

YWCA NORTHEAST INDIANA

STRATEGIC PLAN 2019-2022

NOVEMBER 25, 2019

Sophisticated Advice for Nonprofit Challenges

**eliminating racism
empowering women**

ywca

Northeast Indiana

TRUE
NORTH
NPO

Table of Contents

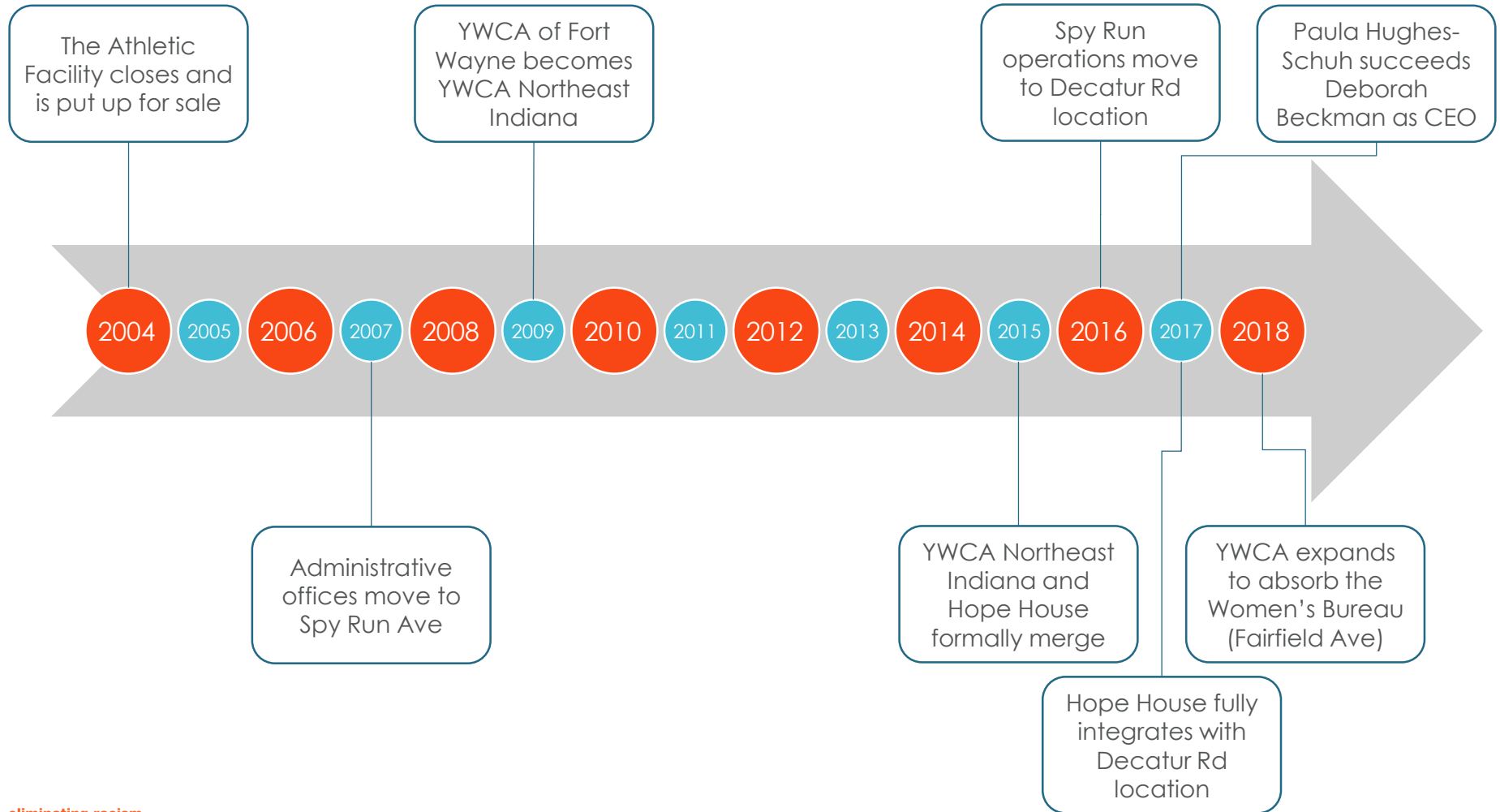
Strategic Context.....	03
Organizational History	04
Programs & Services	05
Financial History.....	06
Strategic Framework.....	09
Mission, Vision, Guiding Principles	10
Major & Supporting Strategies.....	11
Dashboard Report.....	20
Implementation Timeline.....	21

STRATEGIC CONTEXT

eliminating racism
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Organizational History



Crisis Services

➤ Domestic Violence Crisis Shelter

- Our crisis shelter is available for anyone (women, men, and their children) who needs a safe place to live because they are experiencing crisis with domestic violence.

➤ Sexual Assault Counseling

- Sexual assault survivors receive help and support to relieve the trauma of sexual violence through crisis intervention, counseling, and support group services. This service is available to men, women, adolescents, children, and entire families.

