Creating a Tipping Point for Early Childhood

2018–2023 Strategic Plan

A transformational investment has allowed the Ounce to contemplate strategies to help the early childhood field reach a “tipping point” at which access to high-quality early learning experiences might be attainable for all of the 5.3 million young children living in poverty in the United States. With an aim of impacting 25% of this population over the next five years, the Ounce believes it can help shift the landscape of early childhood in communities and states and generate momentum for change throughout the nation.

We believe that widespread commitment to early education requires a field that holds a common vision for the desired outcomes, pathways to achieve them, and metrics that indicate success. With unparalleled grounding in program, policy, and research, the Ounce is uniquely positioned to lead a collective and dynamic effort to share knowledge, foster innovation, amplify excellence, and accelerate change. We plan to launch an Early Childhood Knowledge Navigator in partnership with others who share our vision of weaving disparate initiatives, programs, and expertise into a collective resource that can bring coherence and unity to a fragmented field.

Our work over the past decade to transfer knowledge through coaching and solution development leads us to appreciate that no individual program, operating in isolation, can provide socially significant impact at scale. Decades of work in Illinois demonstrate that systems change is essential to creating sustainable, comprehensive supports for children and families. Insights from customers, partners and funders help us to appreciate the need for tailored consultation to institutionalize quality programs in local settings.

We cannot bridge the gap between what we know children and families need and the resources and capacity currently available to serve them without an exponential increase in the pace of experimentation, the quantity of sophisticated community change efforts and the accumulation of evidence. Absent a clear hub for inquiry, improvement, and know-how, there is limited ability in communities to synthesize and integrate knowledge for decision making and to provide “roadmaps” for leaders of systems to implement effective early childhood services for children at scale. We believe that the Navigator can support rapid improvement in program quality and systems development and drive the field toward common metrics, helping all stakeholders unify around a clear ask for policymakers.

The Ounce brings to the Navigator an interdisciplinary perspective, on-the-ground expertise, and a distinct point of view focused on continuous quality improvement, appreciation for the organizing conditions that promote excellence, and a commitment to genuine partnership with parents. We have amassed expertise about what leaders at all levels—from the classroom to the statehouse—need to believe, know, and do in order to deliver outcomes and sustain systemic improvement.

We recognize that these complex issues are too large for any single organization to solve alone. We aim to serve as a steward of the Navigator as a public good, actively listening and continually learning alongside
our colleagues, assessing needs, and co-creating solutions. We are confident in all that we know about what matters most for children, families, professionals, and systems leaders, but we are approaching this work with humility, outlining an agenda for learning, assessing, and growing our capabilities to deliver on what the field needs from a Navigator. We expect to offer our own solutions to the field alongside those created by others.

The Ounce of 2023 will continue to build expertise from the foundational program and policy work that requires excellence every day. We will have built a strong capacity for innovation, solution development, refinement and delivery and reorganized our existing work to support the Navigator effort. We will have curated our internal expertise before building this capacity for others, and we will continue to attract the most diverse, outstanding talent in our field. We will have the financial and technological foundation to support a national connector role and will have developed metrics in partnership with others to prove that more young children living in poverty are entering kindergarten ready to succeed in school and life.

**Vision**

High-quality early learning opportunities from birth that prepare children for success in school and in life are an integral part of our nation's education system.

**Mission**

The Ounce of Prevention Fund gives children in poverty the best chance for success in school and in life by advocating for and providing the highest quality care and education from birth to age 5.

**Five-Year Impact Goal**

Twenty-five percent of young children living in poverty have high-quality early learning experiences.

**2018-2023 Strategic Goals**

1. **Positioning & Value:** We transform the early childhood field’s ability to deliver quality at scale by generating knowledge, deploying solutions and expertise, maturing systems, and navigating the field toward a cohesive vision.

2. **Impact & Sustainability:** We demonstrate our impact on children and families and build a broad and sustainable base of support for the Ounce and our mission.

3. **People & Process:** We are an effective organization that attracts, develops, and retains talented individuals who are leaders, facilitators, and connectors of people, ideas, and resources.

4. **Technology & Architecture:** We have the technological infrastructure and capabilities to support exceptional execution.

