

# **INCREASING OUR IMPACT**

2025 - 2027 STRATEGIC PLAN

**BRUNER STRATEGIES, LLC** 

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Our strategic planning process was facilitated by Bruner Strategies, LLC.

#### **MESSAGE FROM THE BOARD**

Elevate Oregon Community,

We are delighted to share with you our plans to increase Elevate's impact.

Last year we embarked on a comprehensive process to develop a thoughtful, actionable plan to guide our work over the next three years. Approximately 100 people engaged in our professionally-facilitated process, which was informed by an array of sources.

We are excited about the path our strategic plan provides for increasing our impact. While we explored many needs, issues, and opportunities, two primary themes emerged consistently regarding Elevate's near-term future:

### The Need and Opportunity for Replication, Growth & Expansion

- Refine our program by clarifying its core components, ensuring consistent implementation across classrooms, and establishing clear outcome metrics.
- Pursue opportunities to provide services in additional Eastside school districts.
- Enhance our capacity and expertise to serve additional communities of color, particularly Latino.

#### The Need for Continued Organizational Development

- Strengthen our human resources systems, including compensation, policies and procedures, professional development, and succession planning.
- Improve our fundraising, particularly with individuals and corporations, and increase Board engagement in year-round fundraising.
- Amplify our marketing with compelling messages that motivate and inspire, and effective outcomes-based communications.

To ensure accountability for implementing our plan, we identified goals, strategies, tactics, measurable outcomes, leads, and timelines.

We invite you to read, support, and engage with us to help make our strategic plan a success. Thank you for your continued support of our important work.

Board of Directors July 2024

### MISSION, PROGRAM, CHARACTER QUALITIES & LIFE SKILLS

#### **MISSION**

Elevate Oregon builds relationships with at-risk youth to promote education, self-reliance, and leadership.

#### **PROGRAM**

Class Curriculum. Age-appropriate curriculum that integrates with school district goals.

One-on-One Mentoring. Life-changing guidance from dedicated Teachers/Mentors.

Enrichment Opportunities. Empowering students to step up and take control in academics and beyond.

#### CHARACTER QUALITIES & LIFE SKILLS

- Vision
- Courage
- Respect
- Caring
- Responsibility
- · Positive Work Ethic
- Integrity
- Career-Mindedness
- Communication
- Leadership
- Problem-Solving
- Decision-Making
- Goal-Setting

#### PLANNING PROCESS & INFORMATION SOURCES

#### **OVERVIEW**

Elevate identified, gathered, and evaluated both qualitative and quantitative data in the course of our planning.

#### PROCESS & INFORMATION SOURCES

The following process and information sources informed our strategic planning:

- Constituent Survey. An anonymous web-based survey was developed and sent to our constituents, including community partners, Elevate parents, funders, and donors. 32 responses were received.
- Key Informant Interviews. Individual interviews were conducted with 10 stakeholders, including partners, funders, donors, and community leaders.
- Student Input. We sought the input of current Elevate students by facilitating a group discussion with 15 participants at Parkrose High School.
- SWOT Analysis. The strategic planning committee evaluated our current strengths and weaknesses, as well as our opportunities and threats (SWOT), at a half-day work session.
- Organizational Review. We assessed our organization's operations, including its structure, staffing, volunteerism, communications, and Board.
- Financial Review. We reviewed trends in our revenue, expenses, liabilities, assets, and net assets for the past five fiscal years.
- *Programmatic Review.* We evaluated our current programming model, structure, eligibility, processes, and utilization over the past five years.
- *Demographic Review.* We reviewed the demographics of the Parkrose neighborhood, Parkrose School District, and Elevate's students, staff, and Board.
- Assessment. Our planning committee reviewed a summary of the information gathered above, and identified two goals and associated strategies at a half-day work session.

#### **PLAN FORMAT & TERMINOLOGY**

#### **OVERVIEW**

Elevate's strategic plan exists on a google spreadsheet to allow for ease of access and annual updates, as needed, by designated parties. The plan includes two goals. Both goals have associated strategies, tactics, outcomes, leads, and timelines to guide phased implementation over three years.

#### TERMINOLOGY

A definition of terminology used in our strategic plan follows:

- Goals. A broad aim toward which our efforts are directed; what we are trying to achieve.
- Strategies. A plan of action designed to achieve our objectives; how we will pursue our goals.
- *Tactics*. A specific action step required to deliver on a strategy; the group of actions we will take to fulfill the strategy.
- Outcomes. Measurable results we will see if and when we are successful; the specific metrics behind what we are trying to achieve.
- Lead. The person(s) or position(s) responsible for championing an area of work, and ensuring that activity is coordinated and progress is tracked.
- Timeline. The phased implementation of components of the plan over time.