Addiction Recovery Services

➤ Hope House

- Provides women with opportunities to pursue recovery and self-sufficiency. Women build a strong foundation of recovery, employment, and graduate ready to reunite with their families.

➤ Harriet House

- Provides women with opportunities to pursue recovery with a focus on parenting skills. Women build a strong foundation of recovery while preparing to provide for their family.

Community Programs

➤ Domestic Violence Community Programs

- Community Case Managers work one-on-one with individuals who are experiencing domestic violence but are not in need of shelter. Counties served include Allen, Wells, Huntington, Whitley, Noble, and DeKalb.
- Steps to Success is a home-based support program that helps survivors of domestic violence focus on personal goals and self-esteem.

➤ Dress for Success

- Dress for Success Fort Wayne promotes the economic independence of disadvantaged women by providing professional attire, a support network, and career development tools to help women enter the workplace and continue to thrive.

➤ Education

- YWCA's education opportunities include Diversity Dialogues for adults, Eyes Wide Open® for youth, and various topics including racial justice, domestic violence, immigration, and digital bullying.

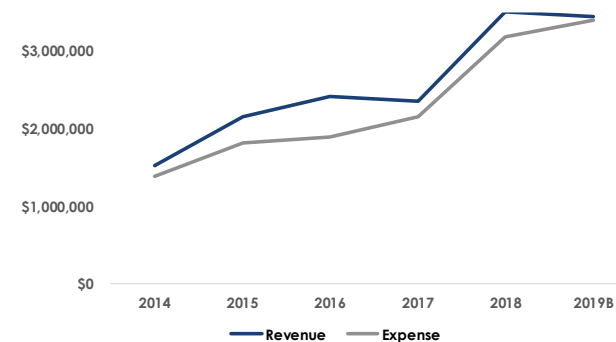
Financial History – 2019 Budget



YWCA Northeast Indiana 2019 Budget and History

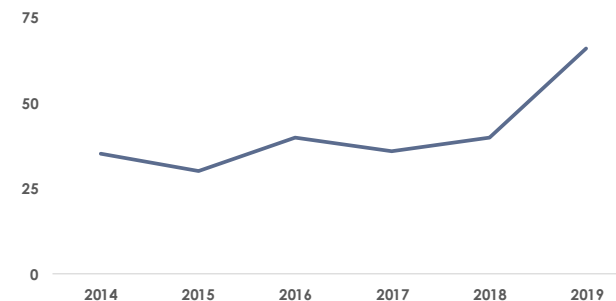
	2014 Actual	2015 Actual	2016 Actual	2017 Actual	2018 Actual	2019 Budget
Revenue						
Charitable Contributions						
Contributions	\$579,809	\$1,960,074	\$2,224,930	\$965,473	\$974,935	\$745,840
United Way	\$171,973	\$204,852	\$205,276	\$182,591	\$169,950	\$157,318
Government Funding - Federal	\$292,048	\$509,971	\$608,284	\$516,076	\$931,126	\$2,083,309
Special Events	\$140,992	\$136,489	\$105,739	\$122,963	\$143,777	\$213,380
Trust and Estate Distributions	\$57,877	\$65,250	\$60,492	\$72,150	\$50,256	\$81,189
Total Charitable Contributions	\$1,242,699	\$2,876,636	\$3,204,721	\$1,859,253	\$2,270,044	\$3,281,036
Investment and Miscellaneous Income						
Program Service Fees	\$3,793	\$22,818	\$47,805	\$44,732	\$135,120	\$113,133
Investment Income	\$105,062	\$100,699	\$83,248	\$75,044	\$82,579	\$50,895
Gain on Disposal of Land, Building and Equipment		\$400	\$4	\$50,400		
Gain on Investments	\$172,037		\$113,605	\$371,252	\$32,993	
Miscellaneous	\$3,400	\$9,591	\$20,021	\$18,982	\$524,494	
Total Investment and Miscellaneous Income	\$284,292	\$133,508	\$264,683	\$560,410	\$775,186	\$164,028
TOTAL REVENUE	\$1,526,991	\$3,010,144	\$3,469,404	\$2,419,663	\$3,045,230	\$3,445,063
Expenses						
<u>Personnel Expense</u>						
Employment Expense	\$937,897	\$1,147,655	\$1,328,555	\$1,279,674	\$1,828,354	\$2,394,502
Total Personnel Expense	\$937,897	\$1,147,655	\$1,328,555	\$1,279,674	\$1,828,354	\$2,394,502
<u>Administrative Expenses</u>						
Professional Fees	\$125,266	\$136,918	\$100,067	\$195,992	\$163,433	\$163,895
Client Welfare	\$48,070	\$66,508	\$89,057	\$74,286	\$150,448	\$16,157
Supplies (Supplies and Program Exp in audit)	\$3,067	\$5,238	\$6,756	\$8,446	\$10,148	\$16,157
Postage	\$3,579	\$2,192	\$4,316	\$2,396	\$2,030	\$2,500
Communications (Telephone in audit)	\$10,258	\$13,803	\$16,113	\$18,852	\$23,504	\$26,940
Occupancy	\$105,328	\$123,897	\$142,441	\$197,665	\$258,019	\$334,028
Equipment	\$21,834	\$20,132	\$26,306	\$35,304	\$45,027	\$59,326
Printing & Publicity	\$8,758	\$15,187	\$13,444	\$9,760	\$8,851	\$9,615
Marketing	\$4,225	\$968	\$6,013	\$1,989	\$30	\$10,538
Special Events	\$4,074	\$203		\$18,363	\$7,481	
Development						\$7,870
Travel	\$26,199	\$28,585	\$22,789	\$23,714	\$36,140	\$60,050
Staff Training & Meetings Expense	\$4,475	\$8,370	\$6,274	\$10,156	\$14,477	\$29,095
Residential						\$195,943
Aid to Individuals						\$25,853
Interest			\$901	\$7,528	\$84	
Membership Dues	\$2,984	\$3,159	\$2,207	\$1,988	\$2,675	\$16,675
Fundraising					\$8,790	\$41,300
Bad Debt Expense	\$2,945				\$7,764	
Miscellaneous Expense	\$2,974	\$2,573	\$850	\$2,478	\$5,962	
Total Administrative Expenses	\$374,036	\$427,733	\$437,534	\$608,917	\$744,863	\$999,785
Total Expenses Before Depreciation	\$1,311,933	\$1,575,388	\$1,766,089	\$1,888,591	\$2,573,217	\$3,394,287
CHANGE IN NET ASSETS Before Other Income and Expenses						
	\$215,058	\$1,434,756	\$1,703,315	\$531,072	\$472,013	\$50,776
Depreciation	\$66,920	\$74,110	\$101,205	\$206,570	\$222,535	\$239,351
Other Expenses	\$8,292	\$167,750	\$28,703	\$53,850	\$394,029	\$394,029
Contribution from Acquisition		\$490,070			\$457,665	
CHANGE IN NET ASSETS	\$139,846	\$1,682,966	\$1,573,407	\$270,652	\$313,114	(\$188,575)