5. **Culture & Commitments:** We live our core values and serve our customers with passion, humility and integrity.
### Strategic Goal 1: Positioning & Value

*We transform the early childhood field's ability to deliver quality at scale by generating knowledge, deploying solutions and expertise, maturing systems, and navigating the field toward a cohesive vision.*

<table>
<thead>
<tr>
<th>Objectives:</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.1</td>
</tr>
<tr>
<td>1.2</td>
</tr>
<tr>
<td>1.3</td>
</tr>
<tr>
<td>1.4</td>
</tr>
<tr>
<td>1.5</td>
</tr>
<tr>
<td>1.6</td>
</tr>
</tbody>
</table>

### Strategic Goal 2: Impact & Sustainability

*We demonstrate our impact on children and families and build a broad and sustainable base of support for the Ounce and our mission.*

<table>
<thead>
<tr>
<th>Objectives:</th>
</tr>
</thead>
<tbody>
<tr>
<td>2.1</td>
</tr>
<tr>
<td>2.2</td>
</tr>
<tr>
<td>2.3</td>
</tr>
</tbody>
</table>
Strategic Goal 3: People & Process
We are an effective organization that attracts, develops, and retains talented individuals who are leaders, facilitators, and connectors of people, ideas, and resources.

Objectives:

3.1 Build an organizational structure that supports our strategic direction with clear and transparent governance and decision making

3.2 Create the organizational climate, conditions and structures that support shared ownership, learning, and collaboration

3.3 Use robust customer feedback tools, processes, and forums to guide our work and improve customer experience

3.4 Enhance employee career pathing and staff development plans

3.5 Continue to develop Board expertise that aligns with our strategic direction

Strategic Goal 4: Technology & Architecture
We have the technological infrastructure and capabilities to support exceptional execution.

Objectives:

4.1 Efficiently and effectively manage our core operations and resources

4.2 Provide easy access to high-quality, single-truth data

4.3 Prepare and catalog knowledge assets to support the Navigator

4.4 Provide a personalized self-guided experience for our customers

Strategic Goal 5: Culture & Commitments
We live our core values and serve our customers with passion, humility and integrity.

Objectives:

5.1 Live our core values through our behaviors in our work with each other and with our customers, partners, and funders

5.2 Exemplify the Ounce leadership brand, model core values and behaviors, and instill accountability for continued personal and staff development

5.3 Share information, insights and resources internally and externally with urgency
How We Will Measure Our Progress: **Key Performance Indicators**

<table>
<thead>
<tr>
<th>KPI</th>
<th>Metric</th>
<th>Data Availability</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Field Impact</strong></td>
<td>% of young children living in poverty with high quality early learning experiences</td>
<td>X</td>
</tr>
<tr>
<td><strong>Direct Reach</strong></td>
<td># children</td>
<td>✓+</td>
</tr>
<tr>
<td></td>
<td># professionals</td>
<td>✓+</td>
</tr>
<tr>
<td></td>
<td># systems</td>
<td>✓+</td>
</tr>
<tr>
<td><strong>Quality &amp; Outcomes</strong></td>
<td>Child outcomes (kindergarten entry assessment)</td>
<td>X</td>
</tr>
<tr>
<td></td>
<td>Professional outcomes (program quality: CLASS, Early Ed Essentials, HVPQRT, HOVRS)</td>
<td>✓</td>
</tr>
<tr>
<td></td>
<td>Systems (Systems Improvement Index)</td>
<td>X</td>
</tr>
<tr>
<td><strong>Navigator Adoption</strong></td>
<td>Internal and external utilization of the Navigator platform</td>
<td>✓</td>
</tr>
<tr>
<td><strong>Knowledge Curation</strong></td>
<td>Quality and quantity of knowledge curation</td>
<td>✓</td>
</tr>
<tr>
<td><strong>Customer Experience</strong></td>
<td>Trend in customer experience score</td>
<td>X</td>
</tr>
<tr>
<td><strong>Reach through Technology</strong></td>
<td>Trend and reach of families and professionals utilizing Ounce technology</td>
<td>✓</td>
</tr>
<tr>
<td><strong>Brand Awareness</strong></td>
<td>Survey results re: brand awareness and key leadership attributes</td>
<td>✓</td>
</tr>
<tr>
<td><strong>Financial Health</strong></td>
<td>Actual revenue and expenses compared to budget for the organization</td>
<td>✓+</td>
</tr>
<tr>
<td><strong>Funding Diversification</strong></td>
<td>Trend in funds by source (private, public, earned income)</td>
<td>✓+</td>
</tr>
<tr>
<td><strong>Open Key Positions &amp; Vacancy Rate</strong></td>
<td># and duration of open key positions</td>
<td>✓+</td>
</tr>
<tr>
<td></td>
<td>Open positions out of total positions</td>
<td>✓+</td>
</tr>
<tr>
<td><strong>Employee Satisfaction</strong></td>
<td>Trend in employee satisfaction scores</td>
<td>✓+</td>
</tr>
<tr>
<td></td>
<td>Trend of employee reasons for leaving the Ounce</td>
<td>✓+</td>
</tr>
</tbody>
</table>
APPENDIX 1: FY19 Action Plan

Strategic Goal 1: Positioning & Value

We transform the early childhood field’s ability to deliver quality at scale by generating knowledge, deploying solutions and expertise, maturing systems, and navigating the field toward a cohesive vision.

