



Three-Year Strategic Plan

March 2021

As we look ahead to the next three years, we believe that Able to Serve is poised for growth. In order to maximize this opportunity, we recognized the need for a straightforward and executable strategic plan. This plan begins with an optimistic **vision** for the future. It includes a commitment to our **mission** at all levels of the organization. It clearly states the key **objectives** that we have identified that will move us in the direction of fulfilling our mission, followed by the **strategies** that are vital in the process of achieving those goals. Finally, we have included tactics — which are the individual tasks that are make up our strategy.

VISION & MISSION STATEMENTS

VISION

We envision a world where people with disabilities are reaching their potential in a community where they are valued and accepted.

MISSION

We exist to equip adults with disabilities to be independent and connect them with opportunities to serve others in their community.

OBJECTIVES

Objectives are the specific goals we want to accomplish within the next three years. They help us define what success will look like by the end of 2023.

- Become the premier organization that serves adults with disabilities in Wake and Johnston County
- Become the go-to organization that provides a seamless transition for adults with disabilities who are exiting high school.
- Provide the best-in-class day program (in-person and online) for adults with disabilities.
- Increase the number of participants in the program to 80 by the end of 2023.
- Grow revenue up to \$650,000 by the end of 2023 to accommodate participant growth.

STRATEGIES

Strategies are the overarching actions that we will take to achieve our objectives.

Objective: To be the premier organization that serves adults with disabilities in Wake and Johnston County

- Expand exposure in the community
- Marketing: Upgrade design of all printed collateral / Make improvements to website
- Secure external validation
- Ensure management controls, policies, and procedures are documented and that we are in compliance with all legal & regulatory requirements
- Establish succession plan / executive team

Objective: To be the go-to organization that provides a seamless transition for adults with disabilities who are exiting high school

- Educate schools and parents regarding the opportunity and benefit of transition
- Identify and build relationships with key decision-makers at county and school level
- Increase exposure among families with students with disabilities

Objective: To provide the best-in-class day program (in-person and online) for adults with disabilities

- Increase relational engagement with families/participants
- Establish a case for being best-in-class
- Create plan to implement online components of curriculum and program activities

Objective: Increase our capacity to effectively serve up to 80 participants by the end of 2023

- Acquire additional space and upfit for expansion and satisfy necessary infrastructure to accommodate 80 participants (budget, staffing, etc)

Objective: Grow revenue up to \$650,000 by the end of 2023 to accommodate participant growth

- Expand church partnerships
- Expand ATS network of new prospective donors
- Create a compelling framework for communicating cost vs fundraising
- Put together a plan for moving followers/donors to the next level of engagement
- Feature the full five-day program when presenting to families to increase fee-for-service revenue

TACTICS

Tactics are the individual tasks that make up our strategy — providing a clearly defined roadmap for fulfilling our strategies and accomplishing our objectives. No matter how good the strategy, the plan will certainly fail without solid tactics that provide accountability along with the execution of those tasks.

Objective: To be the premier organization that serves adults with disabilities in Wake and Johnston County

Strategy	Tactic	Person Responsible	Due Date
Expand exposure in the community	Put together plan for reaching out to faith community and civic organizations	Carlton	
	Create slide deck/presentation for churches/civic organizations	Carlton/Bill	5/1
Marketing: Upgrade design of all printed collateral / Make improvements to website	Write founder's story and post on website	Carlton	
	Produce video that tells the founding story	Carlton	
	Add program components to website	Bill	
	Redesign parents' packet & brochures	Amber/Bill	4/1/21
	Implement GiveCloud online donation/campaign pages	Jerry/Bill	5/1/21
	Prioritize list of collateral	Amber/Bill	
	Quarterly review of website to maintain high-quality online design	Carlton/Bill	
	Clarify/specify target audiences & ensure marketing plan/materials for each (donor/volunteers - families/participants)		

