

BIRTHRIGHT COUNSELING, ST. LOUIS

Strategic Plan

Approved by the Board of Directors

September 18, 2019

Table of Contents

	Page
Mission, Vision and Values	3
Overview & Summary of Birthright STL's Strategic Planning Process and Direction	3-4
Strategic Priorities/Big Questions and Strategic Initiatives	4-9
Strategic Priority/Big Question 1	4-5
Strategic Priority/Big Question 2	5-6
Strategic Priority/Big Question 3	6-7
Strategic Priority/Big Question 4	7-9
Implementation and Evaluation	9
Appendix	10-20
Planning Team	10
Planning Process	10-11
Strategy Screen	12
Planning Timeline	13
Client Data	14-16
Financial Data	16-17
Financial Data – Friends	17
Strategic Planning Committee Meeting Agendas	18-20

Mission:

Birthright is a non-profit organization providing free, confidential and professional counseling as well as practical assistance to women facing an untimely pregnancy. Birthright offers positive alternatives to abortion. We believe in the right of every woman to give birth and the right of every child to be born.

Vision:

Our vision is for every woman to be aware of Birthright Counseling, St Louis as a safe place to work through the challenges of pregnancy and new motherhood.

Values:

Dedication to Excellence

Teamwork among Staff, Volunteers, Friends and Donors

Non-judgmental services

Respect

Overview & Summary of Birthright STL's Strategic Planning Process and Direction:

The Board and staff leadership of Birthright STL decided to update the agency's strategic plan in order to help the organization better live into its mission of serving pregnant women during pregnancy and new motherhood. While Birthright STL is a well-managed, successful operation with strong volunteer and staff leadership and a solid financial foundation, there is a belief that there are unserved pregnant women in the region who could benefit from the services Birthright STL provides. The planning process was undertaken to address the strategic issues necessary to enable Birthright STL to continue to be successful and to grow the number of women being served during pregnancy and new motherhood.

A committee of volunteer leaders was formed to direct the planning process and to provide context and direction. In addition, listening sessions were conducted with staff and several additional volunteers. The committee reviewed Birthright STL's environment, business model, market trends and position, and competitive advantages. In addition, the existing organizational, programmatic and operational strategies were reviewed. From this work, the committee identified key strategic priorities facing the organization and framed those in the terms of Big Questions that need to be addressed. (A Big Question is defined as "an opportunity or threat to which the organization must respond. Usually it is beyond the scope of the organization's current strategies and thus requiring a new strategy. It may offer an opportunity to do something new, or to take a thing currently done to a greater scale. It may be a threat or barrier to what you are doing now, with a negative impact on the organization." (La Piana)

In analyzing the various aspects and attributes of the organization, the committee articulated four (4) strategic priorities/Big Questions that need to be addressed for the agency to build on

its success and serve more pregnant women during pregnancy and new motherhood. The four strategic issues are:

- Identity and Brand
- An Aligned and Unified Fundraising Plan
- Marketing and Communications
- Organizational and Operational Structure

The committee refined the strategic issues/Big Questions and identified strategic initiatives to capitalize on opportunities and negate potential threats. To assist in evaluating current and future proposed strategies, the committee developed a Strategy Screen that incorporates values-based criteria to guide strategic decisions.

Strategic Priorities/Big Questions and Strategic Initiatives:

- 1. How can Birthright clearly communicate and live into its brand and identity so both those inside and outside the organization experience our mission and work for what it truly is versus some long and widely held mistaken perceptions?**

Desired Goals and Outcomes:

- A broader awareness and more accurate understanding of Birthright's work so potential clients will be more likely to connect with Birthright when needing services.
- Increase the number of entities/organizations willing to refer to and partner with Birthright.
- Increase the pool of prospects who find the actual, versus the perceived, identity and work of Birthright compelling and thus are likely to volunteer and/or contribute.

