**Strategy Planning Retreat Summary**
**July 25, 2025**

The full board gathered with the Executive Director on Friday, July 25, 2025, to start conversations around strategy and strategic planning. Pre-session surveys were submitted and compiled for input and feedback. The board reviewed governance work from 2024 and came to consensus on top strategic priorities for the organization. The top three focus areas for the year are to create a strategic framework for the organization; revise mission, vision and values; and continue board governance work including composition, onboarding, and recruiting. The priorities and additional information is summarized below for the next steps.

## STRATEGIC FRAMEWORK

A SWOT was created using pre-retreat survey responses which is included below.



The top areas identified as priorities in the strategic framework from the 2025 board retreat ranked in order of importance include:

1. Funding: donor engagement, diversify, explore private funding, grant opportunities, rising costs, unstable government funding/government instability, rising operational costs (9 votes)
2. Leadership: board recruitment & diversity, board onboarding, action/doing, accountability (8 votes)
3. Growth and Expansion: help more people, decrease wait time, county growth, property acquisitions, partnerships/collaborations, build strategic partnerships, and explore mission-aligned mergers or acquisitions to expand reach, rapid county growth driving up housing prices, currently have an inability to scale (8 votes)
4. PR/Awareness: lack of understanding what Del-Mor does, mental health stigmas, leveraging public dialogue to advocate for its population, persistent stigma and community resistance (8 votes)

Additional Areas Identified:

5. Clients Relations: services, engagement, good relationship with clients, currently have an unclear feedback loop from clients (5)
6. Metrics: organization structure, procedures, measurable goals (2)
7. Service Delivery: use volunteers more (2)
8. Staffing: retention, support/workforce shortages that limit service capacity (2)
9. Diversify (1)
10. Feedback loop for clients (1)
11. Rapidly Changing Environment - hard to address one thing before another pops up. Reactive rather than proactive decision-making (1)

The board broke into groups to start outlining strategic goals, objectives and metrics for the top three areas of funding, leadership, and growth. Photos are included in the appendix.

Key Note: It was decided that clear metrics are important to incorporate into each area as Del-Mor currently has a lack of measurable goals, and an absence of a culture that prioritizes evaluation and data-driven decision-making. Metrics will provide a process to track progress, ensure accountability, and guide operations. This will help communicate impact with storytelling, PR, and fundraising.

Metrics discussed at the board retreat included finances, processes and procedures, community perceptions, and people (resident, volunteers, and staff). A survey to residents, volunteers, staff and community members was mentioned as an ongoing way to receive feedback for metrics.

Tracy, as Board Chair, will take the lead in continuing strategic planning work with the board.

**MISSION, VISION & VALUES**

Del-Mor does not currently have vision or values statements which are guiding points for the organization’s direction and strategic planning. Generally, most board members agreed

that the current mission statement was headed in the right direction but could be revisited to be more impactful.

Current Mission Statement: To provide rent-assisted, permanent supportive housing in a multi-county area to eligible persons living with disabling mental health conditions.

Chris Baker offered to lead the board through a mission, vision, values exercise.

**BOARD GOVERNANCE**

**Board Composition - Top Priorities Identified at the 2024 Retreat**

The organization would benefit from a more proactive structure with written board position overviews and matrixes that track skills, demographics, and connections to better identify and proactively fill gaps. This includes:

- Role Clarification
  - Create written position descriptions for general board members and each board officer's role
  - Identify additional board leadership roles needed
  - Develop a pipeline for committee members, board members, and board leadership roles
- Board Terms
  - Create a matrix of board terms to identify years when people will roll-off
  - Better utilize committees
    - As potential board members to serve before board service
    - To keep former board members engaged on committees after board service
    - As a place for residents to serve
  - Keep former board members engaged
    - Share regular communication with former board members
    - Consider committee service for former board members
    - Possibly establish a service board
- Board Demographics
  - Add current board demographics to the board term matrix document. Consider proactively seeking board members who better mirror the communities Del-Mor serves including:
    - People of color
    - Young professionals
- Board Skills
  - Add current board skills to the board term and board demographics matrix
  - Consider adding board members to fill current and anticipated skill gaps to include:
    - Developers
    - Finance

- Fundraising
- Grant writing
- HR
- Regional philanthropy

Additional skill gaps shared in the pre-survey:

- Construction
- Creative thinking and problem-solving
- Governance
- Networking
- PR/raising awareness
- Property management
- Social media

**Board Recruitment - Top Priorities Identified at the 2024 Retreat**

The organization would benefit from more structure with written materials to better identify, educate, and nominate potential board members. This should include:

Role Clarification

- Establish a Nominations Committee with a written position description of the committee's duties
- Create space for everyone on the board to help identify potential board members. People can self-identify, and current or former members can share candidate ideas through the formal Nominations Committee

Process/Structure

- Proactively identify the best candidates/qualifiers
- Collaborate with other nonprofits to see if people rolling off their boards would be a good fit for Del-Mor's board
- Clarify and formalize the process with written materials to include:
    - Board member expectations to be shared with candidates prior
    - Step-by-step written action items
        - New board member identifications
        - Formal nominations
        - Formal approval at the May board meeting
        - New members attend the June board meeting

Timeline

- Start now and finish by the fall
- In the future place people on committees before nominating them for board service

Education

- A packet with information before to include:
    - Background of the organization
    - Board committees and purposes
    - Board roles and responsibilities
    - Board terms and current board members
    - Bylaws

- Characteristics and skillsets sought in new board members
- Committees available and how often they meet
- Directors and Officers Insurance
- Events board members are expected to attend annually
- Financial expectations of board members and/or the companies they represent (donations)
- Financial statements
- Future board objectives and focus areas
- History of the board
- How often meetings occur (when and where)
- List of other board members, their backgrounds, and terms
- List of staff and positions/organizational structure
- Main objectives of the current board
- Meeting minutes
- Strategic plans
- The current state of the board (successes/failures)

Additional ideas shared

- Continue a personalized approach to recruitment where candidates are asked by people they know and trust

**Board Onboarding - Top Priorities Identified at the 2024 Retreat**

As with board composition and recruitment, the organization would benefit from more structure with written orientation and onboarding materials for new board members. After identification, recruitment, and formal approvals, the onboarding process should include:

- A formal orientation process:
  - Convene a group of new members to do onboarding with the Executive Director and current board member(s)
  - Write formal onboarding meeting agendas
  - Create written materials to take and/or a slide deck to share
  - Provide site tours and have staff and residents join if possible
  - Continued onboarding with board members serving as mentors/buddies
- Space for ongoing learning/board education and social time to include:
  - Establish a centralized space for all materials (binder and/or electronic repository)
  - Consider “continued education” as a standing item on board agendas and bring in subject matter experts and partner agencies as needed. Topic ideas include:
    - Overview of supportive housing & housing best practice
    - Trauma-informed care
    - Regulatory environment
    - Governance and strategic planning
    - Community and stakeholder engagement
    - Cultural Competency and DEI

    - Incorporate social aspects into board service and consider annual board retreat/social event

Onboarding Roles

- Board-led effort to help with content annually. Consider establishing a committee of the board and incorporating former board members
- The Executive Director and board do orientation together to provide both organization and board context
- Board member to serve as their mentor/buddy. Consider the person who recruited them

Timeline

- Onboarding should be done quickly (within three weeks or less)
- Have new members come together as a group for education
- Add one-on-one meetings with mentors/buddies following the group onboarding session

Additional Ideas Shared

- Share bylaws with everyone including existing board
- Share attendance policy or create board attendance policy as needed
- Consider annual one-on-one meetings with each board member and board chair

Final Action Items

- Circulate current bylaws and board terms
- Establish a Nominating Committee. Volunteers to serve:
    - Chris Baker (leading next steps)
    - Paula
    - Staci
    - Derek

Key notes since 2024 retreat: A committee has been established that includes external community leaders but needs a chairperson. Tracy, as Board Chair, will take the lead in asking the committee to identify and select a chairperson for this work in 2025.

