STRATEGIC PLAN PREPARED FOR:
eliminating racism
empowering women
ywca
Lancaster
PRESENTED ON FEBRUARY 20, 2019

PILOT PEAK CONSULTING

PREPARED BY: PILOT PEAKCONSULTING, LLC
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A. Introduction

Fully developed organizations typically include a full leadership staff, diversified funding streams, a focus on capacity building, a strong governance model on the Board, and a well-recognized brand and mission. While the YWCA of Lancaster (YWCA) is not yet a fully developed nonprofit, the goals and objectives in the strategic plan will help the organization move positively in that direction. The organization is at a crossroads: it is time for the YWCA to decide how to effectively accomplish its mission. The questions that the organization needs to ask include: what are the programs that the YWCA should offer to best serve the community? Who needs to be involved to ensure success and effective decision making? How will the organization live its mission both internally and externally?

As the YWCA endeavors to accomplish the goals and tasks put forth in this plan, PPC recommends focusing intently on a few items that are directly related:

- The Board has helped shepherd the organization through several leadership changes over the last few years. The opportunity now is for the Board to move more towards a visionary role where members are less involved in the day-to-day operations of the organization. Board members should focus on fundraising, financial oversight, organizational vision, and being ambassadors for the YWCA within their own communities. The organization will not be able to be fully successful until this happens.

- Communications between and among the staff and the Board needs to be addressed. In order for the Board to govern effectively, it is important to hear feedback from the staff more regularly. In addition, there are conversations at the Board level that should include staff, specifically around the strategic direction of the organization. Without an agreement on communications protocol or a culture of transparency, the YWCA will not be capable of thriving. PPC recommends engaging a communications expert to address this issue.

- Nonprofits thrive when they offer unique programs that fulfill both needs and desires within the community. Evaluation of these needs and desires is a project that is constant and tends to be very resource heavy. PPC recommends that the YWCA put into place a simple mechanism to collect feedback from the community on an annual basis in order to evaluate programming needs for the following year. The collection of this feedback should be done in a way that allows for quick evaluation and implementation.

- Fundraising needs to be proactive and diversified. While institutional donors (foundations and corporations) are often more appealing for a less mature nonprofit because they have guidelines and application deadlines, mature nonprofits focus on developing strong individual relationships that can sustain the organization for decades. PPC recommend enhancing individual donor relationships significantly, a task which can only be done with both staff and Board involvement.

Thank you for the opportunity to work with you on this important project. Pilot Peak Consulting, LLC looks forward to seeing the organization thrive!
**B. Overview**

The YWCA has been leading change since 1889, pioneering social justice and women’s empowerment. The roots of gender and racial inequality are deep and pervasive. But, with its rich history and steadfast commitment to the community, the YWCA remains on the forefront of social change. The organization creates opportunities, breaks down barriers and gives voice to the voiceless. They are teachers, thought leaders, and advocates. By harnessing the potential of every person and opening doors of opportunity, the YWCA brings real change to the fight for gender equality, and racial and social justice.

The YWCA focuses on meeting immediate needs while creating long-term solutions, which uniquely positions the organization to achieve its mission. This continuum of response from direct service to issue education to advocacy keeps the YWCA poised and ready to meet some the community’s biggest needs.

As the Lancaster region continues to grow and change, it is imperative that local nonprofits work thoughtfully and strategically to maximize the benefits from these changes. To that end, the YWCA embarked upon a strategic planning process that will enable the organization to grow and sustain itself for years to come.

