



**THREE YEAR STRATEGIC PLAN**  
**BUILDING ON A STRONG FOUNDATION**  
**2018 ❖ 2020**

**PROPOSED STRATEGIC PLAN**  
**January 10, 2018**  
**Adopted February 14, 2018**



**Santa Ynez Valley People Helping People**  
**545 North Alisal Road, Suite 102**  
**Solvang, CA 93463**  
**(805) 686-0295**

## **VISION STATEMENT**

**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 STATEMENT**

**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.

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 Continued Financial Stability.***

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#### **OBJECTIVES:**

- a. Attain reserve balance of \$250,000 by June 30, 2020
- b. Retain or replace key contracts and grants to fund basic needs programs at June 30, 2017 levels
- c. Maintain annual event net income at \$110,000
- d. Increase store net income to \$4k per month by June 30, 2018; \$6k per month subsequently
- e. Maintain combined fundraising/G&A overhead to 11%
- f. Increase endowment funding to \$1mil by June 30, 2020

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

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#### **OBJECTIVES:**

- a. Furnish formal CEO succession plan to Board by June 30, 2018; provide training to potential internal successors / improve management capacity with minimum two workshops per year, topics TBD
- b. Transition all PHP physical servers to cloud based platform by June 30, 2018; Develop and implement electronic client records by June 30, 2019
- c. Revise and implement donor data base by December 31, 2018, dependent on Salesforce consultant availability
- d. Produce quarterly financial statements for Board review within 75 days of close of quarter.
- e. Complete audit for review by Audit/Finance Committee by October 30<sup>th</sup>.
- f. Maintain annual turnover of full-time staff at 15% or less
- g. Explore low cost employee wellness opportunities including counseling services. Implement findings by September 30, 2018.
- h. Review PHP complaint resolution process with staff at staff meeting by June 30, 2018

## **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:**

- a. Implement Aging Adult Behavioral Wellness program by February 1, 2018; sustain program past January 2019 at minimum 75%
- b. Develop scalable plan to maintain basic need services at the highest levels possible in the event of retreating funding by June 30, 2018
- c. Explore feasibility of expanded services within Food Program to include summer food program for school aged children in SYV and restaurant gleaning program. Prepare feasibility assessment of both projects and present to Board by end of 2018 calendar year

***GOAL 2: Sustain Current and Expand Availability of Prevention Services for “At-Risk Youth.”***

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**OBJECTIVES:**

- a. Implement 3-year Mid County Alcohol and Drug Prevention Coalition work plan as submitted to SBCO Behavioral Wellness department
- b. Maintain school counseling levels and fulfill contract deliverables
- c. Maintain 3 primary school’s Life Skills Prevention training for 7<sup>th</sup> grade students
- d. Explore fee for service Alcohol and Other Drug counseling and present implementation plan to Board if funding is available by December 2018
- e. Implement Strengthening Families program in partnership with Family Service Agency to one, 10-person cohort, per year, starting May 2018
- f. Improve childcare quality through completion of the Family, Friend, and Neighbors training program by March 2018 and subsequent implementation to first local cohort by September 2018. If successful, expand to FSA and IV Youth Cohorts and provide one cohort implementation by March 2019

**GOAL 3: *Expand Advocacy Efforts that Promote PHP as Community Catalyst for Positive Change***

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**OBJECTIVES:**

- a. Advocate with local governmental agencies, foundations, and housing entities to expand availability of quality affordable housing in the SYV and immediate environs
- b. Assist Coalition to Promote Inclusion and Equality in the development and adoption of a clear mission and vision statement, and adoption of clear operating guidelines by June 30, 2018
- c. Support the development of a K-12 education plan for each primary and secondary school in SYV by June 30, 2019
- d. Support the development of a K-12 Anti-Bullying plan for each primary and secondary school in SYV by June 30, 2019
- e. Conduct outreach with S.B. County Sheriff's Office to PHP client base to increase enrollment in emergency notification system.

**BOARD OF DIRECTORS GOALS**

**GOAL: *Maintain Full Complement of and Participation of Proactive Members.***

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**OBJECTIVES:**

- a. Continue to maintain diversity among board membership to reflect corporate service area and client demographics
- b. Achieve 75% annual attendance rate at board meetings by 85% of members
- c. Achieve 100% member financial contribution
- d. Furnish 3 program presentations and 3 skill training workshops during regular board meetings per year
- e. Obtain commitments from minimum 3 board members to chair event committees or subcommittees by March 2018; maintain or substitute committee chairs through 2020
- f. Increase use of video conferencing by Board Members; conduct board meeting training of board members on personal devices by December 31, 2018; provide in-home training as requested through June 30, 2019