Revenue* vs. Expense



*Excludes Capital Campaign contributions

Number of Employees



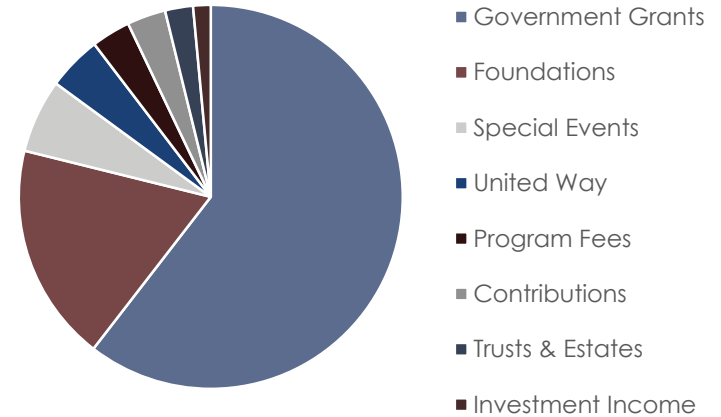
Financial History – Balance Sheets

	YWCA Northeast Indiana Historical Balance Sheets				
	Fiscal Years Ended December 31				
	2014	2015	2016	2017	2018
ASSETS					
Cash and Cash Equivalents	\$141,128	\$500,177	\$388,302	\$305,866	\$659,146
Claims Receivable	\$50,702	\$194,974	\$165,298	\$217,454	\$339,475
Pledges Receivable - net	\$446,882	\$344,230	\$222,135	\$441,929	\$252,550
Pledges Receivable - Capital Campaign - net		\$1,029,054	\$1,051,927	\$312,784	\$84,433
Prepaid Expenses	\$13,491	\$12,692	\$14,422	\$17,178	\$49,295
Investments	\$3,534,226	\$3,466,078	\$2,625,510	\$2,923,997	\$3,062,285
Land and Buildings Held for Sale			\$260,838	\$260,838	
Cash Surrender Value of Life Insurance					\$10,683
Beneficial Interest	\$46,733	\$66,181	\$69,127	\$76,974	\$72,918
Cash Restricted for Investment in Land, Buildings, and Equipment	\$63,496	\$222,614	\$8,431		\$16,185
Land, Building & Equipment - net	\$592,598	\$920,874	\$3,609,648	\$3,933,280	\$3,832,891
TOTAL ASSETS	\$4,889,256	\$6,756,874	\$8,415,638	\$8,490,300	\$8,379,861
LIABILITIES & NET ASSETS					
Accounts Payable	\$21,686	\$179,526	\$38,392	\$66,919	\$41,114
Accrued Expenses	\$70,216	\$97,028	\$112,498	\$99,002	\$158,919
Note Payable			\$211,021		
TOTAL LIABILITIES	\$91,902	\$276,554	\$361,911	\$165,921	\$200,033
NET ASSETS					
Unrestricted	\$2,546,654	\$3,096,612	\$7,015,783	\$6,987,747	\$6,688,644
Board Designated	\$1,000,000	\$1,000,000			
Total Unrestricted	\$3,546,654	\$4,096,612	\$7,015,783	\$6,987,747	\$6,688,644
Temporarily Restricted	\$970,575	\$2,089,652	\$743,888	\$1,042,576	\$1,197,128
Permanently Restricted	\$280,125	\$294,056	\$294,056	\$294,056	\$294,056
TOTAL NET ASSETS	\$4,797,354	\$6,480,320	\$8,053,727	\$8,324,379	\$8,179,828
TOTAL LIABILITIES & NET ASSETS	\$4,889,256	\$6,756,874	\$8,415,638	\$8,490,300	\$8,379,861

