders improve their focus and results. |
| Navigators provide targeted organizational coaching around key areas of focus and organizational challenges. | Organizations experience their navigator as a "thought partner," helping to negotiate organizational challenges and tap into existing resources (e.g. Support Center's training and leadership development programming). | Organizations are able to leverage additional knowledge, make better decisions, grapple with setbacks and ultimately focus more on their mission and programs than without this resource. |

CONCLUSION

Grantmakers for Effective Organizations (GEO)—a membership organization of more than 7,000 grantmakers across the globe that exists to help grantmakers turn their desire to improve into real progress—has identified three basic principles to inform capacity-building support. We believe the organizational navigator program embraces these principles in a way that can lead to transformational change.

- ***Make it contextual:*** Meeting organizations where they are is critical. Capacity building must meet the unique characteristics and needs of each and taking a contextual approach to capacity building means designing support tailored to meet the unique needs of our partners.
- ***Make it continuous:*** A long-view continuous approach to building capacity is needed because organizational transformation will not happen overnight, and the need for attention to capacity never goes away for any organization.
- ***Make it collective:*** Taking a collective approach to capacity building can help ensure greater buy-in across the organization and community, build deeper leadership within organizations and the community.

The navigator program brings these three best practices to life and with support we will be able to bring contextual, continuous, and collective support to nonprofit organizations that provide vitally important services and resources to communities across the nation

APPENDIX A: ABOUT SUPPORT CENTER NAVIGATORS



Babette Baker's expertise includes program development, marketing and public relations, process facilitation, fiscal management, policy development, program monitoring and evaluation, grants administration, and grant writing.



Dr. Melba Butler specializes in leadership capacity building including management and board coaching; board development, team building; and strategic planning; facilitating strategic alliances and project management.



Joan Malin is a seasoned nonprofit executive with experience in growth management, operations, results tracking and program design.



Gilles Mesrobian is a skilled consultant with expertise in organization restructuring, executive search and transition management, mission change and executive coaching.



Stephan Russo has expertise in the management and delivery of human services in New York City. He stepped down as the Executive Director of Goddard Riverside Community Center, a highly regarded New York City settlement house, in February 2017 after a career spanning more than four decades.



Sharmila Rao Thakkar has over twenty years of experience working with nonprofits as a volunteer, board member and executive director. Most recently Sharmila led the Siragusa Family Foundation in Chicago and joined Support Center's pool of affiliate consultants in 2018.



Frank Schneiger's expertise includes strategic planning, human resource management, finance and operations in a variety of fields including health care management.



Sarah BJ Sung (BJ) is an expert in strategy and design of corporate social responsibility (CSR) programs, corporate philanthropy and nonprofit management.



Dr. Michael Zisser has decades of experience with nonprofits including board and coalition leadership positions as well as leading University Settlement for nearly 30 years. He also teaches and is the author of *How The Other Sector Survives: Lessons in Non-Profit Management*.

APPENDIX B: ABOUT SUPPORT CENTER

SUPPORT CENTER'S CORE SERVICES INCLUDE:

- 1. Strategy and Management:** We work directly with nonprofit leaders to increase organizational effectiveness, in areas including succession planning, board development, strategic planning, restructuring (including mergers, partnerships, and internal restructuring), executive coaching, human resources, and financial management. We leverage the skills and expertise of over 40 affiliated consultants to best address an organization's needs. Our consultants, coaches, and staff have decades of experience working in the nonprofit, philanthropic, and public interest fields.
- 2. Executive Transition:** Our approach to executive transition covers the full leadership transition process, from succession planning and potentially placing an interim executive, to recruiting and hiring a new long-term leader, and to supporting a new executive with intensive onboarding designed to ensure sustainable success. Our goal is to help organizations maintain their strengths and values, minimize the risks they may face, and solidify their standing with all stakeholders. This integrated approach streamlines the transition process for boards and enables organizations to keep running their programs and services at full capacity while undergoing the search for their next executive director.
- 3. Professional Development:** We offer affordable workshops, convenings, and multi-day customized trainings that provide tools and strategies to empower nonprofit leaders and staff and increase their effectiveness. We also work with partners to plan and implement forums, panels, and conferences that bring together nonprofit organizations and funders to share learning and drive innovative, cutting-edge thinking in the sector.
- 4. Organizational Navigation:** Support Center's Organizational Navigator Program supports long-term change in organizations that are working to negotiate shifts in their operating environment or phases in their growth. Our navigators are experienced nonprofit leaders who serve as organizational coaches. After administering a baseline assessment, navigators help organizations measure their progress according to key performance indicators (KPIs). This program is designed to leverage the knowledge and experience of a navigator, improved data tracking, and the commitment of leaders to improve their organization's results.

APPENDIX C: NAVIGATOR BUDGET

The following chart highlights our annual program costs (\$25,750) as well as the \$7,500 cost per organization to support 50 hours of organizational support annually (including four hours per month with a navigator), impact capacity administration and dashboard development with quarterly progress reports.

| Activity | Units | Rate | Fee/Flat Fee | Notes |
|--|----------|------|--------------|--|
| Annual Basecamp fee for Navigator Community of Practice | | | 350 | Annual fee for our digital community |
| Quarterly navigator meetings | 4 | 350 | 1,400 | Space, materials |
| Staff support for navigator community | 240 | 75 | 18,000 | 20 hours per month of community support |
| Development of resource guides | 80 | 75 | 6,000 | Quarterly collections of navigator-curated resources |
| TOTAL PROGRAM COSTS \$25,750 | | | | |
| Support for 12 months of navigational support per organization | 50 hours | 150 | 7,500 | Cost per organization for the navigator program |



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