



## MULTICULTURAL INSTITUTE

# Strategic Plan (2012-2017)

### **Previous Assessment and a New Effort to Plan for the Future**

After several years of operation, in 2005 the Board of Directors and staff of the Multicultural Institute (MI) engaged in an extensive strategic-planning process to review MI's early efforts and to develop priorities for strengthening programs and board leadership. Since then, a number of the objectives outlined in that strategic plan were achieved, while other issues identified remain as work in progress. Meanwhile, in recent years, the Institute has developed a number of new strategies and has expanded its programs to a new county.

In late spring of 2011 MI's leadership launched a new round of assessment and planning to strengthen the organization's capacity to undertake and sustain *transformational change work* with its core constituencies. The planning process included activities to: (1) Confirm/Strengthen the Institute's vision, values, & mission; (2) Assess the Institute's capacity to undertake and sustain transformational change strategies, including: program alignment, efficacy and scale (compared to actual needs) and the sustainability of the organization and its programs; (3) Develop a five-year Capacity-Building Plan that included: priorities and accompanying strategies for the Institute in each program area, specific leadership imperatives needed to accomplish each objective, and resources that are required for success.

### **Vision Statement**

We envision a community in which immigrants, regardless of their immigration status, are embraced and valued in the communities in which they work and live.

### **Mission Statement**

*We accompany immigrants in their transition from poverty and isolation to prosperity and participation.*

We accomplish this by

- Providing adults with economic opportunities and educational development
- Mentoring youth at an early age
- Connecting people to social services and bringing provider partners on site
- Shaping city and county policies that validate immigrant community contributions

### **Our Values**

- *Dignity of each person: promoting respect and communication*
- *Social Equality: believing that resources should be shared by all*
- *Transparency & Integrity: good stewards of all gifts given to us*
- *Community Involvement: joining our voices to create positive change*
- *Simplicity & Flexibility: keeping our work efficient and effective*

### **“Stretch Goals”**

- Through specific educational efforts and as a positive byproduct of *how* we do our work, improve appreciation of immigrants in the communities among both residents and decision-makers
- Promote dignified and well-compensated work opportunities for immigrant workers and continuing to aid workers victimized by employers
- Develop capability and become known as an organization that can assist immigrants directly and via referral with immigration-related cases and preparing for citizenship
- Increase sustainability through ownership of MI headquarters and growth of institutional reserves

### **Who We Are and What We Do**

The Multicultural Institute (MI) has successfully served low-income immigrants in the Bay Area for over 20 years. MI has also assisted the broader community transform to more fully integrate and appreciate these newer arrivals. One of our featured programs supports day laborers and other low-income working adults; our unique street-based approach allows us to offer job-matching and social services more efficiently while also improving conditions on the actual street corners where day laborers seek jobs. Another key program is the Mentoring for Academic Success (MAS) afterschool program aiding low-income youth to succeed academically and its complementary summer Youth Writing Festival where participants (3<sup>rd</sup>- 9<sup>th</sup> grade) sharpen writing skills and their self-expression in an environment that makes such learning applied and relevant. MI works mainly with Spanish-speaking Bay Area residents, and enjoys specific cultural and linguistic expertise with these populations. Staff members of the Institute are bilingual and bicultural from varied backgrounds and this goes a long way in creating the *confianza* or trust that is a cornerstone of program success.

### **Where We’ve Been, Where We Are, and Where We’re Going**

MI is a 501(c)3 nonprofit founded in 1991. Under the leadership of Fr. Rigoberto Calocarivas, MI has continually nurtured partnerships with diverse civic, business, and community leaders to carry out several successful projects completed over the years. MI has enjoyed gradual but steady growth with an annual budget now exceeding \$550,000. We maintain a diverse funding base drawing from a mix of public sector contracts, foundation grants, private giving, and fundraising events. The Institute is now engaged in a capital campaign that will allow our work to ‘move to the next level’ by completing the purchase and renovations of a permanent center, located in the heart of its service community at 1920 Seventh Street in West Berkeley. The new center provides an ideal location and opportunity for the Institute to serve more people, maximize effectiveness of our programs, and give the community we serve greater ownership of the Institute’s visionary work.

The Multicultural Institute operates in three Northern California counties: Alameda, San Mateo and Contra Costa and is based respectively in the low-income neighborhoods of West Berkeley, North Fair Oaks (near Redwood City), and Richmond. Services include job-matching, resolving wage claim cases, facilitating on-site health services, ESL, GED, and other educational/training opportunities, and providing emergency and food aid. Altogether, we provide direct services to about 1200 people per year and the indirect benefits reach many more through household and community networks.