The YWCA convened a Strategic Planning Committee (SPC) comprised of staff and Board members to develop a strategic plan for 2019 – 2021 with the assistance of Pilot Peak Consulting (PPC), an outside consultant. The committee included:

- Michelle McCall
- Susan Peipher
- Ruth Devenney
- Anna Echo-Hawk
- Jessica Laspino
- Sheila O’Rourke
- Stacy Whisel
- Emma Kieran (PPC)

**C. External Stakeholder Feedback**

In August and September 2018, PPC conducted external data collection via one-on-one interviews, focus groups, and an online survey to assess stakeholder perception of the YWCA Lancaster (YWCA). The external data collection participants included:

- **Interviews**
  - Shakeel Amanullah
  - Peter Barber
  - Mandy Billman
  - Sam Bressi
  - Lisa Cameron
  - Cheryl Gahring
  - Lawrene Lee
  - Angie Lightfoot
  - Liz Martin
  - Gingr Robinson
  - Deb Saporetti
  - Lenny Walton
  - Dana Robertson
Focus Groups (Staff, Board, Community Partners)

- Luann Aument (B)
- Devin Coutreyer (S)
- Jerry Egan (CP)
- Deb Gadsden (B)
- Xavier Garcia-Molina (S)
- Wendy Gaunt (S)
- Karen Mansfield (CP)
- Nancy O’Halloran (B)
- Valerie Paige (CP)
- Vanesa Philbert (CP)
- Dana Robertson (B)
- Jen Reiner (B)
- Gina Russo (CP)
- Alice Yoder (CP)

Survey

- Invited 2,107 participants via email
- Made survey available in YWCA lobby for clients
- Received 330 total responses; total response rate of 15%
  - Breakdown of responses
    - 217 complete
    - 113 partial
  - Respondent demographics
    - 77% female; 22% male; 1% other

Survey Respondent Connection to the YWCA

*Those who answered “other” often suggested that they belonged to several categories. Some respondents did not indicate what “other” meant.
Key findings from these stakeholder interactions are as follows:

- **Mission**

Interview and focus group participants overwhelmingly believe the YWCA’s mission involves eliminating racism and working for racial justice as well as empowering women. Many participants mentioned both in their responses. About 50% of participants stated social justice, creating equity, and emergency or transitional housing as part of the YWCA’s mission. Childcare and sexual assault services were also mentioned by a smaller number of interviewees. Quotes include:

- “The YWCA has an active role in the community to engage around their programming.”
- “The mission is multi-faceted.”
- “Many people don’t know the breadth of what the YWCA does.”

Interviewees suggest that the YWCA’s work is important because eliminating racism and empowering women is critical in Lancaster. They note the challenges faced in Lancaster by those who benefit from the YWCA’s services and how no other organizations are actively working to tackle those challenges. There is a concern, however, that the YWCA’s internal culture does not reflect its mission. Quotes include:

- “There are other community groups that provide services, but I can’t think of any – the YWCA takes a leadership role.”
- “The Leadership team thinks that the mission is being lived in Lancaster, but it’s not.”
- “Lancaster is a conservative area and you must work hard to advance and support women and their needs.”

When asked why they continued to be engaged with the YWCA, survey participants chose programming over other choices, however mission and impact ranked a collective second:

![reasons for continued engagement with the YWCA chart](chart.png)
Those that chose other largely named a specific program as the reason that they continue to be engaged with the YWCA.

- **Strengths**

There was quite a bit of diversity in interviewee, focus group, and survey responses to the question of what is going well for the YWCA, mostly based on how they participate in the organization. 75% of participants praised the YWCA’s programming – either specifically or generally – with many specifically praising the sexual assault and housing services. In addition, 25% of participants mentioned staff as a strength. Quotes include:

- “Michelle has done a great job showcasing the building and getting people into it.”
- “Sexual assault services are key – we’re the only ones and it’s key to our mission.”
- “We need to do a better job explaining our impact – on numbers and satisfaction.”

When asked to rate program effectiveness, almost a quarter – sometimes more – of survey participants were unable to respond to the effectiveness of all programs. This indicates, similar to our question around mission, that there isn’t a wide-spread knowledge about the breadth of the YWCA programs. All four program categories listed were rated very favorably – with less than 20%, and sometimes less than 5% of respondents answering that the programs were either not or only somewhat effective.

