



# Strategic Plan

## Fiscal year 2020-21, 2021-22, 2022-23

### INTRODUCTION

The Strategic Planning Committee has developed this draft plan over a series of meetings in Fall 2019 through Spring 2020. This Plan was developed after examining a great deal of financial data and discussing the findings or research conducted with agencies and members regarding our current programs.

#### Strategic Plan (FY 2020-21, FY 2021-22, FY 2022-23)

The Committee also conducted a critical review of goals and measurable objectives noted in the previous strategic plan. While the majority of the goals were met, those not completed and still relevant have been incorporated into the new three-year plan.

Goals	Accomplished	Ongoing
1. Strengthen member involvement in the organization	Engage new members Provide info updates Seek member input regularly Recognize member accomplishments	Evaluate hours requirements Target and recruit younger members Mentors for new members
2. Operation School Bell® will work toward fulfilling requests from schools currently participating	Revised work shifts Reorganized shop and storeroom Refined scanning process Expanded Beyond The Bell	Explore service model improvements Expand on how to serve students who can't be transported to School Bell shop
3. Maintain the number of adults and children served to meet 100% of requests from agencies currently being served		
Assault Survivor Kits®	Maintained the number of client agencies served/recipients of kits	Assess needs and missions of client agencies.
ALI Bears	Maintained the number of client agencies served/recipients of bears	Assess needs and missions of client agencies.
ALI Friends	Maintained level of commitment	Assess new agencies

<p>4. Resource Development Committee will strive to achieve an annual balanced budget</p>	<p>Increased corporate and community investment in our programs  Promoted United Way with school personnel  Testing a new spring fundraiser  Increased donations from OSB direct mail campaign</p>	<p>Assess new fundraisers  Grow corporate partnerships  Use of a crowd-funding campaign</p>
<p>5. Communicate the chapter's accomplishments to recognize Assistance League of Indianapolis as a major philanthropic organization in the community</p>	<p>Developed relationships with traditional print media outlets  Increased website visits and social media likes  Increased advertising efforts  Sent electronic news articles and newsletters to members and donors  Participated in networking opportunities</p>	<p>Continue to develop a social media presence  Explore advertising options</p>
<p>6. Enhance Chapter leadership to secure the future role of the organization</p>	<p>Ongoing "educational moments" with membership at monthly meetings.  A chapter calendar of events is included in the President's weekly e-newsletter</p>	<p>Additional training in basic computer skills and business management is needed.</p>

## **CRITICAL FACTORS**

There were a number of external and internal factors over the past 12 months that impacted management of the Chapter, the programs and goals and strategies noted in this Plan. The most significant that required changes in processes and procedures included:

1. Recruiting new advisory council members
  - a. Financial Consultant
  - b. PR Consultant
  - c. Technology Consultant
2. Creating a data base of members experiences and skill sets
  - a. Reference for Nominating and Placement Committees
  - b. Identify training needs
3. Releasing building funds to support chapter activities/programs
4. Creating a balanced budget for 2020-2021 in compliance with National's recommendation

## **OVERARCHING CHALLENGES**

It was determined that the two major challenges that are part of or contribute to most of our critical issues are:

- A. Financial RESOURCES
- B. Member/Human RESOURCES

## **MISSION STATEMENT**

Assistance League volunteers transforming the lives of children and adults through community programs

## **VISION**

Essential needs are met in our community and families flourish

## **CORE VALUES**

- Commitment
- Leadership
- Ethics
- Accountability

Respect

## **STRATEGIC GOALS**

*(How we will achieve the Vision)*

**Goal 1: Strengthen members' involvement in the organization**

**Goal 2: Operation School Bell® will work toward fulfilling requests from schools currently participating**

**Goal 3: Maintain the number of adults and children served to meet 100% of requests from agencies currently being served**

**Goal 4: Resource Development Committee will strive to achieve an annual balanced budget**

**Goal 5: Communicate the chapter's accomplishments to recognize Assistance League of Indianapolis as a major philanthropic organization in the community**

**Goal 6: Enhance the leadership to secure the future of the Chapter**

## **GOALS, OBJECTIVES, STRATEGIES**

*Utilized the SMART principle to ensure we define how we will achieve our Goals:*

*Specific*

*Measurable*

*Accurate*

*Real*

*Time*

## **Goal 1: Strengthen member involvement in the organization**

### Objectives:

- 1) Grow membership with emphasis on recruiting members who will ensure the longevity of the Chapter
- 2) Bolster members' skills to competently manage a small business and to expand the pool of members filling leadership positions
- 3) Encourage former members/alumnae to reengage in the Chapter and programs