## Our Priorities and Accompanying Strategies for 2012-2017

<b>(Regional Impact)</b>	
<p><b>Priority:</b></p> <ul style="list-style-type: none"> <li>❖ To demonstrate innovation in how localities work with and address the presence of immigrants (especially immigrant workers) in the Bay Area region and beyond.</li> </ul>	<ul style="list-style-type: none"> <li>▪ <b>Strategy 1:</b> Document MI’s approach to working with immigrant workers and promote media coverage about it so that others can benefit from learning about these experiences;</li> <li>▪ <b>Strategy 2:</b> Explore social documentary as a powerful tool to convey technique &amp; passion for this work;</li> <li>▪ <b>Strategy 3:</b> Pursue publication of an academic article and other opportunities to highlight the MI approach to working with day laborers.</li> </ul>
<b>(Program Development: General)</b>	
<p><b>Priority:</b></p> <ul style="list-style-type: none"> <li>❖ To undertake a program by program review in order to articulate the best growth/ restructuring path for each with appropriate levels of staffing for optimal effectiveness and cost-efficiency.</li> </ul>	<ul style="list-style-type: none"> <li>▪ <b>Strategy 1:</b> Examine costs and benefits of each program in regard to alignment with our mission and relative availability of funding in order to benefit strategic decision-making;</li> <li>▪ <b>Strategy 2:</b> Explore restructuring options for current programs (i.e. separating the GED from LifeSkills, grouping activities under an Education program vs. maintaining a Youth Programs focus);</li> <li>▪ <b>Strategy 3:</b> Bolster mechanisms for ongoing process and outcome program evaluation and reporting that allows comparison across programs and sites;</li> <li>▪ <b>Strategy 4:</b> Evaluate activities that have not been ongoing (ESL, occupational health training) to analyze successes, obstacles, and best practices for future planning.</li> </ul>
<p><b>Priority:</b></p> <ul style="list-style-type: none"> <li>❖ As MI’s banner programs are with immigrant workers, we seek to improve this program’s core functions (like job-matching) while leveraging its successes.</li> </ul>	<ul style="list-style-type: none"> <li>▪ <b>Strategy 1:</b> Grow and market job placement assistance and other economic opportunities across all three LifeSkills/day laborer program sites;</li> <li>▪ <b>Strategy 2:</b> Explore additional ways for participants to have a role in shaping program implementation and present productive opportunities for them to act as a group in economic, social, and policy-related activities;</li> </ul>

	<ul style="list-style-type: none"> <li>▪ <b>Strategy 3:</b> In addition to existing work (such as health access, wage claim help, community-building, and others), develop guidelines for strategic decisions on growth opportunities (i.e. addressing housing as an issue in East Bay after evaluating the progress of having added this component to the NFO program);</li> <li>▪ <b>Strategy 4:</b> Partner with and leverage resources and networking with governments, businesses, philanthropy, and non-profits on behalf of MI's mission.</li> </ul>
<p><b>Priority:</b></p> <ul style="list-style-type: none"> <li>❖ To expand the services we offer that are related to immigration law.</li> </ul>	<ul style="list-style-type: none"> <li>▪ <b>Strategy 1:</b> Systematize and document work we are already doing in this area including the successful partnerships already in place;</li> <li>▪ <b>Strategy 2:</b> Explore obtaining accreditation to represent individuals in front of the Bureau of Immigration Appeals (BIA);</li> <li>▪ <b>Strategy 3:</b> Partner with individual lawyers and non-profit legal assistance organizations to explore the possibilities of obtaining documents to remain in the U.S. or facilitate naturalization for eligible individuals.</li> </ul>
<p><b>(Program development: North Fair Oaks/San Mateo County)</b></p>	
<p><b>Priority:</b></p> <ul style="list-style-type: none"> <li>❖ To strengthen our presence in San Mateo County and fully document program impact in the North Fair Oaks (NFO) community.</li> </ul>	<ul style="list-style-type: none"> <li>▪ <b>Strategy 1:</b> Continue to develop expertise on community-wide issues in the North Fair Oaks area in a way that is recognized as occurred with MI's key role in the development of the 2011 NFO Community Plan;</li> <li>▪ <b>Strategy 2:</b> Be prepared to become involved in efforts that address such NFO community needs including housing, wellness, and economic development (identified in the community plan or others) reaffirming that our work benefits a wide range of area residents;</li> <li>▪ <b>Strategy 3:</b> Document program impact as one that addresses the needs of NFO day laborers comprehensively but also contributes to public safety, supports local businesses, and provides services to other residents.</li> <li>▪ <b>Strategy 4:</b> Through partnership with the Catholic Worker House, pilot program providing housing to day laborers at a property that is also available for other program uses.</li> </ul>

**(Program development: North Fair Oaks/San Mateo County)**

<p><b>Priority:</b> To evaluate alternatives and then carry out the best approach to MI's San Mateo County-based program becoming institutionalized as a locally-based entity</p>	<ul style="list-style-type: none"> <li>▪ <b>Strategy 1:</b> Consult with organizational partners, funding entities, and others in the community to reaffirm support for the program to transition to become an independent and local-based entity working with immigrant families;</li> <li>▪ <b>Strategy 2:</b> Consult knowledgeable sources about best practices in regard to phasing-in an entity that could eventually become a non-profit separate from MI;</li> <li>▪ <b>Strategy 3:</b> Further explore the feasibility of this priority by contacting potential sources of funding and other support.</li> </ul>
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**(Program development: Richmond/Contra Costa County)**