- **Areas for Improvement**

The most commonly mentioned obstacles include funding and the leadership team. Participants note the need for a full-time fundraising staff person and a more robust fundraising strategy. They also noted many internal obstacles facing the leadership team and staff, which has significant
effects on other areas of YWCA. Specifically, lack of diversity on the leadership team was mentioned by both Board and staff members. Quotes include:

- “We don’t have equal representation of gender or people of color on the Board, in our volunteers, or on the leadership team.”
- “There is so much fundraising competition.”
- “We need to get the word out more about the YWCA in a way that reaches every audience.”

External stakeholders from all groups had targeted suggestions for improvements at the YWCA. Those suggestions are as follows:

- **Leadership:** participants believe the staff leadership team doesn’t accurately reflect the voices of the community. A few participants also noted similar challenges with the Board, indicating difficulty recruiting a diverse group of Board members.
- **Mission:** participants noted a few programming areas they believe don’t fit into the mission or are not serving the mission. There are questions about whether all programs at the YWCA exist to “eliminate racism and empower women.”
- **Marketing and communications:** participants believe the YWCA isn't getting the word out about their programming, impact, and successes. This causes some confusion in the community about the YWCA's brand. In addition, there is concern about low event turnout (Race Against Racism not included).
- **Staff:** several survey participants noted a need for increased staff professionalism, especially with child care staff.
- **Social justice programming:** participants believe the current social justice programming raises awareness but don’t think it makes any actionable change or impact in the community. In addition, several survey respondents suggested streamlining and even reducing the number of programs offered.
- **Infrastructure:** participants note that the YWCA tends to focus on a reactive, tactical response rather than strategic proactivity. As a result, new programs or ideas aren’t often seen through to completion. Additionally, there were several comments about encouraging the YWCA to determine whether it wants to be a leader or a follower within the county.
- **Culture:** there are significant concerns about a lack of staff morale and about the internal culture of the organization. Through interviews, focus groups, and the survey, an internal culture of racism, exclusion, and lack of trust was suggested.

Quotes include:

- “The YWCA needs more diverse events. They aren’t reaching the entire county.”
- “The national brand helps build a reputation, but the YWCA needs to talk about where it is the expert in the Lancaster community.”
- “The Race Against Racism allows us to hide behind an activity instead of doing the hard work around racism.”
- “Habit and longevity are a problem. We are using the same paths to get to our goals.”
“We head down a path but don’t have a full plan – need to stop always charging ahead.”

“Staff morale is a huge concern. Staff give feedback and opinions and then nothing happens with it.”

- **Opportunities**

There was a myriad of suggestions for opportunities of which the YWCA should take advantage. The top suggestions include:

- **Governance**
  - Evaluate Board make-up and create a program for increasing Board diversity
  - Consider opportunities for Board training on a variety of topics
  - Work more strategically one-on-one with Board members to engage them in strategic decision making, giving, and getting

- **Communications**
  - Evaluate need for brand awareness campaign
  - Enhance communications and advertising of the YWCA and its services
  - Develop more comprehensive internal communications plan that meets the staff where they are

- **Fundraising**
  - Hire full-time fundraising staff
  - Communicate more regularly with funders on current issues and funding impact
  - Create a more robust plan for cultivating and stewarding donors regularly
  - Research additional grant opportunities
  - Develop more comprehensive impact statements

- **Programs**
  - Evaluate mission achievement within current programs
  - Conduct market research and demographic study to strategically determine service and programming needs in the community
  - Determine LGBTQIA needs in the community
  - Expand social justice programming

- **Culture**
  - Evaluate the current cycle of decision making by those in positions of “natural power”
  - Develop a plan for changing the internal culture to help retain staff

- **Infrastructure**
  - Develop a plan for addressing ongoing IT needs
  - Evaluate building for access issues to create a more welcome, open space
  - Fundraise for ongoing building maintenance and up-keep costs
Partnerships and Community Engagement
- Evaluate event offerings to create more opportunities for broad community engagement
- Develop more opportunities for coalition building with the YWCA as the convener and the leader

Staff
- Offer opportunities for training on leading and managing staff
- Ensure each position has a job description in place

Growth Priorities
Depending on the external stakeholder’s relationship to the organization, responses around priorities for growth varied. The most common goal mentioned by interview participants was to enhance community relations and partnerships, while survey participants suggested enhanced social justice programming as the top growth priority. There is a strong desire from both interview and survey participants for the YWCA to better understand the community’s needs to inform its program offerings and to create new partnerships. The next most commonly stated goals are around strengthening fundraising, internal evaluation of how the organization is living its mission and improving organizational leadership.

