



Strategic Plan: 2014-2018

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Background and Process

Within the last 24 months, Wesley has undergone significant changes with the retiring of an executive director that had a long tenure at the helm of the organization, new leadership assuming responsibility, key staff retiring or set to retire within the next year, and a difficult financial environment. There is a need to be proactive and evaluate how to best move forward.

In late 2012, the executive director of Wesley began discussions about the need to develop a plan that would help identify the challenges and opportunities facing Wesley Center. Through a systematic planning process over the course of 9 months, we have developed this strategic plan which incorporates an internal and external SWOT analysis, identification of the Key Strategic Areas that will be the five year focus of the organization and a corresponding 1 year operational plan that will guide the efforts of transformation.

The operational plan is specifically designed to identify goals, strategies and tasks that allow Wesley to impact the Key Strategies in this current year. Using the operational as a guide, achievements and progress will be assessed on an on-going basis. Wesley will meet and develop an operational plan for each year of the strategic plan allowing for changes in the environment and allowing Wesley to ensure that they are addressing the key issues that face the organization as it moves into the future.

The solutions that have been identified require an honest open review by the organization in order to be sure that emphasis is placed where it is needed and where the organization can have most impact in the communities it serves.

To that end, a multi-pronged approach to our strategic steps has been suggested. Efforts will be concentrated in the following key areas during this strategic planning cycle.

SWOT Analysis

Key internal trends and issues impacting Wesley

The SWOT analysis allows a strategic look at the organizational strengths, weaknesses, opportunities, and threats. The following is a summary of the key internal and external trends impacting Wesley.

Strengths

The strengths were identified as categories or areas that were best practices of the agency. The staff members were encouraged to think of all areas of the organizations that highlighted what is right about the organization.

The People	Commitment by staff; fighting drugs and violence in the community	Advocacy	The dedication	Creative: Find ways to make things work
Location- Walking distance	Middle of community near bus line	West side of town	Easy to find	
Track Record	Work is central to needs in the community	Historical is strong, consistently serve people	People come back/ Reputation is good	Stability: Hello generations of families
Many Services	Multi-purpose serves different ages	Strong network and collaborations	Resource rich	Divers funding sources

Weaknesses

Weaknesses highlight the agreed upon areas that the staff and board believed were areas of growth and development. Weaknesses try to take a realistic view of the perceived areas of weakness. These identified areas can be used to develop strategic opportunities for improvement.

Lack of Funding	Need exceeds the capacity of the organization			
The People	Need more people willing to share gifts need focused growth and increase the pool of talent	Need to increase professional development	Lack of unified understanding of organization	Lack clear understanding of vision and services
Out dated	Facility Cluttered	Outdated methods of meeting current needs	Not on cutting edge of resources- need current tools for strength	Need equipment
Lack of focus	Wide range of services	Lack of communication among staff and communication with community about services		
Lack of advocates- people in the community to come help more				
Discount. Lack of recognition for positive collaboration in west side				
Customer service	Internal and external need for respect	Better interaction and how we treat each other		

Opportunities

Every organization exists in the broader context of community. There are a number of opportunities that Wesley could take advantage of if strategic decision were made to engage in certain activities. The board and staff identified the following list as opportunities that Wesley could exploit to strengthen its position and roles in the community.

Increase community service	Redesign appearance of the facilities
Wesley is ahead of the curve- being proactive vs. reactive	Positively impacting the community
More creative programming for children i.e. nature focused programs	Increase funding
Attract new resources to W. Dayton	Renew relationships with past community members
Address a wide-range of social justice issues	Strengthen relationships with UMC/faith-based orgs
Strengthen self-sufficiency in others	Encourage others to come to Wesley
Be the leading organization on the west side	Attract businesses and employment opportunities
Unify older and younger generations	Increased community engagement- West side
Be Gateway and connection point for educational resources	Be more involved in the formation of the Westside
Make impacts and document them	Opportunity to be a community capacity builder.

Summary

The opportunities fall into three broad categories:

Wesley as a leader and change agent for the Westside
Increased Funding opportunities
Diversification of programs and services

The staff and board were confident that Wesley could take advantage of the lack of leadership on the Westside. Wesley has the opportunity to be a strong voice that rallies new resources, programs, services, and business to the Westside.

External Trends

The staff and board discussed the political, technological, societal, and economical external trends that would have a direct impact on the success of the organization. These areas were considered so that future planning would be made in a broader context other than daily operations. Below is a list of the key issues identified in the external trend analysis.