## APPENDIX

- Additional Responses From 2025 Strategic Planning Board Survey
- Bloomerang Simple Plan Framework
- Boys and Girls Club Strategic Plan Example
- Retreat Chart Paper

## Additional Questions From 2025 Strategic Planning Board Survey

Where We Are

1) Why Do We Exist/What Are The Goals of Del-Mor?
   - "Help end homelessness"
   - "Provide a community for people struggling with mental illness
   - "Provide stable, supportive housing for individuals living with a mental health diagnosis"
   - "To house the less fortunate"
   - "Provide safe and affordable housing for those people with chronic mental illness, disability, and/or homelessness"
   - "Provide safe and permanent housing for those with disabling mental illness to live as independently as possible"
   - "Provide permanent supportive housing for individuals with serious mental illness"
2) What Would Happen If Del-Mor Did Not Exist?
   - "There would be a lot of unhoused and uncared for people in Delaware and Morrow Counties"
   - "Increased risk of homelessness. Increased risk of hospitalization. More burden on families"
   - "If Del-Mor did not exist, access to safe, affordable housing for individuals with developmental disabilities would be drastically reduced. Many would face institutionalization, homelessness, or unstable living situations, increasing"
3) Do you believe the Del-Mor's mission, "to provide rent-assisted, permanent supportive housing in a multi-county area to eligible persons living with disabling mental health conditions" encompasses the work Del-Mor is doing?
   - Yes but..
     - "think it does on a surface level, it might be missing some of the heart behind the organization. I think it could also be reworded and less lengthy."
     - "there has to be a better way to describe the organization's work. The current mission statement feels clinical and doesn't fully reflect long-term impact Del-Mor provides to its residents."
     - "It is not ALL that Del-Mor does, but it is certainly a large part."
4) What keeps us from using our strengths more?
   - Action – ""We need to be a board of action and leading by example."
   - Awareness – "I think of the people who do know about Del-Mor and what we do, we

have a great reputation, but there is still room to grow in awareness."

- Fundraising – "We have an opportunity to undertake targeted fundraising to support additional programming for residents, thus enhancing their quality of life."
- Impact – "Needs to better show the impact it has on housing stability and resident well-being."
- Leveraging Strengths – "Make full use of its internal strengths"
- Metrics – "Lack of clear metrics to assess its success."
- Time – "It feels like we are just creating these and haven't had time to utilize them as much as we should."

5) What keeps us from addressing our weaknesses?
   - Time (2)
   - Absence of a culture that prioritizes evaluation and data-driven decision-making
   - Investing in PR
   - Lack of planning (board and staff together)
   - Lack of internal organization
   - Relationships – "Perhaps Deanna or her CFO could visit one of our Finance (or even full board) meetings."
   - Resource constraints
6) What keeps us from capitalizing on opportunities?
   - Time (2)
   - Resources (2) – "Need to increase donor engagement and larger grants."
   - Board Diversity (skills/connections) that can help get Del-Mor in front of more audiences
   - Donor interests
   - Economic conditions
   - Reorganization
   - Talent
7) What keeps us from addressing treats?
   - Constant changes – "it seems like we can't address some issues before they change again."
   - Lack of expertise - "We've talked about needing a development consultant."
   - Lack of planning (moving forward regardless of possible threats)
   - Lack of PR
   - People
   - Time

<u>Where We Want To Be</u>

1) If budget was not a concern, who else could we be helping?
   - More housing (3) – "Build another facility like Courage Court, in Morrow County!"
   - Housing more individuals with mental health diagnoses (3)
   - Reduce wait time for housing (2)
   - Physically handicapped individuals
   - Problem youth – housing and programming

- Veterans
- Victims of domestic violence

2) In your opinion, what other local nonprofits are really making a difference and why?
   - United Way of Delaware County (2)
   - Common Ground Free Store
   - Delaware County Foundation
   - Flying Horse Farms
   - HelpLine
   - NAMI
   - Ronald McDonald House
3) What do these other nonprofits do better than us?
   - "Connects families to income resources, educates, school initiatives, holiday initiatives, etc. Focuses on the overall family."
   - "Good community presence and awareness while also accomplishing their mission and raising good funds for their orgs."
   - "HelpLine - well-publicized and consistent availability for people experiencing crisis (however that is defined by the individual). HelpLine has a fantastic outreach & public engagement strategy. We could learn a few ideas from them."
   - "Laser focus on serving their populations and quantifying impact."
   - "Name recognition and public information are far greater than ours."
   - "United Way is a broad spectrum of social issues. Quickly helps with disaster relief, emergency housing and financial assistance."
   - "Use of metrics to guide operations and storytelling to communicate impact."
   - "Visibility and the public's perception of their mission is greater."
4) What do we do better than these nonprofits/what makes us different from these other nonprofits?
   - Our mission (3) – "is much more specific that these other organizations which I think can make it easier to know where to put our money and make it's impact go further."
   - Complex clients served - serving individuals with complex needs and work with populations that require a higher degree of care, sensitivity, and persistence. Clients that many other organizations find too challenging or resource-intensive to take on.
   - Consistent funding.
   - Housing is permanent - many nonprofits provide temporary aid.
5) Five years from now, where would you be proud to see Del-Mor?
   Growth
   - "I would love to see Del-Mor continue to grow and provide more housing for more people. The more individuals we can serve the better, right? Maybe we need a development person to focus on private funding? I would love to see the waitlist time decrease!"
   - "Proud if we took a broader role in the community to communicate for the organization and the people we serve."
   - "I'd like to see more housing opportunities for more individuals and families, and more youth opportunities."

- "Expanding, more donors/grants, flourishing to provide housing AND expand to emergency needs."
- "Offering housing options to more individuals with serious mental illness; better known & recognized in the communities that we serve."

Plan To Get There

1) What do we have to address or overcome to get there?
   - Lack of planning and metrics
   - Money and visibility
   - PR
2) What staffing model would we need?
   - "unclear."
   - "In house therapy for residents."
   - "Probably a broader based area of expertise in mental health types and programming."
   - "Need to provide basic housing but also supportive services for a stable living environment."
   - "Staffing model seems pretty strong now. We need to continue to focus on meaningful retention strategies to demonstrate to our staff that they are valued and respected. This includes training & professional development as well as meaningful communication, engagement in planning, etc."
3) What volunteers would we need?
   - "unclear."
   - "More volunteers for programs."
   - "Many more than what we currently have!"
   - "Experienced volunteers that have lived with family that had mental illness or challenges."
   - "Would be nice to have a group that can help add more programming and/or quality of life benefits for residents."
4) What governance would we need?
   - "unclear."
   - "Probably a larger group with specialized areas for guidance."
   - "Effective management, accountability, compliance with law and complete the mission!"
   - "Engaged board; strong communication between Kevin & the board and Kevin & the staff."
5) What else is critical to discuss about the Del-Mor in our strategic planning session?
   - "Getting committees where we want them! Bringing in new committee members and board members."
   - "Visibility and Function going forward."
   - "Economic changes."
6) What is the most important/significant thing you hope we can accomplish at the retreat?
   - "I'd love to talk about what we'd like to see Del-Mor Dwellings look like in 3-5 years.

How have we grown/changed; What new housing have we built or acquired; How long is our waitlist, etc.? And then how to we accomplish those things?"

- "Onboarding for new board members. develop plan for coming year(s), including priorities and plan for achieving."
- "The most important thing I hope we accomplish at the retreat is to begin building a clear plan and establish a process to track progress and ensure accountability moving forward."
- "Organization."
- "Revisit the mission and vision. We leave with a renewed commitment as a team."
- "Identify some assignments that will enable us to implement our priorities for the next year."

