



# Strategic Plan

**2007-2009**

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October 2007

Dear Friends and Supporters:

| On December 11, 2007, the first program of United Ministries, Inc. - Earl's Place - commemorates ten years of providing hope and housing to homeless men. We would like to say that our services are no longer needed, but sadly that is not the case. Rather, the number of individuals seeking housing continues to grow.

Recognizing this need and building on both our experience and successes, two years ago United Ministries began working toward developing a strategic plan.

We are pleased to say that the plan is now complete, the board of directors has approved it and we are in the process of assigning committees and setting timelines for implementation of the goals.

| The plan includes a goal to double the number of men being served. This is a bold, but we feel feasible, target.

This strategic plan is not a static document but a dynamic strategy to address changing needs and opportunities. The Board will review this plan annually and make adjustments as needed.

We invite your comments and, as always, thank you for your support.

Sincerely,

*Sheila Helgerson*

Sheila Helgerson  
Executive Director

*Marcia Conlin*

Marcia Conlin  
Board President

## Executive Summary

The annual board meetings in 2005 and 2006 laid a foundation to begin a strategic planning process by looking at the mission and vision of United Ministries and developing a SWOT (Strengths, Weaknesses, Opportunities and Threats) analysis. In March 2007 the Board of Director's began working with The Welsh Consulting Company to develop a strategic plan.

Since 2005, the amount of available emergency and transitional shelter space in Baltimore City has decreased. More than 3,000 individuals were estimated to be homeless on January 16, 2007. In Baltimore City, homeless individuals are most likely to be African American males. More than half of homeless individuals are without a home for more than a year. The primary stated need of those experiencing homelessness is housing. The number of persons who report being homeless for more than three years increased from 15% in 2005 to 24% in 2007. On average an individual in chronic homelessness costs us as taxpayers \$40,000 a year.<sup>1</sup>

Not only is providing housing morally right; it is also cost effective. Since 1998, United Ministries has served 183 men and 71 of those men moved on to have their own housing and be positive, self-sufficient citizens. The cost to provide transitional housing and supportive services to a resident is approximately \$15 a day; less than \$6,000 annually.

According to the most recent census data, Maryland is ranked highest in the nation in median household income;<sup>2</sup> however, more than 21 percent of Baltimore City's population lives below the poverty line.<sup>3</sup> The "hidden" poor are our neighbors. It is more and more difficult for those who may be undereducated, underemployed, addicted to alcohol or substance abusers, living in overcrowded housing or for those who have no housing at all to survive.

For the past ten years United Ministries has provided shelter to homeless men while working to raise awareness of and change attitudes toward the homeless. On page one, you will find a new, more concise mission statement and a new vision statement. The planning process follows and we are grateful to all those who took the time to answer questions and share their thoughts as we worked on this plan.

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- The 2007 Baltimore City Homeless Census

<sup>1</sup> The 2007 Baltimore City Homeless Census. Baltimore Homeless Services/Baltimore City Health Department

<sup>2</sup> Maryland Department of Business and Economic Development.  
[www.choosemaryland.org/factsandfigures/demographics/incomedate.html](http://www.choosemaryland.org/factsandfigures/demographics/incomedate.html)

<sup>3</sup> Bullock, Scott G. Baltimore: No Harbor for Entrepreneurs, Institute for Justice.  
[www.ij.org/publications/city\\_study/CitStud\\_Baltimore\\_report.html](http://www.ij.org/publications/city_study/CitStud_Baltimore_report.html)

United Ministries Strategic Plan for 2007 – 2009 addresses seven strategic issues: expansion, clarity of name, outreach and advocacy, fund raising, staffing, organizational accountability, and program evaluation.

Our goals are:

- To double the number of men being served within the next 24 months.
- To be more deliberate in identifying United Ministries as the organization and Earl's Place as a program of United Ministries.
- To develop a plan for outreach and advocacy.
- To structure a program expansion budget that responsibly balances public and private resources.
- To develop a staffing pattern that supports efficiency and effectiveness, internal risk management, and facilities program expansion.
- To update internal controls.
- To put in place an enhanced tracking system for outcome measurements.



