



# PLANNED PARENTHOOD SOUTHEAST (PPSE)

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Emory University - PRS 575D

Presented by

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# INTRODUCTION

Birgit Bolton



- Planned Parenthood is a nonprofit organization which provides reproductive health, maternal and child health services
- Training and education programs:
  - In-school health education
  - Boys to Men
  - Teen Action Group
  - Programs for expecting parents
  - Prevention is paramount
  - Outreach efforts
  - Medical health care services



# HISTORY

Birgit Bolton



## ○ PPFA

- Founded by Margaret Sanger in 1916
- Currently a federation of 85 independent Planned Parenthood affiliates

## ○ Three affiliates

- GA affiliate founded in 1964
  - Started through a collaborative effort between Emory, Grady and faith-based entities
- AL affiliate founded in 1930
- MS affiliate founded in 1989

## ○ 2010 merger



# MISSION STATEMENT

Birgit Bolton

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.



# ORGANIZATIONAL STRUCTURE

Heather Peebles

- Planned Parenthood Federation of America
- Organizational Communication
- Leadership Roles vs. Management Roles
- Recommendations



# FINANCIAL HEALTH

Heather Peebles

- Bottom-Up Approach
- Diverse Funding Sources
  - Individual and Foundation Donations
  - Grant Funding
  - Self-Generated Fees
  - Targeted Fundraising Events



# FINANCIAL HEALTH

Heather Peebles

## ○ Fund Balance



PPSE 2009 Form 990

<b>Permanently Restricted Assets</b>	<b>Temporarily Restricted Assets</b>	<b>Unrestricted Assets</b>	<b>Excess Assets</b>
\$500,000	\$377,810	\$697,151	\$370,949

Comparison of Unrestricted Net Assets Form 990, Years 2007 – 2009

<b>Year</b>	<b>Unrestricted Assets</b>	<b>Difference</b>
2009	\$697,151	(\$572,689)
2008	\$1,072,319	(\$75,893)
2007	\$1,148,212	Baseline



# FINANCIAL HEALTH

Heather Peebles



- Overhead

<b>2009</b>	<b>2007-2009 Average</b>
25%	27%



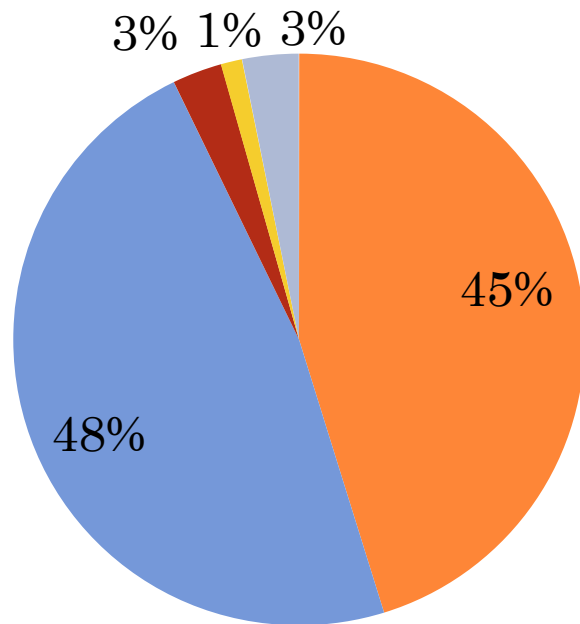


# FINANCIAL HEALTH

Heather Peebles

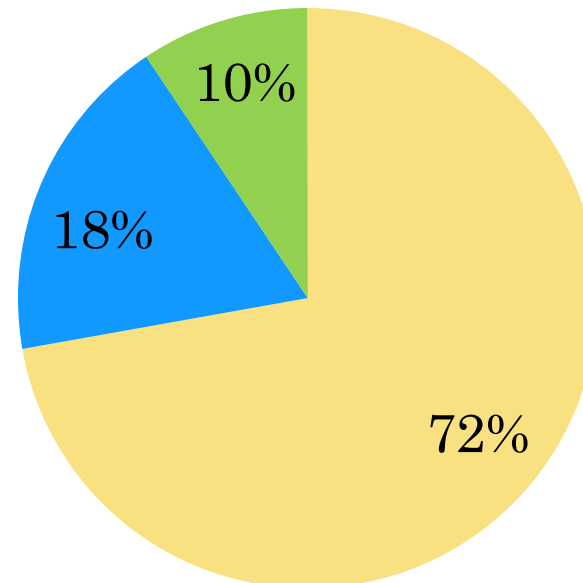
## 2009 Revenue

- Contributions
- Program Services
- Government Grants
- Investments



## 2009 Expenses

- Program Services
- Administration
- Fundraising



# FINANCIAL HEALTH

Heather Peebles



- Recommendations for Change
  - Reassess sliding scale fees charged for clinical services
  - Verify income
  - Consider partnering with public health departments
- Recommendations to Continue
  - Targeted fundraising activities
  - Specify to donors what funds will be used for



# PLANNING & OPERATIONS

Leslie Lee

- Mission focus
- Measures
  - Direct impact
  - Indirect impact
- Recommendations
  - Opportunities in rural areas
  - Continue with current performance measures



# INTERNAL CONTROLS

Leslie Lee

- Separation of duties/powers
  - Voluntary board of advisors
  - Diverse leadership
  - Division of labor
- Conflict of interest
  - Acceptable pay grade
- Recommendations
  - Maintain current internal controls



# STRATEGIC PLAN

Leslie Lee

- From a general work plan to a strategic plan
  - Community needs driven
  - Flexible & practical
- Short & long term measures
  - 5-year plan
  - 6-month, quarterly, & monthly monitoring
- Recommendations
  - Qualitative measures
  - Continue with strategic plan
  - Theory of change



# EXTERNAL REVIEW

Rhonda Tankersley

- Independent Financial Audit
  - Jones & Kolb CPA
- PPFA Review
  - Affiliate accreditation process
  - 500 indicators
  - Financial management = key requirement
- Recommendation



# SUMMARY

Rhonda Tankersley

## ○ Overall Strengths

- Longevity
- Strategic plan aligned with mission
- Close attention to budget/finance
- Targeted fundraising/better than average overhead reported
- Integrity/provide opportunities for external review
- Internal communication – work groups



# SUMMARY

Rhonda Tankersley

## ○ Overall Strengths

- Merger

- *Strengths*: larger operating budget (cost sharing, resources available) and financial stability, less duplication in financial and medical management, marketing, HR and IT; with GA being a strong affiliate, PPSE increases opportunities and resources for the AL and MS
- *Challenges*: management of staff remotely, time zones, communication impacted during the adjustment process





# SUMMARY

Rhonda Tankersley



## ○ Opportunities

- Review and align clinical services with medical staff leadership
- Review fee schedule and policies
- Expand reach to rural areas
- Evaluation of outcomes and impact



# QUESTIONS?