### Strategies & Tactics:

- Manage a major Membership Campaign to add new members who are both physically able and willing to participate in and manage our chapter and its programs.
  - Target younger members between the ages of 40 to 60 years old through an active recruitment drive via social media
  - Engage with organizations/businesses/groups associated with women
  - Contact business/corporations with required community volunteer commitments
  - Contact women's business groups and sororities Continue to develop opportunities for service during evening that would allow working women and those with family obligations to engage in the organization
  
- Highlight needed skills and experiences during recruitment and new member orientation to engage new members to immediately participate on committees
  - Refine member interest form to identify interests, useable skills and accomplishments
  
- Clarify volunteer member expectations for voting and non voting members
  - Voting Members
    - Regular Meetings - at least 5 meetings, day or evening, held from August thru May
    - Operation School Bell-Apparel – at least 7 shifts as a shopper
    - Other Committees (e.g. OSB, Assault Survivor Kits, ALI Bears, ALI Friends, Administration, Fundraising, Marketing, Finance Committees)
  - Non-Voting Members
    - Regular Meetings – as many as possible, day or evening meetings
    - Operation School Bell-Apparel – at least 7 shifts as a shopper
    - Other Committees (e.g. OSB, Assault Survivor Kits, ALI Bears, ALI Friends, Administration, Fundraising, Marketing, Finance Committees)
  
- Provide enhanced orientation and continuing education to ensure members understand and commit to their responsibilities of time, money and talent
  - Engage new members as soon as possible to actively participate on committees (e.g. Sign-up members for committees and School Bell training at Orientation)
  - Implement skills workshops for current members
  - Provide transition guidance (including an annual timeline), training and mentoring for newly elected and appointed positions.
    - Outgoing chairs will be required to meet with new chairs a minimum of 2 hours during May to review the roles and responsibilities of the position
    - Files and a memory stick with samples of all materials and community contacts will be prepared at the end of the year by each chair and reviewed with incoming chair during a scheduled training session
  - Offer training workshops specific to “required skills” for chairs (e.g. computer skills for Word, Excel, Power Point)
  - Encourage all Board Members to meet with their respective chairs monthly to review their activities in preparation for monthly board meetings

- Chair of Strategic Planning will review monthly board reports to see if goals are being met
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- Keep former members on our mailing database for five years to continue to receive newsletters, invitations, donation requests, updates on programs, activities and awards

**Goal 2: Operation School Bell® will work toward fulfilling requests from schools currently participating**

**Objectives: Overall Program**

- 1) Maintain our present delivery mode to distribute clothing and shoes at Operation School Bell
- 2) Continue to assess community needs to identify program refinements
- 3) Ensure commitments are consistent with the approved program expenses

**Strategies & Tactics: Overall Program**

- Conduct annual program survey with social workers before budgeting cycle to assess necessary changes to program that will affect budget, inventory, and staffing.
  - Utilize Survey Monkey to conduct school personnel survey each January before budget cycle
- All future Letters of Agreement with school districts will include a request that Assistance League of Indianapolis and Operation School Bell be listed as a “community partner” when recognizing contributions from other agencies/organizations

**Objectives: Apparel Division**

- 1) Retain the personal one-on-one shopping experience model at Operation School Bell® shop

**Strategies & Tactics: Apparel Division**

- Change staffing strategy to meet the required number of workers (scanners, shoppers, merchandise, etc.) available to work each day the shop is opened
  - Utilize non-member volunteers such as corporate / community or school groups to supplement volunteer staff at Apparel

**Objectives: Shoes Division**

- 1) Retain the personal fitting experience model
- 2) Explore corporate sponsor opportunities to fund expansion of the Shoes Program

**Strategies & Tactics: Shoes Division**

- Expand the pool of workers to volunteer during the two week shoes event by welcoming employees of our corporate partners and grantors to participate at Shoes
  - Utilize non-member volunteers such as community or school groups to supplement volunteer staff at Shoes
- Evaluate quality and design of shoes offered to meet student preferences
- Evaluate quality, style, quantity and price of socks offered

Objectives: **Beyond The Bell Division**

- 1) Continue the current level of services to IPS
- 2) Keep the current January services to Pike Township
- 3) Consider expanding services to one or more of the townships as permitted by budget