## Strategic Plan 2007-2009

### **Mission Statement**

United Ministries is a housing and social justice organization dedicated to assisting homeless men who want to change their lives, and to changing community attitudes toward the homeless.

### **Vision Statement**

United Ministries is an organization that stands as a source of hope and change in the Baltimore community. Through successful partnerships homelessness will be reduced in both its magnitude and severity, as all people are treated with dignity and have access to both the services and housing that they and their families need.

### **Brief History of Organization**

United Ministries was incorporated in 1993, is a 501(c) (3) nonprofit and is a recognized mission of the United Church of Christ. The name United Ministries was chosen to exemplify a broad-based community organization consisting of both secular and ecumenical groups. United Ministries was created to focus on serving homeless persons who want to change their lives.

Earl's Place is the first project of United Ministries, Inc. The program opened in December 1997 and provides affordable housing and supportive services to homeless men. Earl's Place is named for Earl Johnson, a homeless man, who before his death in 1993 was involved both as a client and as a volunteer with The Supper Club feeding program at First United Evangelical United Church of Christ.

## **Organizational Profile**

Earl's Place provides long-term transitional housing (up to two years) and supportive services for seventeen formerly homeless men. The program is based on a model that emphasizes individual responsibility. Once accepted into the program, each man is provided with intensive case management to determine both short and long-term goals. The services provided include:

- assistance with identifying the reasons for their homelessness,
- assistance in increasing their levels of maturity and responsibility,
- assistance with setting realistic goals for the future and the move back into society as productive citizens,
- assistance with developing self-sufficiency skills including job training or placement, literacy and GED, or continuing education,
- assistance with locating permanent housing and follow-up to help ensure success in independent living.

While in the program, the men are given the opportunity to participate in United Ministries' community outreach work to increase understanding among congregations about the causes of homelessness, and the successes of Earl's Place. The men may remain in the program for up to two years. When the men move into permanent housing, they are provided with an additional year of follow-up to help ensure continued success. Most of the men remain in contact with UM far beyond the initial year of follow-up.

**Cost Effectiveness:** The average annual cost of services per resident is \$5,475, compared to an approximate annual cost for incarceration of \$20,100. (based on U.S. Dept. of Justice statistics, 1996). The residents pay a monthly program fee based on their income. The maximum monthly program fee is \$200.00. Program fees cover approximately nine percent of the total cost for services. The services offered provide both short-term and long-term savings to society.

## **Planning Process**

The current strategic planning process began with board retreats in 2005 and 2006 where initial work was done to look at the mission and vision of United Ministries. A SWOT analysis was conducted and work was done to analyze strengths, weaknesses, opportunities and threats to set a direction that will lead the organization into the future.

In the spring of 2007 the full strategic planning process was undertaken, building from the earlier work and going much more in-depth. Interviews were conducted with clients (past and present), board members, partner organizations and other providers in the Baltimore area, and decision makers within Baltimore Homeless Services (BHS) and foundations that have funded UM in the past. The information from the interviews and an environmental scan (considering the changing environment in Baltimore for homeless programs and housing initiatives, with the new directions being set by BHS, and the realities of a shifting federal focus) was then synthesized for use at a June 2007 board retreat. A discussion was held about various possible scenarios and the pros and cons of each, which also led to a solidification of core values and what outcomes are critical to UM's work. From that comes a set of goals and objectives that will be both achievable and meaningful to the organization's constituents in the next three years as they seek to expand their services. These goals will direct the organization in their expansion of

the program and will include a focus on fundraising, program evaluation, and organizational accountability.

The strategic planning process has been facilitated by The Welch Company, a consulting firm with more than 15 years of experience in working with local nonprofit agencies.

## **Situational Analysis**

It is estimated that on any given night in Baltimore City between 3,000 and 4,000 people are looking for shelter. The 2006 Office of Transitional Services Annual Report on Homelessness reported that 77 percent of the homeless in Baltimore City were individuals and that of the total homeless served 76 percent were men.

The major strengths of United Ministries are the 10 years of success with the men who come to their facility. UM utilizes a holistic approach which offers access to job training, recovery, education and tools to help the men move into permanent housing when they leave. Board and clients agree that the process of allowing men to dream and reach their goals is a strength. UM's work with men is individualized and reaches each client on their terms, helping them to become self sufficient and self confident. The organization's weaknesses revolve primarily around the fact that there is a big mission and small program. Funding sources are not permanent and are in need of being expanded.

