



# ORANGE COUNTY SAFE NEIGHBORHOODS

## *Organizational Planning Guide*

A RESOURCE FOR SAFE NEIGHBORHOODS PROGRAM LEADERS

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# Introduction

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This *Organizational Planning Guide* outlines strategies for Safe Neighborhoods to become successful, self-sustaining organizations. The support provided by Orange County through the Safe Neighborhoods program provides the foundation to launch a healthy, effective organization where neighbors are empowered to invest in the safety and well-being of their neighborhood.

Each neighborhood is unique and makes Orange County who we are today. The content in this guidebook is based on leading best practices from across the country that are proven to help neighborhoods support the safety and well-being of all residents.

This document is a companion to the *Safe Neighborhoods Program Guidebook*. As you will see in the *Guidebook*, funding under this program is limited to specific neighborhood improvements related to safety. However, research on successful neighborhood programs shows that a two-pronged approach that builds social connections and improvements in the built environment provides the greatest impact.

Therefore, this companion *Guide* will help you create a plan to leverage the Safe Neighborhoods program into a neighborhood organization that can eventually sustain operations and effectively address both aspects of safe and connected neighborhoods.

To help you navigate this *Organizational Planning Guide* and the related *Program Guidebook*, we have included symbols to direct you to relevant content.



**Guidebook:**

Look for this symbol to direct you to related information in the guidebook.



**Worksheet:**

This symbol is a cue to look for additional planning worksheets or activities in the Appendix to support your organizational growth.



**Did You Know?**

This symbol will highlight important information for all neighborhood leaders to know.



**Resources:**

The County and partners have a wealth of resources to support your organization. This symbol will direct you to links for additional resources.

# Organizational Capacity Development

Being part of the Safe Neighborhoods program is an ideal way to build organizational capacity.

**Capacity** refers to the organization's ability to leverage its resources (human, financial, physical, etc.) to achieve impact or carry out its mission.

As we mentioned, funding under this program is limited to specific neighborhood improvements related to safety and the built environment. However, being part of the Safe Neighborhoods program can help local leaders achieve social connection goals through organizational capacity development.



Additional information on which activities and initiatives can be supported with funds from the Safe Neighborhoods program can be found in the *Program Guidebook*.

Before you start building capacity, however, it is important to lay out your organizational vision.

## Where does your group want to be in 1 year?

There are many ways that neighborhoods can organize and create a positive impact in their communities. The path you choose is up to your group, but setting a near-term goal for the organizational structure that considers your current capacities is a great place to start.

Some options to consider include:

- A. Remain an independent volunteer association without 501c3 status
- B. Remain an independent volunteer association with 501c3 status
- C. Partner with other neighborhood groups to form a coalition
- D. Work towards a formal non-profit with paid staff

Before you begin, take some time to review the Organizational Benchmarks in [Appendix C](#). The benchmarks are designed to help leaders set reasonable goals based on their current organizational capacity. For example, some neighborhoods may be in the Visioning and Planning phase, while others are ready to move into the Growth phase.



Identify where your organization currently sits within the developmental progression. Use the [1-Year Goals Worksheet](#) to decide where your organization wants to be one year from now. Remember: these are goals for your organization rather than project or neighborhood goals.

Each option (A-D) for growing your organization requires different approaches and time commitments from your team, but to be a member of the Safe Neighborhoods program, you will need to establish baseline structures, policies, and procedures for your organization.



For more information on establishing these foundational elements of your organization can be found in the *Program Guidebook*.

No matter the option you choose for your 1-year goal, your group can decide to pursue other options at a later date. Choosing one pathway does not rule out the others in the future. It is important to realistically assess where you are in the process and begin from there.

## How Safe Neighborhoods Can Help

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Now that you know where you want to go, how can the Safe Neighborhoods program help you get there?

### **For new programs or programs that want to ‘relaunch’**

Safe Neighborhood activities can help newer groups build capacity for successful project execution through:

1. Learning County government processes
2. Implementing projects and measuring success
3. Building a core group of leaders
4. Gaining buy-in from other neighbors

The Safe Neighborhoods program is a great way to build skills and capacities for items 1 & 2, which can set your organization up for long-term success.



If your group still needs experience in items 1 & 2, the *Safe Neighborhoods Program Guidebook* is a great place to start, along with support from the Orange County Safe Neighborhoods liaison.

