



To: Tubman Key Supporters
From: Jennifer J. Polzin, Chief Executive Officer
CC: Board Members
Date: January 2024
Re: Update—Fiscal Year 2023

Happy New Year! As we look back at the accomplishments, challenges, and opportunities of the past year and set our sights on the year ahead, I am pleased to update you about the business side of things here at Tubman.

Financial Position

Audit: The audit of the fiscal year ending September 30 is nearly complete. We expect the audited financial statements to show a modest surplus in the operating budget, which the Board plans to designate to reserves for cash flow, repair and replacement, and staff compensation.

Fiscal 2024 Annual Operating Budget: The Board approved the fiscal 2024 budget and wish list in September, with the annual operating budget revenues and expenses balanced at just under \$12.3 million, up from \$11.7 the previous year.

This year’s budgeting process proved to be the most difficult yet, given that the cost of providing services continues to rise. We made some very difficult choices using our agency values and commitment to equity as our primary criteria along with the strategic plan and funding stipulations. Cuts from the proposed budget were moved to the wish list while we continue to seek additional funding. We’re committed to actively re-forecasting the budget at least quarterly as expenses and revenues evolve, and we continue to figure out new and different ways to do our work, including scaling back services in some areas. Moving forward, systems change and coalition work remain critical to our ability to deliver on our mission.

Operating Revenues: Notification from MN Office of Justice Programs funding for crime victim services (our largest grant contract) was delayed by a month, prolonging the uncertainty for domestic violence and sexual assault providers like Tubman. When we did receive the news, we learned that our funding amount remained the same as it’s been since 2018. At least one domestic violence program in the metro has closed as a result and others may follow—which means that demand for Tubman’s services will continue to rise.

However, there was some good news from other government sources: we received MN Homeless Youth Act funds for the first time in Tubman’s history; we have secured funding commitments from Falcon Heights, Maplewood, Moundsview, Vadnais Heights, and are making strides toward funding from the County for the legal advocacy services we provide to Ramsey County residents; and we received an increase in funds from MN Legal Services Advisory Committee (LSAC) to help cover the cost of attorney representation services for clients.

We’ve reduced this year’s goals for corporate and foundation giving to reflect current trends and to balance our need for operating support with our comprehensive Great Dreams Campaign (more about that ahead). We are incredibly grateful for the extraordinary support of our individual donors and volunteers, both longtime and new. Your contributions truly power our mission.



Staffing: Comprising 66% of the annual operating budget, our staff continue to be our most valuable asset. I'm pleased to report that the severe hiring challenges we've experienced the past eighteen months seem to be easing up. This past September we had just 4 open positions due to turnover in various departments and dedicated program expansion funding in some of our youth and housing programs, compared to 22 vacancies (over 20% of our total FTEs!) at that same time last year.

To help maintain stability, we continued making enhancements to our total rewards plan including a 5% increase for all staff to help offset the cost of living, and raised the target hiring rate accordingly to stay equitable and competitive. Compensation for all positions was reviewed and benchmarked again, with several positions receiving market rate adjustments so that we remain at or above market average for all roles, and we continue to offer a robust benefits package.

In order to make those investments possible, we had to eliminate or delay proposed new positions. We will pause before hiring positions that become open throughout the year; some hiring will continue, if specifically funded or necessary to increase organizational capacity.

Federal and State Capital Investment Funding for Harriet Tubman Center East: Thanks to U.S. Senators Tina Smith and Amy Klobuchar, Tubman was awarded \$850,000 in Congressionally-directed spending to be used for window replacement at Harriet Tubman Center East.

The Minnesota Legislature passed the 2023 capital investment package, which included \$3.388M in cash bonding for capital improvements at Tubman East. These funds will be used specifically for an additional public elevator to increase accessibility, safety, and confidentiality; a partial roof replacement; major electrical upgrades; and the completion of fire sprinkling code compliance. We are incredibly grateful to the chief authors of our bill, Representative Leon Lillie and Senators Tou Xiong and Karin Housley; Capital Investment Committee Chairs, Representative Fue Lee and Senator Sandra Pappas, and all of the Capital Investment Committee members in both the House and Senate.

Both of these awards demonstrated bipartisan support, recognizing the importance of the public/private partnership necessary to best serve our clients and communities.

Great Dreams Campaign

The Great Dreams Campaign remains a primary focus for Tubman, and we are now in the community phase (often referred to as the public phase). The Campaign is funding the future of Tubman's places, programs and people and will accelerate our impact with strategic investments that make Tubman more accessible, welcoming and secure. I am pleased to report that we are *86% towards our goal of \$8.5M*, including the legislative awards above plus funding from foundations, corporations, and individual donors. We're also using the campaign to expand our donor base in order to strengthen our long-term sustainability. Our HOPEtober appeals alone brought 275 brand new donors to the organization in October, as well as increased awareness about the issues we serve and how to get—and give—help.

Two interesting elements of the campaign will be the center of our appeals in 2024. We will be adding an onsite program that will allow people and their pets to remain together when they seek shelter from relationship violence. This venture will be an important part of the continuum of services that Tubman provides, and we are honored to work with many community partners and clients to bring this new resource to life. You'll be hearing much more about this in the next few months!