1.1 Ensure the best outcomes for children and families through continuous quality improvement of our direct work

1.1.1 Deliver excellent program and professional development, as evidenced by child outcomes

1.1.2 Maintain and grow the early childhood system in Illinois through advocacy and policy development, as evidenced by policy changes and funding levels

1.1.3 Enhance the federal investment in high-quality early childhood programs and explore new strategies to broaden support for early childhood through advocacy, communications, and coalition-building

1.2 Continuously develop early childhood expertise through best-in-class advocacy, professional development, research, and program delivery that is coherent and leveraged internally and externally

1.2.1 Enhance the quality of our direct service, professional development, policy, and research programs through inquiry, collaboration, and continuous improvement cycles that lead to innovative projects, partnerships, and program improvements

1.2.2 Pilot an Ounce-wide innovation fund that allows for release time to explore employee-driven initiatives and support early-stage development of promising ideas

1.2.3 Build a market research and analysis function to more quickly and accurately assess the need and potential for emerging solutions

1.2.4 Fully implement a stage gate process that quickly and consistently drives emerging solution from ideation to commercialization

1.2.5 Document and share learnings rapidly with the field by expanding the quantity of presentations, publications, social media engagement, and media mentions highlighting Ounce expertise

1.3 Expand adoption of Ounce solutions aimed at the most powerful levers for quality improvement

1.3.1 Build a common infrastructure (people, processes) to manage a portfolio of Ounce solutions and support consistent and coordinated approaches to business strategy, business development, solution refinement, operations, and delivery

1.3.2 Identify potential customers and purchasers of Ounce solutions in target geographies, assess their needs, and secure partnerships

1.3.3 Develop a plan and begin to align content of existing solutions so that they can be sequenced and packaged to meet a variety of customer needs

1.3.4 Articulate a multi-year learning agenda for the Ounce’s solutions portfolio to inform solution refinement, improvements in delivery, and go-to-market strategy
1.4 Launch the Early Childhood Knowledge Navigator to foster more innovation, connection, and learning for greater impact across the early childhood field

1.4.1 Curate the Ounce's collective knowledge, aligning and sharing expertise and practices across divisions and functions

1.4.2 Curate the solutions generated by members of the Educare Learning Network, enhance its virtual peer learning and leadership capabilities, and amplify its collective learnings inside and outside of the Network

1.4.3 Pursue near-term opportunities and form partnerships and bring navigator capabilities to the home visiting field

1.4.4 Convene funders, thought leaders, and leading practitioners in a “Wingspread”-style meeting to generate consensus, momentum, and commitment to launching the Navigator

1.4.5 Develop the full prospectus for the Early Childhood Knowledge Navigator, including its value proposition, content, service offerings, initial capabilities, learning agenda, and success metrics—as well as implications for and relationship to the Ounce's current portfolio

1.5 Build the capacity of targeted community and state systems to deliver and sustain high-quality early learning experiences

1.5.1 Build the interdisciplinary (program, policy, research) consultation practice to navigate systems leaders to solutions by developing our methodology, tools, and cost models

1.5.2 Begin to explore and form partnerships in the Ounce’s priority markets

1.5.3 Engage policy and research partners to launch development of a system improvement index to measure the impact of our work in communities and state

1.6 Grow recognition in the early childhood field of the Ounce’s contributions as an innovator and thought leader

1.6.1 Develop and implement methodology and process to measure awareness and other key metrics among the field

1.6.2 Clarify target audiences, craft messaging, and identify tactics to achieve greater reach

Strategic Goal 2: Impact & Sustainability

*We demonstrate our impact on children and families and build a broad and sustainable base of support for the Ounce and our mission.*

2.1 Track progress in achieving our 2023 strategic vision through a defined set of impact, operational and financial metrics