Political

More unfunded mandates, but measures stay the same (more for less)
Lack of regional solidarity within political realm
Move to increase local funding with decrease to state and federal funds
Greater Budget cuts reducing funding for programs

Technological

Social media everything moves faster (challenge in updating web presence)
Digital divide: understand how it impacts residents in the service area
Processes and systems need to be updated
Weak internal systems- technology wise financial, transportation
Financial and data management systems need to be updated
Outdated equipment

Societal

Societal Fear
Increase in individualism
Punctuality of writing grant proposals that get effective attention (being on top of grant process and opportunities)

Economical

Not enough attention on the most poverty stricken areas
Shift from attention on real poverty to those who are middle income with all the recent job losses
Absence of strong economic institutions in the West Side and infrastructures to support them.

External perceptions

Negative Media Focus on the West Side
Preconceived ideas about crime and people on the west side.

This section considers the specific priorities and action steps identified by the board. The action plans allows the board to implement strategies that improve engagement and the functionality of the board.

Key Roles of the Board

Be more visible at activities and functions at the center

Give to the organization

Be able to make tough decisions in the time of crisis

See a project through, by being affective in sub-committees

Have accountability for work of committee

Meet frequently enough to move projects to completion

Board needs to work externally more than internally for community development

Have clearly identified goals for the year

Key guiding documents need to be revised or developed

By laws

Personnel process manual

Job descriptions

Operational manual

Policy and procedures handbook

Organizational chart

Marketing materials and plan

Formative document – review and identify documents that outline relationship with Methodist church

Develop annual report

Developing strategic plan

Goal 2: Leveraging relationships to bring in resources

Strategy

2.1 Identifying key stakeholders in community

Tasks

	<u>By When</u>	<u>By Whom</u>	<u>Outcomes</u>
1. Contact via email/phone/letter	On-going	All board members	Clearly communicate needs of agency
2. Develop Quarterly News letter	2 nd /4 th Qrts.	Ralph	Garner increased support
3. Develop relationship with technical, human or other organization that specializes in PR	2 nd Quarter	Ralph/Harris/Sherry	Build capacity to tell the Wesley story effectively.
4. Official Annual Report	End of Fiscal year no later than end of 1 st Qrt.	Executive Director	
5. Meet with presidents of companies for recourses	On-going	Executive Director	Increased stakeholder support

Develop fund development database	By end of Fiscal Year	Executive Director/Committee	
Develop game plan	By end of 2 nd quarter	Executive Director/Committee	

Key Area (Board): Develop Comprehensive Marketing Strategy

Goal 1: Developing a Marketing Plan

Strategy

1.1. Establish plan and implement strategies to achieve the plan

Tasks

	<u>By When</u>	<u>By Whom</u>	<u>Outcomes</u>
Define target markets	6/1/14	Exc. director/ Board committee	Increased awareness of Wesley
Create a marketing audit of current marketing efforts and materials	6/1/14	Kristen/Exc. director/ Board committee	Focus marketing efforts across the organization
Create engagement strategies for various stakeholders	6/1/14	Exc. director/ Board committee	Increase utilization of

Goal 2: Acquire a budget and designate money for marketing Strategy

2.1 Develop comprehensive funding strategy

Tasks

	<u>By When</u>	<u>By Whom</u>	<u>Outcomes</u>
Create relevant engagement strategies for each stakeholder group	On-going	Committee/Kristen/Manika	Clearly communicate needs of agency
Determine what is actually needed by the organization (what are we requesting)	2 nd /4 th Qrts.	Committee/Kristen/Manika	Garner increased support
Develop WIFM (What's in it for me) for businesses and corporate donors	2 nd Quarter	Ralph/Harris/ Sherry	Build capacity to tell the Wesley story effectively.

Goal 2: Strengthen Relationship with the Community

Strategy

2.1 Increase support of community organizations and residents

Tasks

	<u>By When</u>	<u>By Whom</u>	<u>Outcomes</u>
Identify activities that increase involvement of the community residents.	On-going	Committee/Kristen/Manika	Engage community around Key Wesley Issues
Identify opportunities for community members to volunteer and give back (i.e. financial, time, other resources)	2 nd /4 th Qrts.	Committee/Kristen/Manika	Garner increased support from community
Create advocacy and grassroots training opportunities to increase advocacy for community organizations/residents.	4th Quarter	Ralph/Harris/Sherry/committee	Build capacity to tell the Wesley story effectively.
Create advocacy agenda that will be supported by the board and the staff(i.e. infant mortality, drugs, violence) by developing position statements and plan of action.	12/30/14	Exec. Dir/Board Committee	

**Key STAFF Strategies
(OPERATIONAL PLAN)**

Goal 2: Modernize the technology of the facilities.