FY2019 Projected Funding Sources

Funder/Donor	\$ Amount	% of Total
Contributions*	\$112,000	
Foundations	\$633,840	
Trusts & Estates*	\$81,189	
Special Events	\$213,380	
United Way	\$157,318	
Government Grants	\$782,084	
Government Contracts	\$1,301,225	
	\$3,281,035	
Investment Income	\$50,895	
Program Fees	\$113,133	
	\$164,028	
	\$3,445,063	100%

Revenue by Source



*Contributions and Trusts & Estates represent less than 6% of total revenue.

STRATEGIC FRAMEWORK

Major and supporting strategies with goals, metrics, and milestones



Mission

YWCA is dedicated to eliminating racism, empowering women, and promoting peace, justice, freedom, and dignity for all.

Vision

Empower individuals, support families, and unite communities to improve the quality of life.

Guiding Principles

- We empower individuals to challenge the status quo and provide solutions to move forward, whether facing a crisis of abuse, lack of opportunity, or striving for a better way.
- We support families on a journey of healing, providing help and hope through a full continuum of care.
- We unite our community to promote healthy relationships, equality of opportunity, and freedom from addiction, challenging hearts and minds through education, advocacy, and collaboration.

- 1 Continuously align program impact with our mission, vision, and guiding principles.
- 2 Cultivate a workplace environment of understanding, respect, and trust.
- 3 Strategically utilize and expand facilities.
- 4 Establish a clear identity by building our brand, market presence, and community awareness.
- 5 Build community networks and strategic partnerships.
- 6 Ensure financial sustainability through new fundraising strategies and revenue streams.

Major & Supporting Strategies

Strategy #1

Continuously align program impact with our mission, vision, and guiding principles.

Supporting Strategies

Supporting Strategies	Tactics	Milestones / Metrics	Financial Implications	Primary Leader
A. Establish green light criteria for evaluating new opportunities—including vertical and horizontal expansion—to include criteria such as mission alignment, sustainability, duplication, and need.	1. Establish Board policy consistent with the green light criteria.	<ul style="list-style-type: none"> Creation of Board policy by 7/31/2020 	None	Exec. Committee for full Board approval
	2. Identify Board sponsors for program areas.	<ul style="list-style-type: none"> Establish which board committee (or newly formed committee) is responsible for program expansion 	None	Governance Committee
B. Evaluate transitional housing as an area of long-term program expansion.	1. Survey community need for transitional housing.	<ul style="list-style-type: none"> Conduct community survey by 6/30/2020 	None	Director of Crisis Services
	2. Identify existing service providers (i.e., environmental scan).	<ul style="list-style-type: none"> Create environmental scan by 9/30/2020 	None	Dir. of Crisis Services
	3. Evaluate funding opportunities, both public and private.	<ul style="list-style-type: none"> Analyze funding opportunities by 12/31/2020 	None	Dir. of Marketing & Relationships
C. Develop a community-wide program with the focus of eliminating racism through expansion of equality of opportunity programming.	1. Convene other service providers focused on racism issues.	<ul style="list-style-type: none"> Identify collaborative service provider group by 12/31/2020 	None	Dir. of Empowerment
		<ul style="list-style-type: none"> Establish initial discussion forums by 12/31/2021, hosting 2 per year 	None	Dir. of Empowerment
		<ul style="list-style-type: none"> Determine which organizations would be the best partners by 6/30/2022 	None	Dir. of Empowerment
	2. Establish partnerships with like-minded community organizations.	<ul style="list-style-type: none"> Define partnership expectations and form partnerships by 12/31/2022 	None	Dir. of Empowerment
D. Optimize current programming.	1. Set targets for key program areas to track community exposure.	<ul style="list-style-type: none"> Increase attendees at Diversity Dialogue events by 10% YOY 	None	Dir. of Empowerment
	2. Track progress of clients as they reach goals and/or complete programming.	<ul style="list-style-type: none"> 60% of clients with an increased score in 4 of 12 Family Development Matrix categories 	None	Program Directors
		<ul style="list-style-type: none"> Maintain 75% client satisfaction rate on client survey 	None	Program Directors

Strategy #2

Cultivate a workplace environment of understanding, respect, and trust.