2.1.1 Pilot and refine key performance indicators, assigning clear ownership and developing a standardized dashboard

2.1.2 Pilot and refine management metrics and align annual operating plans around them
2.2 Broaden the base of support for the Ounce and its mission
   2.2.1 Develop an annual and multi-year marketing and communication plan
   2.2.2 Implement a process to routinely measure awareness of the Ounce among potential investors, key stakeholders
   2.2.3 Refresh website to focus on key audiences professionals and prospective donors with specific pathways to engage them to take action
   2.2.4 Develop email marketing program to cultivate donors and convert individuals constituents to donors
   2.2.5 Broaden donor acquisition capabilities, focusing on search and lead generation
   2.2.6 Align social media program to support online giving strategy

2.3 Develop a sustainable funding model, increasing revenue to make necessary investments to achieve our 2023 strategic vision
   2.3.1 Develop organization fundraising campaign and master case for support
   2.3.2 Increase number of constituents and donors actively engaging with the Ounce
   2.3.3 Develop cause marketing strategy to attract corporate partners to join the Ounce in activating the public in support of early childhood education

Strategic Goal 3: People & Processes

We are an effective organization that attracts, develops, and retains talented individuals who are leaders, facilitators, and connectors of people, ideas, and resources.

3.1 Build an organizational structure that supports our strategic direction with clear and transparent governance and decision-making
   3.1.1 Hire and transition key roles with new job descriptions, supervisory structures, and accountabilities
   3.1.2 Implement RAPID decision making processes across the organization to clarify governance and accountability
   3.1.3 Hire and onboard open leadership positions; develop near-term recruiting plans for additional key capability needs
   3.1.4 Establish change management as a way of working, with leadership, goals, metrics, processes, and timelines

3.2 Create the organizational climate, conditions and structures that support shared ownership, learning, and collaboration
   3.2.1 Implement project management processes, practices, and tools to achieve effective work planning and efficient resource allocation
   3.2.2 Establish governance and leadership and roll out hub and spoke teaming
3.3  **Use robust customer feedback tools, processes, and forums to guide our work and improve customer experience**

3.3.1  Define customer feedback objectives, and design effective tools and processes to support regular feedback
3.3.2  Integrate customer voice into organizational processes
3.3.3  Train and support staff to exhibit customer-centric behaviors throughout their work

3.4  **Establish employee career pathing and staff development plans**

3.4.1  Develop a capability model and learning and development plan that fosters skill/ discipline and leadership development, and that aligns with career progression paths
3.4.2  Identify the critical performance attributes required to achieve our vision and reflect them in performance review process
3.4.3  Reassess and adjust our compensation philosophy and structure
3.4.4  Identify critical personnel and develop strategies to retain; create framework and process for succession planning

3.5  **Continue to develop board expertise that aligns with our strategic direction**

3.5.1  Explore realigning or adding board committees to strategic objectives
3.5.2  Prioritize board capacity in field expertise, technology, marketing and org effectiveness
3.5.3  Explore board membership from targeted geographic areas

---

**(Strategic Goal 4: Technology & Architecture)**

*We have the technological infrastructure and capabilities to support exceptional execution toward our goals.*

4.1  **Efficiently and effectively manage core operations and resources**

4.1.1  Upgrade core finance technology platform
4.1.2  Develop new process for budgeting and forecasting to allow for improved data availability on budget use and alignment to funding
4.1.3  Decommission salary database due to functionality handled within core systems after Navision upgrade
4.1.4  Inventory existing and future-state finance and core operations processes in order to establish improvement plan
4.1.5  Implement an improved HR & payroll system

4.2  **Provide easy access to high-quality, single-truth data**

4.2.1  Define data strategy, governance process, owners/stewards, and research capability
4.2.2  Confirm integration layer technology and establish high priority integrations
4.2.3  Build data model to allow for capture and analysis of critical data elements needed for operational metrics
4.2.4  Clean and review quality of SalesForce and Cornerstone OnDemand
4.2.5  Integrate Qualtrics and SalesForce
4.3 Prepare and catalog knowledge assets to support the Navigator
   4.3.1 Define knowledge management strategy
   4.3.2 Develop taxonomy which describes the possible domain of values to tag assets for searchability and reusability
   4.3.3 Create knowledge management processes and define owners
   4.3.4 Collect all production ready (i.e. published, marketable) assets
   4.3.5 Store and tag all production ready assets in current knowledge management solution

4.4 Provide a personalized self-guided experience for our customers
   4.4.1 Create a profile for each customer type
   4.4.2 Create customer experience maps for initial target customers
   4.4.3 Redesign customer interfaces

Strategic Goal 5: Culture & Commitments

We live our core values and serve our customers with passion, humility and integrity.