This *Guide* provides additional practical information on how to address items 3 & 4.

### Moving from volunteer association to organization



Safe Neighborhoods funds can be used to support incorporation as a 501c3 nonprofit.

Is your group ready to move towards nonprofit status, or do you already have a 501c3 and want to leverage it more effectively? If your neighborhood already has a solid foundation with the above activities, you might be ready to examine how establishing an independent non-profit (a 501c3 organization) could benefit your team.



The Resources section found in Appendix B has information on grant opportunities available to those with 501c3 status.

## Succession Planning

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All organizations will experience changes in leadership and membership turnover. Rather than be caught off-guard when these changes inevitably occur it is crucial to plan for succession.

**Succession planning** may be defined as “an ongoing process for organizations to identify and develop capable and skilled leaders who can fulfill key roles when they become open. It considers existing organizational needs and future strategic direction.”

As part of the Safe Neighborhoods program, you will establish key leadership positions. It is important to begin by identifying the skills and abilities each role requires. Creating a job description for each role will help leaders recruit interested candidates in the future.



Use the [Job Description template](#) to begin drafting your key leadership positions.

Now that you have job descriptions, you’ll want to map your existing leadership and volunteer team. In addition to key leadership roles required by the Safe Neighborhoods program, you can also consider additional roles that build neighborhood cohesion. You might consider sorting roles into low-, medium-, and high- commitment positions. Low commitment might include one-time or infrequent volunteers; medium commitment can include program or committee-specific involvement; and high commitment includes leadership roles.



Use the [Organizational Mapping Tool](#) in the Appendix to assess your current leadership and volunteer team. This will help you identify any gaps to target later recruitment efforts.

After completing these exercises, you will likely find that your organization is missing some important skills and roles. To adequately plan for succession, it is important to recruit new volunteers and identify pathways to help individuals develop the skills to step into leadership roles.

# Volunteer Recruitment and Development Pathways

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[Asset-Based Community Development \(ABCD\)](#) is an approach to mobilizing neighbors around what is strong, not what is wrong in the neighborhood. When we use asset-based approaches, we can better address the concerns or issues in the neighborhood in a way that encourages more neighbors to be involved.

## Begin with what is strong, not what is wrong

The Safe Neighborhoods program is an ideal opportunity to begin with the strengths in your neighborhood.

Many people become involved in their neighborhood to solve a specific problem, raise awareness about concerns, or create new opportunities. These motivations and goals are key to building momentum in your neighborhood. However, the best way to support such initiatives is often different than what we assume. Instead of mobilizing neighbors around problems or weaknesses, neighborhood engagement is more effective when we engage neighbors around their interests, passions, and skills and then leverage those strengths to solve local problems.



Use the [Neighborhood Assets](#) page in the Appendix to begin mapping your community's strengths.

## Get stuff done while having fun

Research has shown that one of the strongest predictors of safety in a neighborhood is how many neighbors you know by name. Providing more interactive opportunities for neighbors to connect can happen through existing opportunities and by creating new ones. For example, during monthly meetings, asking an icebreaker question for people to respond to can help add this element.

Revisit the results from your Organizational Mapping Tool. Identify opportunities and activities where you can begin recruitment at each of the commitment levels. Here are some strategies to get you started:



## Intergenerational approaches

Many neighborhood organizations right now are struggling to find ways to engage with younger generations, such as Millennials and Gen Z. However, designing opportunities for engagement that appeal to all life stages will be key to organizational sustainability. Below are a few recommendations from the [#Gen2Gen Cities Report](#):

- Engage with young adults and youth by inviting them to plan an intergenerational event with the neighborhood organization. Ensure this is a specific and time-bound opportunity so they know what they are committing to.
- When creating events such as [neighborhood clean-ups](#), ensure they are accessible to older adults and that volunteer roles consider any accessibility requirements.
- Identify the public spaces (coffee shops, playgrounds, libraries, dog parks) where different generations are likely to gather and leverage those spaces. Instead of meeting in a private area, plan events in these public spaces to attract more people.

## Block-level Strategies

As mentioned above, the relationships that matter most for neighborhood safety are on the street level. Encouraging neighbors to [host block parties](#), events, or small get-togethers can create the social networks needed for the neighborhood association to succeed.