Through this strategic plan, United Ministries has identified opportunities in the community as homelessness continues to be a major issue in Baltimore, and BHS is looking for expanded opportunities to serve the population. UM affirmed the need for more housing for homeless men, and its organizational commitment to serving that population. UM is ready to step up and play a bigger role. Enhancing UM's focus on developing more partnerships with organizations that offer the services not offered there is another opportunity that is continually being developed. Being a faith based organization, UM has access to support from churches in the greater Baltimore area and will seek to strengthen those ties. Threats the organization is aware of are the competition for funding, potential cut backs in governmental programs and the limited amount of grant dollars available for the number of non-profits seeking them.

## **Core Values**

United Ministries as an organization very quickly came to consensus on a set of core values that board, staff and clients, all see as being the basis for their work and part of what makes this organization unique and their program successful. It is very clear that the core values revolve around the ability of United Ministries to enable men to move to self sufficiency by recognizing

- Each person is an important and unique individual;
- A belief that people can change;
- A need to meet each client where he is.

These core values will be shared with all board and staff, and will be used as the touch stone in any consideration of program additions or changes, including expansion options.

## **Key Outcomes**

United Ministries is committed to providing a high-quality service, and to striving for successful outcomes for and with their clients. The primary outcomes that United Ministries is working towards, that they see occurring as a result of their work (again articulated through consensus of board, staff and clients), are that:

- Clients do not experience a return to homelessness/they stay housed
- Clients achieve educational goals set for themselves of at least GED, and work goals of living-wage employment
- Clients move to positive self-sufficiency, socially and emotionally (able to nurture and use their support network, beat their addiction/stay clean)

United Ministries will continue to refine its program monitoring capabilities to allow tracking and reporting on these outcomes on a regular basis.

## **Strategies, Goals and Objectives**

### **Strategic Issue #1 Expansion**

**After ten years managing Earl's Place, United Ministries is ready to consider program expansion. The organization has determined that there continues to be a large unmet need for what UM offers, and the organization is ready to take on a more significant role addressing that need.**

**Goal: United Ministries will within 24 months double the number of men being served.**

Based upon conversations among board and staff leadership, and with clients, as well as a review of local needs and possible funding sources, there is convergence on the priority for expansion into permanent housing. This is consistent with the core values of the organization, and currently has more government resources available to support it. It also became clear through interviews and a review of the local environment that it will be increasingly difficult for UM to continue as a viable organization if it remains with Earl's Place as its sole program.

There is also the potential for the organization to become a sponsoring participant in the Section 8 rental voucher program, to make available rental vouchers within market-rate private rental properties. Clients saw this as a valuable opportunity to achieve independence in the private market. Board members saw it as a low-risk, low-overhead way to further support permanent housing. The opportunity will depend upon there being vouchers available and there being landlords interested in participating. It is recommended that after the executive director has stabilized staffing and begun the process of applying for capital funds from the government for a permanent housing project, a thorough review and consideration of participation in the Section 8 rental voucher program be considered. This would include a complete cost-benefit analysis to determine financial feasibility, administrative burden, access to units, etc

A third option would be to open/manage a second facility of transitional housing. UM has an opportunity right now— they have been invited to consider taking over a transitional program that had been managed by another nonprofit organization. Similar opportunities may arise in the future as the local funding situation continues to drive small organizations to evaluate their viability. Factors to consider include appropriate fit of cultures and core values, questions of program delivery and staffing, current site and relationships, as well as funding resources. In each instance, United Ministries will undertake due-diligence to determine if taking over management of an existing transitional program is a viable option. The core values and mission of UM will be the framework/lens through which a determination of feasibility will be made, along with a careful consideration of the pros and cons listed in discussion at the June 2007 board retreat.