Strategy

2.1 Update various technology in the program.

Tasks

	<u>By Whom</u>	<u>By When</u>	<u>Outcomes</u>
Assess technology needs center and programs.	IT Manager/ Finance/ Managers	2/15/14-2/28/14 As funding allows	Increased Productivity New computers & Technology for center
Identify costs	IT Manager/ Finance/ Managers	2/15/14-2/28/14 As funding allows	
Purchase equipment	IT Manager/ Finance/ Managers	2/15/14-2/28/14 As funding allows	
Identify Department Technology needs	IT/Managers/ Finance	End Q1, 2014 As Upgrades occur As Funding Allows	
Identify costs	IT/Managers/ Finance	End Q1, 2014 As Upgrades occur As Funding Allows	
Purchase technology	IT/Managers/ Finance	End Q1, 2014 As Upgrades occur As Funding Allows	

Goal 3: Train Staff/Volunteers on use of the new technology.

Strategy

3.1 Increase technology knowledge of the staff/volunteers.

Tasks

	<u>By Whom</u>	<u>By When</u>	<u>Outcomes</u>
Identify baseline knowledge	IT/Darian	2/15/14	Increased Productivity/Knowledge Assessment- Pre/Post
Identify form of assessment	Nikki Wilcox/ Training Instructor	2/28/14	
Develop lesson plans	Training Instructor	3/3/14	
Make Implement Schedule	Nikki Wilcox/ Training Instructor	As classes are sched.	
Implement Assessments	IT/Managers/Randi/Nikki	After upgrades within week 1	

Goal 2: Create an appealing work environment.

Strategy

2.1 Develop instruments to collect information from client served.

Tasks

	<u>By When</u>	<u>By Whom</u>	<u>Outcomes</u>
Update facilities	on-going	Management/Staff/Board	Retention of staff Improve quality of work environment
Create timeline for services	6/30/14	Management/Staff/Board	
Create team work and a family oriented environment	on-going	Management/Staff/Board	
Create training and personal development via meetings, workshops, etc.	7/31/14	Management/Staff/Board	
Create competitive compensation and salaries package.	on-going	Management/Staff/Board	
Seek additional/new funding	on-going	Management/Staff/Board	

Goal 2: Update and revise safety procedures.

Strategy

2.1 Each program/department develops safety procedures.

Tasks

<u>Tasks</u>	<u>By When</u>	<u>By Whom</u>	<u>Outcomes</u>
Assess and Create procedures for various safety related process for building/programs/departments	End of Quarter 3	Operations Team	A single resource for all safety policies
Complete Assessment to Integrate staff input in the development of procedures	End of Quarter 2	Operations team/Staff	Increase knowledge of staff
Train staff on new procedures i.e. OSHA, DOL, professional orgs..	End of July	Management and staff	
Make policies accessible and annual review as needed.	By end of July and annually	Operations Team	

Goal 4: Update and revise purchasing procedures.

Strategy

4.1 Identify desired client outcomes.

Tasks

	By When	By Whom	Outcomes
Review refine current procedures.	6/30/14	Operations Team/dept. managers/Harris	Increased program/operational efficiency
Train managers and other staff	8/30/14	Operations Team	
Managers train departments	9/30/14	Dept. Managers	
Develop quarterly and yearly program reports on resources used.	2nd qrt/ on-going	Operations team/dept. managers/ Harris	

Key Area: Review of services through evaluation and quality improvement

Goal 1: Create a skilled staff and high quality programs/services

Strategy

1.1 Develop an evaluation and improvement process for all programs/services

Tasks

	By When	By Whom	Outcomes
Create evaluations aligned to established state, national, or funding standards	8/30/14	Operations team/Managers	System to improve hiring (pt right people on the bus)
Create specific orientations and trainings for each position/department.	9/30/14	Operations team/Managers	Improved capacity and skills of staff
Create a mentoring program for new hires and succession planning	9/30/14	Operations team/Managers	Become an asset to other organizations
Incorporate one-on-one evaluations for each staff person.	9/30/14	Operations team/Managers	
Create a performance management matrix for staff and volunteers	7/30/14	Operations team/Managers	
Integrate professional development opportunities for each staff.	10/30/14	Operations team/Managers	
Incorporate book discussions	5/30/14	Operations team/Managers	

Key Area: Update and organize the facilities.

