

The WILLFUL Foundation, Inc.

Strategic Plan 2016 - 2018



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Enrich. Inspire. Transform.

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Background

The WILLFUL Foundation, Inc. is committed to helping low-income families and individuals with disabilities elevate their quality of life through improving educational outcomes, exposure to broadening experiences, and exploring career opportunities.

We recognize that nonprofits in North and South Carolina face many challenges and opportunities. The WILLFUL Foundation, Inc.'s Board of Directors (BOD) developed this strategic plan with the understanding that nonprofits play a central role to helping local communities move into this new operating environment. While several elements of this strategic plan address immediate economic conditions, the overall plan is designed to ensure that communities are well-prepared for the future. Our intent is HELP, not ENABLE! When people/organizations enable, they prevent others from experiencing the consequences of their own actions. Enabling not only prevents others from realizing there may be a problem, but it also deprives them of fully reaching their own potential. To ensure compliance with the high standards of The WILLFUL Foundation, taking the initiative to seek our services will be one of the selection criteria used to select the families and individuals that will participate in our program. We use a two-generation approach which provides the information, resources, and support that community members need to HELP individuals break the cycle of poverty.

Management Plan

This Strategic Plan is a living document. It is a road map that will lead us to accomplish Foundational goals and strategies. The BOD will review it frequently and make necessary adjustments to keep it aligned with the targeted environments, and our customers' needs and priorities. By utilizing a process of review and analysis, we will regularly assess our performance at all levels. During these reviews, we will assess our process towards achieving our strategic goals and objectives and evaluate and incorporate constructive customer feedback.

Organizational Competencies

Professionalism, Leadership, Teamwork, Interpersonal Skills, Manage Client Relationships

Our Vision

A world where all people are exposed to quality education, cultural experiences, and career broadening opportunities.

Our Mission

To equip low income families and individuals with disabilities with essential strategies, tools, and resources necessary to become future leaders.

Our Focus/Who We Serve

We devote our time and energy to passionately advocate for the disabled and low income families primarily in Marlboro County (SC).

Our Priorities

- *Enrich* worldly experiences to promote a brighter outlook for the future.
- *Inspire* others to create a legacy impacting the community and world.
- *Transform* lives so all are compelled to pave the way for others.

Our Values

| | | | |
|--------------------|-----------------|----------------|-------------|
| Family & Community | Ethical | Partnership | Empathy |
| Acceptance | Respect | Responsibility | Excellence |
| Accountability | Personal Growth | Equality | Empowerment |

Marketing and Communication Plan

| What groups do we need to serve most? | What do they need to hear from us? | What is the best way to find and communicate with them? | How often will we communicate with them? | How will we know if they have heard our message? |
|---------------------------------------|---|---|--|--|
| Low- Income Families | We are here for them Services provided | In Person (Networking events) | Often | Seeking more information, Participation in programs |
| Individuals with Disabilities | We are here for them Services provided | In Person (Networking events) | Often | Seeking more information, Participation in programs |
| Community Members | Services we provide | In Person (Networking events) | Often | Seeking more information Increased support Donations |
| Community Leaders | Service we provide | In Person (Networking events & Annual Gala) | Often | Increased support Donations |
| Funders/Partners | Our mission & vision Where donations go | In Person (Networking events & Annual Gala) | Bi-annually | Donations |
| Volunteers | Our existence. Services provided How they can help | In Person (Networking events) | Often | Increased number of volunteers |
| Local Businesses | Where donations go How they can help | In Person (Networking events & Annual Gala) | Often | Increased support Donations |
| Local Organizations | Service we provide | In Person (Networking events) & Email | Often | Increased support Networking Inclusion |

People Development Plan

| People | Area of Development Needed | What will be done | When | Cost of this development (Both in terms of time and money) |
|-------------------------|--|---|--|--|
| Officers, Volunteers | Website Design Business Principles Marketing Program Implementation | Research, Networking Accounts Developed | Ongoing; official launch beginning week of 3/21/16 | \$0 |
| Board Members | Leadership Development Grant Writing | Readings, Training, Courses | Ongoing; official launch beginning week of 3/21/16 | \$0 |

