

Executive Summary

Planned Parenthood Southeast (PPSE) Evaluation

The Chick Peas consulting firm was approached by Ms. O. Vera Ztopp of Planned Parenthood Southeast (PPSE) to perform an external review and evaluation of PPSE. This document details the findings, conclusions and recommendations for each area of interest within PPSE identified by Ms. Ztopp.¹

1 Introduction

Planned Parenthood is a nonprofit organization that provides reproductive health services. PPSE offers training and education programs to youth, teens, college students, community members and expecting parents. Planned Parenthood also offers counseling and medical health care services related to pregnancy prevention and birth control, prenatal care, STDs, emergency contraception and abortions.

At 95 years, Planned Parenthood is one of the oldest nonprofits in existence. The Georgia affiliate started in 1964, evolving from solely providing education into a provider of healthcare services. The Alabama affiliate began in Birmingham in 1930 and is the oldest affiliate in the Southeast. Lastly, the Mississippi affiliate started in 1989. All three combined to be Planned Parenthood Southeast in 2010.

2 Findings

2.1 Mission

PPSE's mission has remained unchanged for 40 years: "Ensure that every child is a wanted child and to protect reproductive health by providing comprehensive, medically-accurate sex education and quality health care, while advocating for the reproductive rights of women, men and families." All of PPSE's programs and activities fall within at least one of the three legs of the mission: education, health care and/or advocacy.

2.2 Organizational Structure

A voluntary, knowledgeable Board of Directors from a wide array of influential backgrounds works with the PPSE leadership team consisting of the CEO, COO, CFO and VPs to make final organizational decisions, based on the five-year strategic plan. VPs oversee several divisions organized according to the visions and goals of PPSE. Leadership activities focus on stakeholders and engaging supporters while the management team delivers the message and end product.

2.3 Financial Health

PPSE utilizes diverse sources of funding, which include well-established, long-term individual and foundation donors, government grants, self-generated fees, and money from fundraising events. The organization's fund balance averaged 1.7 million from 2007-2009 and the organization's overhead is significantly higher than other nonprofits. Since 2007 income from program services have averaged 48% of total revenue and costs of these services have averaged 74% of total expenses.

2.4 Planning and Operations

PPSE operates strategically on three different legs to address their vision: family planning and health care, education, and advocacy. Recent adjustments to planning and operations incorporate the 2010 merger of Mississippi, Alabama and Georgia affiliates into PPSE. The merger has created much opportunity and in many ways strengthened the organization. Performance measures are evident, and findings are shared within the annual report distributed to supporters and stakeholders.

2.5 Internal Controls

Current findings indicate internal controls are in place for separation of duties/powers and conflict of interest, including voluntary board of directors in addition to committees and work groups consisting of members internal and external to PPSE. Financial controls include a voluntary board of directors who provide support, guidance and

¹ As Emory Career Public Health Masters students, we were tasked with performing an evaluative analysis of Planned Parenthood Southeast (PPSE) for our Planning and Performance class. Information was derived from many resources, including: interviews conducted with Leola Reis, Vice President of External Affairs; GuideStar; references and assignments provided by Dean Surbey, Instructor; and group interaction and input.

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assistance through strategic planning. A division of labor exists within the management system, together with communication efforts across departments. PPSE's Form 990 indicates there are no excess benefit transactions.

2.6 Strategic Plan

PPSE hired consultants to develop a five year strategic plan to assess progress of their mission-based metrics at program and organizational levels. The plan consists of goals driven by community needs, focused on reproductive health care data and information. Prior to the adoption of their strategic plan, PPSE utilized individual work plans. Short-term and Long-term measures are incorporated into PPSE's strategic plan. The organization is in its second five year plan, revisited every six months and monitored monthly.

2.7 External Review

Planned Parenthood Southeast commissions an independent audit of its accounting practices from a reputable firm with expertise specific to nonprofit finance. Additionally PPSE participates in the accreditation process administered by its parent organization, Planned Parenthood Federation of America (PPFA). This external review is comprised of data and information collection on 500 indicators, which include policies, personnel, and financial management.

3 Conclusions

3.1 Mission

PPSE's consistent mission statement over time indicates that the organization is well grounded and believes in its mission. This stability also speaks to the dedication of PPSE's collaborators, sponsors and volunteers.

3.2 Organizational Structure

There is overlap between leadership and management of PPSE as evidenced by quarterly organization-wide meetings, small focus groups and well-represented work groups which are in place to preserve strategic clarity throughout the organization. This emphasis on communication minimizes the gaps between the business and program sides of the organization. There appears to be a disconnect between the medical supervision and clinical services; the COO is directly linked to the supervision of clinical services and staff.

3.3 Financial Health

PPSE fund balance indicates a long-term supply of financial resources. The revenues generated by healthcare services have consistently not covered the expenses required to provide these services. PPSE should also consider partnering with public health departments to avoid duplication of services.

3.4 Planning and Operations

The components to PPSE's strategy are the key focus of the organization, and remain consistent with the mission of PPSE. Performance measures are clearly identified and detailed, examining both indirect and direct impact.

3.5 Internal Controls

Voluntary board members allow support and decision-making based on minimal influence of organizational and financial pressures. Incorporation of outside supporters and board members help diversify leadership and add multiple perspectives to decision making. The division of labor and communication efforts across departments ensures alignment of process and action. PPSE's actions support efforts to remain free from conflict of interest with regards to fair and appropriate salaries.

3.6 Strategic Plan

PPSE has a firm grasp on strategic clarity and performance evaluation with a specific plan that is measureable and speaks to the mission. Shifting from individual work plans to the current strategic plan has been flexible and practical for the organization in terms of established and measurable deliverables. Revisiting the strategic plan periodically allows accountability and evaluation/adjustment of goals as needed. In effect, PPSE can examine short-term outputs in view of long-term goals. Monthly monitoring of finances by program and use of quarterly benchmarks help PPSE track financial performance.

3.7 External Review

Planned Parenthood Southeast appears to maintain transparency and integrity via opportunities for review. These practices of external audit and accreditation are beneficial and even critical to PPSE's sustainability and reputation among funders and donors in the nonprofit world.

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4 Recommendations

4.1 Mission

The first part of the mission statement should be changed so that program goals and successes in this area can be measured. "Ensure that every child is a wanted child" does not currently allow for any reliable mechanism of measure. It is an intangible statement.

4.2 Organizational Structure

PPSE should review the organizational chart and consider reorganizing the medical supervision aspect.

4.3 Financial Health

PPSE should reassess their sliding scale fee policy and procedures; this could include raising the fees charge at each income level or require clients to show proof of income.

4.4 Planning and Operations

Maintaining current planning and operations, while additionally looking to further expand to rural areas, where STD and pregnancy rates are higher. Additionally, PPSE should continue to utilize the performance measures currently in place to evaluate the success of their organization.

4.5 Internal Controls

PPSE should continue to maintain current internal controls that are in place.

4.6 Strategic Plan

PPSE would benefit from using individual success stories as a qualitative measure of performance to continue motivating staff and providing ideas to better serve the organization's beneficiaries. Continue current efforts and carefully monitor adjustments to the plan from the 2010 merger to ensure PPSE is on track with its goals and programs. Consider a periodic holistic process of discussing and defining outputs, outcomes and impacts over time based on the theory of change to enhance strategic clarity and program alignment moving forward.

4.7 External review

PPSE is applauded for their efforts, and should continue their commitment to integrity.