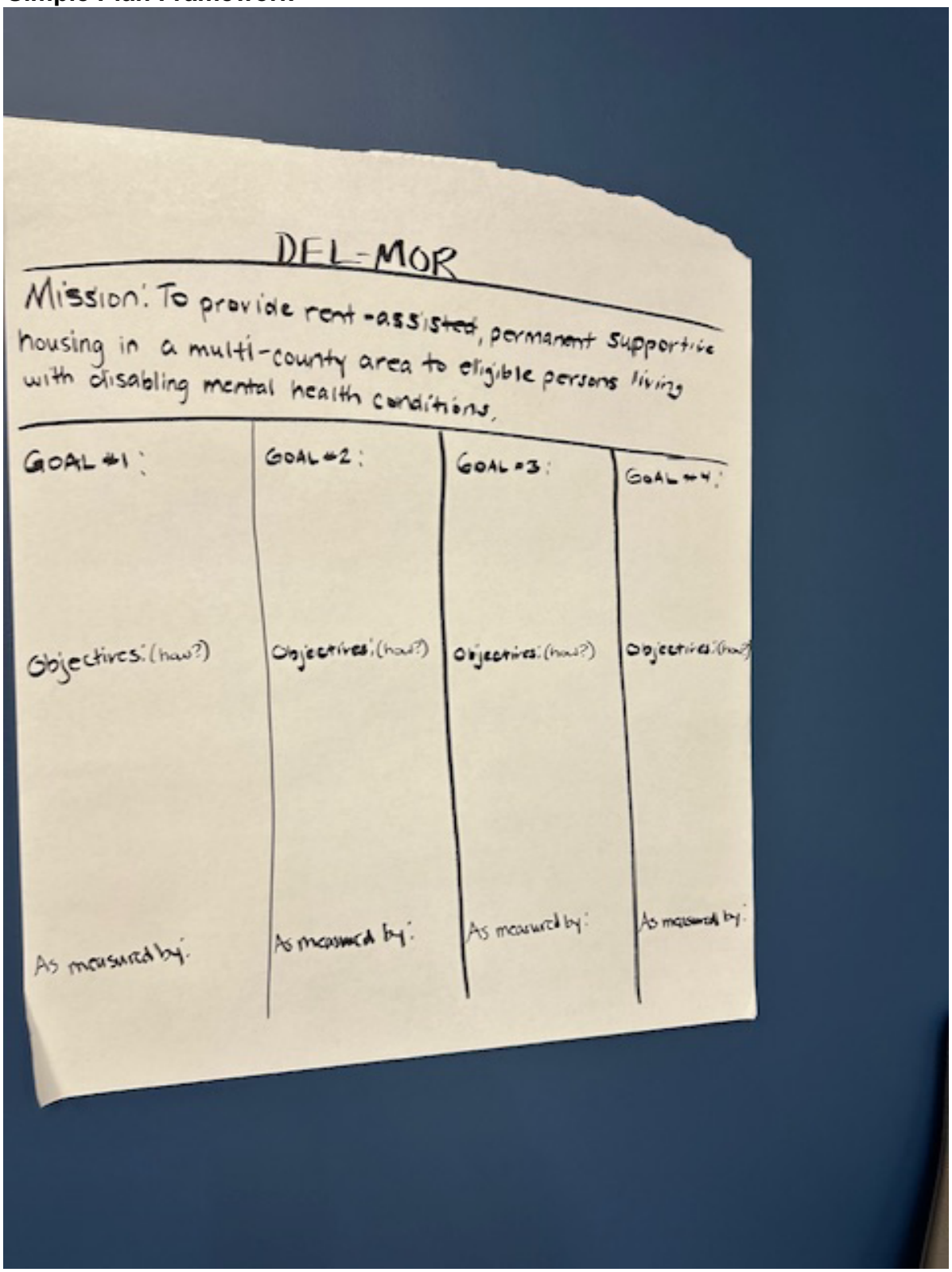
7) Anything more you would like to share or questions you have as we prepare for our time together?
   - "Please provide a clear understanding of the organization's current status. Provide to us your challenges so we can formulate solutions."