Strategies & Tactics: **Beyond The Bell Division**

- Explore new funding sources (e.g. corporate sponsorships/partnerships, federal or corporate grants) to expand services

**Goal 3: Maintain the number of adults and children served to meet 100% of requests from agencies currently being served**

Objectives: **Assault Survivor Kits, ALI Bears, ALI Friends**

- 1) Assess current agencies to identify unmet needs
- 2) Increase recognition and value of ALI and Program among agencies
- 3) Ensure commitments are consistent with the approved program expenses

**Assault Survivor Kits®**

Strategies & Tactics:

- All future Letters of Agreement with agencies will include a request that Assistance League of Indianapolis be recognized for its contributions on their websites
- Committee members to schedule meetings with client department heads for initial deliveries for 2019-20 FY to reintroduce Assistance League of Indianapolis and Assault Survivor Kits
  - Evaluate current agencies to ensure all meet program mission and eliminate duplicative services provided by other community services
  - Contact Assault Survivor Kits agencies each January to update contact info and identify need for the next fiscal year
- Look for opportunities to dialogue with current SANE (sexual assault nurse examiner) with online survey, attend professional meetings, collaborate with local organizations that focus on preventing sexual assault

Attend local and regional meetings of domestic and assault violence agencies to explore new agencies and program expansion

- Determine how state legislation has affected reporting of sexual abuse and the timeline to report the event that potentially affects program needs and items offered (current laws allow victims to wait 24-48 to report assault delaying examinations and eliminating need for kits)
- Schedule activities during Sexual Awareness Month (April) to publicize the Assault Survivor Kits Program and the services we offer.

**ALI Bears**

Strategies & Tactics:

- All future Letters of Agreement with agencies will include a request that Assistance League of Indianapolis be recognized for its contributions on their websites

- Evaluate current agencies to ensure all meet program mission and eliminate duplicated services provided by other community services
  - Meet with clients quarterly when delivering the inventory of bears to reassess needs

## **ALI Friends**

### **Strategies & Tactics:**

- All future Letters of Agreement with agencies will include a request that Assistance League of Indianapolis be recognized for its contributions on their websites
- Evaluate current agencies to ensure all meet program mission and eliminate duplicated services provided by other community services

## **Goal 4: Resource Development Committee will strive to achieve an annual balanced budget**

- 4.1 Chapter Fundraising Events
- 4.2 Member Fundraising Activities
- 4.3 Grants
  - 4.4 Corporate Partnerships/ Sponsorships
  - 4.5 Miscellaneous Donations/Investment Return
- 4.6 Estate Planning/Pledging Plans
- 4.7 New Fundraising Events
- 4.8 Evaluation Tool

## **4.1 Chapter Fundraising Events**

### **Objectives:**

- 1) Chapter will support and manage annual fundraising events/activities to generate at least 31% of budgeted revenue
- 2) Total Projected Revenue from Chapter Fundraising Events: \$170,000

### **Strategies & Tactics:**

- Holiday Luncheon - Raise at least 35% of projected revenue from Chapter Fundraising Events -- Projected Revenue - \$ 60,000 of \$170,000
  - Raise ticket prices as needed to keep up with overhead increases
  - Improve quality of silent auction items
  - Require a starting bid on each auction item
  - Utilize Fund-A-Cause video to raise the FAC donations
  - Replace wine pull with a 50/50 raffle
  - Continue gift card tree using a community sponsor
  - Increase visibility on all social media sites
- Operation School Bell Fall Mailer - Raise at least 18% of projected revenue from Chapter Fundraising Events – Projected Revenue - \$ 30,000 of \$170,000

- Increase the number of potential donors receiving the mailer
    - Persuade more members to mail additional mailers
  - Encourage donors to increase donation amounts
    - Include the purchasing value in dollar amounts of various donation levels
    - Update the amount on mailer to reflect the current retail cost to completely outfit a student to include shoes, clothing, supplies, and the duffel bag
  - Increase visibility on all social media sites
  - Distribute printed and electronic versions of the mailer to all school boards, PTAs, and personnel in the districts we serve
  - Link with school district's websites to promote the mailer
- Spring Gala/Event - Raise at least 47% of projected revenue from Chapter Fundraising Events -- Projected Revenue - \$ 80,000 of \$170,000
- TBD

