

TO: SAY San Diego Board Of Directors
FR: Nancy Gannon Hornberger, CEO
RE: Strategic Plan Scorecard
DATE: Sept 6, 2024

The following strategic plan summary and scorecard of progress (attached) will provide you with insights both on progress and the barriers to progress with the current SAY San Diego Strategic Plan. They were prepared by the staff leads on the Strategic Plan Implementation Team. As a reminder, the current Strategic Plan was designed to move the needle in just a few key areas that are cross-cutting and engage the entire organization. Substantial and beneficial progress has occurred in all areas as noted on the scorecard! In addition, each strategic focus area has also faced barriers related primarily to the following, details below:

- Insufficient funding.
- Need for greater human resources and creative capacity.
- Vague focus or lack of understanding, organization-wide, of the value of the goals.

Insufficient funding: We're at a pivot point. More comprehensive efforts in every one of the strategic areas cannot be fully enabled due to lack of investment. Staff across many roles are generous with their time, participation, and expertise, beyond their current job responsibilities. Yet without greater funding for these strategic priorities, they will flag. This said, three of the strategic priorities were provided with a sustainable budgetary allocation in this budget year: EDI, Communications, and Leveraging Resources, and one – Sharing Expertise – was not. For EDI and Leveraging Resources, SAY is investing in dedicated full-time managers to facilitate the work and in an external consulting firm for Communications. Budget allocations to EDI and Leveraging Resources increased slightly to cover core costs and COLA, Communications was reduced by 50%.

Need for greater human resources and creative capacity: Related to the above, we are limited on the subject matter experts we can hire/engage to augment staff efforts, and/or outside trainings and resources we can engage, as there is not current revenue source beyond indirect G&A revenue for Strategic Plan Implementation. The Sharing Expertise goal, now unbudgeted, had an initial grant for a curriculum development expert, now expended, but no funding for finalization and publication of the curriculum. Leveraging Resources/Resource and Referral Hub has also obtained private funding support. The other areas have had no revenue sources other than the G&A.

Vague focus or lack of understanding, organization-wide, of the value of the goals: This is not for lack of trying! Without a staff team to continually socialize and give immediate value to the strategic priorities, it is hard to break through employee's busy agendas and responsibilities to promote our strategic work. There are weekly communications, regular updates and agenda items for team and unit meetings focused on strategic goals, but without more capacity and activity it is hard to have strong, perpetual focus across a highly dispersed workforce. Project management and design is also needed at an increased level to take the work to the next level. Of note, two positions were re-started due to staff changes – in Leveraging Resources, to replace a lead staff member promoted to a different position at SAY and who left a solid foundation, and in EDI, to follow a person who left us without a solid foundation, requiring a re-building effort.

Next steps: Every strategic effort has had value. Perhaps some more than others. Given the board's stewardship of the strategic plan, it would be useful to have a dedicated conversation in an upcoming meeting about the board's role in realigning the priorities, as well as in identifying and developing resources to effectuate, continue and build the most valuable aspects of the strategic plan.