**Bloomerang Simple Plan Framework**

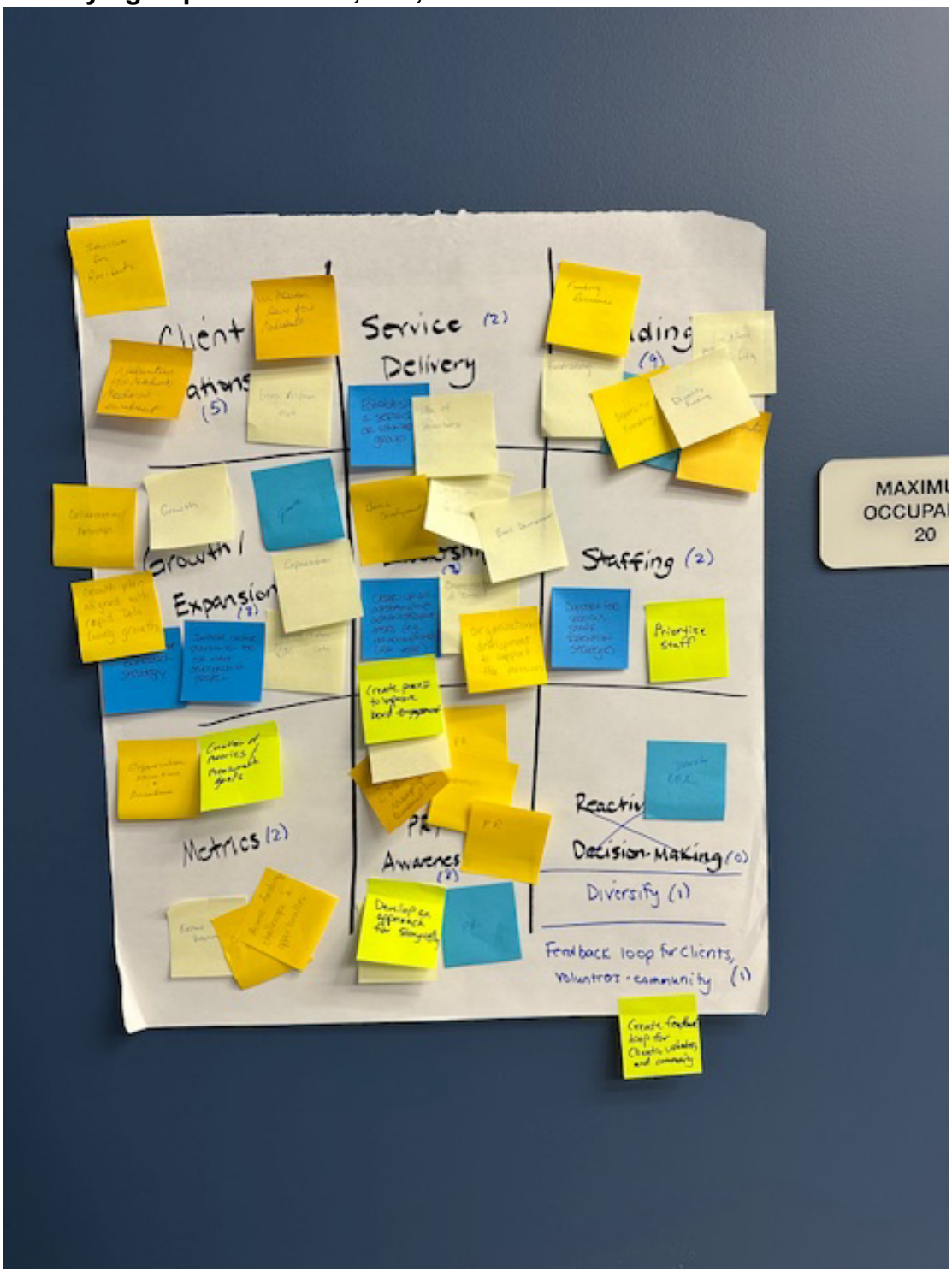


**Retreat Chart Paper**

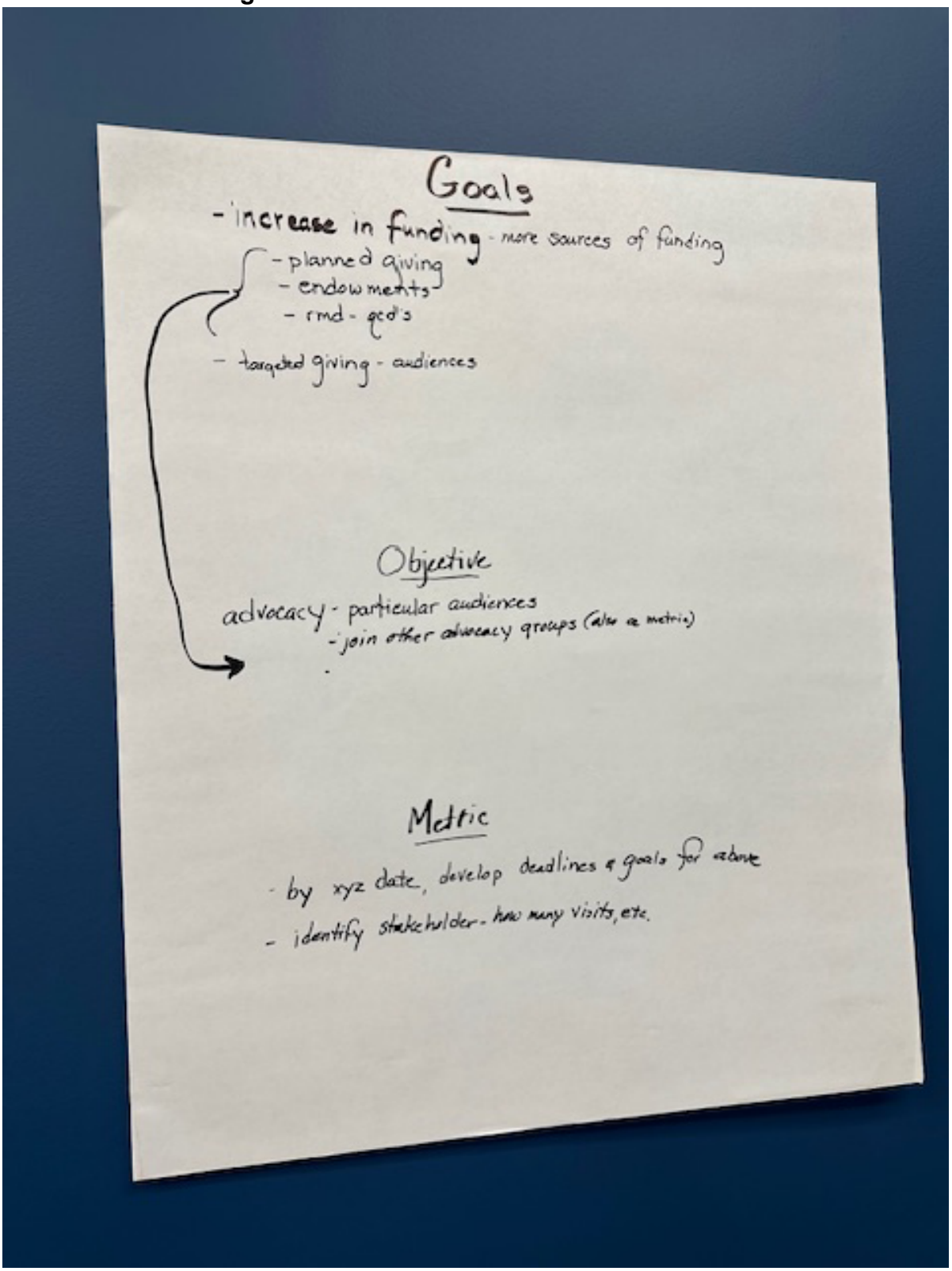
**Simple Plan Framework**



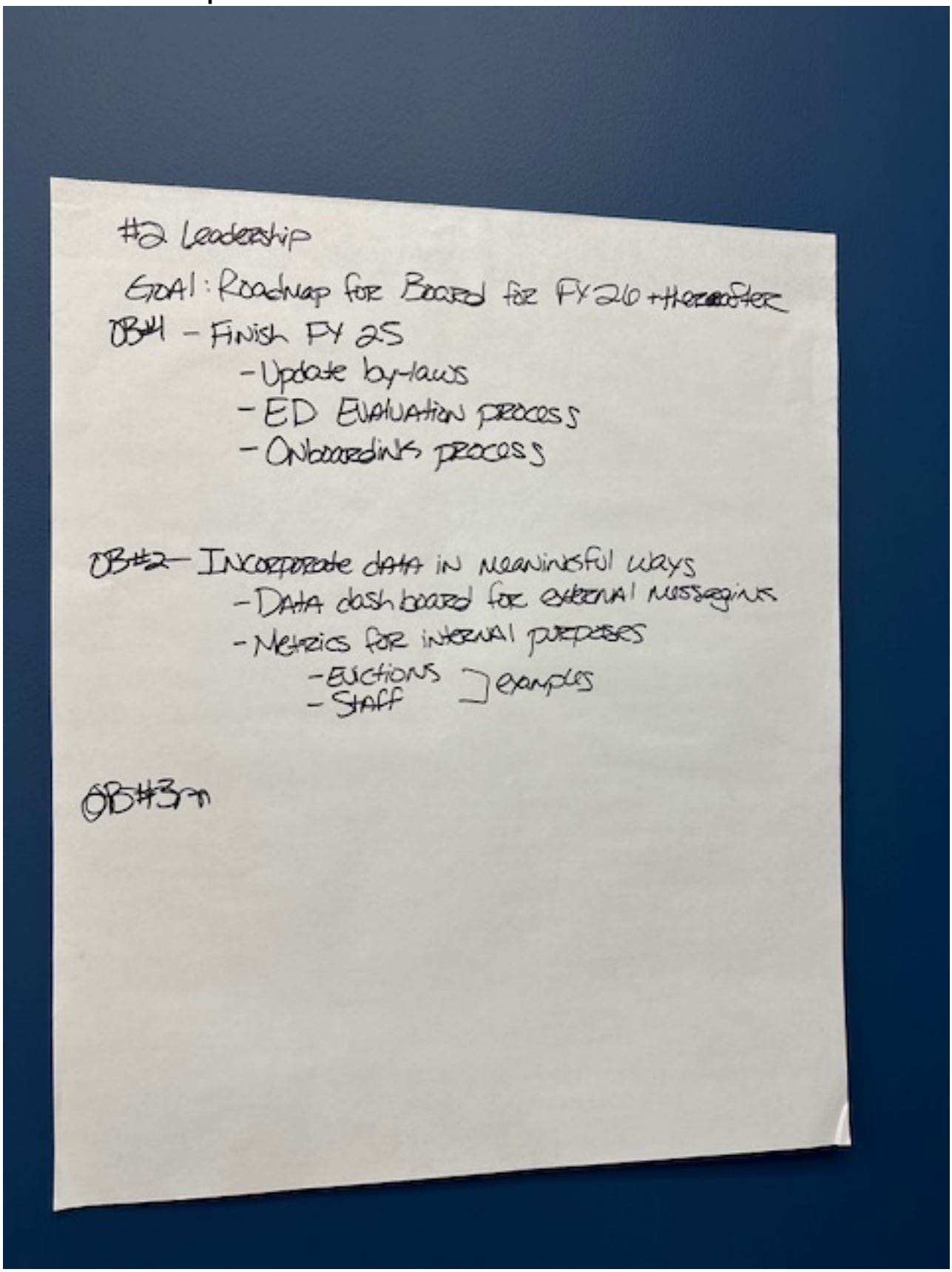
**Identifying Top Goals – Tic, Tac, Toe**



