



# THREE YEAR STRATEGIC PLAN

## LOOKING FORWARD

From 2014 ❖ To 2017



**ADOPTED:  
December 4, 2014**

**Santa Ynez Valley People Helping People  
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# STRATEGIC PLAN EXECUTIVE SUMMARY

The Board of Directors and staff of PHP in consultation with our agency partners, community representatives, and customers have completed an assessment of the organization's past and current program and financial performance, local demographics and economics, and contemporary and prospective issues facing the organization. The purpose of this evaluation has been to establish the future direction for the organization including outcomes desired and strategies needed to reach the desired results. This analysis was conducted within a historical framework but was not limited by that framework.

Assessments of community members and clients indicate that PHP has earned an enviable reputation for ease of access to services, problem solving, and provision of high levels of customer service. PHP has been able to meet clients' requirements for key basic needs services but identified gaps remain in both safety net and self-sufficiency services.

Following this assessment, the Board of Directors established goals, objectives, and measurable performance targets and outcomes for the organization for the forthcoming three years. Overarching goal setting is the premise that the organization's financial stability and sustainability are on equal footing with meeting service needs. Specific goals are focused on four major areas:

- **Financial Stability**
- **Development of Resources in Order to Expand Programs Serving Youth and Young Children.**
- **Advocacy for Client Needs Including Affordable Housing, Reduction of Achievement Gap, and Parent Education**
- **Board of Directors Development, Structure and Focus**

The Board also adopted minor revisions to the vision and mission statements that more clearly reflect its broader focus and achievements.

## VISION

People Helping People has a vision that all men, women and children in our service area have the opportunity to attain self-sufficiency with dignity, are able to fulfill their potential, and live in a healthy community.

## MISSION

People Helping People is dedicated to improving the lives of men, women, and children in the Santa Ynez Valley, Los Alamos, and surrounding communities by addressing emergency and basic needs, furnishing comprehensive integrated family and individual support services, and acting as a catalyst for positive community change.

## **ORGANIZATION GUIDING PRINCIPLES AND VALUES**

Underlying the development and implementation of this strategic plan and PHP operations are certain principles and core organizational values. The Board reviewed these ideas and reaffirmed its commitment with one minor change.

1. The strategic plan is not an end in itself but part of a continuous planning process to improve the organization,
2. Organization decisions shall support implementation of the strategic plan. Staff will be held accountable for progress made on completing the Strategic Plan,
3. Attract and retain a highly qualified diverse and culturally sensitive workforce **reflective of clients served and** dedicated to the vision and mission and capable of implementing this plan,
4. Select and maintain a high energy, committed, diverse, and visionary Board of Directors representative of the community served,
5. Manage the non-profit organization as an efficient and effective business while simultaneously adhering to the client service mission,
6. Serve clients with respect and dignity,
7. Maximize public and private partnerships and collaborations to reduce barriers to and duplication of services, minimize administrative costs and maximize service to the client population,
8. Staff and Board will maintain the highest ethical standards, operate in the interest of the clients and communities served, and act as a catalyst to develop the community resources necessary to meet the needs of the organization and clients,
9. PHP encourages employees to actively participate in the community by joining organizations and serving on their Boards. PHP management will support employees who do so by appropriate means including providing time off as necessary, and
10. PHP highly values its staff and endeavors to reflect their value in its employee relations and compensation programs.

# **GOALS & OBJECTIVES**

## **MANAGEMENT AND ORGANIZATIONAL GOALS**

### ***GOAL 1: Achieve Greater Financial Stability.***

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#### **OBJECTIVES:**

- Attain total reserve balances of \$200,000,
- Identify and obtain foundation and other categorical funding to reduce net program losses by 10% per year (\$10k/yr.),
- Increase PHP event net revenues by 5% (\$8K) per year,
- Develop framework and implement plan for building long term endowment,
- Set aside 40% of fundraising income growth for endowment, and
- Increase Sore net income by 10% total-3% per year.