Survey respondents recommended several improvements for fundraising, including evaluating current event offerings and grant opportunities as the top priorities. Other responses include enhancing social media presence, finding ways to build events like the Race Against Racism, and enhancing communication with donors.

Other suggestions for growth include:
- Define where the YWCA wants to be a convener and a leader in the community
- Fundraising around long-term building needs to ensure physical plant sustainability
- Look at streamlining what the YWCA does for programs
- Strengthen the social justice program to become the go-to leader in that area
- Tell the story about what the YWCA does better

Additionally, survey respondents recommend that social media and events are top priorities for improvement in communications, with speaking engagements, traditional media, and the website close behind.
D. Strategic Plan Components

After reviewing the external data collection results, the YWCA SPC convened to create multi-year goals and tasks for the YWCA. As a reminder, the current statements of purpose are:

- **Statements of Purpose**
  
  **Vision:** We seek to empower women and eliminate racism through education, advocacy, and programs for all women and families from all walks of life, and by emphasizing our core competencies of expert staff, openness to change, and collaborative partnerships. We are sustainable by income generating programs, government contracted programs and generous donors.

  **Mission:** YWCA Lancaster is dedicated to eliminating racism, empowering women and promoting peace, justice, freedom and dignity for all.

- **Goals and Objectives**

  The following strategic goals and tasks define the YWCA’s overall direction for 2019 – 2021. They will also help to drive resource allocation and provide focus to the day-to-day work at the YWCA. These strategic priorities will be employed to advance the YWCA from its current to its desired state.

  - **Infrastructure:** Create a space that is fully utilized and welcoming for all
    - Create ongoing budget for diversity, equity, and inclusion work for Board and staff
    - Creating a plan and budget for routine maintenance of the building
    - Fulfill Property Committee’s Phase I recommendation
▪ Engage diversity, equity, and inclusion consultant re: inclusive space
▪ Create dedicated community space and remove barriers to its use
▪ Plan for technology upgrades
▪ Research and invest in web portal for staff/board/clients
▪ Review accessibility, safety, and emergency plans

Governance: Optimize board engagement with intentional focus on mission
▪ Hold an annual retreat to educate the Board on governance, program, social justice, and other pertinent topics
▪ Redefine roles for staff and Board leadership, Board members, and committees
▪ Create system of accountability for committee work
▪ Develop onboarding and education plan for Board members
▪ Review Board bylaws and policies, including gender make-up and inclusion for members
▪ Create new ways to engage and empower more community members that are served by the YWCA’s programming
▪ Develop education for Board on anti-racism and details of programs offered
▪ Identify personal development and collective culture change work that is needed within the organization and its leadership to better engage and empower women of color within the Board and leadership of the organization

Staff: Cultivate, develop, and maintain a motivated, enriched, fulfilled, dedicated, expert staff
▪ Audit and update wage, incentive, and benefit policies to ensure they are competitive with other organizations
▪ Review current and new outsourcing opportunities
▪ Engage diversity, equity, and inclusion consultant to help with recruiting, onboarding, and retention of staff
▪ With diversity, equity, and inclusion consultant, explore opportunities to enhance diversity, equity, and inclusion literacy for staff
▪ Evaluate retention, staff development, and growth opportunities
▪ Create regular 360° feedback mechanism for staff to create opportunities to discuss problems, successes, and needs
▪ Build a recruitment and onboarding plan to strengthen anti-racist, equity-focused workplace culture in support of all staff members
▪ Ensure safe reporting options for workplace concerns