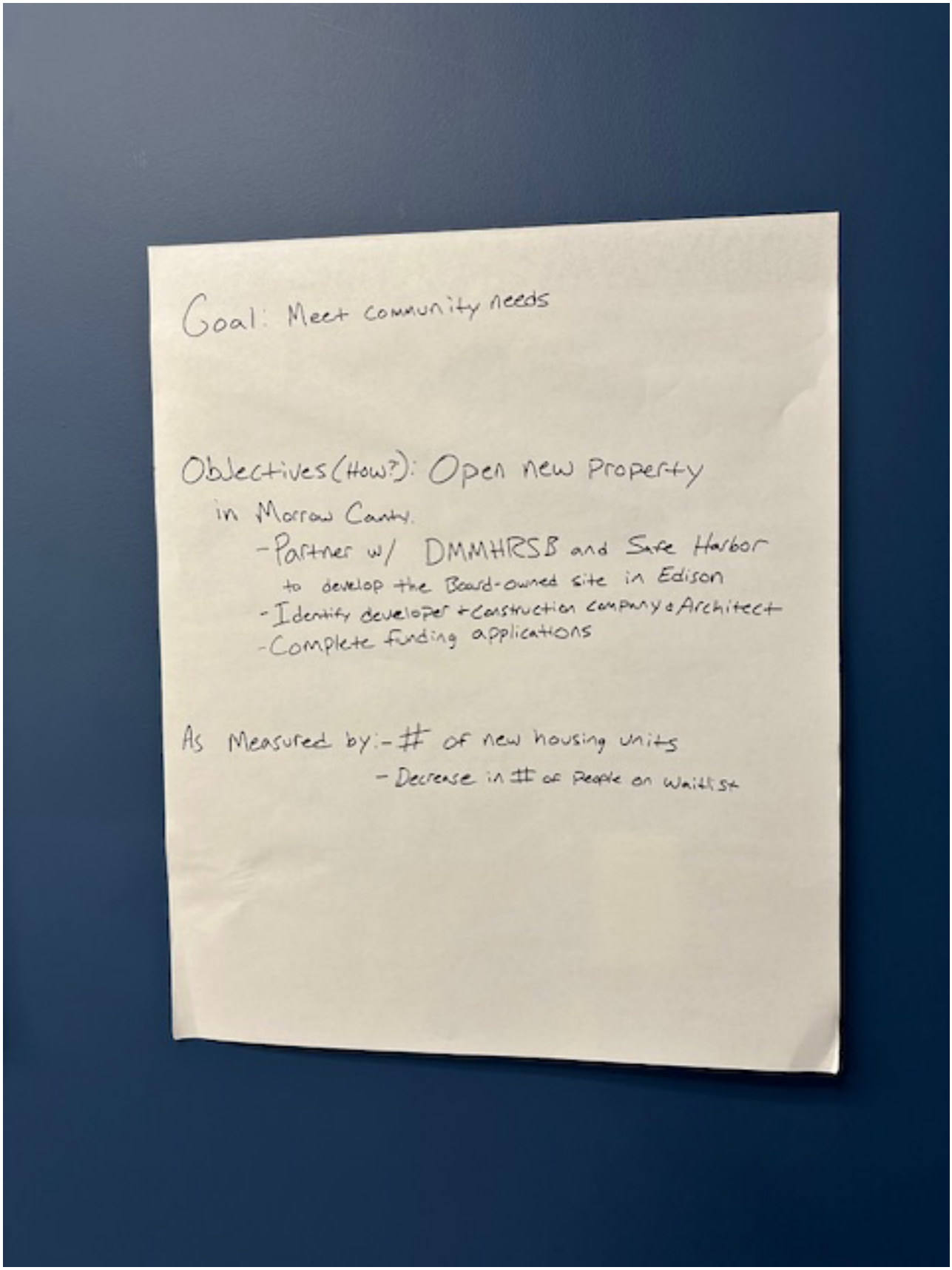
**Goal #1: Fundraising**



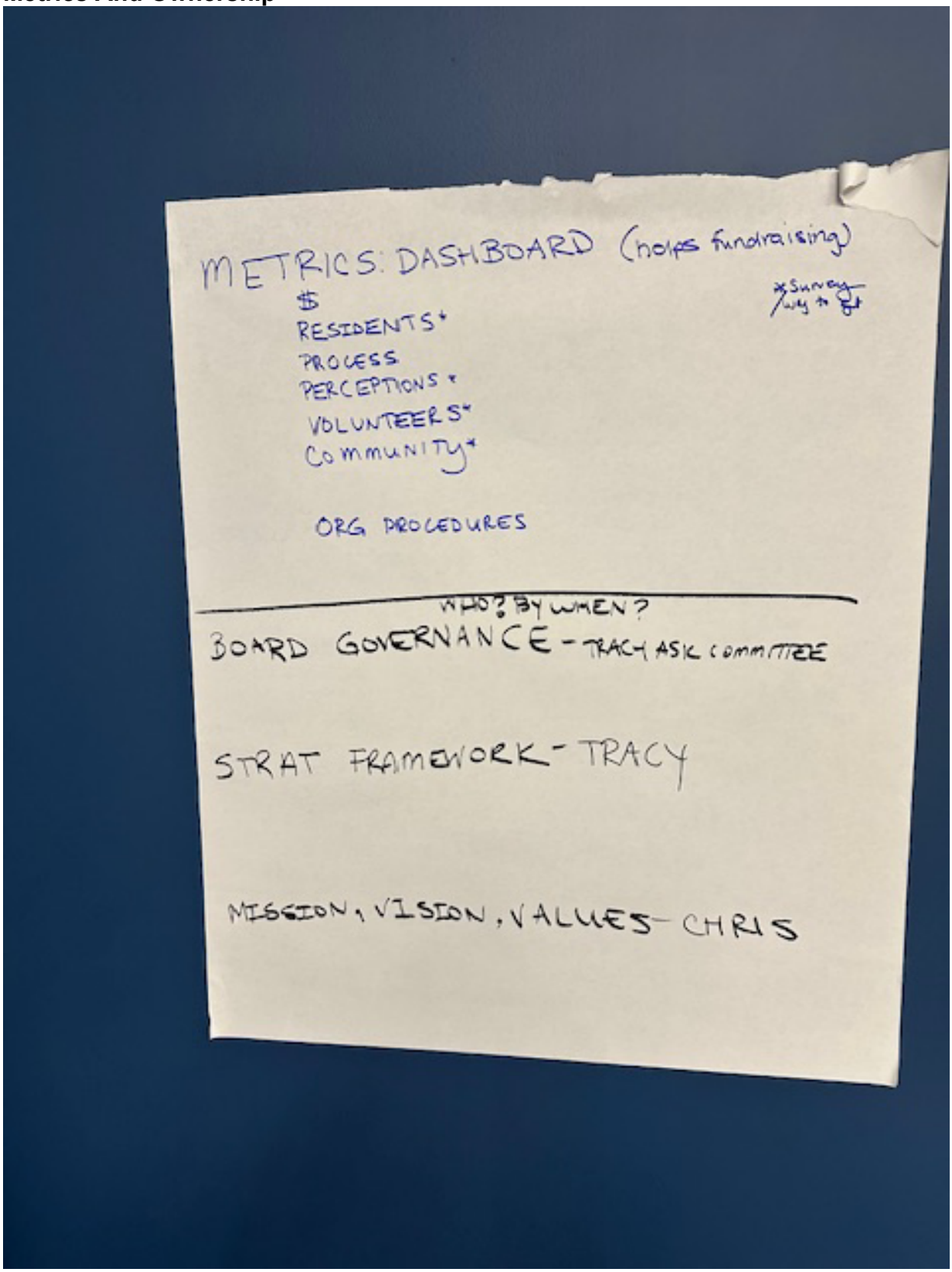
**Goal #2 Leadership**



**Goal #3 Growth**



**Metrics And Ownership**



**Boys and Girls Club Strategic Plan Example**

BOYS & GIRLS CLUBS OF METRO ATLANTA

RISE2025



# Strategic Plan: 2021 - 2025
# Executive Summary

Metro Atlanta is, by so many measures, a thriving metro area. With nearly 6 million people, it has become the ninth-largest metro city in the nation, and all signs indicate it will continue to be a destination of choice for employers and job seekers. It is home to 16 Fortune 500 companies, boasts 54 colleges and universities, and has seen tremendous growth in industries that include technology and film. There are 640 technology companies in Alpharetta alone, and film industry production in Georgia surpassed California in 2016. (Source: Metro Atlanta Chamber)

There are so many indicators of opportunity and growth and yet, depending on where you live in Metro Atlanta, people are having very different experiences in terms of prosperity, hope, and access to opportunity. Consider these startling facts:

- Among 381 U.S. metro areas, Metro Atlanta ranked near the bottom at 360 in terms of children's ability to move up from the bottom of the socioeconomic ladder. (The Opportunity Atlas, 2018).

- Atlanta has the worst disparity in average household income inequality, with the lowest 20 percent in Atlanta earning an average of $9,400, while the highest 20 percent brought home more than $256,000. (U.S. Census Bureau's American Community Survey from 2018).

**"Much of the stagnation in mobility results from how we provide opportunities for kids from disadvantaged families. In particular, factors including access to higher education, the uneven quality of elementary schools, and the rise of both income and racial segregation."**

**Raj Chetty, Economist, Harvard University**
**The Opportunity Atlas**

Race continues to factor into the equation in terms of economic opportunities. While African Americans make up nearly 52% of Atlanta's population, Black representation among high-income jobs is lacking. In the top three highest-paying careers in the city, Black employees made up less than 25% of workers in the first quarter of 2020. (Source: ACR using JobsEQ)

Public schools play an important role in bridging the gap. In Metro Atlanta, public schools serve over 600,000 students (Fulton, Cobb, Dekalb, Gwinnett & Clayton), most of whom are non-white (78%) and from low-income families (59%).

While progress has been made over the past 8 years, in terms of students' academic performance, statistics show there is still work to do:

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- Only 39% of 3rd graders are reading proficiently. Students who do not read at grade level by 3rd grade are four times more likely to drop out of high school than proficient readers.

- 1 in 5 students does not graduate from high school on time.

*Source: Governor's Office of Student Achievement, 2017-2018*

Since 1938, Boys & Girls Clubs of Metro Atlanta has been part of the ecosystem dedicated to ensuring all children and teens can take advantage of every opportunity this great metro city has to offer. These statistics reaffirm the important role we must play as we develop our plans for the future.

BOYS & GIRLS CLUBS OF METRO ATLANTA

# RISE 2025

## A Time of Serious Reflection

When we embarked upon our path to develop our 2025 strategic plan in October 2019, the driving question was, essentially: "How can we serve more kids with greater impact?." And while that continued to inform our discussions and planning, we had both the challenge and opportunity of developing our strategic plan during 2020, one of the toughest years our country has experienced in recent history. Understanding how to answer that question came into much sharper focus as the pandemic wreaked havoc on our lives, the economy plunged, and social unrest gave rise to a heightened awareness of racial inequality and injustice.

While difficult to navigate at times, the events of 2020 fueled meaningful discussions. And it led to greater introspection as we considered our role in working towards a better future for Metro Atlanta and the most important steps we would need to take over the next five years to achieve our vision. As part of that process, we were compelled to revisit, revise, and launch new mission and vision statements.

### MISSION

We ignite the unlimited potential of kids and teens by creating safe, inclusive, and engaging environments.

### VISION

Thousands of young leaders thriving in life and strengthening the future of their communities and the world.



