

ASSISTANCE LEAGUE® OF THE TRIANGLE AREA STRATEGIC PLAN 2018-2021

Mission statement: Assistance League volunteers transforming the lives of children and adults through community programs

Vision: Essential needs are met in our community and families flourish

Values: Transforming Lives . . . Strengthening our Community

Legend: Assistance League of the Triangle Area (ALTA); National Assistance League (NAL); Funds and Grants (F&G); Open Your Heart (OYH); Operation School Bell (OSB); Presidents Emeritus Group (PEG); Vice President (VP); Women in Need (WIN)

Notes: Cost column indicates zero (0) for no money needed & dollar sign (\$) for money needed in budget

I. GOAL: ENSURE PHILANTHROPIC PROGRAMS ADDRESS COMMUNITY NEEDS					
Objectives	Action Steps	Cost	Committee/Person Responsible	Measure of Success	Progress/Status
1. Improve effectiveness of philanthropic programs	A. Monitor school percentages of free and reduced lunches per school	0	Operation School Bell (OSB)	Maintain or increase number of children helped by tracking percentages	
	B. Expand a plan to help the homeless K to 12 student population and add budget	0	OSB/Advisory Council	# served per McKinney-Vinto policy	
	C. Evaluate current delivery model for OSB traditional program	0	OSB Chair	Make recommendations for improvement	
	D. Contact additional institutions to reach other populations and high school eligible for scholarships	0	Scholarship Chair	List of types of institutions	
	E. Optimize current Community Sharing partnerships and monetary contribution level	0	Community Sharing Chair	Record volunteer time and dollar contribution	
	F. Expand Kids Place to other locations into Orange and Durham Counties	\$	Kids Place Chair	List of locations	

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Objectives	Action Steps	Cost	Committee/Person Responsible	Measure of Success	Progress/Status
	G. Determine local nonprofits working with homeless facilities to decide on program	0	Women in Need (WIN) Chair	Increased number of people helped by tracking numbers	
	H. Explore expansion of WIN into Durham and Orange counties	0	WIN ad hoc committee	List of agencies	
	I. Increase member involvement in SMILE: question if will continue	0	SMILE Chair	Track number of members involved	
2. Maintain a strong communication link between our chapter and institutions with which we support	A. Develop an annual evaluation tool for philanthropic programs	0	All chairs	Evaluation tool	
	B. Review the evaluations and report results to members and institutions we support	0	All chairs	Report to membership and institutions we support	

II. GOAL: RECRUIT AND MAINTAIN AN INFORMED AND PARTICIPATIVE MEMBERSHIP					
Objectives	Action Steps	Cost	Committee/Person Responsible	Measure of Success	Progress/Status
1. <u>RECRUIT</u> Expand membership by 5% annually	A. Have a Bring a Friend event	0	Membership committee	Membership Evaluation	
	B. Create Formal Membership Plan	0	Membership committee	Total number of members	
	C. Visit 2 independent living facilities	0	Membership committee	# of new members	
	D. Contact companies whose employees are required to volunteer	0	Membership committee	List of contacts	
	E. Contact retiring teachers	0	Membership committee	List of contacts	
	F. Investigate ways to get a more age divergent membership	0	Membership committee	Recorded number in age groups	

II. GOAL: RECRUIT AND MAINTAIN AN INFORMED AND PARTICIPATIVE MEMBERSHIP					
Objectives	Action Steps	Cost	Committee/Person Responsible	Measure of Success	Progress/Status
	G. Investigate a “sustaining” membership body	0	Membership committee	List of members	
	H. Conduct exit interviews	0	Membership committee	Reasons for turnover	
2. <u>INFORM</u> Improve members knowledge of Standing Rules, Policies, Chapter Bylaws, Strategic Plan and expectations	A. Update Travel Brochure	\$	Education Chair	Yearly evaluation of first year members	
	B. Provide new member orientation sessions monthly	0	Education Chair	Annual member evaluation	
	C. Educational moments, such as speakers, explanations, presentations	0	Speaker’s Bureau Education Chair	Number of happenings	
	D. Maintain Mentoring Program	0	Mentoring Chair	Evaluation sheet	
	E. Maintain Monday Updates	0	Communications Chair	Awareness of Events	
	F. Wear name badges at all times	0	All Members	Wearing badges	
	G. Color-coded or other random seating at both potluck meetings	0	Social Chair Membership committee	List of times	
	H. Reestablish member updates in Monday Updates	0	Newsletter Chair	Publication in Monday Updates	
	I. Include new member’s biography in Monday Updates	0	Members hip VP and Placemen t Chair	Publication in Monday Updates	
3. <u>PARTICIPATIVE MEMBERSHIP</u> A. Identify areas of volunteer experiences	A. Publish monthly calendar	\$	Chapter Activity Chair	Increase in participation	
	B. Advertise events in Monday Updates; Establish emergency Phone Tree	0	Members hip VP	Increase in participation	