5.1 Live our core values through our behaviors in our work with each other and with our customers, partners, and funders
   5.1.1 Identify behaviors aligned to our core values and integrate them into our performance management system
   5.1.2 Establish annual pulse survey to measure progress toward living our core values

5.2 Exemplify the Ounce leadership brand, model core values and behaviors, and instill accountability for continued personal and staff development
   5.2.1 Establish an ongoing leadership development program that strengthens leaders' ability to develop trusting relationships with peers and staff
   5.2.2 Develop a set of leadership expectations aligned with our leadership brand
   5.2.3 Complete 360 reviews of executive staff

5.3 Share information, insights, and resources in a timely and effective manner
   5.3.1 Follow an organizational communication roadmap and protocol that ensures regular and timely communication with staff
APPENDIX 2: Target Geographies

The map illustrates the target geographies for OUNCE's 2018–2023 Strategic Plan, highlighting states with the highest numbers of young children living in poverty. The states are color-coded to indicate priority regions for transforming systems.

### Table: Target Geographies

<table>
<thead>
<tr>
<th>State</th>
<th>TX</th>
<th>IL</th>
<th>GA</th>
<th>MI</th>
<th>TN</th>
<th>LA</th>
<th>WA</th>
<th>AR</th>
<th>OR</th>
<th>NE</th>
</tr>
</thead>
<tbody>
<tr>
<td># Young Children Living in Poverty</td>
<td>609,947</td>
<td>201,522</td>
<td>226,825</td>
<td>177,002</td>
<td>137,539</td>
<td>111,160</td>
<td>93,396</td>
<td>68,701</td>
<td>63,962</td>
<td>30,277</td>
</tr>
</tbody>
</table>

### Total

<table>
<thead>
<tr>
<th>Total</th>
<th>% of 5.3M</th>
</tr>
</thead>
<tbody>
<tr>
<td>1,720,331</td>
<td>32%</td>
</tr>
</tbody>
</table>
APPENDIX 3: Key Investment Areas and Projected Costs

$78.1M in new investments would allow us to reach 25% of children living in poverty by:

- Continuing the momentum of our current strategic plan
- Accelerating impact through new and expanded initiatives
- Building the infrastructure needed to support and sustain the work
- Growing fundraising and marketing capacity to sustain significant increases in private donations

<table>
<thead>
<tr>
<th></th>
<th>FY19 Total</th>
<th>FY20-23 Total</th>
<th>5-Year Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Navigator - People and Technology</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Navigator Capacity</td>
<td>1,600,000</td>
<td>17,100,000</td>
<td>18,700,000</td>
</tr>
<tr>
<td>Consultation</td>
<td>300,000</td>
<td>2,000,000</td>
<td>2,300,000</td>
</tr>
<tr>
<td>Subtotal</td>
<td>1,900,000</td>
<td>19,100,000</td>
<td>21,000,000</td>
</tr>
<tr>
<td>Solution Innovation, Development and Scaling</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Innovation</td>
<td>-</td>
<td>3,700,000</td>
<td>3,700,000</td>
</tr>
<tr>
<td>Scaling Solutions</td>
<td>3,000,000</td>
<td>22,000,000</td>
<td>25,000,000</td>
</tr>
<tr>
<td>Solution Development</td>
<td>600,000</td>
<td>2,500,000</td>
<td>3,100,000</td>
</tr>
<tr>
<td>Subtotal</td>
<td>3,600,000</td>
<td>28,200,000</td>
<td>31,800,000</td>
</tr>
<tr>
<td>Marketing, Development, IT, People &amp; Finance</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Marketing</td>
<td>1,000,000</td>
<td>9,000,000</td>
<td>10,000,000</td>
</tr>
<tr>
<td>Development</td>
<td>600,000</td>
<td>5,200,000</td>
<td>5,800,000</td>
</tr>
<tr>
<td>IT, Talent Management &amp; Finance</td>
<td>1,400,000</td>
<td>8,100,000</td>
<td>9,500,000</td>
</tr>
<tr>
<td>Subtotal</td>
<td>3,000,000</td>
<td>22,300,000</td>
<td>25,300,000</td>
</tr>
<tr>
<td>Strategic Plan Investment Total</td>
<td>8,500,000</td>
<td>69,600,000</td>
<td>78,100,000</td>
</tr>
<tr>
<td>Current Private Revenue Goal*</td>
<td>28,000,000</td>
<td>112,000,000</td>
<td>140,000,000</td>
</tr>
</tbody>
</table>

* This represents the FY18 private revenue level, extrapolated for additional years.