<p><b>Priority:</b> ❖ To make our relatively new Richmond program more comprehensive and interconnected locally.</p>	<ul style="list-style-type: none"> <li>▪ <b>Strategy 1:</b> Solidify strategic alliances specific to Contra Costa County and those within the City of Richmond so that MI is better known and that these partnerships benefit those we work with;</li> <li>▪ <b>Strategy 2:</b> Explore establishing a site office and/or additional program spaces;</li> <li>▪ <b>Strategy 3:</b> continue to gradually expand services we offer day laborers and other populations we aid (such as those who attend GED classes); establish mechanisms to decide which new services should be a priority (i.e. should we pursue possible funding for tenants rights education in Richmond).</li> </ul>
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**(Program development: West Berkeley/Alameda County)**

<p><b>Priority:</b> ❖ To showcase the impact of the West Berkeley program while focusing efforts on further improving how it benefits both individuals and the surrounding community.</p>	<ul style="list-style-type: none"> <li>▪ <b>Strategy 1:</b> Work to envision and subsequently phase-in a functioning community center in West Berkeley that benefits different population groups;</li> <li>▪ <b>Strategy 2:</b> In regard to day laborers, strive to highlight worker contributions to the neighborhood while mitigating issues that could provoke resident/ merchant concerns; Berkeley residents who volunteer with the program and/or support immigrant rights more generally are allies;</li> <li>▪ <b>Strategy 3:</b> Promote linkages between different program goals (i.e. West Berkeley seniors getting household help by providing jobs to day laborers).</li> </ul>
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**(Program Development: Mentoring for Academic Success)**

**Priority:**

❖ To make a strategic decision about the future of the MAS program and its components including the Youth Writing Festival.

- **Strategy 1:** Recognizing the historic nature and positive impact of MAS on its participants but difficulties in recent years to grow this program, we will analyze the pros and cons of expanding, maintaining, or eventually phasing out this program;
- **Strategy 2:** Given institutional experience working with immigrant and other youth, explore applying this experience in other program sites (i.e. Richmond) or with local partners (such as YSA).

**(Sustainability)**

**Priority:**

❖ To purchase/renovate West Berkeley building as MI's permanent administrative headquarters and as a community center.

- **Strategy 1:** Successfully complete the capital campaign by June 2014 engaging constituents with full participation by MI's Board, staff and other allies;
- **Strategy 2:** Phase-in renovation work paced to campaign revenue and in a way that minimizes disruption to program operations;
- **Strategy 3:** Continue informational technology (IT) planning and implementation so that main office and program sites/staff can work and communicate efficiently.

**Priority:**

❖ To undertake multiple efforts to ensure long-term organizational sustainability.

- **Strategy 1:** Develop and maintain a robust individual donor program (including carrying over supporters from the capital campaign into the long-term future);
- **Strategy 2:** Build MI's reserve, interest-generating fund;
- **Strategy 3:** Be prepared for mission-linked opportunities that become available as non-profits or government programs seek high-capacity agencies like MI to partner with or absorb their programs.

**(Governance)**

**Priority:**

❖ Our board of directors will excel in its governance and responsibilities that increase institutional sustainability.

- **Strategy:** Board members make/renew commitment to carry out responsibilities related to: (a) fiscal oversight; (b) fundraising and recruitment of donors for both the capital campaign and for program/operations; (c) first-hand participation in MI programs and, (d) evaluation of its Executive Director performance;

	<ul style="list-style-type: none"> <li>▪ <b>Strategy:</b> Hold a one-time board development and executive director retreat to clarify, re-commit to roles, responsibilities, systems and structures and related governance items;</li> <li>▪ <b>Strategy:</b> reestablish yearly retreats, that may be structured as joint Board-staff retreats;</li> <li>▪ <b>Strategy 4:</b> Continue long-term board development so that diverse and talented individuals continue to rotate through the board and carry out its work without disruption.</li> </ul>
<p><b>(Human Resources)</b></p>	
<p><b>Priority:</b></p> <ul style="list-style-type: none"> <li>❖ To focus on reviewing and, as necessary, changing internal structures of the organization so that workplace policies and practices evolve alongside agency growth and expansion</li> </ul>	<ul style="list-style-type: none"> <li>▪ <b>Strategy 1:</b> Given growth of staff and programs, clarify and strategically deploy supervision authority lines to augment senior managers' ability to focus on strategy and external tasks;</li> <li>▪ <b>Strategy 2:</b> Ensure that positive communication, staff development opportunities, and encouragement of staff autonomy/creativity are institutionalized in a way that supports staff dedication despite financial disincentives of non-profit sector employment.</li> </ul>
<p><b>(Branding)</b></p>	
<p><b>Priority:</b></p> <ul style="list-style-type: none"> <li>❖ To review program names and other terminology in use by MI so that these are relevant and standardized.</li> </ul>	<ul style="list-style-type: none"> <li>▪ <b>Strategy 1:</b> Revisit terminology (Day laborer vs. LifeSkills program; East Bay vs. site program names; etc.) with external assistance so that the terms in use can be standardized and best reflect our work;</li> <li>▪ <b>Strategy 2:</b> following the conclusion of the capital campaign, explore new branding effort that could include changing the organizational name.</li> </ul>