Your organization's ability to fund and implement social events will be partly determined by the goals you set in your 1-year Plan. Refer to the [Resources in Appendix B](#) for more information on funding. **Remember:** It's best to start small!

Successful recruitment efforts are highly dependent on your communication strategies - after all, how can you join something you don't know about? Using a variety of communication approaches can help you connect with neighbors who might want to get involved. Think about who you want to reach and the best ways to communicate with them. Create a communications plan that uses different tools, such as email and text blast programs, social media platforms, and physical mailers, to get your message out to your entire community. Any social media posts must adhere to Orange County guidelines.



Use the [Communications Plan Template](#) to get started building your strategy.

Building a volunteer organization is a lot of work, and you will likely find your team needs additional support and training.



Refer to the [Resources in Appendix B](#) for additional information that can support your Safe Neighborhoods program's continued growth and development.

# Appendix A: Worksheets and Templates

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## 1-Year Goal

Organizational sustainability requires careful planning and may take several years to achieve. To make the process manageable, think about where your organization would like to be in one year. Some important areas for organizational growth include leadership development, communications, volunteer engagement, fundraising, and succession planning. Select one overarching goal from the list below and then create 1-3 organizational goals that will help you achieve your main goal.

- Remain an independent volunteer association without 501c3 status
- Remain an independent volunteer association with 501c3 status
- Partner with other neighborhood groups to form a coalition
- Work towards a formal non-profit with paid staff
- Other: \_\_\_\_\_

Each of your goals should be SMART: Specific, Measurable, Achievable, Relevant, and Time-bound

| Goal | S: Is your goal clear and detailed? | M: How will you measure your progress? | A: Is your goal realistic? | R: Why are you setting this goal? | T: What is the target deadline? |
|------|-------------------------------------|--|----------------------------|-----------------------------------|---------------------------------|
|      |                                     |  |                            |                                   |                                 |
|      |                                     |  |                            |                                   |                                 |
|      |                                     |  |                            |                                   |                                 |
|      |                                     |  |                            |                                   |                                 |
|      |                                     |  |                            |                                   |                                 |
|      |                                     |  |                            |                                   |                                 |

## Organizational Mapping Tool

In the table below, enter the position titles that your organization needs to fulfill its goals. Some examples include traditional leadership roles, such as president, vice president, treasurer, etc. You can also include chairs for subcommittees focused on specific areas of interest or even one-time volunteers.

Think carefully about what skills and abilities are needed to fill the roles successfully, and what their primary responsibilities would be within the team. You can also begin mapping out succession pathways that allow new volunteers to grow and learn skills that are required by more intensive positions. For example, a one-time volunteer might progress to becoming part of a quarterly newsletter team, or the vice president might work with the president to plan for leadership changes.

By indicating which positions remain unfilled, your team can begin to strategize how to recruit and build your organizational capacity over time.

| Position | Skills and Abilities Needed | Primary Duties | Succession Pathway | Filled? |
|----------|-----------------------------|----------------|--------------------|---------|
|          |                             |                |                    |         |
|          |                             |                |                    |         |
|          |                             |                |                    |         |
|          |                             |                |                    |         |
|          |                             |                |                    |         |

## Communications Plan Template

We recommend creating a spreadsheet on Google Docs or other similar shared work platform where your team can plan and organize your communication efforts. The template below provides a starting point that can be adapted to meet your needs.

| <b>Audience</b>          | <b>Deliverable</b>      | <b>Timeline</b> | <b>Description</b>  | <b>Delivery Methods</b>          | <b>Owner</b>                       |
|--------------------------|-------------------------|-----------------|---|----------------------------------|------------------------------------|
| <b>Executive Leaders</b> | Meeting minutes         | Monthly         | Send meeting minutes within one week of meeting             | Email                            | Secretary                          |
|                          | Annual meeting schedule | December        | Inform County and community about scheduled meeting dates   | Email, Website, Social media     | President and Communications Chair |
|                          |                         |                 |   |                                  |                                    |
| <b>Volunteer</b>         | Recruitment             | November        | Develop mailer with QR code to encourage volunteer sign-ups | Print mailer                     | Engagement Chair                   |
|                          | National Night Out      | October         | Sign-up for volunteers to represent SN at NNO table         | Text blast                       | Communications & Engagement Chairs |
|                          |                         |                 |   |                                  |                                    |
| <b>All Community</b>     | Newsletter              | October         | Inform community about Safe Neighborhoods activities        | Mailer, Text blast, Social media | Communications Chair               |
|                          |                         |                 |   |                                  |                                    |

## Job Description Template

Once you have a better understanding of the roles and skills needed to successfully carry out your organization's activities, you can create job descriptions for each role.