Supporting Strategies

Supporting Strategies	Tactics	Milestones / Metrics	Financial Implications	Primary Leader
A. Intentionally integrate across program areas as well as across admin and direct care staff.	1. Provide cross-training and interagency awareness across program areas.	• Design training programs by 12/31/2020	\$100	Dir. of Operations
		• Initiate training programs by 1/1/2021	Staffing wages for time spent.	HR Coordinator
		• Cross-train 75% of staff annually	None	HR Coordinator
	2. Develop agency-wide committees.	• Develop and promote agency-wide committees to increase cross department integration by 12/31/2020	\$200	Leadership Team
		3. Provide diversified delivery of communication methods when change is happening across the organization.	• Develop internal "What's Happening" by 12/31/2020	\$200
	• Develop systems of communication that include 2-4 routes of information delivery by 3/30/2021		\$100	HR Coordinator & Marketing Coordinator
B. Deepen our understanding of workplace dynamics toward improving workplace culture.	1. Refine current workplace surveys.	• Determine what survey(s) to be utilized by 6/30/2021	Staffing wages for time spent.	Dir. of Operations
		• Initiate by 9/2021	\$100	HR Coordinator
		• Maintain 80% employee satisfaction on annual survey (Strongly Agree or Agree)	None	HR Coordinator
	2. Create other objective assessment and feedback mechanisms for measuring and improving workplace culture.	• Create reporting mechanisms by 6/30/2021	Staffing wages for time spent.	Dir. of Operations
		3. Optimize onboarding process and exit interviews to improve the workplace experience.	• Revise onboarding process by 3/31/2020	\$100
	• 100% of new hires to complete orientation within first 30 days		None	HR Coordinator
	• Update exit interview procedures by 3/31/2020		\$100	HR Coordinator

Strategy #2

Cultivate a workplace environment of understanding, respect, and trust.

Supporting Strategies

Supporting Strategies	Tactics	Milestones / Metrics	Financial Implications	Primary Leader
C. Create additional opportunities for team building and social interaction for all staff.	1. Create off-site, all-staff social opportunities.	<ul style="list-style-type: none"> Identify 2 opportunities per year and place in annual calendar by 3/31/2020 	\$2500	Staff Social Committee
	2. Celebrate personal and organizational success.	<ul style="list-style-type: none"> Determine schedule of recognition for employees by 12/31/2020 	\$200	HR Coordinator
D. Formalize internal committee structure.	1. Create social committee annual budget.	<ul style="list-style-type: none"> Add budget line to 2020 budget 	\$3000	CFO & CEO
	2. Create leadership team sponsors for each committee	<ul style="list-style-type: none"> Implement leadership sponsor program by 6/30/2020 	None	Leadership Team

Strategy #3

Strategically utilize and expand facilities.

Supporting Strategies

Supporting Strategies	Tactics	Milestones / Metrics	Financial Implications	Primary Leader
A. Reestablish facilities committee to articulate current and future facilities needs.	1. Designate board and volunteer participants.	<ul style="list-style-type: none"> Identify board member participants by 3/31/2020 	None	CEO & Board
	2. Include cross-functional staff members.	<ul style="list-style-type: none"> First meeting of committee by 5/31/2020 	None	Leadership Team
B. Create a Facilities Master Plan that would optimize current space and address future needs.	1. Perform a detailed utilization analysis of existing space.	<ul style="list-style-type: none"> Utilization analysis by 12/31/2020 	None	Facilities Committee
		<ul style="list-style-type: none"> Facilities committee report to BOD by 3/31/2021 	None	Facilities Committee
	2. Understand and monitor current facility usage.	<ul style="list-style-type: none"> Maintain shelter census of 66 individuals at or below 50% of the time 	None	Director of Crisis Services
		<ul style="list-style-type: none"> Target 90% capacity of addictions program 	None	Director of Addictions Services
C. Identify need for presence in current service area and outlying counties.	1. Evaluate need for presence in Adams, Wells, Huntington, Whitley, DeKalb, and Noble counties.	<ul style="list-style-type: none"> Identify counties in which presence should be studied by 12/31/2020 	None	Director of Empowerment
		<ul style="list-style-type: none"> Create outlying county presence and service study by 6/30/2021 	\$15,000	Facilities Committee
	2. Evaluate the importance of a downtown presence in some form.	<ul style="list-style-type: none"> Determine best approach for framing the downtown decision by 12/31/2021 	None	Facilities Committee
		<ul style="list-style-type: none"> Complete downtown study by 6/30/2022 	\$25,000	Facilities Committee

Major & Supporting Strategies



Strategy #4

Establish a clear identity by building our brand, market presence, and community awareness.

