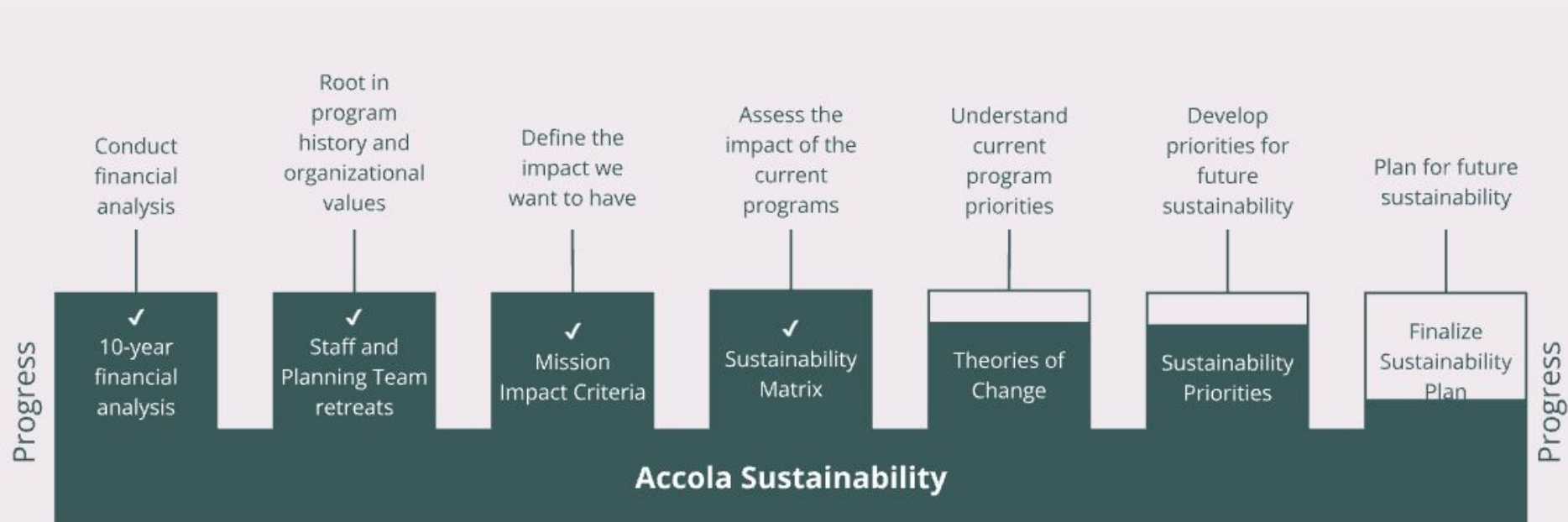


Sustainability Project Update

For Accola Board
February 20, 2025





Accola Project Process Overview

Phase 1: Financial Assessment and Initial Forecasting (March – May)

- Assess the NDO's recent financial performance and assist in prospective financial information preparation at the programmatic and organizational levels.
- Identify key topics and questions to be addressed through business planning.

Phase 2: Sustainability Matrix & Financial Dashboard Development (August – October)

- Develop a Sustainability Matrix that connects the NDO's mission impact with financial sustainability goals.
- Assess the current performance of NDO programs on mission and financial grounds and develop a vision for how programs will perform in the future.
- Design a financial dashboard to be implemented by NDO staff that will support board and leadership financial oversight and decision-making.
- Understand current and future program models, program outcomes, and intended organization-wide outcomes.

Phase 3: Sustainability Planning & Theory of Change Development (November 2024 – March 2025)

- Identify programmatic strategies that will support mission impact and financial sustainability as identified in Phase 2 through the development of the Sustainability Matrix.
- Plan for the staffing, management, and administrative and operational infrastructure needed to support sustainability through a thorough business planning process.
- Develop logic models and theories of change for the NDO's three core programs and the organization as a whole.

Mission Impact Criteria

- ◆ **Stability:** Participants in our programs feel safe and supported in sharing and having basic needs met, providing the stability necessary to work towards other goals
- ◆ **Empowerment:** Participants in our programs build the skills and tools to the access resources and opportunities necessary to achieve their goals in our community
- ◆ **Spirituality:** Nurtures a personal spiritual connection that provides comfort, healing, & unconditional love of self and others, and spurs action towards social justice
- ◆ **Community:** Builds and strengthens community between neighbors, creating the relationships that are foundational for individual and systemic change
- ◆ **Meeting the Needs of the Time:** There are opportunities to grow our impact by addressing unmet needs in communities potentially served by this subprogram
- ◆ **Excellence in Execution:** Takes advantage of our unique position, strengths, and/or the unique intersection of our program offerings.
- ◆ **Fundraising Capacity:** Creates opportunities for fundraising by establishing & nurturing important partnerships, establishing Accola's reputation, building credibility

Draft Sustainability Priorities: Transformational

- **Build an infrastructure for billable services** like case management, legal, housing, mental health
 - Billing for services already provided could contribute fundraising dollars for other initiatives and prepare us for a changing landscape
 - LIS and Sarah's can access the services for participants, and we could also serve new participants
 - Assess potential ROI, organizational capacity, implementation investment/timeline, the right billable service at the right time for the needs of the community
- **Initiate Feasibility Study for a Facilities and Program Expansion Campaign**
 - Capital campaign to support long-term facilities planning, growth in program facilities, and overall program and operating growth
 - Facilities planning would set Accola up for a sustainable long-term future
 - Combining facilities and program growth in one campaign enables donors to see the effect of their contributions to Accola's direct impact

Draft Sustainability Priorities: Transformational

- **Drive growth and impact through exponential expansion of volunteer department**
 - Volunteers will be integral to direct service and organizational management
 - Volunteer opportunities will connect Accola programs
 - Attract and retain more volunteers and a diverse group of volunteers
 - Provide more high-impact volunteer opportunities
- **Implement and Market Wisdom Ways 2.0**
 - Programs and Opportunities Committee will share more
 - Program design to be led by a new Wisdom Ways leader
- **Center organizational partnerships as a means of helping the community to respond to the needs of the time**
 - Define partnership criteria, mutual commitments, and processes for nurturing relationships with partner organizations
 - Explore a deeper relationship with St Mary's Health Clinics
 - Ensure the continuity of vital community programs as organizations are threatened by the current federal administration
 - Maintain a strong relationship with the Province

Draft Sustainability Priorities: Incremental/In Process

- Continue to refine and develop Learning in Style and Sarah's services and programming
 - Develop opportunities for progressing levels of housing independence
 - Grow the digital literacy program
 - Increase number of program participants
 - Define and enhance nurture of spirit and its impact
- Development planning:
 - Affirm and develop Accola's brand
 - Plan, invest in and launch a marketing campaign
 - Support capital campaign

Opportunities for Additional Input and Feedback

- Share live feedback during the board meeting
- Respond to a survey (coming after the board meeting) with further thoughts
- Join one of the following work groups to be more directly involved:
 - Earned income / billing for services
 - Capital campaign/program and facilities growth
 - Volunteer program
 - Partnerships
 - Finance and risk