Operating Budget

Estimated Operating Budget Worksheet- 2016

| | Estimated Amount | Actual |
|--|------------------|--------|
| Expected Income | | |
| Grants | \$ 1,000 | |
| Donations | \$ 1,000 | |
| Fundraising | \$ 1,200 | |
| Interest | \$ 0 | |
| Other income | \$ 0 | |
| TOTAL: | \$ 3,200 | |
| Expected Expenditure | | |
| Staffing Costs | \$ 0 | |
| Office running costs (rent, etc.) | \$ 0 | |
| Operating Expenses/Supplies | \$ 750 | |
| Mileage | \$ 0 | |
| Staff development | \$ 0 | |
| Marketing | \$ 250 | |
| Other costs | \$ 0 | |
| TOTAL: | \$ 1,000 | |
| Programs/Project Costs | | |
| Goal 1: Program Costs | | |
| Development costs | \$ 0 | |
| Marketing Costs | \$ 200 | |
| Running Costs | \$ 200 | |
| Staffing Costs | \$ 0 | |
| William A. Fuller Memorial Scholarship | \$ 1,000 | |
| TOTAL: | \$ 1,400 | |
| Goal 2: Program Costs | | |
| Development costs | \$ 0 | |
| Marketing Costs | \$ 200 | |
| Running Costs | \$ 200 | |
| Staffing Costs | \$ 0 | |
| TOTAL: | \$ 400 | |
| Goal 3: Program Costs | | |
| Development costs | \$ 0 | |
| Marketing Costs | \$ 200 | |
| Running Costs | \$ 200 | |
| Staffing Costs | \$ 0 | |
| TOTAL: | \$ 200 | |
| TOTAL EXPENDITURE: | \$ 3,200 | |
| TOTAL Profit/Loss: (Income – Total Expenditure) | \$ 0 | |

Estimated Operating Budget Worksheet- 2017

| | Estimated Amount | Actual |
|--|------------------|--------|
| Expected Income | | |
| Grants | \$ 5,000 | |
| Donations | \$ 5,000 | |
| Fundraising | \$ 3,600 | |
| Interest | \$ 0 | |
| Other income | \$ 0 | |
| TOTAL: | \$ 13,600 | |
| Expected Expenditure | | |
| Staffing Costs | \$ 0 | |
| Office running costs (rent, etc.) @ \$300 per month | \$ 3,600 | |
| Operating Expenses/Supplies | \$ 2,000 | |
| Mileage | \$ 0 | |
| Staff development | \$ 0 | |
| Marketing | \$ 1,000 | |
| Other costs | \$ 0 | |
| TOTAL: | \$ 6,600 | |
| Programs/Project Costs | | |
| Goal 1: Program Costs | | |
| Development costs | \$ 0 | |
| Marketing Costs | \$ 1,000 | |
| Running Costs | \$ 1,000 | |
| Staffing Costs | \$ 0 | |
| William A. Fuller Memorial Scholarship | \$ 1,000 | |
| TOTAL: | \$ 3,000 | |
| Goal 2: Program Costs | | |
| Development costs | \$ 0 | |
| Marketing Costs | \$ 1,000 | |
| Running Costs | \$ 1,000 | |
| Staffing Costs | \$ 0 | |
| TOTAL: | \$ 2,000 | |
| Goal 3: Program Costs | | |
| Development costs | \$ 0 | |
| Marketing Costs | \$ 1,000 | |
| Running Costs | \$ 1,000 | |
| Staffing Costs | \$ 0 | |
| TOTAL: | \$ 2,000 | |
| TOTAL EXPENDITURE: | \$ 13,500 | |
| TOTAL Profit/Loss: (Income – Total Expenditure) | \$ 0 | |