### ***GOAL 2: Improve Management Capacity, Infrastructure, And Systems.***

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#### **OBJECTIVES:**

- Develop formal marketing plan
- Train development position incumbent to take on major responsibilities for development and fundraising,
- Maintain state of the art PHP websites and Facebook presence; keep information current; include "local hero-success story min. quarterly
- Maintain currency of personnel policies and procedures,
- Complete quarterly financials and annual audit on time,
- Complete invoicing, cash flow analysis, budget & budget reports in a timely manner,
- Utilize strategic plan as basis for annual management operating plan; evaluate staff on completion of strategic objectives,
- Complete final implementation of donor and client data base systems,
- Maximize use of social media to promote awareness of PHP and events.
- Maintain highly trained workforce; continue tri-annual staff training on topical issues,
- Reduce turnover to 10% per annum,
- Increase number of domestic violence prevention advocates to minimum of three (3), and
- Develop CEO succession plan including mgt. training component.

## **PROGRAM & SERVICE**

***GOAL 1: Sustain Core Programs that Allow Individuals and Families to Meet Their Basic Needs for Food Shelter, Health Care and Family Safety.***

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**OBJECTIVES:**

- Identify key organizations/agencies with the capacity to address unmet needs and partner and collaborate with those providers,
- Identify and successfully apply to funding sources to sustain current programs,
- Expand access to a full range of health care services in Los Alamos,
- Continue to seek transit services to maximize access to existing services within the region,
- Expand food supply by 20% from 250 K lbs. to 300 K lbs. available annually through strategic partnerships including summer/school meal program and Solvang Sr. Center Farmer's market,
- Reduce food insecurity as measured by results of customer survey,
- Promote use of children's dental fund, increase usage by 30%,
- Sustain existing neighborhood/school based Resource Centers, and
- Fully implement expanded mental health wellness program to include part time counseling interns on all FRC campuses, 40 hours of community based family services, and employee wellness/assistance program.

***GOAL 2: Sustain Current & Expand Availability of Prevention Services for "At-Risk Youth"***

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**OBJECTIVES:**

- Re-establish after school youth program in Buellton for middle school students. Promote local fundraising program,
- Develop and implement services via ADCAP program to address issues related to adolescent/teen dating violence; minimum 1 presentation per year to health ed. classes at SYVUHS,
- Sustain Los Alamos afterschool youth program and SYVUHS Mentoring,
- Develop practical sustainability budget and plan for Youth Coalition,
- Sustain SPAN & SYVUHS "Alcohol Ed." and
- Reduce marijuana, tobacco and alcohol use by 9<sup>th</sup> & 11<sup>th</sup> graders by 5%.

***GOAL 3: Enhance And Expand Programs And Services That Increase The Capacity Of Clients To Maximize Self-Sufficiency.***

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**OBJECTIVES:**

- Partner and advocate to develop quality affordable housing for low income seniors and families,
- Establish early literacy programs in all service area communities based upon nurturing parenting curriculum,
- Expand parent education efforts and attendance via Nurturing Parenting curriculum directed at improving family functioning, parenting skills, safety, and wellness,
- Develop partnerships with First 5, SBCEO and others to develop training/education classes for family members furnishing early care,
- Advocate with school districts to expand/enhance parent education on topic related to local and advanced education for their children, and
- Develop Youth Down to Business (YD2B) Program outline, budget and formulate marketing plan.

**BOARD OF DIRECTORS GOALS**

***GOAL 1: Maintain Full Complement Of And Participation Of Proactive Members.***

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**OBJECTIVES:**

- Fill full complement of Board positions (21) to reflect the ethnic, geographic, and client and community diversity of service area,
- Maintain active nominating committee to recruit, screen, and select members on an ongoing basis,
- Solicit minimum of 1 nominee recommendation from each Board member annually,
- Maintain committee structure, assignments, meeting schedules, and reporting procedures,
- Achieve average 75% Board meeting attendance rate, and
- Continue education of Board members at monthly meetings, alternating PHP program presentation and outside presentations on topical issues.

***GOAL 2: Fully Commit To Short And Long Term Revenue  
Development Goals And Objectives Of The Organization.***

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**OBJECTIVES:**

- Publish and train members on 1 minute elevator speech,
- Develop additional business partnerships & sponsorships,
- Establish individual Board member individual gift objectives; attain 100% contribution rate, and
- Promote volunteerism among Board and affiliated group members.