II. GOAL: RECRUIT AND MAINTAIN AN INFORMED AND PARTICIPATIVE MEMBERSHIP					
Objectives	Action Steps	Cost	Committee/Person Responsible	Measure of Success	Progress/Status
B. Enhance harmonious relationships	A. Encourage two (2) years rotation in positions	0	Chairs and Board members	Members evaluation from focus groups	
	B. Shadow present chairs and Board members	0	Chairs and Board members	Record of attendance	
C. Create social opportunities among members	A. Summer picnic	\$	Social committee	% of participation	
	B. Create opportunities for smaller interest groups	0	Social Chair Membership VP	List of groups created	
D. Adhere to chapter security requirement	Complete legal background check	\$	Security Committee Community Volunteer Chair	100% member and volunteer participation	
E. Monitor member and volunteer service hours	Report monthly all service hours	0	Secretary Service Hours Recorder	100% member and volunteer participation	
F. Strategic Plan	Hold membership evaluation of every three (3) years (due 2021)	0	VP Programs	Evaluation tool	
	Annual evaluation	0	Strategic Planning Committee/Chair	Update progress/status in the working document	

III. GOAL: EXPAND PUBLIC VISIBILITY					
Objectives	Action Steps	Cost	Committee/Person Responsible	Measure of Success	Progress/Status
Increase community awareness of the chapter	A. Identify and participate in community-wide events that showcase ALTA	0	Marketing committee	List of events attended	Volunteer Fair NCCU and NCSU
	B. Make four (4) presentation for Speaker's Bureau annually	0	Speaker's Bureau Chair	List of presentations made	Union Baptist Church, Beaverdam Elementart School, NCCU, Hayes Barton Baptist Church

III. GOAL: EXPAND PUBLIC VISIBILITY

Objectives	Action Steps	Cost	Committee/Person Responsible	Measure of Success	Progress/Status
	C. Identify two (2) public awards to showcase ALTA	0	Awards Chair Marketing Chair	Number of recognized awards	Applications submitted for award.
	D. Continue to refine marketing committee roles and function (Thrift Shop, Programs)	0	Marketing Chair Thrift Shop advertising committee	Written defined roles	Membership flyer created
	E. Evaluate current and new advertising for value	0	Thrift Shop Manager Marketing committee	List of contacts	Carolina Dance Theater, newspaper ads. wall display.
	F. Explore Public Service Announcement opportunities	0	Marketing Committee	List of costs/value of advertising	TV coverage, Press releases local media ,Marketing grant IBM
	G. Expand distribution of Community Link	0	Community Link Chair	Number of recipients	added 10 to 15 recipients
	H. Expand Social Media presence	0	Social Media Chair Thrift Shop Advertising manager	List of what media we continue to use	YELP, Facebook, and Instagram
	I. Investigate opportunities for Triangle visibility	0	Marketing committee Membership committee	List of Contacts	Barnes and Noble Holiday Wrapping, Capitol Bank,
	J. Prepare publicity packages with current information	\$	Speakers Bureau Marketing committee Thrift Shop Advertising committee	Packages ready to use	Updated and ready to use.