## **4.2 Member Fundraising Activities**

### **Objectives:**

- 1) Bolster current Member Fundraising Activities to increase the total revenue to contribute at least 5% of budgeted annual revenue

### **Strategies & Tactics:**

- The VP of Education or Resource Development will present a 'lesson' at a regular meeting at the second regular meeting each year to remind members of all of the ways they can support our fundraising efforts that do not require them to write a check – focus would be on securing money from outside sources
- Cookbooks
  - Sell remaining cookbooks at discounted price
  - Increase member participation by placing a reminder in the President's weekly e-newsletter to bring a check to the monthly meetings
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- Amazon Smile
  - Increase member designation of Assistance League by placing a reminder and instructions on how to enroll in the President's weekly e-newsletter
  - Put instructions in the Handbook
  - Create display boards and/or handouts for each table at the Regular Monthly Meetings featuring a reminder and instructions on how to enroll in Amazon Smile
- Memorials/Tributes Donations
  - Remind members by publishing names of donors and who they were honoring once a month in President's e-newsletter and in Regular Meeting Agendas
- United Way Donations
  - Encourage members to ask family members and friends to promote UW donations at their workplace at all general meetings and in President's weekly newsletter [Revenue from United Way Donations appears under 4.4 Corporate Partnership/Sponsorship]
- Membership Dues/Meeting Lunches

- Encourage members to stay for lunch following the regular meetings
- Restaurant Fundraisers and Special Events
  - Fundraising committee will organize special one-time events and restaurant fundraisers that will add to the total of Chapter Fundraising- “Other” in the budget.

### **4.3 Grants**

#### **Objective:**

- 1) Grants will generate a revenue to contribute at least 36% of budgeted annual revenue

#### **Strategies & Tactics:**

- Increase grant funding by seeking new sources of grants
  - Find at least 3 new grant opportunities per year
  - Ask members to investigate and utilize workplace grant opportunities (including members who are retired)
  - Chairman of Grants will coordinate activities with the professional grant writer
  - Publicize grant awards on social media sites and recognized through PR/Marketing
  - Maintain membership in the Better Business Bureau

### **4.4 Corporate Partnerships/Sponsorships**

#### **Objective:**

- 1) Increase funds raised through United Way Donations, Gift Matching Programs and Corporate Sponsored Events to contribute at least 20% of budgeted annual revenue

#### **Strategies & Tactics:**

- Promote United Way donations to our network of contacts
  - Have United Way forms available at all Assistance League of Indianapolis functions
  - Encourage members at all regular meetings to ask family members and friends to designate Operation School Bell for their United Way donations
  - Schedule Speaker’s Bureau to go out to organizations and companies to speak of the opportunity to support Operation School Bell
  - Create a link on our website to the donor designation page on the United Way website
  - Solicit United Way donations from staff at the school districts and agencies we serve
- Promote Corporate Gift Matching Programs
  - Encourage members to solicit family and friends to donate through gift matching programs sponsored by their employers
  - Provide a list of local companies to members that offer gift matching programs
- Solicit and support corporate sponsored fundraising events
  - Use the AECOM Hunt Construction Annual Golf Outing as a model for successful corporate events
  - Use Kroger Employees as a model for corporate sponsorship of a school or a program
  - Entice untapped corporations, organizations and foundations who share our vision to support Assistance League both financially and with in-kind donations

- Collaborate with businesses to be the designated charity of their fundraising opportunities
- Identify and implement ways to allow corporate and community investment in our programs
- Find ways to utilize in-kind goods and services to support fundraising events and philanthropic programs that will defray expenses. Use websites to research philanthropic sites that are resources for in-kind goods and services
- Utilize donation information from our proprietary database to evaluate donations received from local business and community organizations to prepare a comprehensive plan to solicit future donations
- Confirm our Better Business Bureau membership is renewed annually
- Contact Volunteer Match for new opportunities

#### **4.5 Miscellaneous Contributions**

##### Objective:

- 1) Generate other donations not directly associated with an event, direct solicitation or grant application to contribute to the annual fundraising revenue

##### Strategy:

- Insert remittance envelopes in Annual Reports
- Include donation information in all press releases and social media opportunities

#### **4.6 Estate Planning/Pledging Plans**

##### Objective:

- 1) Establish new long-term financial vehicles to contribute to annual revenue

##### Strategies & Tactics:

- Use our Advisory Council Financial Expert to educate members on various donation options
  - Estate Planning
    - Encourage more members to designate Assistance League of Indianapolis in their estate planning
    - Have an estate planner speak at a meeting with information as to how this is done and provide written reference materials
  - Pledging Plan
    - Offer members and other donors an opportunity to schedule donations over the course of our fiscal year
- Present quarterly reports of revenue received from Estate Planning and Pledging Plans to encourage more members to consider these options

