# UPC STRATEGIC PLAN AT-A-GLANCE

## WORKING TIMELINE AS OF JUNE 2013

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<thead>
<tr>
<th></th>
<th>2013</th>
<th>2014</th>
<th>2015</th>
<th>2016</th>
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<tr>
<td></td>
<td>Q1</td>
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## PART ONE: INSPIRE (I)

### GOAL ONE (I.1): PROVIDER OF CHOICE

**Strategy I.1: Update image and marketing tools.**  
- Objective I.1.1: Logo and tag line.  
- Objective I.2.1: Consistent graphic standards.

**Strategy I.2: Tell 30 stories for 30 years.**  
- Objective I.2.1: Collect stories from our community.  
- Objective I.2.2: Invite teacher/trainer stories.  
- Objective I.2.3: Use stories frequently.

**Strategy I.3: Social Media for parent collaboration.**  
- Objective I.3.1: Develop on-line community.  
- Objective I.3.2: Recruit social media guru.  
- Objective I.3.3: Create accountabilities for digital spaces.

**Strategy I.4: Actively refine and use vision for decision-making.**  
- Objective I.4.1: Review decision matrix periodically.  
- Objective I.4.2: Identify and apply core organizational values.  
- Objective I.4.3: Conduct regular board discussions on a preferred future.

**Strategy I.5: Clarify core programs.**  
- Objective I.5.1: Assess current program strategies.  
- Objective I.5.2: Identify unique niche in the marketplace.  
- Objective I.5.3: Promote core training competence.
### PART TWO: CONNECT (C)

#### GOAL ONE (C.I): CONNECT WITH INTERNAL AUDIENCES

**Strategy C.I.1: Professional tools for professionals**
- Objective C.I.1.1: Develop website as a learning tool.
- Objective C.I.1.2: Build mutually supportive on-line community.

**Strategy C.I.2: Identify new mission outreach populations.**
- Objective C.I.2.1: Conduct SWOT analysis of school & agency partnerships.
- Objective C.I.2.2: Identify and prioritize community partnerships.
- Objective C.I.2.3: Conduct community partner assessment.
- Objective C.I.2.4: Identify and prioritize medical provider relationships.
- Objective C.I.2.5: Define Spanish language program.
- Objective C.I.2.6: Define geographic outreach.

**Strategy C.I.3: Connect with families past and present.**
- Objective C.I.3.1: Update needs assessment methodology.
- Objective C.I.3.2: Engage families in social media.
- Objective C.I.3.3: Invite families into volunteer opportunities.
- Objective C.I.3.4: Create protocols for information updates.

#### GOAL TWO (C.II): CONNECT WITH EXTERNAL AUDIENCES

**Strategy C.II.1: Build the UPC brand.**
- Objective C.II.1.1: Produce/distribute media kit.
- Objective C.II.1.2: Write compelling elevator speech.
- Objective C.II.1.3: Create long-term marketing plan.

**Strategy C.II.2: Develop strategic corporate partnerships.**
- Objective C.II.2.1: Leverage media partner promotional activities.
- Objective C.II.2.2: Outline & foster partnerships w/ schools & service orgs.
- Objective C.II.2.3: Create a Speaker's Bureau.
- Objective C.II.2.4: Seek a corporate media partner.
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<tbody>
<tr>
<td>Objective C.II.3.1: Personally thank all donors.</td>
<td>Q1</td>
<td>Q2</td>
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<td>Objective C.II.3.2: Assess volunteer satisfaction.</td>
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<td>Objective C.II.3.3: Create a donor cultivation and stewardship plan.</td>
<td>Q1</td>
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<td>Q4</td>
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<td>Objective C.II.3.4: Actively manage PIX relational database.</td>
<td>Q1</td>
<td>Q2</td>
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**PART THREE: SUSTAIN (S)**

**GOAL ONE (SI): DIVERSIFY FUNDING STREAMS**

**Strategy S.I.1: Launch a development program.**

Objective S.I.1.1: Assess current fundraising capacity.

Objective S.I.1.2: Provide fundraising training for board and staff.

Objective S.I.1.3: Research prospective foundation/corporate donors.

Objective S.I.1.4: Apply for funding.

Objective S.I.1.5: Write an annual fundraising plan.

Objective S.I.1.6: Hire a fundraising professional.

**Strategy S.I.2: Develop a philanthropic approach to fundraising.**

Objective S.I.2.1: Create a signature breakfast event.

Objective S.I.2.2: Create a new culture of fundraising outside gvmt grants.

Objective S.I.2.3: Engage prospective donors in UPC programs.

Objective S.I.2.4 Actively diversify funding streams.

Objective S.I.2.5: Research funding prior to beginning new programs.

**Strategy S.I.3: Examine viability of long-term government grants.**

Objective S.I.3.1: Review programs and funding streams.

Objective S.I.3.2: Prioritize funding needs.
GOAL TWO (S.II): MAXIMIZE THE QUALITY OF GOVERNANCE

**Strategy S.II.1: Conduct long-range financial planning.**
- Objective S.II.1.1: Annually, review a 3-year projected budget.
- Objective S.II.1.2: Plan for unrestricted revenues.
- Objective S.II.1.3: Assess growth of operating reserve/endowment.
- Objective S.II.1.4: Analyze staff salaries/benefits annually.
- Objective S.II.1.5: Create a contingency facility planning group.

**Strategy S.II.2: Create process for board recruitment & performance**
- Objective S.II.2.1: Conduct an annual board self-assessment.
- Objective S.II.2.2: Create recruitment needs and engage prospects.
- Objective S.II.2.3: Maintain and cultivate a pipeline of board prospects.
- Objective S.II.2.4 Create a Board manual.
- Objective S.II.2.5: Create a Board operations sub-committee.
- Objective S.II.2.6: Create real work for each committee from this plan.

**Strategy S.II.3: Evaluate Organizational Effectiveness**
- Objective S.II.3.1: Evaluate the Executive Director annually.
- Objective S.II.3.2: Develop criteria for program evaluation.

**Strategy S.II.4: Create staffing succession plans.**
- Objective S.II.4.1: Draft an Emergency Succession plan.
- Objective S.II.4.2: Finalize and approve Emergency plan.
- Objective S.II.4.3: Begin board discussions about ED succession.
- Objective S.II.4.4: Create a plan for current and future staffing needs.
- Objective S.II.4.5: Create required policy statements to clarify mission.

**Strategy S.II.5: Launch technology planning and implementation.**
- Objective S.II.5.1: Create a technology plan.
- Objective S.II.5.2: Integrate PIX into UPC operations.