**Objective 1: Begin process of negotiation with Baltimore Homeless Services (BHS) to undertake development of a permanent housing site within the umbrella of United Ministries.**

**Objective 2: Explore opportunities for UM to facilitate rental vouchers for current and past clients as an additional housing resource offering.**

**Objective 3: Be open to opportunities that may come available to take over management of existing transitional housing facilities currently operated by other organizations.**

### **Strategic Issue #2 Clarity of Name**

**There is a lack of clarity both internal and external as to whether the organization is United Ministries, or is Earl's Place; and whether the organization does anything besides EP currently.**

**Goal: United Ministries board and management will be more deliberate in identifying themselves as United Ministries, with Earl's Place being the first program that UM developed.**

Speaking of itself as UM/EP has been confusing, does not honor the outreach/advocacy work that has been done, and will hamper the expansion (and perhaps survival) of the organization. As expansion does occur, board members will need to consciously embrace oversight and management of multiple sites and programs by moving beyond a view of focusing on Earl's Place.

**Objective 1: Consider changing the name of United Ministries to better reflect what the organization does (or add a bi-line).**

**Objective 2: A thorough review of all written materials will be made to ensure that the organization is consistently identified.**

**Objective 3: The organization will use the opportunity of undertaking expansion in the coming months to overtly lift up the organization's name, that Earl's Place is a project of the organization, and that other projects are being developed.**

### **Strategic Issue #3 Outreach & Advocacy**

**United Ministries needs more internal clarity about what its role is in community outreach and advocacy, and what role community outreach and advocacy play in the organization's future.**

**Goal: United Ministries will affirm and develop a plan for outreach and advocacy as a part of its mission and social justice agenda.**

Advocacy is part of the UM mission, and has been integrated as a part of capacity building with the clients, helping them build their confidence to tell their story and find ways to give back to the community. It also significantly links and connects to the organization's outreach/marketing/fundraising from congregations – they need to understand the issue and what hope there is for success before they can or will commit to being part of the solution by funding or volunteering with UM. And through partnerships with other organizations that are leaders in political advocacy, UM puts forward its voice in the public sector to support funding and services to ease the plight of homeless persons in Baltimore and across Maryland.

**Objective 1: The board of directors will affirm that community outreach and advocacy are a part of the organization's role, and support annual work plans and staff levels of effort in this program as in other programs of the organization.**

**Objective 2: The Executive Director will integrate the social justice/ community outreach and advocacy work plan with the organization's marketing/fundraising plan, so that there is complete coordination for maximum impact and to gain more efficiency with limited resources.**

**Objective 3: The organization will continue on a limited basis to participate in advocacy coalitions and partnerships, recognizing that other organizations are better equipped to be the lead on public policy issues.**

### **Strategic Issue #4 Fund Raising**

**United Ministries wants to grow the organization's programming for homeless men without becoming overly dependent on government grants and contracts.**

**Goal: United Ministries will structure a program expansion budget that responsibly balances public and private resources.**

Several years ago the organization had a three-year HUD Supportive Housing Grant which provided operating support for EP; when time for renewal, the grant was not renewed due to a lack of federal funds, which jeopardized the financial viability of the organization. Thus there is a guarded skepticism of over-reliance on government dollars. At the same time, without access to government grants, especially homeless program dollars, it will not be viable for the organization to consider a timely expansion plan.

The organization recognizes that the operating budget will need to increase as program expansion is undertaken, and wants to ensure that government funds are utilized appropriately while not becoming a large percentage of the budget. Therefore, the organization will implement growth goals in terms of both percentages and dollar levels for each of the key

funding categories – in some instances it will be a success to maintain a stable percentage in an increasing budget, and in other instances as the overall operating budget goes up, a particular category's dollar level may go up but the percentage of overall budget go down. The executive director and new contract bookkeeper will establish clearly defined parameters for what revenue sources will be tracked within what categories, so that tracking and reporting on fundraising efforts by funding category can occur easily and consistently.

While growing the operating budget, the organization will also be undertaking a funding campaign to raise more endowment, and will be managing a capital budget for the physical development of new permanent housing. These budgets need to be maintained separately so that tracking and reporting does not become confusing. Neither of those budgets nor their resources would be reported in the operating budget.