**Job Title:** (Committee Chair)

**Summary Description:** (Write a two or three sentence description of the job and its purpose, as well as any other major responsibilities. \*You may want to write the summary last to capture all aspects of the job as described below.)

**Duties and Responsibilities:** (e.g. Facilitate committee meetings, distribute meeting minutes, communicate with president and other committees as needed, etc.)

**Major Activities:** (e.g. Lead three committee meetings annually, execute one project or subproject to support organizational goals, etc.)

**Skills and Abilities:** (e.g. Experience organizing and leading group meetings, project management experience, familiarity with major modes of organizational communication.)

## Neighborhood Assets

We recommend that all neighborhoods complete a simple mapping exercise to identify the many assets within your company.

Make a list of people and organizations, places, and things that make your neighborhood special. Remember, we aren't focused on issues at this point - stay positive! You may start this activity with just your leadership team, but we recommend this become a 'living' map that can be updated to include more voices as your organization grows.

Once you have a good starting list, you'll want to place these on a map. Google Maps ([maps.google.com](https://maps.google.com)) has numerous features that allow you to quickly and easily map places and features in your neighborhood. A tutorial on how to get started can be found here:

<https://multimedia.journalism.berkeley.edu/tutorials/create-custom-maps-in-google-maps/>

If your Safe Neighborhoods program has been in existence for a while, we also recommend mapping projects that have been completed in the past 5 years. The Orange County Safe Neighborhoods team can help you find that information.

When your initial map is complete, review it as a team and answer the following questions:

Is your neighborhood clearly named and defined on your map, or are the boundaries unclear?

What did you notice that surprised you?

Are assets concentrated in particular areas within the neighborhood?

If yes, do you need to include new voices to ensure other areas are covered?

# APPENDIX B: RESOURCES

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We have compiled a list of additional resources that can support your efforts as Safe Neighborhoods program leaders.

## County Resources

### Nonprofit Development

[GO \(Get Organized\)](#)

### Neighborhood Organization Directory

[Neighborhood Organization Directory](#)

### Resource Guide

[Neighborhood Resource Guide](#)

### Grants

[Neighborhood Grants](#)

### Workshops

[Workshop Calendar](#)

### Clean Ups:

[Clean-Up Program](#)

## External Resources

### Edyth Bush Institute for Philanthropy & Nonprofit Leadership

Non-profit capacity building

[Empowering Good](#)

### UCF Center for Public and Nonprofit Management

[Center for Public & Nonprofit Management](#)



# Appendix C: Benchmarks for Organizational Development

| Category   | Visioning & Planning   | Growth   | Sustainability  |
|------------|--|--|---|
| Leadership | Organization has a clear vision for what they want to achieve in their neighborhood and how the organization can help them achieve that vision                                       | Active Neighborhood leadership team willing to become a Board of Directors and having completed Board of Directors training  | Clear succession planning guidelines and processes are in place.<br><br>Little to no reliance on County intervention and support. |
| Engagement | There is an active strategy for neighborhood engagement  | There is a clear pipeline for recruitment and leadership development, starting from one-time volunteers through Board  | Neighborhood leadership team and volunteers are demographically representative of neighborhood residents                          |
| Funding    | Entirely reliant on SN funding   | Funding sources include Safe Neighborhoods, other county, local, or private grants, or private fundraising efforts   | Resources and personnel are sufficient for organizational objectives. (May still obtain funding from County grants and programs)  |
| Activities | Primarily focused on planning and creating organizational structures, practices, and policies<br><br>Execute at least 1 successful neighborhood project with support from SN Funding | 2-3 successful projects, events, or initiatives completed annually, with SN support<br><br>1-2 projects under Safe Neighborhoods guidelines<br><br>1 project in social or civic engagement | Projects and events are independently organized and run by the organization   |
| Outcomes   | Increased Place Attachment, Safety, Social Capital, Perceptions of trust in individuals and institutions   |  |   |

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