#### **7. New Fundraising Events**

##### Objective:

- 1) Identify and develop new fundraising event or events to contribute to annual revenue

Strategies & Tactics:

- Continually develop ideas for future fundraisers such as explore local restaurant opportunities: e.g. Dining For Dollars
- Develop an annual fundraising event/activity that will target public participation and increase name recognition in addition to raising funds

Measurable Outcomes:

As these are new and untested strategies, revenue from these strategies have not been projected in the 2020-2021 budget.

**4.8 Evaluation Tool**

Objective:

- 1) Develop a standardized tool/form to evaluate each fundraising event to assess success, weaknesses and areas to be examined/improved

Strategies & Tactics:

- Evaluation criteria will include: actual costs; member volunteer hours, donations, revenue realized member participation, community participation
- Major fundraisers to keep a Fundraising Tracking Report that is turned in to the VP of Resource Development within 60 days after the completion of the fundraiser and shared with the Board.
  - Track number of repeat and new donors on an annual basis
  - Compare average monetary contribution size on an annual basis
  - Track member vs. non-member donations
- The Fundraising Committee/Chair of each fundraising event/activity will be responsible for tracking data and completing the standardized tool/form

**Goal 5: Communicate the chapter's accomplishments to recognize Assistance League of Indianapolis as a major philanthropic organization in the community**

Objective:

- 1) Expand our profile in the community to increase membership and donations

Strategies & Tactics

- Develop an ongoing advertising campaign regarding the chapter and it's contributions
  - Produce two new videos specific for YouTube (viral videos) featuring the apparel and shoes divisions of Operation School Bell
  - Develop a new brochure (card type) featuring Operation School Bell and Membership to be used at all public events
  - Continue to advertise in IBJ's annual Giving Guide, IBJ's Not-for-Profit list and Sophisticated Living's Giving Guide

- Publish a printed Annual Report in early November that will be sent to entire database
- Chairman of Public Relations will research awards which our chapter, programs, and members are eligible to receive on both a national and local level
- Improve utilization of our website and social media outlets to communicate with a broader segment of the community
  - A Social Media Appointed Position will manage all social media sites
  - Maintain Instagram, Facebook, Twitter and YouTube sites
  - Train and encourage members to utilize social media and to forward links to family and friends
- Identify and attend networking opportunities where the chapter's story can be told
  - Research and join community organizations that support the philanthropic community including, but not limited to: President's Roundtable and Association of Fundraising Professionals (AFP)
  - Strengthen Speaker's Bureau
    - Rewrite presentation utilizing brochures and other visuals to introduce Operation School Bell and membership opportunities
  - Have selected members present Assistance League of Indianapolis' programs to all PTO's from schools we serve, service organizations, newcomer organizations and local businesses

## **Goal 6: Enhance Chapter leadership to secure the future role of the organization**

### Objectives:

- 1) Improve preparation of leaders for their positions
- 2) Build a relationship with members of our Advisory Council

### Strategies & Tactics

- Enrich the current Board Training process to better prepare the elected board to address current and future challenges facing the Chapter
  - Adhere to National's recommendations for topics and skills to be incorporated into board training by utilizing National's on-line modules
  - Maintain and update as needed a curriculum that will allow more in-depth study of key processes and procedures to manage the Chapter
- Update as needed a training process for Appointed Chairs to help them manage their respective responsibilities and better understand their role as leaders in the Chapter
  - Utilize National's recommendations for topic and skills to be developed for Appointed Chairs
  - Maintain and update as needed a training model to help establish skills and chapter wide processes to effectively manage their respective committees
- Define, confirm, and expand the role of the Advisory Council as a source of advice, counsel and expertise to guide and support the Chapter in all aspects
  - Advisory Council representatives will meet with Board members annually
  - The Secretary will provide copies of monthly regular meeting minutes, the June newsletter, and the Annual Report

- Council members will be invited to attend a regular meeting of their choice as a guest of the Chapter
- Members of the Council will be expected to support the Holiday Luncheon and the Spring Fundraising Event
- Members of the Advisory Council will be listed on all printed materials as approved by the Vice President of Marketing