## Our Differentiators

As we chart our path forward, we recognize that we are not at a starting point, but rather building on years of progress, lessons learned, and key strengths that uniquely position us to be an effective player in this work:

- **Geographic Reach** – We have over 20 Clubs located across ten counties in Metro Atlanta reaching 7,000 children and teens. The more kids we can serve, the greater our potential to influence and impact Atlanta's future for the better. That equates to more caring, confident, smart, and creative young people assuming leadership positions and bringing their inherent talents, skills, and unique perspectives to bear.

- **Continuity of Service** – Real, lasting impact often takes an investment of time. Our youth development approach focuses on the full span of school-aged years, ages 6 – 18, positioning us as essential guides and mentors throughout critical developmental milestones. That level of permanence and reliability for a young person results in deeper and more meaningful relationships that positively influence and impact their lives.

- **National Affiliation** – We are part of a larger movement led by a national organization that provides resources and support to ensure our success. From training and programs to advocacy and funding, Boys & Girls Clubs of America is the world's largest youth-serving organization. Headquartered in Atlanta, we also have the unique benefit that comes from being close in proximity.

- **Primed for Partnership** – While we have always worked to build strong partnerships with the 10+ school districts and 100+ schools which our members attend, COVID-19 allowed us to deepen those relationships and demonstrate our value. When most schools replaced in-person learning with virtual as a safety measure, our Clubs pivoted to play a critical role for students and their families. Starting in August 2020, Clubs opened their doors during the day to provide kids with supervision and assistance with virtual learning. We plan to prioritize our partnerships with schools so that student/members' success continues to be a collective goal we work towards together.

BOYS & GIRLS CLUBS OF METRO ATLANTA

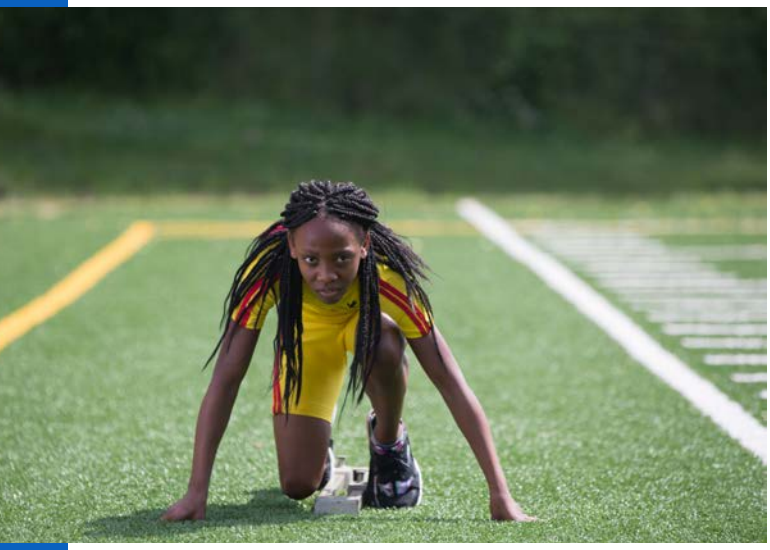
# RISE2025

## Our Path Forward

Our planning process included a full assessment of our performance across every business function and data analyses to understand the state of children and teens - ones we serve and those throughout Metro Atlanta. This insight, coupled with the unique perspective informed by the events of 2020, were instrumental in charting our path forward. Ultimately, we landed on five significant priorities:

- **Reach more kids.** According to a 2020 survey conducted by the Afterschool Alliance, unmet demand is soaring. In all, at least 38 percent of Atlanta students are without the afterschool programs their parents say they need today. We are committed to growing our reach by maximizing our current Clubs' space and opening new Clubs using a more economically sound model. We will prioritize growth through partnership opportunities versus building new facilities. We will also select geographic areas based on the United Way of Greater Atlanta's Child Well Being Index that identifies areas in Metro Atlanta where the need is high, and services are non-existent or limited.

- **More significant impact.** Getting more kids in the door is only the first step. We need to make sure we are truly making a difference in their lives. Ultimately, we define that difference by the degree to which members achieve specific academic success, healthy lifestyle, and leadership outcomes. And while we offer many programs aligned to those three pillars, we need to dispel the notion that "programs drive impact" when, in fact, it's the people delivering those programs that lead to impact. Based on tremendous evidence-based research done in the youth development field over the last 20 years, we know the practices that will increase kids' likelihood of achieving successful outcomes. Targeted training, better support structures, and greater accountability will ensure Club staff become "brilliant at the basics," the fundamentals of youth development.





- **Grow our fanbase.** To do more, we need to grow our base of supporters. While we have amazing individuals and companies who have been "raving fans" for many years, we believe there are more out there who share our passion and hopes for the children and teens in Atlanta. They just need to be invited to join us. Putting the right resources in place and engaging our current fanbase to identify others interested in joining our cause will be important next steps.

- **Get serious about diversity.** While we made a commitment to diversity years ago and have seen progress in terms of board composition and hiring practices, we haven't necessarily put a significant "stake in the ground." This includes setting specific goals and building out intentional steps around board and talent recruitment that will hold us accountable for finally realizing a level of leadership diversity that more closely reflects the communities we serve.

- **Nurture a culture of inclusion.** Through a series of challenging yet insightful discussions, particularly with our employees, we gained tremendous insight into their experience with the organization. From there, we have formed a permanent employee council to guide and inform our commitment and specific action items to creating an environment where individuals across the whole spectrum (staff, Club members, board, etc.) feel included, respected, valued, and engaged. While this is simply "the right thing to do," we also know that individuals who feel more engaged will remain with us longer and produce better results towards furthering our mission.

These five priorities are captured within five focus areas that make up our strategic plan along with specific objectives, metrics to track progress, and goals to define success.

BOYS & GIRLS CLUBS OF METRO ATLANTA

RISE2025

# FOCUS AREA 1. SERVE MORE KIDS MORE OFTEN

## OBJECTIVES

### 1.1 Strengthen existing and establish new partnerships.

We know we can't do this work in a silo. Partnering with others who align with our mission and have a vested interest in ensuring all young people realize their full potential is critical to our success. These partners include the 100+ schools our members attend now, the higher education institutions they are pursuing for their future, the companies seeking to equip the future workforce, and the many non-profits with programs and services that align with our strategic priorities. Working collaboratively will exponentially allow us to reach more kids and ensure they are positioned for success in school, work, and life.

### 1.2 Strengthen current service delivery model(s) and implement new innovative approaches.

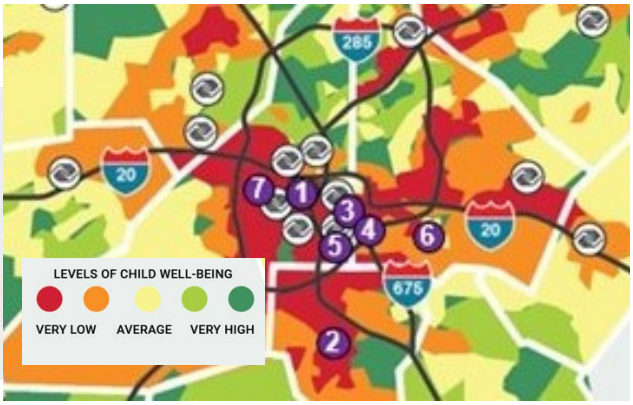
We have remained rooted in a traditional service delivery model since our inception which essentially means we provide a facility-based after-school program. To reach more kids utilizing existing resources will require us to be more innovative and think differently about how we approach our work. This will involve taking an intentional approach to exploring, building out, piloting and potentially scaling new service delivery models to include concepts like opening Clubs on the weekends, serving kids during the school day, and building on demonstrated success with virtual programming.

### 1.3 Develop & implement a future footprint strategy.

We will take a proactive approach to build out our future footprint that is aligned to clear criteria for both growth and closures. Growth will primarily come from maximizing our current capacity (500+) and opening new locations (500+). Expansion to new locations will be achieved through partnerships (not by acquiring or building new facilities) that will provide substantial support for the operations. At the same time, we will adopt the discipline of assessing our current locations to determine the need for any closures based on the degree to which they serve the larger mission.