Strategic Initiatives:

- Develop a brand statement/position and assess how the experiences people and organizations have with Birthright express the brand statement/position.
 - Develop messages for staff and volunteers that communicate the desired brand experience for those encountering Birthright.
 - Train staff and volunteers on how to engage clients and partners in ways that consistently communicate the desired brand experience.
 - Evaluate current procedures and practices to determine their alignment with the desired brand experience.
 - Initiative Owner:
 - Timeline:
- Identify 5-10 desired partner organizations/groups/individuals and develop a plan for building a mutually beneficial relationship based on an accurate understanding of Birthright's identity.

- Build the desired partner list based on the potential for a positive response and a mutually beneficial relationship.
- Articulate what the desired response is for each potential partner.
- Identify a volunteer and staff team, based on relationships and ability to articulate the brand experience, to serve as “partner managers” for each organization/group/individual.
- Initiative Owner:
- Timeline:

2. How does Birthright develop an aligned fundraising strategy and plan that unifies the work of both the Friends and Birthright without losing the unique and important identity of Friends and that grows the number and generosity of our donors?

Desired Goals and Outcomes:

- A unified fundraising strategy and plan that enables Birthright to address the changing fundraising environment to build long-term financial stability.
- Recognition and maintenance of the unique contributions and support of Friends.
- A better donor experience that leads to a deeper and more meaningful relationship with Birthright.
- Donors develop life-long giving to Birthright including endowment/planned gifts.
- Develop relationships with new generations of donors.

Strategic Initiatives:

- Form a committee comprised of members of Friends and the Board of Birthright to explore how the two might work together and appear to be one Birthright organization.
 - Refine and use the unified/shared data base that enables a consistent relationship building initiative for donors.
 - Initiative Owner:
 - Timeline:
- Develop a unified fundraising plan and calendar that builds on the foundation of past efforts and successes and includes specific initiatives that focus on fundraising activities, events and requests that generational and potential donor groups would be inclined to support.
 - In coordination with Friends, outline and calendar the fundraising events/activities for 2020.
 - Coordinate the relationship building “touches” and requests for donor groups to maximize the opportunities to build stronger relationships with Birthright. Provide donors a singular feeling “Birthright experience”.

- Identify and recruit generational leaders to plan an engagement and event strategy for younger giving groups.
- Explore ways to develop a more individual/major gifts relationship
- Initiative Owner:
- Timeline:
- Develop and implement a focused, sustained endowment/planned giving initiative.
 - Incorporate into the unified fundraising plan and calendar activities/events that encourage endowed/planned gifts.
 - Develop a list of prospects for endowed/planned gifts.
 - Develop a recognition plan for endowed/planned gifts.
 - Recruit volunteers to help build relationships with and solicit donors for endowed/planned gifts.
 - Explore if and how the 50th Anniversary of Birthright might be used to launch an endowed/planned giving program.
 - Initiative Owner:
 - Timeline:
- Develop a plan to recognize and celebrate the 50th Anniversary of Birthright and how it might be used to build and enhance donor relationships and fundraising.
 - Initiative Owner:
 - Timeline:
- Analyze the resources – budget and personnel – needed to develop and implement a unified fundraising plan and determine how and how many resources might be secured and, based on that, how much the organization should undertake over the next 18 to 24 months.
 - Initiative Owner:
 - Timeline:

3. How can Birthright market/communicate and remove barriers to its services to reach more women in need of the services Birthright provides?

Desired Goals and Outcomes:

- More pregnant women use Birthright services during pregnancy and new motherhood.
- Barriers such as transportation, locations, hours and language are removed so more pregnant women can use the Birthright services during pregnancy and new motherhood.
- More extensive and accurate marketing/communications about Birthright's services so pregnant women understand the positive help Birthright provides during pregnancy and new motherhood and thus are more inclined to use the services.
- Increase the number of organizations that refer women to Birthright.