Programs: Continually evaluate and evolve effective and self-sustaining programs that serve the YWCA mission
▪ Audit all programs
▪ Develop comprehensive evaluative tool and regularly evaluate
▪ Solidify social justice program and curriculum
▪ Evaluate financial stability of each program and participant reach
▪ Identify areas for growth and expansion
▪ Identify target market for each program
Consider diversity, equity, and inclusion by program
Develop mechanism to regularly gather feedback and have dialogue with staff, community, participants, to inform programs

- **Communications:** Authentically and boldly communicate the mission of the YWCA with staff and community
  - Diversify forms of communication
  - Develop a marketing plan to promote programs and impact
  - Develop a brand messaging and brand awareness plan
  - Re-engage marketing committee
  - Evaluate diversity, equity, and inclusion in all communication
  - Conduct a mission event to promote community awareness
  - Improve internal communication through the adoption of an intranet
  - Get to know stakeholders and segment communications based on preferences and interests
  - Clarify audiences for each communication type
  - Model learner-leader model in communication

- **Fundraising:** Build a financially thriving organization that supports and expands mission-driven programs
  - Diversify revenue streams
  - Conclude an events audit, evaluation for mission alignment and return on investment, and plan for attendee engagement in subsequent 2-3 months
  - Hire full-time development staff member with a diversity, equity, and inclusion lens
  - Communicate restricted giving and program sponsorship opportunities
  - Develop partnerships/relationships in community that can lead funding
  - Educate staff and Board on philanthropy education with a DEI perspective
  - Develop relationships with donors who share our values
  - Develop or revise gift acceptance policies
  - Define Board role in fundraising and conduct a Board training to ensure Board becomes an effective fundraising body
  - Develop Board fundraising toolkit that outlines Board member opportunities for engagement and provides sample materials and assign individual Board members to current or potential major donors to cultivate and maintain those relationships.
  - Seek new charitable funding grants
  - Explore cause-marketing relationships
  - Build moves management pipeline to appropriately engage donors**
  - Identify top 20-40 donor prospects for major gifts and develop cultivation strategies for each
  - Develop communication strategies for most reliable corporate sponsors to build relationships and potentially increase sponsor levels. Consider adding additional volunteer opportunities to further engage their staff in our mission.
- **Culture:** Focus attention, intention, and resources on defining and meeting specific goals and measurables towards becoming a more equity-focused and anti-racist organization, internally and externally
  - Conduct a comprehensive diversity, equity, and inclusion audit
  - Engage in new and deepening anti-racist behavior organization-wide
  - Become spokespeople/organization on racism for community education
  - Transform internal community to become learners about ourselves and anti-racism
  - Communicate our culture transparently and with self-awareness
  - Value and empower individuals through benefits, wages, professional/personal development

**Moves Management** is the process by which a prospective donor is moved from cultivation to solicitation. “Moves” are the actions an organization takes to bring in donors, establish relationships, and renew contributions.
### Action Plan

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<tr>
<th>Category</th>
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<td><strong>Culture</strong></td>
<td>Focus attention, intention, and resources on defining and meeting specific goals and measurables towards becoming a more equity-focused and anti-racist organization, internally and externally</td>
<td>Conduct a comprehensive DEI audit</td>
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<td>Engage in new and deepening anti-racist behavior organization-wide</td>
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<td>Become spokespeople/organization on racism for community education</td>
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<td>Transform internal community to become learners about ourselves and anti-racism</td>
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<td>Communicate our culture transparently and with self-awareness</td>
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<td>Value and empower individuals through benefits, wages, professional/personal development</td>
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<td>Strategic Goal</td>
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<td>Diversify revenue streams</td>
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<td>Conduct an events audit, evaluation for mission alignment and return on investment, and plan for attendee engagement in subsequent 2-3 months</td>
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<td>Hire full-time development staff member with a diversity, equity, and inclusion lens</td>
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<td>Communicate restricted giving and program sponsorship opportunities</td>
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<td>Develop partnerships/relationships in community that can lead funding</td>
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<td>Educate staff and Board on philanthropy education with a DEI perspective</td>
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<td>Develop relationships with donors who share our values</td>
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<td>Develop or revise gift acceptance policies</td>
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<td>Define Board role in fundraising and conduct a Board training to ensure Board becomes an effective fundraising body</td>
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<td>Develop Board fundraising toolkit that outlines Board member opportunities for engagement and provides sample materials and assign individual Board members to current or potential major donors to cultivate and maintain those relationships</td>
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<td>Seek new charitable funding grants</td>
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<td>Explore cause-marketing relationships</td>
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<td>Build moves management pipeline to appropriately engage donors</td>
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<td>Identify top 20-40 donor prospects for major gifts and develop cultivation strategies for each</td>
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<td>Develop communication strategies for most reliable corporate sponsors to build relationships and potentially increase sponsor levels. Consider adding additional volunteer opportunities to further engage their staff in our mission</td>
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**KEY**