#### 2025 Strategic Growth Plan

| | | | |
|---|---|---|---|
| 1 | At Promise – South | Opened January 2021 | 35 kids |
| 2 | Flint River Community Center Boys & Girls Club | *Opening Spring 2021* | 75 kids |
| 3 | T.H. Slater Elementary School (PBC) | *Opening Spring 2021* | 100 kids |
| 4 | Thomasville Heights Elementary School (PBC) | *Opening Spring 2021* | 100 kids |
| 5 | Luther J. Price Middle School (PBC) | *Opening Fall 2021* | 100 kids |
| 6 | South Dekalb | *Opening in 2021/ 2022* | 150 kids |
| 7 | At Promise – Southwest | *Opening in 2022* | 35 kids |




## GOALS

**01**

Serve More Kids, More Often

| Metric | 2019 Actual | 2025 Goal |
|---|---|---|
| # of Members Served Annually | 6,938 | 10,000 |
| # of Teens Served Annually | 2,048 | 3,000 |
| Average Daily Attendance | 2,784 | 4,000 |
| Members attending 3x or more per week | 55% | 65% |
| Teens attending 2x or more per week (incl. virtual) | 39% | 45% |

BOYS & GIRLS CLUBS OF METRO ATLANTA

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# FOCUS AREA 2. ACHIEVE GREATER IMPACT WITH OUR KIDS

## OBJECTIVES

### 2.1 Establish a structure and process that provides training, support and accountability on youth development and management practices that lead to a high-quality Club experience.

Research done over the last twenty years in the youth development profession has brought a greater understanding of the practices that lead to better outcomes. These practices, if employed consistently and with fidelity by our youth development professionals, primarily the part-time team members who work directly with our kids, will lead to a high-quality Club experience. Over time, that type of experience will lead to better outcomes. To achieve this, we will implement a new support structure and process that provides hands-on coaching, on-going support, and accountability. Additionally, Club leaders will become equipped to train and coach their team members.

### 2.2 Design and implement tween and teen retention strategies.

Making sure our teen members graduate from high school on time with the 21st Century skills such as creativity, collaboration, initiative, leadership, and productivity are critical to their future success. For that reason, we've made significant investments in teen-focused programming with excellent results in terms of the life-changing impact it has had on participants. We now want to take that proven success model and increase the number of teens impacted. Our most significant opportunity to grow the number of teens we serve is by retaining our middle-school-aged members. Middle-school tends to be when members no longer "have" to attend the Club but rather "choose" to come. It is a time when competing priorities (both healthy and unhealthy) give rise. This specific objective targets this important age group with a level of intentionality that includes staffing, training, programming,

### 2.3 Design and implement racial equity and social justice programming.

Boys & Girls Clubs have always focused on building leadership skills and providing self-expression opportunities as a primary focus in preparing kids for future success. However, to better equip our members to successfully navigate and address racial inequity and social injustice, we need to refine our suite of programs. We will work to integrate activities and lesson plans that encourage members to explore, reflect, and engage in discussions around race and social injustice, positioning our young people to be leaders for change in their communities. Additionally, our approach will include opportunities for self-expression specific to their experience.

### 2.4 Promote a data-driven culture that includes refining our outcome measurement system with metrics needed to track youth progress, inform Club improvement plans, and evaluate staff performance.

We know that data helps us to understand our level of effectiveness, the areas where we are making progress and the areas that need improvement. While the organization transitioned to an outcome-driven model almost 10 years ago, changes to our staffing structure and theory of change require us to refine our approach. This includes establishing the right metrics, outcomes, collection tools and data sharing platform. We will also re-energize our internal teams around using data as a daily practice and put the processes in place that ensure accountability.

## GOALS

**02**

Achieve Greater Impact with Kids

| Metric | 2019 Actual | 2025 Goal |
|---|---|---|
| Overall Club Experience | #18 out of 28 Largest BGC Orgs | #10 out of 28 Largest BGC Orgs |
| # of Teens Graduating w/ Placement | 96 | 250 |
| % of Parents Likely or Very Likely to Recommend their Boys & Girls Club to a friend, family member or colleague | n/a | 80% |

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# FOCUS AREA 3. REALIZE A STRONG FINANCIAL POSITION

## OBJECTIVES

### 3.1 Implement strategies to improve cash flow management.

We need a positive cash flow to effectively fund our operations, meet our financial obligations, and implement new strategic initiatives. This can prove challenging when incoming cash is seasonal due to a fundraising-based revenue model and expenses that are consistent and even higher during the summer months when we support longer club hours. We will implement several strategies including establishing a cash reserve account of $1M, improving our process around the collection of receivables (donor pledges), and increasing monthly recurring donors in an effort to improve our cash flow position.

### 3.2 Identify and implement internal process improvements, including technology solutions, that will result in cost savings and increased efficiencies.

While reaching more youth and having a greater impact is a priority in realizing our vision, we don't have unlimited resources to achieve that. We must look at doing more with what we have. This includes making investments in technology to improve productivity. It also requires an assessment of practices and processes to identify opportunities for improved workflow and ensuring we are allocating our time and resources to those strategies that have the biggest return. Utilizing external expertise to do an org-wide assessment for each business function will be the first step. We will then prioritize the recommendations with the goal of having streamlined technology processes and tools, improved access to business intelligence and data analytics, and reduction of inefficiencies in staff workflow.

### 3.3 Build a more robust individual giving program that focuses on high-net-worth individuals and planned giving.

We have the benefit of long-standing, very passionate individuals who support our work. However, when we compare ourselves to our Boys & Girls Club peers who have a much larger base of individual supporters and assess the concentration of wealth and philanthropic propensity in Atlanta, we know there is an opportunity to build our "fanbase." We have a compelling mission, a well-established and respected brand, and a network of 200+ volunteer leaders. We are confident that these factors, combined with the right talent and sufficient resources, will enable us to increase support from our current donors and convert many more to join us in achieving our vision.

### 3.4 Secure new and maximize existing corporate partnerships with the goal of leveraging the full scope of their assets to support our mission priorities.

From small businesses to large Fortune 500 companies, we have had the great advantage of a philanthropic-minded business community here in Metro Atlanta. While there is certainly an opportunity to continue growing our financial support from the corporate sector, they also serve as a great resource for volunteers (garden project), skilled pro-bono services (comp/benefit analysis), in-kind support (new computers, sports equipment), PR/awareness (media/publicity) and workforce development opportunities for our teens (internships). By taking a more comprehensive and strategic approach, we can fully maximize our partners' potential for helping advance our cause and deepen their commitment and investment in our mission.

## GOALS

**03**

Realize a Strong Financial Position

$

| Metric | 2019 Actual | 2025 Goal |
|---|---|---|
| Days of Cash on Hand (monthly avg) | 21 | 30 |
| # of Individuals Giving $25K+ Annually | 12 | 25 |
| # of Members in Planned Giving Society | 28 | 50 |
| # of Companies Giving $50K+ Annually | 9 | 25 |
| Total Fundraising Revenue | $15.8M | $17.7M |
| Cost to Serve a Member | $7,591 | $6,000 |

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# FOCUS AREA 4. BUILD DIVERSE AND EFFECTIVE LEADERS

## OBJECTIVES

### 4.1 Develop a talent pipeline of diverse and highly-qualified candidates for leadership roles that reflect the community and the children we serve.

An organization's ability to achieve success relies, in great part, upon the leaders at the helm. A diverse leadership team, particularly one that reflects the communities we serve, will ensure that decisions being made at the most senior level benefit from unique and relevant perspectives. It will also allow for new and innovative thinking necessary to navigate the ever-changing world in which we find ourselves. We will implement a two-tiered approach to achieve this. One that will look to identify high-performers within the organization and prepare them for future leadership roles. The other will be more externally-focused and include building relationships with HBCUs and implementing a formal candidate referral program that leverages the professional and personal networks of our employees.

### 4.2 Invest in the professional development of our staff to deepen their leadership capacity.

While it's important to develop the pipeline for more diverse leaders, we also need to invest in all employees. Research makes it very clear that investing in employees' professional development results in greater retention and productivity. Additionally, our organization has a unique challenge that is best met when every employee is empowered with strong leadership capabilities. We have over 20 Clubs that span across 10 counties and have established a structure that will ensure a consistent approach to the youth development practices we know will lead to better outcomes for our kids. While a uniform and consistent approach is critical, Clubs also need to have a level of autonomy that allows them to respond with programs and services that address the unique needs and interests of their kids and communities. Building out the leadership capabilities of all our employees, no matter their role, will ensure we can strike the right balance between consistency/uniformity and autonomy, and empower employees to make good decisions as they go about their work.

### 4.3 Develop a board of directors and county boards that are inclusive, reflect the communities we serve, and are effective in supporting our strategic priorities.

Our current volunteer leadership lacks diversity. There is agreement around the need to target future recruitment efforts to ensure our volunteer leaders reflect the communities we serve. To realize this objective, we will make a concerted effort to ensure each class of new board members is more diverse with a specific focus on racial diversity. We also have aggressive goals related to board composition. Additionally, we are committed to ensuring the culture of the board is welcoming to people of all backgrounds and will build out a plan that dedicates resources to the training and dialogue needed to achieve a more inclusive board culture.