Strategic Initiatives:

- Develop an ongoing, consistent communication/marketing program to women who have used Birthright's services.
 - Communicate messages that encourage the clients to stay connected to Birthright and to share the information about Birthright with others who might need the services.
 - Explore the most effective and cost-efficient methods for communicating with current and past clients.
 - Track the data on referral sources and determine the effectiveness of the initiative.
 - Initiative Owner:
 - Timeline:
- Identify the barriers to pregnant women using Birthright's services and work to alleviate those within Birthright's ability to do so.
 - Review office locations and the advisability and feasibility to locating an office in Illinois.
 - Evaluate if adding or changing service hours at any office location could enhance service usage.
 - Regularly ask direct service staff to identify barriers clients articulate to see if and how they are changing.
 - Initiative Owner:
 - Timeline:
- Explore the best and most efficient use of social media to reach potential clients.
 - Initiative Owner:
 - Timeline:
- Identify and build relationships with agencies/organizations that could be referral sources for Birthright.
 - See the Strategic Initiative (second bullet point) under Strategic Priority 1.
 - Initiative Owner:
 - Timeline:

4. How can Birthright develop and maintain an organizational/operational structure that enhances our effectiveness and efficiency and allows us to serve more pregnant women during pregnancy and new motherhood.

Desired Goals and Outcomes:

- The organization has standards and objective performance indicators to evaluate if it is high performing and maximizing the use of its financial and human resources to more effectively serve more pregnant women through pregnancy and new motherhood.

- The Board understands its role and fulfills its governance responsibilities in a manner that enhances the outcomes Birthright achieves.
- Volunteers and staff are prepared, able to fulfill their roles and annually evaluated on the effectiveness of their serving pregnant women during pregnancy and new motherhood.

Strategic Initiatives:

- Develop a regular, ongoing process to evaluate how Birthright is performing in delivering its mission.
 - Develop a list of Key Performance Indicators (KPI's) that measure Birthright's performance in delivering on its mission.
 - Track and regularly report to the Board the KPI's results.
 - Initiative Owner:
 - Timeline:
- Do annual self-evaluations of the Board and the individual members of the Board.
 - Choose evaluation tools to use for the evaluations.
 - Plan a yearly cycle of evaluations and reporting of the results.
 - Based on the results, the Board develops an action plan, if needed, to enhance its performance.
 - Initiative Owner:
 - Timeline:
- Establish an annual formal evaluation and compensation review process of the Executive Director based on best practices.
 - Choose an evaluation instrument.
 - Plan a regular time annually to evaluate the Executive Director.
 - Annually review the Executive Director's compensation and use established best practices to determine compensation.
 - Initiative Owner:
 - Timeline:
- Review and revise, as needed, volunteer and staff training in relation to the roles they perform.
 - Review the position descriptions for each volunteer and staff role.
 - Review the training for each volunteer and staff position based on the position descriptions.
 - Initiate formal evaluations of volunteer and staff performance on a regular, as least annual, basis. Based on the evaluations, provide additional training or reassignment of duties if needed.
 - Initiative Owner:
 - Timeline:

Implementation and Evaluation:

No strategic plan is intended to be accomplished immediately; many of the strategies and tactics identified above will not be initiated in the current year. And, it is possible that the environment and/or needs may change, and so what is identified as a strategy or initiative now may be revised at a future date. The strategies articulated in this plan, however, are the ones the organization has identified as being vital to its ongoing success at this time.

Best practices suggest that an ongoing assessment of Birthright's environment be done by the Board on at least an annual basis to evaluate the organization's strategic direction and status:

- How far did it get in its current year priorities?
- Based on our KPI's and key data, are we moving in the direction we desired? Is the overall strategic direction still relevant to enabling us to serve more pregnant women during pregnancy and new motherhood or does it need to be revised?
- If it is still relevant, what should be the next year's priorities/strategic initiatives we pursue?
- What is the timeline and who will be responsible for implementing the priorities/strategic initiatives?