Goal 1: Improve the outside grounds and building,

Strategy

1.1 Develop a plan to improve outside of facilities

Tasks

	<u>By When</u>	<u>By Whom</u>	<u>Outcomes</u>
Create database to track projects.	June 1, 14	<u>Operations Team/IT</u>	<ul style="list-style-type: none"> Improved working environment.
Solicit input from staff and volunteers.	<u>Feb/March</u>	<u>Management/Operations Team</u>	<ul style="list-style-type: none"> Appeals to the guests.
Create "Improvement teams" for staff and volunteers to improve the outside.	<u>April</u>	<u>Operations Team/Harris</u>	<ul style="list-style-type: none"> Attract and hire staff and volunteers.
Create timeline and plan to determine systematic improvement of the facility and creation of new building.	<u>May</u>	<u>Operations Team</u>	<ul style="list-style-type: none"> Attract to new clients.
Find funding for renovations and changes	<u>on-going</u>	<u>Harris/Finance Team/Board</u>	

Key Area: Developing metrics for success that capture appropriate data at appropriate times, for appropriate audience

Goal 1: Determine client demographics served in each program.

Strategy

1.1 Develop database to collect information from clients served.

Tasks

	<u>By When</u>	<u>By Whom</u>	<u>Outcomes</u>
1. Identify what program demographics are needed for each program	Feb 2014	Managers	Improved data collection
1. Develop clerical process for collecting data	MAY 2014	Managers	Improved accuracy of program and client data
1. Design and develop reports to track changing program data.	MAY 2014	Managers	Improved data for program improvement
1. Implement service plan	May 2014	Managers	

Goal 3: Develop success measures for what we do in each program/service.

Strategy

3.1 Develop instruments to collect information from client served.

Tasks

	<u>By When</u>	<u>By Whom</u>	<u>Outcomes</u>
1. Specify and Develop resource used for each program, personnel, facilities, finances	Feb. 28/14	Managers/COO? Harris	Appropriate instruments to measure appropriate outcomes
1. Create timeline for services	March/14	Managers/COO? Harris	
1. Develop measures for assessing resources utilization, including determining short falls	March/14	Managers/COO? Harris	
1. Develop quarterly and yearly reports on resources used.	On-going	Managers/COO? Harris	

Goal 2: Increase Volunteer Recruitment

Strategy

2.1 Engage volunteers in activities that allow them to give back

Tasks

<u>Tasks</u>	<u>By When</u>	<u>By Whom</u>	<u>Outcomes</u>
Have volunteers donate 5 hours of time	2/1/14	Randi,Denise, Angela, Graciela/ Marketing staff	Increase number of volunteers supporting Wesley
Identify volunteer projects to expand volunteer opportunities	2/1/14	Randi,Denise, Angela, Graciela/ Marketing staff	Increase the number of projects that Volunteers assist with.
Benchmark total numbers of volunteer hours for 2013-2014	2/1/14	Randi,Denise, Angela, Graciela/ Marketing staff	
Set target volunteer recruitment numbers. Increase by 25%	2/1/14	Randi,Denise, Angela, Graciela/ Marketing staff	
Develop marketing/outreach plan to engage volunteers	2/1/14	Randi,Denise, Angela, Graciela/ Marketing staff	

Goal 4: Increase Contact with neighbors

Strategy

4.1 Increase Interaction with neighbors within 2 block radius

Tasks

	<u>By When</u>	<u>By Whom</u>	<u>Outcomes</u>
Hold Open House	3/30/14	Randi, Denise, Angela, Brenda, Committee members	Target at least 100 visitors/Increased knowledge of Wesley
Thanksgiving Dinner for the Community	November	Randi, Denise, Angela, Brenda, Committee members	10 new volunteers for the dinner
Talent Show/Minority Health/Harvest	October	Randi, Denise, Angela, Brenda, Committee members	Increase number of zip codes served
Toys for tots	December	Randi, Denise, Angela, Brenda, Committee members	2 new business partners supporting events.
Juneteenth Celebration	June	Randi, Denise, Angela, Brenda, Committee members	70% of participants complete a survey
Community Fair/Block Party	June	Randi, Denise, Angela, Brenda, Committee members	

Goal 6: Regular Contact with Neighbors

Strategy

6.1 Increase communication with neighbors

Tasks

	<u>By When</u>	<u>By Whom</u>	<u>Outcomes</u>
Email birthday greetings and updates	7/1/14	Operations Team/Randi	Increased interaction with neighbors
Mailers and flyers	on-going	Operations Team	Increased awareness of Wesley services and programs
Monthly Newsletters	April-July	Operations Team	
Complete interest survey	9/14	Operations Team	Increased visits to the center