IV. GOAL: ENSURE FISCAL STABILITY

Objective	Action Steps	Cost	Committee/Person Responsible	Measures of Success	Progress/Status
1. Improve Thrift Shop Profitability	A. Expand procurement opportunities	0	Procurement Chair	New Contacts Shop Donations	
	B. Increase gross income by 5% annually	0	Shop Bookkeeper	Thrift Shop Sales	
	C. Determine if our current space is adequate to meet our financial goals.	0	Facility Planning and Strategic Planning Chairs	Recommendations to the Strategic Planning Committee	
	D. Investigate options to buy or lease and why, including location and funding options if membership supports any changes upon lease expiration in March 31, 2019	0	Facility Planning and Strategic Planning Chairs	Recommendations to the Strategic Planning Committee	
2. Improve Thrift Shop Operation	A. Fill 75% of time slots for upcoming week and 50% for following week by end of current week	0	Thrift Shop Scheduler	Thrift Shop Schedule	
	B. Mentor training for cashiers and pricers	0	Bookkeeper and Pricing Manager	Need to add measure	
	C. Bi-annual review training for cashiers	0	Bookkeeper	90% of participation	
	D. Increase membership working in shop to 75%	0	Shop Manager VP Membership Scheduler	Thrift Shop Schedule and sign-in sheet	
3. Increase financial support through Funds and Grants (F & G)	A. Submit three new viable applications annually	0	F & G Chair	List of contributors	
	B. Increase F&G by 3% each year	0	F & G Chair	Financial records	

IV. GOAL: ENSURE FISCAL STABILITY					
Objective	Action Steps	Cost	Committee/Person Responsible	Measures of Success	Progress/Status
4. Expand Open Your Heart (OYH)	A. Identify outside sources annually	0	OYH Chair, VP Resource Development	Donors list	
	B. Increase OYH campaign by 3% each year	0	OYH Chair	Financial records	
	C. Investigate email invitations		OYH Chair	List of donations	

V. GOAL: DEVELOP AND MAINTAIN STRONG ADMINISTRATION					
Objective	Action Steps	Cost	Committee/Person Responsible	Measures of Success	Progress/Status
1. Education of current Board and Committee Chairs	A. Develop and Implement Board and Appointed Committee Chair Training Module	0	President, President Emeritus Group (PEG)	Scheduled training, planning, videos	
	B. Outgoing chairs to review Procedure Books by June each yr.	0	Outgoing committee chairs	Scheduled session	
	C. Engage Advisory Council members in committee work	0	President-Elect, Committee Chairs, Board Members	Advisory Council involvement	
	D. Investigate regional training/meeting and arrange meeting	\$	Board Members to create committee to identify topics that will attract participation	Report	
	E. Increase use of technology to become more efficient	0	Board Members, Information Technology Chair	Training session Growing usage of database & other tools	
2. Maintain a good working relationship with National	A. Prepare for NAL Site Visit in Spring 2020 and complete NAL Guidelines Review	\$	Board Members, Committee Chairs, President	NAL Report	

V. GOAL: DEVELOP AND MAINTAIN STRONG ADMINISTRATION					
Objective	Action Steps	Cost	Committee/Person Responsible	Measures of Success	Progress/Status
Assistance League (NAL)	B. Develop relationship with NAL Board consultants	0	Board Members	Identify and contact NAL Consultants	
	C. Share highlights of NAL review with all members	0	President	Report to membership	
3. Continue to develop strong leadership internally	A. Mentor new Board Members	0	President, PEG	Establish mentor & mentee relationships	
	B. Identify and educate potential leaders	0	Board Members, PEG	Percentage increase new leaders	
	C. Establish a succession plan	0	Committee Chairs Vice Chairs	Document Vice Chair	
4. Establish cohesive Information Management system	A. Establish and maintain data storage system	0	Secretary, Information Management Chair	Consolidate to one database system	
	B. Research and approve digital storage locations such as cloud storage	0	Board, Secretary, Information Management Chair		
	C. Standardize reporting of inventory, service hours and chapter data	0	Secretary, Committee Chairs	Technology usage in new database	
5. Recruit strong and increase the number of Advisory Council members	A. Increase members on Advisory Council to represent all areas of chapter operations	0	President-Elect, Board Members	One new advisory council member	
	Skill set needed in advisory council members	0	Board Members	?	
6. Determine the optimum size of Board	Investigate and recommend the number of Board members	0	PEG, Bylaws Committee, Placement Chair	Complete slate of officers	