The second project that is benefitting from investment in the Great Dreams Campaign is the feasibility study on how to best use the 6,500 square foot commercial kitchen at Harriet Tubman Center East. We asked the question, “Would this space be of benefit to the community?” and after touring with more than 30 community leaders in the local food ecosystem, the resounding answer is yes! We will continue our exploration to turn it into a community resource—providing space for emerging food entrepreneurs and creating a social enterprise revenue stream for Tubman.

We are extraordinarily grateful for the generosity from the Tubman community to make Great Dreams come true. If you would like an update on the campaign, to tour the spaces or to help us finish the campaign strong, please contact Dana Nelson at dnelson@tubman.org.

Strategic Priorities

Progress on Strategic and Racial Equity Goals: We achieved 2 of our 2023 goals in the Strategic Plan with significant progress made on the other 2 goals, and we achieved 4 of the 5 goals in the concurrent Racial Equity Plan with plans underway to resume work on the remaining goal in 2024. You’ll find more details about our results in our report card to the community, which is part of Tubman’s Annual Report that will be released in March. In 2024, you can also expect to hear more about our substantive endeavor to reimagine streamlined access so that clients and community members consistently have an exceptional experience and are seamlessly connected to what they need no matter how they first reach out to Tubman; no small feat considering the breadth and depth of our full continuum of services.

Program Updates: In 2023, we refreshed many of the existing highly used spaces at Tubman East including new carpeting, paint and window coverings; relocated the welcome desk in the shelter and transitional housing program for improved sight lines and security; upgraded the kitchenettes on each shelter floor; added a beautiful new group room; and created a new break room for staff to recharge.

We also made the difficult decision to discontinue our Co-Occurring Disorders substance abuse treatment program, as demand and participation remain low. We will continue to provide addiction-informed support through all of our clinical services including assessments, individual and group therapy, groups for people who are sober curious, relapse prevention groups, psychiatric medication services, and Melissa’s Connections Group for peer support.

You can find out more about these and all of our services in our Program Guide, which is updated quarterly and can be found online. Go to www.tubman.org and check out our new website!

Employee Engagement

This fall, we completed our fourth bi-annual Employee Engagement Survey, encouraging all staff to share their views on where Tubman is succeeding as a place of employment and where improvements should be made. Responses can be analyzed by groups while preserving anonymity to compare and improve experiences by overall team; supervisor/non-supervisor role; generation; staff who identify as BIPOC, LGBTQ+, and/or having a disability; and length of tenure to make sure that we take steps to ensure that staff across identities, roles, and departments have a sense of belonging and opportunities to thrive. I am thrilled to report continued positive growth agency-wide on all three of our key indices compared to results of the last survey two years ago, with significant improvement across the board since the inaugural survey in 2019.

The Employee Engagement Index (people's attitudes and perceptions that drive behaviors around client satisfaction, productivity, and efficiency) went up 6 points from the 2021 survey, to 88%. Highlights include: 100% of respondents agreed or strongly agreed with that the mission and values of Tubman are important to them personally; 100% said they are proud to say they work at Tubman; and 85% said it is very likely they will be an employee of Tubman one year from now.

The Performance Enablement Index (people's attitudes about whether they have the necessary tools and resources to effectively and efficiently do their jobs) went up slightly by 1 point, to 84%. Highlights include increases in the number of people who said their job makes good use of their skills; say that most days they see positive results because of their work; and that the organization provides opportunities for training and development.

The Work Well Index (assessing the stress level and well-being of employees) went up by 7 points to 90%, of which I am especially proud, given the nature of the work and the toll the past several years has taken on all of us in the community. Responses in this area indicate people feel their colleagues treat them with respect; their opinions are valued; Tubman cares about our employees; and the agency is genuinely committed to attracting, developing and keeping a diverse work force.

While the results are overwhelmingly positive, there are certainly areas for improvement for the agency as a whole. These include improving two-way communication, increasing understanding of the organization's strategic directions and priorities, better supporting staff in navigating change, helping supervisors communicate more clearly, and enhancing opportunities for training and professional development. Each team is currently reviewing their specific results as compared to the agency averages, and identifying areas to celebrate and areas they wish to work on together to enhance cohesion and engagement.

Our Gratitude and an Open Invitation

I'd like to extend an open invitation to contact me anytime for a conversation (jpolzin@tubman.org or 612.767.6697). I'd love to listen and learn what inspires you to support Tubman, what we're doing well, and where we can improve. I'm delighted to answer your questions, explore the ways you can get further involved in Tubman's mission, tell you more about our great dreams for Tubman's future, or give you a tour.

With your generous investment, commitment, and partnership, we continue striving forward inspired by Harriet Tubman, whose motto was "Keep going." On behalf of the Tubman board, staff, and every one of the thousands of people we served this past year, we thank you for helping us do just that.

P.S. Please mark your calendars now to join us at the Starlight Soiree on Friday, May 3 at Inwood Oaks Event Center in Oakdale!