

GOAL I. INCREASE ADVOCACY FOR UPWARD TRANSITIONS

Strategy: Increase internal brand awareness

Objectives

- Create brand sheet for board
- Compose UT elevator speech card

Strategy: Increase engagement with new contacts

Objectives

- Each board member open 2 doors
- Develop relationships with community influencers

GOAL II. INCREASE & DIVERSIFY SUSTAINABLE FUNDING

Strategy: Diversify sustainable funding through relationship building

Objectives

- Attract & cultivate 5 donors over \$2,500
- BOD promote UT to employer
- Nurture UT Circle of Hope donor relationships

Strategy: Expand funding reach to targeted demographics & donors

Objectives

- Expand brand to reach males & millennials
- Develop corporate donor campaign
- BOD hold UT in top 3 giving

GOAL III. STRENGTHEN COMMUNITY PARTNERSHIPS

Strategy: Engage in reciprocal sharing of partner resources

Objectives

- Define what "Partner" means & requirements
- Nurture four (4) community partnerships
- Create processes outline & training

GOAL IV. UPDATE MARKETING PLAN

Strategy: Update marketing plan to align with organizational goals

Objectives

- Streamline marketing efforts to greater efficiency
- Promote importance of homeless prevention
- Develop new & updated client stories
- Develop Plan B for events

Strategy: Develop campaigns & projects to achieve organizational objectives

Objectives

- Strategically leverage social media platforms
- Design infographics
- Add graphic intern
- Add ad agency partner

GOAL V. DEVELOP 100-YEAR ANNIVERSARY EVENT PLAN

Strategy: Coordinate event with community leaders

Objectives

- Recruit community members to planning committee
- Assign board & staff members to support committee
- Recruit in-kind & financial sponsors for event
- Coordinate with Travelers Aid International

Strategy: Collect & present historical data to tell today's UT story

Objectives

- Research city archives for historical documents
- Digitize historical archives
- Assign staff leader to own the effort
- Schedule volunteers to scan historical documents
- Create a visual, digital timeline



Upward Transitions (UT)

Strategic Plan

FY2022

Goals

I. Increase advocacy for our organization

Advocacy is the main driver to increase brand awareness. When we improve internal brand awareness through education and equipping, it builds the confidence of the staff and board of directors to advocate for our strategic goals and encourages them to become ambassadors of our mission. To equip our internal members is to expand our advocacy pathways exponentially.

Strategy: Increase internal brand awareness

Objectives

- a. Create a brand sheet for board and staff that categorizes our collaborative relationships and services based on client needs served
- b. Compose a UT elevator speech for board and staff for print on a credit card sized for easy access

Strategy: Increase our engagement with new contacts

Objectives

- a. Request each board member to open two doors for a UT presentation or coffee conversation
- b. Develop relationships with a targeted list of community influencers

As we move toward greater advocacy, we pause to evaluate the roadblocks or the weaknesses within our organization that has the potential to thwart our momentum.

Lack of Engagement. Engagement is foundational for successful advocacy. If our internal members possess poor engagement toward fulfilling the mission of Upward Transitions, we must revisit the “Why” we are involved.

Lack of Knowledge. Becoming knowledgeable on the processes of client assistance, our core strengths, our effectiveness, and the goals of the organization all support the equipping of our internal members to tell our story and share our mission.

The UT Governance Committee is responsible for the development of board members and the monitoring of their performance. UT’s CEO and Director of Development and Public Relations provide institutional knowledge and support to the Governance Committee and board members.



II. Increase and diversify sustainable funding

The ever-standing goal of increasing and diversifying sustainable funding support is affected each year by donor mood, markets, and relationship building ... and even pandemics. We are challenged to keep what strategies are working and dispose of the ones that are not; all the while keeping up with the latest trends in donor behavior to implement into the mix of development, marketing, and communication initiatives.

Strategy: Diversify our sustainable funding through relationship building

Objectives

- a. Attract and cultivate relationships with five higher-level donors over \$2,500
- b. Board Members to promote UT to their employer for an annual contribution or event sponsorship
- c. Nurture our relationships with UT Circle of Hope donors through VIP options with every UT event and other appropriate initiatives

Strategy: Expand our funding reach through targeted initiatives to reach desired demographics and donors

Objectives

- a. Expand our brand to reach males and millennials through new events
- b. Develop a campaign to reach out to new corporate donors
- c. Every Board Member to hold UT in top three of their charitable giving

To accomplish our goal through relationship building, we rely on supporters, staff, and board of directors to make those introductions and to look for opportunities to invite Upward Transitions into the “give back” conversation. It takes everyone working together, aligned toward increasing mission support, which in turn, will increase and diversify sustainable funding as a natural consequence of connection and cultivation.

The UT Fund Development and Marketing Committee (FD&M) supports the Director of Development and Public relations in the execution of development and marketing initiatives along with the activities of UT staff and the board of directors.



III. Strengthen our community partnerships

Strategy: Engage in reciprocal sharing of partner resources to provide more effective support and services to our mutual clients

Objectives

- a. Define what “Partner” means and requirements
- b. Nurture four (4) community partnerships over the next year
- c. Create re-usable documentation outlining processes for services to share with partner agencies

UT’s CEO and program directors work to develop relationships with community partners with the support of UT’s Performance Quality Improvement Committee (PQI) and staff.

IV. Update Marketing Plan

The marketing plan should encompass both short-term and long-term goals and objectives, which would require an annual evaluation of not only goals achieved, but remedies to adjust the strategies overall. Adding a global pandemic to the mix of standard business fluctuations has produced new communication channels and engagement protocols that require an overhaul of strategies but not necessarily the goals and objectives.

Strategy: Update marketing plan to align with organizational goals

Objectives

- a. Determine the marketing activities that add value to our organization to streamline our marketing efforts to greater efficiency
- b. Promote the significance of the prevention of homelessness
- c. Develop new and updated client stories
- d. Develop a Plan B for all UT events related to public health protocols

Strategy: Develop campaigns and projects to achieve organizational objectives

Objectives

- a. Strategically leverage social media platforms to increase donor engagement
- b. Design our programs and performance results into infographics
 - i. Add graphic intern
 - ii. Add agency partner

The UT Fund Development and Marketing Committee (FD&M) owns the responsibility of updating the marketing plan and fostering discussions to solve strategic problems facing the UT organization within the scope of development and marketing initiatives. The Director of Development and Public Relations is responsible for the execution within the organization with the support of UT FD&M Committee members, staff, and the board of directors.



V. **Develop 100-Year Anniversary Event Plan**

A centennial provides an opportunity to tell our organization's origin story, demonstrate our evolution and service to the community, and set the stage for the future. Upward Transitions has served the Oklahoma City community through wars, recession and depression, natural disasters and pandemics, terrorist attacks, as well as times of peace and prosperity. We must begin planning now to ensure we are prepared to share our unique story in the best possible manner.

Strategy: Coordinate event with community leaders

Objectives

- a. Recruit community members to the planning committee
- b. Assign board members and staff members to support planning committee
- c. Recruit in-kind and financial sponsors for the event
- d. Coordinate with Travelers Aid International

Strategy: Collect and present historical data to tell today's UT story

Objectives

- a. Research City archives for historical documents
- b. Digitize historical archives
 - i. Assign staff leader to own the effort
 - ii. Schedule volunteers to scan historical documents
- c. Create a visual, digital timeline

UT's Advisory Council lead by the immediate past president will lead the planning of our centennial anniversary celebration with the support of the UT CEO and staff.

Assign Strategic Plan for Execution

- 1) Evaluate performance and results of Strategic Plan at fiscal year end