#### **PLANNING COMMITTEE**

#### **OVERVIEW**

Elevate set out to ensure our planning committee was inclusive of an array of perspectives, variety of positions in our organization, and varying lengths of tenure with us. We convened a group comprised of representatives from our Board of Directors, as well as our entire staff leadership team.

#### **BOARD MEMBERS**

Board members on the planning committee included the following:

- Jordan Bader, Chair
- · Sean Gabrio, Vice Chair
- Billy Ladd
- Sarah Raymond
- Kara Adams
- · Eva Delgado

#### STAFF MEMBERS

Staff members on the planning committee included the following:

- Donell Morgan, Executive Director
- Tony Ande, Chief Operating Officer
- Sarah Dougherty, Program Director
- Kristen Rogers, Development Director
- Angela Taylor, Finance Director

#### STAFF SUPPORT

The planning committee and planning process was supported by Jim Wildermuth, Elevate's administrative assistant.

#### **FACILITATION**

The planning committee and planning process was facilitated by Thomas Bruner, Principal with Bruner Strategies, LLC.



## Increasing our Impact: Strategic Plan, 2025-2027

Goals	Strategies	Tactics	Outcomes	Lead	Timeline											
PROGRAM					FY 2025					FY 2026				FY 2027		
					Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
Increase our Impact by	Expanding our Programmati	c Reach														
	Prepare for replication by refining our program model	Identify core non-negotiable program components	100% of program components are clear and consistently implemented	Program Director												
		Finalize outcome metrics and data collection methodology	100% of data collection methodology is consistently implemented	Program Director												
	Prepare for replication by refining our program model	Define program financing model	Board-approved funding model is in place and shared with partners	Program Director, Chief Operating Officer												
		Identify and secure funds needed for replication	Development strategy with prospects and timeline is in pace	Executive Director, Board												
	Replicate in David Douglas School District	Expand elementary-level pilot program to all schools	1 Teacher-Mentor in place per school for grades 3-5	Program Director												
		Implement fully-staffed middle school program to all schools	3 Teacher-Mentors in place per school for grades 6, 7 and 8	Program Director												
		Implement high school pilot program	1 Teacher-Mentors in place for grade 9	Program Director												
	Be prepared to replicate in 3rd district	3rd district is identified with an agreement in place	Signed agreement in place with district	Program Director, Executive Director,												
		Identify and secure funds for replication	Funding identified and secured	Executive Director, Development Director												
		1st phase of replication begins	Elementary-levels program launched	Program Director												
INFRASTRUCTURE																
Increase our Impact by	Strengthening our Organizati	on														
	Equip our staff by improving our HR systems and procedures	Refine our policies and procedures and ensure consistent implementation	100% of staff report that HR policies and procedures are clear and consistently implemented	Chief Operating Officer												
		Ensure compensation is at 50% of local nonprofit market	100% of staff report being paid at local non-profit market levels	Chief Operating Officer, Executive Director,												

	Develop a comprehensive onboarding program	100% of staff report onboarding is comprehensive and well-managed	Chief Operating Officer			
	Develop and ongoing professional development program	100% of staff report professional development program is robust and useful	Chief Operating Officer			
	Develop succession plans for ED and COO positions	Succession plans in place for ED and COO positions	Chief Operating Officer, Executive Director			
, ,	Refine and market an individual major donor program	Number of and total gifts from individual major donors increases 100%	Development Director, Executive Director			
	Amplify corporate giving and sponsorship program	Number of and total gifts from corporations increases 100%	Development Director, Executive Director			
	Increase and maintain Board engagement in year-round fundraising	100% of Board members are active in year-round giving and getting	Development Director, Board Chair			
	Increase Executive Director's focus on revenue generation, including fundraising	80% of ED's time is consistently spent on revenue generation	Board, Executive Director			
	Develop compelling key messages that emphasize outcome and impact	85% of constituents report that key messages are clear and compelling	Development Director			
	Increase consistency, frequency, and timeliness of internal and external communication	85% of constituents report that communication is consistent, frequent, and timely	Development Director			
	Develop, resource, and implement an external marketing plan	85% of key stakeholders report that marketing efforts are effective	Development Director			