- **Performance On Track**
- **Performance Improving**
- **Performance Behind**

**Ongoing**

**Work Period**

Committee = Committee to be formed
F. Final Recommendations

This strategic plan should serve as a guide to help the YWCA through decision making around both strategic and tactical questions over the next two- to three-years. The plan should also help guide the organization as it works through a few larger questions: finding a new CEO, the overall direction of programming, and the need for work around diversity, equity, and inclusion from a cultural and organizational perspective. The plan should not, however, be so rigid as to prevent the YWCA from seizing valuable opportunities as they arise. In addition to the goals and objectives listed previously, PPC offers the following recommendations:

- **Programs**: The YWCA provides high-quality and valued programs to the community but has not yet had the opportunity to gather comprehensive feedback from its constituents on what programs the community wants. PPC recommends that as the YWCA performs its assessment and benchmarking, the organization focus on not only current clients, but also on those in the surrounding communities that haven’t yet participated in the YWCA fully.

- **Staff**: Staffing structures should be dynamic and nimble, able to change as an organization shifts and grows. The most important next step will be to evaluate what supplemental support is needed in order to poise the YWCA for the future. PPC believes that the current staff is sufficient to maintain present operations but is not be sufficient for growth.

- **Infrastructure**: Infrastructure is directly related to available resources – a more robust infrastructure will require significant financial investment. While this investment is critical to the YWCA’s growth, PPC recommend first understanding what can be done with current resources to build efficiency before spending significant money on additional infrastructure.

- **Communications**: Current communications is strong and comprehensive but limited by staff bandwidth. In order to enhance internal and external communications at the YWCA, additional staff or volunteer resources are needed. PPC recommends identifying these additional resources while maintaining current communication methods in 2019 and 2020 while focusing on more pressing issues.

- **Fundraising**: Individuals contribute 80% of charitable dollars in the United States and the most successful nonprofits utilize their Boards to develop and maintain relationships with individual donors. PPC recommends that the YWCA focus on individual giving and Board engagement in fundraising in order to advance charitable giving.

- **Culture**: Organizational culture is not only difficult to define but difficult to change. Peter Drucker said, famously, “Culture eats strategy for breakfast.” PPC recommends that the YWCA pay attention to organizational culture as objectives are accomplished and goals are reached as culture needs to change and shift with an organization as it grows.
• **Governance:** In addition to the objectives listed in the action plan, there was significant interest in Board education. As committees begin to work towards achieving the recommended goals, PPC recommends the Board revisit how best to provide ongoing learning opportunities for Board members that support the mission of the organization.

**G. Conclusion**

This Strategic Plan expresses the SPC’s recommendations that will enable the YWCA to eliminate racism and empower women. It should serve as a blueprint for excellence and future growth of the YWCA.

This plan will achieve success through the communication of these strategic goals, the incorporation of them in day-to-day operations, and the allocation of resources to meet the goals identified. In order to ensure successful implementation of the plan, PPC recommends that the Board Executive Committee (or a new committee formed as a result of the strategic plan) be responsible for evaluating the progress towards these goals and objectives each quarter. The Board Executive Committee will also be responsible for making adjustments to the plan timing and the objectives as each fiscal year progresses.

We believe the implementation of these recommendations will enable the YWCA to retain its current strengths while preparing for optimal success.