Estimated Operating Budget Worksheet- 2018

| | Estimated Amount | Actual |
|--|------------------|--------|
| Expected Income | | |
| Grants | \$ 10,000 | |
| Donations | \$ 7,500 | |
| Fundraising | \$ 6,500 | |
| Interest | \$ 0 | |
| Other income | \$ 0 | |
| TOTAL: | \$ 24,000 | |
| Expected Expenditure | | |
| Staffing Costs | \$ 0 | |
| Office running costs (rent, etc.) @ 300 per month | \$ 3,600 | |
| Operating Expenses/Supplies | \$ 2,900 | |
| Mileage | \$ 0 | |
| Staff development | \$ 0 | |
| Marketing | \$ 1,500 | |
| Other costs | \$ 0 | |
| TOTAL: | \$ 8,000 | |
| Programs/Project Costs | | |
| Goal 1: Program Costs | | |
| Development costs | \$ 0 | |
| Marketing Costs | \$ 500 | |
| Running Costs | \$ 4,500 | |
| Staffing Costs | \$ 0 | |
| William A. Fuller Memorial Scholarship | \$ 1,000 | |
| TOTAL: | \$ 6,000 | |
| Goal 2: Program Costs | | |
| Development costs | \$ 0 | |
| Marketing Costs | \$ 500 | |
| Running Costs | \$ 4,500 | |
| Staffing Costs | \$ 0 | |
| TOTAL: | \$ 5,000 | |
| Goal 3: Program Costs | | |
| Development costs | \$ 0 | |
| Marketing Costs | \$ 500 | |
| Running Costs | \$ 4,500 | |
| Staffing Costs | \$ 0 | |
| TOTAL: | \$ 5,000 | |
| TOTAL EXPENDITURE: | \$ 24,000 | |
| TOTAL Profit/Loss: (Income – Total Expenditure) | \$ 0 | |

SWOT Analysis

| | |
|---|--|
| <p><u>Strengths</u> Dedication Commitment Team-Oriented Passionate Resourceful Strong Mission, Vision, Priorities, & Values Motivation to Serve Personable</p> | <p><u>Weaknesses</u> Lack of non-profit knowledge Lack of current resources Community unfamiliar with foundation Lack of marketing Inability to focus full efforts primarily on foundation (full-time employment, school)</p> |
| <p><u>Opportunities</u> Garner community/business support (buy-in from the community) Secure stakeholders & partners Obtaining knowledge on running/maintain a non-profit</p> | <p><u>Threats</u> Lack of/difficulty obtaining funding Numerous non-profit groups in area Small pool of funding in local areas Upcoming presidential elections State/Federal Non-profit laws and regulations</p> |

Risk Assessment

Use the table below to capture any risks that are identified during your SWOT analysis, and any others you are aware of that might come up over the next year. (You may want to expand on this as part of your organizational governance activities and review them at Board meetings at least quarterly.)