Secure external validation	Secure Guidestar Platinum status		
	Secure association with NCCDD (North Carolina Council On Developmental Disabilities)		
	Explore options for financial audit		
	NY2 Accreditation for curriculum		
Ensure management controls, policies, and procedures are documented and that we are in compliance with all legal & regulatory requirements	Develop process, procedures, policies for 100% of Finance	Jerry	Jun-23
	Develop process, procedures, policies for 90% of Admin	Carlton/Amber/Jerry	Dec-23
	Develop process, procedures, policies for 90% of Program	Amber/Carlton	Dec-23
	Ensure legal compliance	Carlton/Jerry	23-Dec
	Complete successful external financial audit by year 2023	Carlton/Jerry	Dec-23
Establish succession plan / executive team	Identify executive roles that may be filled in the next three years	Carlton/Jerry/Bill	
	Put together a staffing plan that aligns with the strategic plan (including identifying current staff members who could fulfill leadership roles and gaps...)	Carlton/Jerry/Bill	
	Implement executive committee as part of the board of directors & engage in exploring executive roles that need to be filled		

Objective: To be the go-to organization that provides a seamless transition for adults with disabilities who are exiting high school

Strategy	Tactic	Person Responsible	Due Date
Educate schools and parents regarding the opportunity and benefit of transition	Develop list of local high schools and establish relationships with key leaders	Carlton	12/21
	Create a plan for educating parents based on input from school teachers/administrators	Carlton	12/21
	Develop brochure/materials specific to transition out of high school	Carlton/Bill	12/21
Identify and build relationships with key decision-makers at county and school level	Increase exposure (decision-makers at school districts, teaching sororities, etc)		
	Put together a plan for targeting key decision-makers		
	Share success stories		
Increase exposure among families with students with disabilities	Establish ATS as subject-matter experts in the field of adults with disabilities by developing a social media community for families with students with disabilities		
	Develop a network for home school groups		
	Develop mini-curriculum components (e.g., one-page activities) to share resources with these networks		

Objective: To provide the best-in-class day program (in-person and online) for adults with disabilities

Strategy	Tactic	Person Responsible	Due Date
Increase relational engagement with families/participants	Put together a plan for recognizing important dates/milestones (anniversary dates, birthdays, etc)		
	Establish creative ways of introducing current families/participants to new families		
	Explore options for some type of family directory		
	Develop plan for quarterly Zoom sessions with families		
Establish a case for being best-in-class	Identify and establish best practices for the delivery of each component of the program		
	Implement high-quality curriculum and...improving teacher training and delivery		
	Continue with our commitment to and focus on transportation, travel, community engagement		
	Establish process for teachers to be certified in curriculum		
Create plan to implement online components of curriculum and program activities	Engage team of staff/volunteers who can execute on plan to implement online sessions		
	Establish plan for video recording specific sessions of curriculum and activities		

Objective: Increase our capacity to effectively serve up to 80 participants by the end of 2023

Strategy	Tactic	Person Responsible	Due Date
Acquire additional space and upfit for expansion and satisfy necessary infrastructure to accommodate 80 participants (budget, staffing, etc)	Carlton to present proposal to the church		
	Explore options for a different location that provides more space for growth		
	Buy additional licenses for curriculum		
	Get program budget approval for infrastructure		

Objective: Grow revenue up to \$650,000 by the end of 2023 to accommodate participant growth

Strategy	Tactic	Person Responsible	Due Date
Expand church partnerships	Establish plan to identify and engage churches with the ATS mission		
	Put together a document/brochure that specifies what a partnership with ATS looks like		
Expand ATS network of new prospective donors	Develop welcome email series		
	Increase exposure through Chamber of Commerce		
	Create direct mail campaign to drive traffic to new GiveCloud system		
	Create plan for asking volunteers to become donors		
Create a compelling framework for communicating cost vs fundraising	Implement cost/fundraising breakdown into parents packet, and include on website and annual report		
	Clearly communicate to donors how their money is invested		
Put together a plan for moving followers/donors to the next level of engagement	Establish dollar amounts for giving levels		
	Mid-level to major donors		
	Upgrade major donors each year		
	Design a major donor strategy (how to present to them and how to cultivate relationships)		
	Feature "Able to Give" more prominently as a monthly giving campaign		
	Replace \$20k revenue loss from		

	canceling 2021 golf tournament		
Feature the full five-day program when presenting to families to increase fee-for-service revenue	Emphasize five-day benefits during parent presentations and in welcome packet	Amber/Bill	