Supporting Strategies

Supporting Strategies	Tactics	Milestones / Metrics	Financial Implications	Primary Leader
A. Establish a clear brand identity.	1. Determine branding strategy and solicit proposals.	<ul style="list-style-type: none"> Branding firm proposals by 12/31/2021 	\$40,000	Marketing Committee
	2. Oversee development of a cohesive look and feel to all marketing materials (digital, print, and web).	<ul style="list-style-type: none"> Cohesive look in place by 12/31/2021 	\$20,000	Dir. of Marketing & Relationships
	3. Create collateral material to advance fundraising efforts.	<ul style="list-style-type: none"> Program-specific materials created by 6/30/2022 	\$50,000	Marketing Coordinator (w/ Agency)
B. Increase community presence and awareness.	1. Explore networking opportunities.	<ul style="list-style-type: none"> Identify all networking opportunities for senior staff members by 12/31/2020 	None	Leadership Team
		<ul style="list-style-type: none"> Assign each senior staff member to a networking opportunity by 3/31/2021 	\$3000	Leadership Team
	2. Increase social media presence and postings.	<ul style="list-style-type: none"> Increase engagement on Facebook, Twitter, LinkedIn, and Instagram by 20% annually 	\$500	Marketing Coordinator
		<ul style="list-style-type: none"> Increase website traffic by 5% quarterly 	None	Marketing Coordinator
	3. Increase YW's presence at key community events.	<ul style="list-style-type: none"> Develop plan to have staff presence at 6 key partner events per year by 12/31/2021 	\$1500	Leadership Team
4. Identify and pursue other public relations opportunities.	<ul style="list-style-type: none"> Create calendar of PR events for each year 	None	Dir. of Marketing & Relationships	
C. Equip YWCA Board and staff as ambassadors of the programs of the YW.	1. Develop common language to describe programs.	<ul style="list-style-type: none"> Create common language discussion document by 12/31/2020 	None	Marketing Committee
	2. Regularly train board and staff members on programs (in conjunction with Strategy 2).	<ul style="list-style-type: none"> Hold 1 training session for the Board annually 	\$500	Governance Committee
		<ul style="list-style-type: none"> Hold annual refresh training for existing staff 		HR Coordinator
	3. Communicate program data and outcomes to internal audiences, both board and staff.	<ul style="list-style-type: none"> Establish program data and outcomes reporting by 12/31/2020 	None	Director of Operations
<ul style="list-style-type: none"> Create reporting schedule (quarterly) 		None	Director of Operations	

Strategy #5

Build community networks and strategic partnerships.

Supporting Strategies

Supporting Strategies	Tactics	Milestones / Metrics	Financial Implications	Primary Leader
A. Position and reinforce YWCA as a community thought leader for empowering women and eliminating racism.	1. Strengthen community presence.	<ul style="list-style-type: none"> In conjunction with other strategies in this plan, create plan for elevating the organization in the community by 12/31/2020 	\$15,000	Dir. of Marketing & Relationships
	2. Identify all mission-aligned advocacy groups in the community to ensure YWCA presence when appropriate.	<ul style="list-style-type: none"> Identify collaborative partner list by 6/30/2021 	None	Leadership Team
	3. Participate in roundtables and community service presentations in mission-aligned areas.	<ul style="list-style-type: none"> Identify appropriate forums by 12/31/2021 	None	Leadership Team
<ul style="list-style-type: none"> Create draft presentation by 12/31/2021 		\$500	Dir. of Marketing & Relationships	
B. Identify community needs and gaps of service in mission-aligned areas.	1. Seek opportunities to sponsor and participate in community research in mission-aligned areas.	<ul style="list-style-type: none"> Partner with Community Foundation of FW Women's Fund to further assess the needs assessment 	\$2000	CEO
	2. Develop community needs assessment and reassess each year.	<ul style="list-style-type: none"> Reassess annually by 9/30 of each year 	None	Leadership Team & Program Directors
C. Identify key community organizations that also focus on mission-aligned areas and look for joint program opportunities.	1. Establish partnerships with like-minded organizations for program-specific opportunities.	<ul style="list-style-type: none"> Identify partner community organizations and specific opportunities with each by 12/31/2021 	None	Leadership Team & Program Directors
		<ul style="list-style-type: none"> Formalize partnerships by 12/31/2022 	None	CEO

Strategy #6

Ensure financial sustainability through new fundraising strategies and revenue streams.