Category of Funding Source	Current Percentage	Proposed Future Goal
<b>Operating Budget</b>		
Foundation Grants	35%	30%
Government Resources	22%	25%
Program Fees	10%	10%
Individuals and Congregations	28%	25%
Special Events	5%	5%
Mission Sunday	1%	5%
Other	1%	

**Objective 1: Maintain a diversity of funding resources in the operating budget that keeps government funding to no more than 25-30% of the total.**

**Objective 2: Refine current budget categories to develop a consistent breakdown of revenue sources/budget sources so that tracking progress in dollars and percentages over time can occur easily and consistently.** It would be difficult if not impossible to set and achieve fundraising goals and budget management goals if there is not clarity among staff, board and the bookkeeper about what resources fit within each revenue category.

**Objective 3: Utilize to every extent feasible, government resources for the capital and start-up costs of program expansion.** These short term costs are appropriately served with government funding as the core resource. Develop and track capital/construction budget separate from operating budget, so that board and management can monitor each separately.

**Objective 4: Use the expansion as a reason to ask foundations, individuals and congregations to give more in order to balance government funding, and to build an operating reserve of 10%**

**Objective 5: ED will explore the value of hiring a contractual grant writer to assist with expansion fundraising.**

**Objective 6: In the coming year, develop a proactive communication plan that clearly supports the goals and mission of the organization.** The time of adopting a new strategic plan and undertaking a program expansion is critical for reaching out to past, current, and potential donors, congregations, foundations, etc, to assure they see the new vitality and growth occurring at UM.

### **Strategic Issue #5 Staffing**

United Ministries does not currently have the staffing pattern that can maximize efficiency and effectiveness as well as optimize risk management.

**Goal: United Ministries will develop a staffing pattern that supports efficiency and effectiveness, improves internal risk management and systems, and facilitates the ability to undertake program expansion.**

In order to maintain and improve the viability and health of the organization, increased administrative staffing is needed. This will be especially true for the organization to begin program expansion which will divert attention of the Executive Director from other responsibilities.

At the present time, the Executive Director is solely responsible for too many duties, including all administrative, fundraising, communications, staff management, financial management, grant reporting and community outreach. If UM is to remain viable and expand, a major shift needs to occur in the administrative staffing of the organization. Hiring a part-time **administrative or office assistant** and a **contract bookkeeper** would benefit the organization by providing an improved system of financial controls, improving its risk management, and will allow the executive director to move away from minor administrative details to the outreach, fundraising and planning work that will be necessary to keep the organization viable through the upcoming expansion.

This staff expansion will require a reconfiguring of space at EP. The addition of an administrative/office assistant will require finding space for another desk and phone.

**Objective 1: Hire a contract bookkeeper for a set number of hours per month to assist in financial management.**

**Objective 2: Revise budget to support hiring of a part-time office/administrative assistant who can take over office responsibilities.**

### **Strategic Issue #6 Organizational Accountability**

United Ministries does not currently have a comprehensive, organized set of processes in place for annual review of staff, executive director and board, linked to the annual budget and work plan cycles.

**Goal: United Ministries will update its internal organizational accountability processes, in order to continue to be an organization able to attract and retain quality staff, and to improve internal processes for efficiency, effectiveness and improved accountability.**

This will make both internal and external accountability and reporting easier to manage. Currently each staff is individually having a performance review at the anniversary of their hire date. And currently there is no consistent systematic review process for the executive director.

Nor does the board of directors undertake a performance review for itself. Without this coordinated accountability, the organization is unable to do the quality annual planning and fine-tuning of processes that will be necessary if it is to be successful in program expansion.

**Objective 1: The executive director will move all staff reviews to a single annual time of year.**

**Objective 2: The board of directors will institute an annual performance review for the Executive Director.**

**Objective 3: The board of directors will institute an annual self-assessment process.**

### **Strategic Issue #7 Program Evaluation**

**United Ministries needs to refine its outcome measurement tracking and reporting systems, to support internal program review and improvement, and to support accountability in reporting to donors, funders, partners and community.**

**Goal: United Ministries will put in place an enhanced tracking system that the ED and board can use for periodic review of outcomes.**

So that there is systematic reporting on the key outcomes for all current as well as prior clients, a “dash-board” style report will be used to track their progress. The new case manager will refine current systems to create appropriate tracking systems, and design a report format and schedule that works for ED and board monitoring.

**Objective: Design a draft of key points and format for a new tracking system, to be implemented fully in new fiscal year.**