## GOALS

**04**

Build Diverse & Effective Leaders

| Metric | 2019 Actual | 2025 Goal |
|---|---|---|
| % of positions filled by internal candidates | 50% | 60% |
| **Metric** | **2020 Actual** | **2025 Goal** |
| % of Racially Diverse Candidates Interviewed (Panel) for a Sr. Director Position or Higher | n/a | 50% |
| % of Board Members and County Board Members from Racially Diverse Backgrounds | 26% corp / 36% county | 50% |

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# FOCUS AREA 5. PROMOTE A CULTURE OF EQUITY & INCLUSION

## OBJECTIVES

### 5.1 Adopt and train on practices that result in more inclusive and equitable behaviors throughout the organization.

In recent years, we have engaged employees in facilitated discussions which brought to light feelings of exclusion and inequities. While we made some progress in addressing those concerns, the social unrest that emerged in 2020, inspired a greater sense of urgency in evaluating our practices and commitment to diversity, equity, and inclusion. As part of that, we formed a Diversity Equity and Inclusion (DEI) Council made up of employees across the organization. Charged with assessing the organization through a DEI lens in a way that would help advance our mission, this group identified the need to take important steps towards becoming a more inclusive organization. This includes establishing a monthly leadership meeting extending the opportunity for Director level and above to express their thoughts and ideas, and engaging a third party to conduct an org-wide inclusion assessment to identify the priority areas that need to be addressed.

### 5.2 Build and maintain relationships with partners and leaders who reflect the communities we serve and can provide advocacy and support for our mission.

Atlanta has a long legacy of Black leaders committing their lives to make Atlanta and its surrounding communities a more just and equitable place for all. We recognize the need for us to become more intentional about building relationships with leaders of color and groups who are driving change in Metro Atlanta today and with whom we share a common goal. That begins with reaching out and inviting them to learn about our work and exploring ways in which we might partner more closely together to achieve our shared goals of making Metro Atlanta a place where all kids thrive.

## OUR DIVERSITY, EQUITY & INCLUSION VISION

**Boys & Girls Clubs of Metro Atlanta is a robust community of high performing professionals that embraces an environment inclusive of all people and cultures. By promoting the value of every voice, most importantly our youth, all stakeholders will develop a deeper understanding of, and genuine appreciation for, the families we serve, positioning us to be a stronger organization and community resource.**

## GOALS

**05**

Promote a Culture of Equity & Inclusion

| Metric | 2020 Actual | 2025 Goal |
|---|---|---|
| Overall Employee Inclusiveness Score (5=agree on a scale of 1 – 6) | 5.1 | 5.35 |
| | **2019 Actual** | **2025 Goal** |
| % of employees who would recommend BGCMA as a great place to work | 73% | 90% |
| Part-time employee turnover | 54% | 45% |
| Full-time employee turnover | 18% | 15% |

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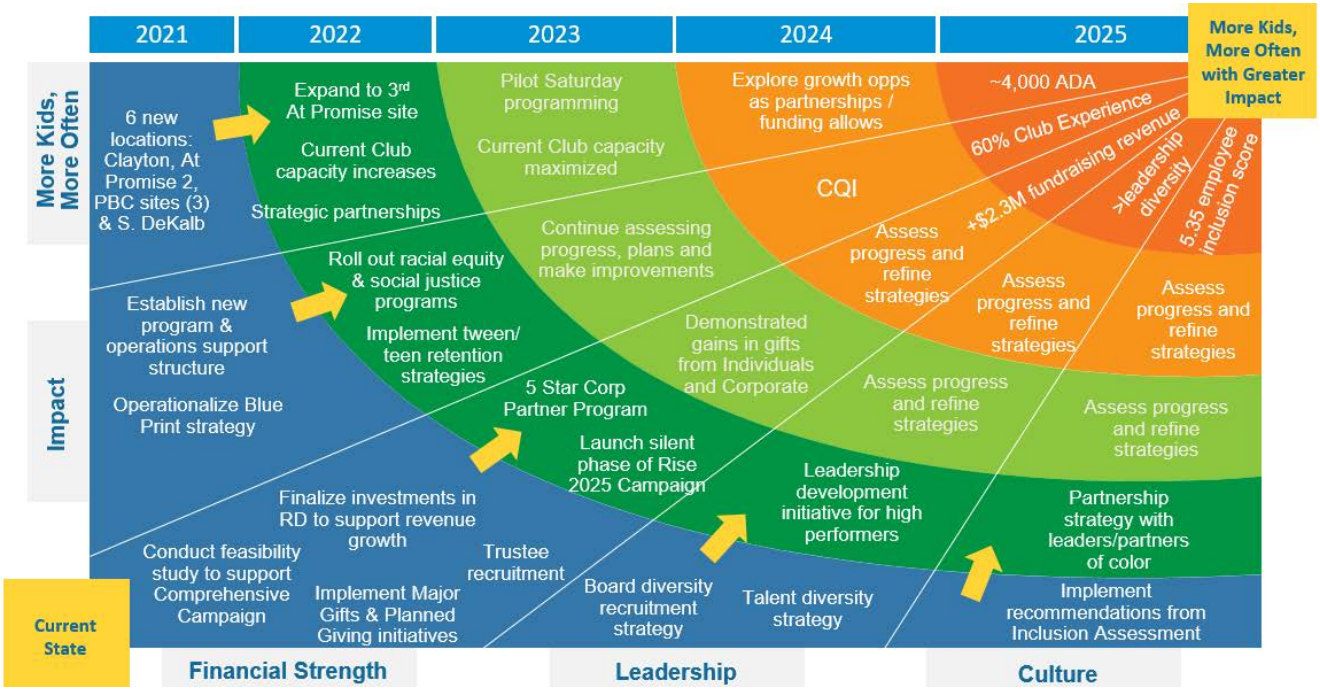
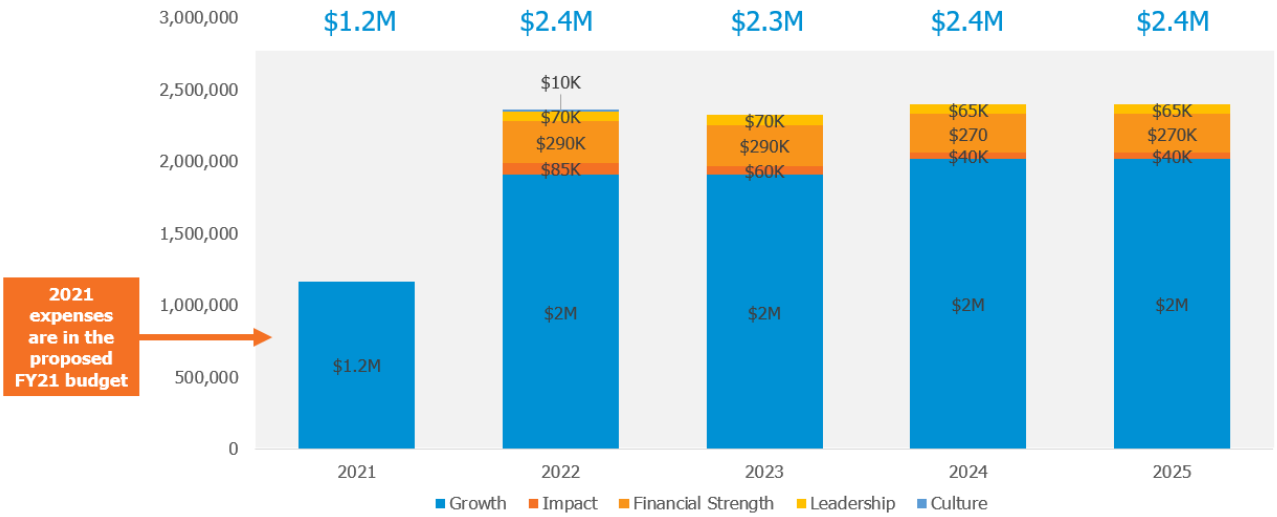
## TIMELINE OF MAJOR INITIATIVES




## STRATEGIC PLAN FINANCIAL PROJECTIONS




- The total cost to operationalize this strategic plan through 2025 is $10.7M
- We anticipate ~$5M coming from growth partners to fund operations at new sites
- The incremental funding required is $4.8M

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# STRATEGIC PLANNING BOARD COMMITTEE

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Springbot
Chair, Strategic Planning Committee

Simon Bloom,
Bloom  Barham Law Firm
Chair, BGCMA Board of Directors

David Jernigan
President & CEO
Boys & Girls Clubs of Metro Atlanta

Jen Bressler
Community Volunteer

Jerel Causey
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LeighAnn Costley
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Jeremy Wing
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Hasco Craver
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