

COLORADO NONPROFIT DEVELOPMENT CENTER

STRATEGIC PLAN 2020-2022 GUIDING VALUES AND SUMMARY OF GOALS

GUIDING VALUES

CNDC's 2020-2022 strategic plan is guided by three core values that will influence all of the organization's decisions and actions. This includes the decisions and actions of the staff, board, contractors and projects. These strategic values include:

- **Increasing diversity, equity and inclusion at every level of the organization.** As a leader in the nonprofit sector in Colorado, CNDC sees diversity, equity and inclusion as core part of its mission. CNDC commits to pursuing cultural competency within the organization and among its projects, to accurately assessing the effectiveness of any efforts to bring underrepresented constituency into the organization, and to making changes to policies and practices where warranted.
- **Remaining nimble and responsive to a changing philanthropic sector .** While continuing to prudently and conservatively managing its resources, CNDC will also be proactive in monitoring changes in the fiscal sponsorship industry and in seeking innovative opportunities that will allow the organization to better serve current projects and future projects.
- **Demonstrating and celebrating the impact of CNDC.** CNDC has traditionally promoted the success and impact of its projects while maintaining humility about its own contributions. Going forward, CNDC will acknowledge and highlight the value of its own work in addition to that of its projects.

SUMMARY OF STRATEGIES AND GOALS

IMPACT: The following strategies and goals are aimed at increasing CNDC's impact in the nonprofit sector.

Strategies for Impact:

- DEI audit and plan
- Metrics of success aligned with CNDC's mission
- Formal impact study
- Technology investments

Goals for Impact:

- **Goal:** Conduct an Equity Audit and create a plan to implement changes to policy or practice suggested by the auditor
- **Goal:** Develop metrics of success that align with the mission of the organization, and adopt a process for data collection and review
- **Goal:** Conduct a formal study of the economic and social impact of CNDC over its 20-year history

GROWTH: The following strategies and goals are aimed at reducing barriers to growth.

Strategies for Growth:

- Communications and outreach
- Potential new products/services

Goals for Growth:

- **Goal:** Develop and implement a formal strategic-communications and outreach plan
- **Goal:** Assess the potential to introduce new products to the CNDC mix and potentially launch one new product over the next three years

SUSTAINABILITY: The following strategies and goals are aimed at enhancing CNDC’s long term sustainability.

STRATEGIES FOR SUSTAINABILITY:

- Reserves policy/best practices
- Long-range financial plan
- President & CEO succession plan
- Flexible staffing model

Goals for Sustainability:

- **Goal:** Adopt and implement best-practice policies related to reserves
- **Goal:** Create a 5-year financial plan
- **Goal:** Develop a long-range succession plan
- **Goal:** Review and revise work policies regarding remote work and flex time
- **Goal:** Assess the viability of having contract workers available for on-demand work

EFFECTIVE GOVERNANCE: The following strategies and goals are aimed at ensuring that CNDC has policies and practices in place to ensure effective governance.

STRATEGIES FOR EFFECTIVE GOVERNANCE:

- Board recruitment plan
- Board member agreements
- Formalize board leadership transitions
- Affiliation structure

Goals for Effective Governance:

- **Goal:** Develop and implement a long-range board recruitment plan
- **Goal:** Establish specific goals for individual board member contributions, including time, resources, expertise, and access to key audiences.
- **Goal:** Adopt and implement best-practice policies and procedures for board leadership transitions
- **Goal:** Assess the feasibility of creating additional mechanisms for affiliation with CNDC and potentially implement one or more new structure

CNDC STRATEGIC PLAN 2020 – 2022
 NOTES ON IMPLEMENTATION TO DATE – REVISED NOVEMBER 2022

- X = Complete
- X = In process
- X = Have not started

Goal	
Strategies for Impact	NOTES
Conduct equity audit and create action plan	See JEDI Journey notes 11/2022. This will be an ongoing effort, although we can consider it complete for the purposes of this strat plan.
Develop metrics of success aligned with mission - Melinda	Omni Institute is working with metrics committee and will have results by Q1 2023. Committee will also be identifying a performance dashboard for the board.
Conduct formal impact study	This has been combined with above work.
Update accounting systems	Accounting system conversion launch in Q1 2021 and is went live in March 2021. Phase II, full Project access to financials is pending capacity in the finance department.
Create long-term IT plan	This plan has been completed and will be implemented.
Strategies for Growth	
Develop/implement communications and outreach plan	Social media increased. Committee did work on CNDC messaging. Waypoint Collective is working on brand and website development. Should be complete Q1 2023.
Study potential new products	Not started formally, although the intermediary services we are providing are an alternative service.
Strategies for Sustainability	
Adopt reserves best-practices	In 2020, we approved a placeholder reserve policy in response to financial uncertainty of the year. A more extensive policy was to be developed for the May 2021 board meeting, but the timeline has been delayed.
Develop long-range financial plan and revise annually	Long range planning has been challenging in the current environment. As an initial step, we will be engaging with a consultant to help analyze our staffing structure and project fee structure.
Create CEO succession plan- Executive Committee	The executive committee focused on revising the emergency succession plan rather than creating a new succession plan. The revised emergency succession plan will be presented at the August board meeting.

<p>Review/revise flex time and remote work policies</p>	<p>COVID accelerated completion of this goal by forcing us to ensure our equipment, systems, and processes are effective for employees who are working remotely. A staff remote work policy and procedures have been developed.</p>
<p>Assess viability of creating a contractor pool</p>	<p>With COVID and low unemployment rates, this goal became a challenge to implement and we have abandoned it for now.</p>
<p>Strategies for Governance</p>	
<p>Create long-term board recruitment plan</p>	<p>The Nominating & Governance Committee has focused on board recruitment. We have developed a process for board member recruitment and selection and have added three new board members.</p>
<p>Create individual board member agreements</p>	<p>Approved by the board.</p>
<p>Formalize board leadership transitions</p>	<p>Nominating & Governance Committee has created process for elections.</p>
<p>Create additional mechanisms for affiliation – Melinda</p>	<p>This goal has been shelved for now.</p>