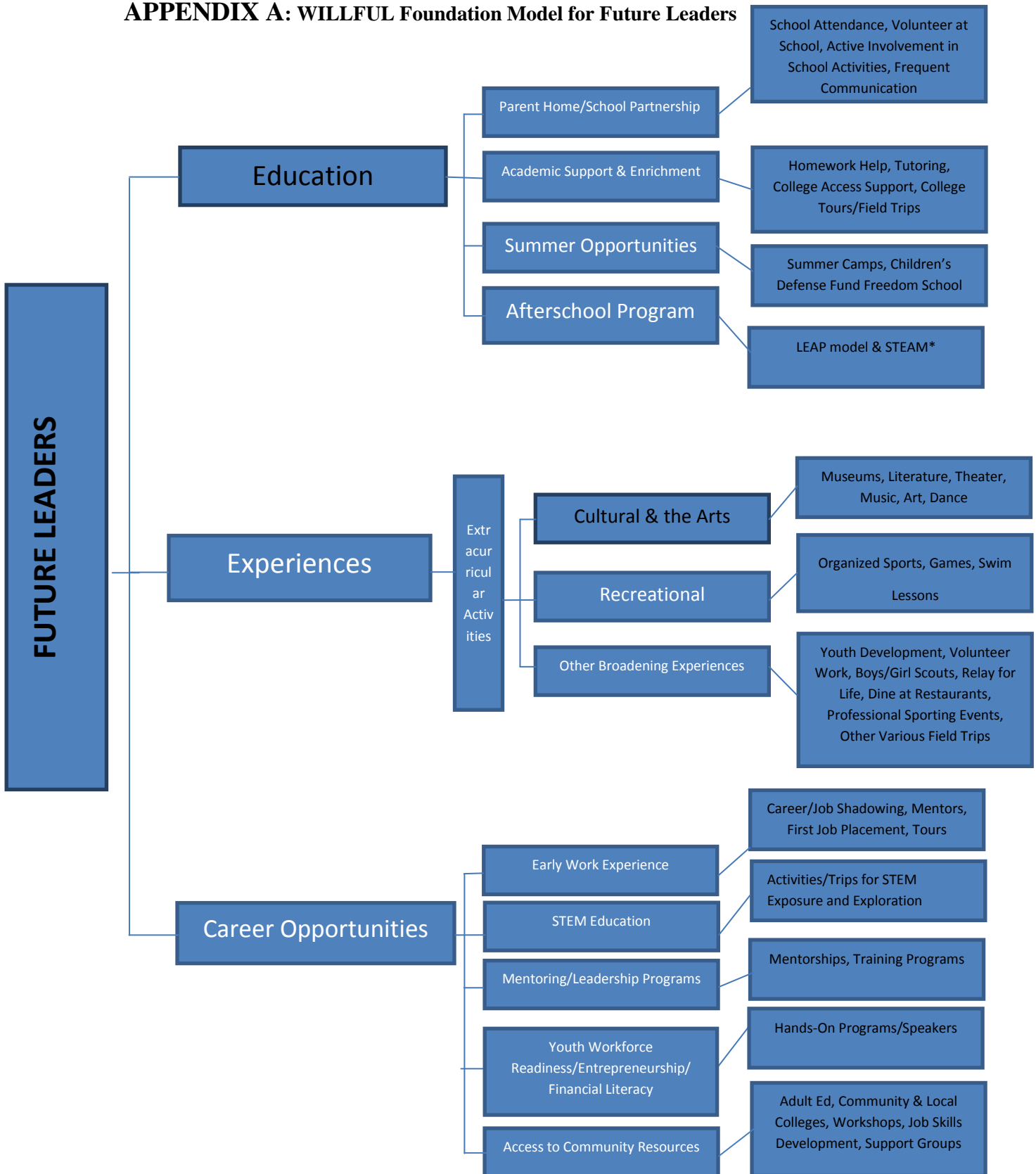
| Risks Identified | Controls in place | Who is responsible |
|---|--|---|
| Grant fundings reduced and resources are not available to cover the operating costs and activities of the organization. | <ul style="list-style-type: none">• Positive relationships building with government officials, funders, business owners, and community leaders• Expertise in grant writing in house• Diversity of income sources developed• Diligence in seeking grants and opportunities to increase knowledge of grantwriting and fundraising through workshops, readings, etc.• Effective, creative, and continuous fundraising | Chief Executive Office Senior Vice President |

Success Measures

| <i>Measures of Success:</i> | <i>When this will be measured: (Try to have measures throughout the year)</i> |
|--|--|
| Increase of IWD that obtain meaningful employment through the Foundation | End of 2 nd and 4 th Quarters |
| Increase of WILLFUL Scholars (WS) that enroll in college | End of 2 nd and 4 th Quarters |
| Total percentage increase of WS | End of 2 nd and 4 th Quarters |
| GPA/Grade increase of WS | End of 2 nd and 4 th Quarters |
| State-wide and/or National recognition of WS | End of 2 nd and 4 th Quarters |
| | |
| | |
| | |

APPENDICES

APPENDIX A: WILLFUL Foundation Model for Future Leaders



APPENDIX B: Acronyms

| | |
|-------|--|
| BOD | Board of Directors |
| IWD | Individuals with Disabilities |
| LEAP | Learning Enrichment After-School Program |
| MCHS | Marlboro County High School |
| STEAM | Science, Technology, Engineering, Arts, and Math |
| STEM | Science, Technology, Engineering, and Math |
| WF | WILLFUL Foundation |
| WS | WILLFUL Scholars |