Supporting Strategies

Supporting Strategies	Tactics	Milestones / Metrics	Financial Implications	Primary Leader
A. Maximize annual operational revenue streams.	1. Significantly expand contributions from business partners.	• Increase new business partner donors by 10% year over year	\$1000	Development Committee
		• Identify business partnership total targeted contribution amounts for 2019, 2020, and 2021	None	Dir. of Marketing & Relationships
	2. Significantly expand contributions from high net worth (HNW) individuals.	• Increase new HNW donors by 10% year over year.	\$2000	Dir. of Marketing & Relationships
		• Identify HNW individual total targeted contribution amounts for 2019, 2020, and 2021	None	Dir. of Marketing & Relationships
	3. Leverage the Circle event by emphasizing fundraising rather than community awareness.	• Identify process to leverage Circle donors year-round	\$1000	Development Committee
		• Identify total targeted contribution amounts from Circle donors for each year	None	Circle Committee
	4. Grow the Bridle Bits event to leverage other philanthropic audiences.	• Increase new Bridle Bits donors by 10% year over year	\$2000	Dir. of Marketing & Relationships
		• Increase Bridle Bits total targeted contribution amounts for 2019, 2020, and 2021	None	Bridle Bits Committee

Strategy #6

Ensure financial sustainability through new fundraising strategies and revenue streams.

Supporting Strategies				
Supporting Strategies	Tactics	Milestones / Metrics	Financial Implications	Primary Leader
B. Create, cultivate, and expand long-term revenue streams.	1. Create planned giving program.	<ul style="list-style-type: none"> Planned giving program created by 12/31/2020 	\$2000	Development Committee
	2. Cultivate major donors.	<ul style="list-style-type: none"> 2 new major planned giving donors in 2020 	\$500	Dir. of Marketing & Relationships
	3. Cultivate Circle donors toward long-term gifts.	<ul style="list-style-type: none"> Increase % of existing Circle givers who have designated long-term gifts 	None	Dir. of Marketing & Relationships
	4. Deepen existing relationships.	<ul style="list-style-type: none"> Identify major gift prospects each year as a part of development plan 	None	Dir. of Marketing & Relationships
		<ul style="list-style-type: none"> Meet with all major gift prospects annually by Sept of each year 	\$1000	Dir. of Marketing & Relationships / CEO
C. Evaluate opportunities for capital contributions.	1. Offer naming opportunities.	<ul style="list-style-type: none"> Annually as part of corporate and HNW donor solicitation 	\$500	Dir. of Marketing & Relationships
	2. Conduct a phased major gift effort.	<ul style="list-style-type: none"> Identify elements of annual operations that are suitable for major gift campaign by 12/31/2020 	None	Dir. of Marketing & Relationships
		<ul style="list-style-type: none"> Implement annual capital needs campaign in 2021 	\$5000	Development Committee
	3. Conduct targeted donor cultivation and stewardship effort, including training development staff and/or board members.	<ul style="list-style-type: none"> Train staff and board by 3/31/2021 	\$250	Dir. of Marketing & Relationships
		<ul style="list-style-type: none"> Establish annual donor cultivation and stewardship events by 12/31/2021 	\$1000	Dir. of Marketing & Relationships

Dashboard Report

Status Indicator		Key Performance Indicators										
Positive Trending Position	▲	KPI or Metric	Status	Target	Q1 2020	Q2 2020	Q3 2020	Q4 2020	Q1 2021	Q2 2021	Q3 2021	Q4 2021
Neutral Trend	■	1.C.1	Host discussion forums focused on racism issues	■	2 per Year							
Negative Trending Position	▼	1.D.1	Increase attendance at Diversity Dialogue events	▲	10% YOY							
		1.D.2	Clients with an increased score in 4 of 12 Family Development Matrix categories	▼	60%							
		1.D.2	Client satisfaction on client survey (Strongly Agree or Agree)		75%							
		2.A.1	Staff participation in cross-training		75% Annually							
		2.B.1	Employee satisfaction on annual survey (Strongly Agree or Agree)		80%							
		2.B.3	New hires complete orientation within first 30 days		100%							
		2.C.1	Plan and host all-staff social events		2 per Year							
		3.B.2	Maintain shelter census at or below 50% of the time		66 Individuals							
		3.B.2	Target additions program capacity		90%							
		4.B.2	Increase engagement on FB, Twitter, LinkedIn, Instagram		20% Annually							
		4.B.3	Have staff presence at key partner events		6 per Year							
		4.C.2	Train board/staff as ambassadors of YWCA programs		2 per Year							
		5	All milestones; no metrics identified		n/a							
		6.A.1	Increase contributions from business partners		\$1,000 YOY							
		6.A.2	Increase contributions from high net worth donors		\$2,000 YOY							
		6.A.4	Increase contributions from Bridle Bits event		\$2,000 YOY							
		6.B.2	Cultivate new major donors		2 per Year							

Primary Strategies	
1. Program Impact	
2. Workplace Environment	
3. Utilize & Expand Facilities	
4. Brand, Presence, Awareness	
5. Networks & Partnerships	
6. Financial Sustainability	

Other Notable Items	
Item 1	
Item 2	
Item 3	
Item 4	
Item 5	

CEO's Notes	
Identify and track non-financial and non-quantitative progress toward strategic goals and objectives	

Implementation Timeline

Primary Strategy	2020	2021	2022
1 Program Impact	1.A.1 Create Board policy consistent with green light criteria by 7/31	1.C.1 Establish initial discussion forums on racism by 12/31	1.C.1 Determine which organizations would be best partners re: racism issues by 6/30
	1.B.1 Conduct community survey by 6/30		1.C.2 Define partnership expectations and form partnerships by 12/31
	1.B.2 Create environmental scan for transitional housing by 9/30		
	1.B.3 Analyze funding opportunities by 12/31		
	1.C.1 Identify collaborative service provider group by 12/31		
2 Workplace Environment	2.A.1 Design cross-training programs by 12/31	2.A.1 Initiate training programs by 1/1	
	2.A.2 Develop and promote agency-wide committees to increase cross-department integration by 12/31	2.A.3 Develop systems of communication that include 2-4 routes of information delivery by 3/30	
	2.A.3 Develop internal "What's Happening" by 12/31	2.B.1 Determine what survey(s) to be utilized by 6/30	
	2.B.3 Revise onboarding process by 3/31	2.B.1 Initiate surveys by 9/30	
	2.B.3 Update exit interview procedures by 3/31	2.B.2 Create reporting mechanisms for measuring and improving workplace culture by 6/30	
	2.C.1 Identify off-site, all-staff opportunities and place in annual calendar by 3/31		
	2.C.2 Determine schedule of recognition for employees by 12/31		
	2.D.2 Implement leadership sponsor program by 6/30		
3 Utilize & Expand Facilities	3.A.1 Identify board member participants of facilities committee by 3/31	3.B.2 Facilities committee report to BOD by 3/31	
	3.A.2 Hold first meeting of facilities committee by 5/31	3.C.1 Create outlying county presence and service study by 6/30	
	3.B.1 Perform detailed utilization analysis by 12/31	3.C.2 Determine best approach for framing the downtown decision by 12/31	3.C.2 Complete downtown study by 6/30

Implementation Timeline

Primary Strategy	2020	2021	2022
4 Brand, Presence, Awareness	4.B.1 Identify all networking opportunities for senior staff members by 12/31	4.A.1 Solicit branding firm proposals by 12/31	4.A.3 Create program-specific materials by 6/30
	4.B.4 Create a calendar of PR events for the year by 1/31	4.A.2 Oversee development of a cohesive look and feel to all marketing materials by 12/31	
	4.C.3 Establish program data and outcomes reporting by 12/31	4.B.2 Assign each senior staff member to a networking opportunity by 3/31	
		4.B.3 Develop plan to have staff presence at key partner events by 12/31	
		4.B.4 Create a calendar of PR events for the year by 1/31	4.B.4 Create a calendar of PR events for the year by 1/31
		4.C.1 Create common language discussion document by 12/31	
5 Networks & Partnerships	5.A.1 In conjunction with other strategies in this plan, create plan for elevating the organization in the community by 12/31	5.A.2 Identify collaborative partner list by 6/30	5.B.2 Reassess community needs assessment annually by 9/30
	5.B.2 Develop community needs assessment by 9/30	5.A.3 Identify appropriate forums/roundtables by 12/31	
		5.A.3 Create draft presentation for forums/roundtables by 12/31	
		5.B.2 Reassess community needs assessment annually by 9/30	
		5.C.1 Identify partner community organizations and specific opportunities with each by 12/31	5.C.1 Formalize partnerships by 12/31
6 Financial Sustainability	6.A.1 Identify business partnership total targeted contribution amount for the year	6.A.1 Identify business partnership total targeted contribution amount for the year	6.A.1 Identify business partnership total targeted contribution amount for the year
	6.A.2 Identify HNW individual total targeted contribution amounts for the year	6.A.2 Identify HNW individual total targeted contribution amounts for the year	6.A.2 Identify HNW individual total targeted contribution amounts for the year
	6.A.3 Identify Leverage the Circle total targeted contribution amounts for the year	6.A.3 Identify total targeted contribution amounts from Circle donors for the year	6.A.3 Identify Leverage the Circle total targeted contribution amounts for the year
	6.B.1 Create planned giving program by 12/31	6.B.4 Identify major gift prospects each year as a part of development plan	6.B.4 Identify major gift prospects each year as a part of development plan
	6.B.2 Cultivate 2 new major planned giving donors by 12/31	6.B.4 Meet with all major gift prospects annually by 9/30	6.B.4 Meet with all major gift prospects annually by 9/30
	6.B.4 Identify major gift prospects each year as a part of development plan	6.C.2 Implement annual capital needs campaign in 2021	
	6.B.4 Meet with all major gift prospects annually by 9/30	6.C.3 Establish annual donor cultivation and stewardship events by 12/31	
	6.C.2 Identify elements of annual operations that are suitable for major gift campaign by 12/31		