SAY San Diego Strategic Plan Update

Updated 9/13/24

SHARING EXPERTISE: We will actively share staff expertise in healthy living and healthy relationships across our communities, partners and workforce.		Status	Impact / Update	Challenges/Barriers	FY25/26 Recommendations
Purpose: To provide a sustainable way to support the sharing of subject matter and lived experience expertise (among SAY staff, program participants and the larger community) to enhance SAY San Diego's programs.					
1	Formed a team of advisors from all units of the organization with expertise in healthy relationships.	Complete	Held quarterly meetings with SAY staff across program units.	N/A	Complete
2	Hired a subject matter expert to write the curriculum to target youth aged 12-17.	Complete	Awarded a \$25K grant from HealthNet.	N/A	Complete
3	Gained input from high school youth about the curriculum.	Complete	Executed 3 focus groups with high school youth.	N/A	Complete
4	Developed learning objectives, learning modules and a facilitator guide.	Complete	Finalized drafts of 11 modules and a facilitator guide.	N/A	Complete
5	Pilot tested some of the modules at a high school.	Complete	Secured a testing site with target age youth at Lincoln High School.	N/A	Complete
6	Design the curriculum for publication.	Not Started	Publish and Promote SAY's first curriculum.	Funding and Staffing	Continue
7	Set distribution goals.	Not Started	Build partnerships to distribute the curriculum within SAY and outside of the organization	Funding and Staffing	Continue
8	Develop and implement an online evaluation tool to assess the quality of the curriculum.	Not Started	Measure learning objectives and gain feedback about the curriculum.	Funding and Staffing	Continue
COMMUNICATIONS: We will strengthen and support all staff, board members and partners to confidently talk about SAY San Diego's overall results and mission.		Status	Impact / Update	Challenges/Barriers	FY25/26 Recommendations
Purpose: Consistent messaging to promote SAY's impact on social change and reducing silos becoming <i>one team with one voice</i> .					
1	Convene and train SAY San Diego outreach program staff to standardize messaging	In progress	Quarterly trainings, support and coordination	Working in Silos	Integrate across org
2	Design and provide new SAY San Diego signage across all 50+ sites	Complete	All SAY San Diego sites have visible physical signage on site for brand awareness, etc.	N/A	Complete
3	Increase traffic to SAY San Diego website	Complete	4000% increase in website traffic 558% increase from an organic search	Funding	Continue
4	Increase digital media impressions (ex: website, social media)	Complete	308% increase in impressions to 1.8 million	Funding	Continue
5	Create an enhanced tracking system for donations and develop a strategy to maximize return on investment	Not Started	Increase individual fundraising / corporate donations	Infrastructure	Continue
6	Utilize Campaign Planning "Year at a Glance" to ensure a cohesive digital strategy	In progress	Strategic call to action/public engagement; Consistent branding and messaging	Funding	Continue
7	Test LinkedIn Ads for upcoming Business to Business (B2B) Campaigns	In progress	Reach new audiences; increase corporate partners	N/A	Complete
LEVERAGING RESOURCES: We will improve whole person / whole family care by implementing a SAY San Diego resource and referral hub.		Status	Impact / Update	Challenges/Barriers	FY25/26 Recommendations
Purpose: Maintain an accessible and informative R&R Hub for clients and facilitate a smooth internal referral process					
1	Respond to emergent community needs; i.e. kept staff up to date with resources/services available during January's storm and floods.	Complete	Urgent/critical info dissemination	N/A	Continue
2	Weekly Resource Newsletter on regular and consistent schedule. Updated format and functionality.	In progress	Newsletter sent to 400+ staff on the global list and 439 external recipients with 42% open rate.	N/A	Continue
3	Maintain Program Guide and expand to serve as an Organization Guide by adding administrative pages.	In progress	Searchable "One stop shop" for all SAY services.	Working in Silos	Continue
4	2-1-1 Direct Referrals – officially launch 2-1-1's Community Information Exchange to accept direct referrals from other partner organizations.	In progress	Pilot Successful.	Infrastructure	Refine approach
5	Leveraging Resource Action Team – coordinate R&R Hub priorities.	In progress	Relaunched /refocused	Staff Transition/Change	Refine approach
6	Bridge Fund – continue urgent cash assistance to SAY clients	In progress	155 Requests processed, \$60,855 distributed.	Funding	Continue

7	Resource and Referral Connections - Measured via Call Tracker	In progress	Total Calls/Requests: 407 Successful Connections: 246 (60.4%) Internal Programs n=133; 54.1%; External Orgs n=113; 45.9%	Funding / Service Gaps	Refine approach
8	In-kind Donation campaign coordination	Complete	2023 Back to School \$12,155 raised, 200+ families 2023 Holiday Hopes \$36,650 raised, \$25k in kind toy donations; 200+ families served	Funding	Continue
9	Sustainability – Prospect and pursue securing current and new funders.	In progress	10+ Corporate Partners engaged.	Funding	Continue
EQUITY, DIVERSITY, and INCLUSION: We will ensure that equity, diversity and inclusion actions are visible and broadly inclusive, to produce structural, anti-racist changes within SAY San Diego, across our spheres of influence, and in the systems and communities where we work		Status	Impact / Update	Challenges/Barriers	FY25/26 Recommendations
Purpose: EDI principles are embedded throughout SAY San Diego work culture and business practices					
1	Reestablished the EDI Committee to do comprehensive review of SAY policies, engage in educational activities, and organize empowering programs.	Complete	15 active staff members from various units, ranging from entry-level staff to Senior Directors	Working in Silos	Refine approach
2	Create and launch the first mandatory EDI Foundations Training to lay a strong foundation for ongoing EDI education.	Complete	306 completed. 97% of participants agreed that they recognize how their social identities impact their personal and professional experiences.	N/A	Continue
3	Establish the first SAY Affinity Group, the Masculinity Education Group.	In progress	Pilot Successful.	Buy in	Continue
4	Collaborate with Human Resources on several key projects and roll out of EDI driven policies.	In progress	Examples: Interview Workshop, Job Description Review, and Annual Supervisor Evaluation Tool.	Funding and Staffing	Continue
5	Facilitated EDI presentations at New Hire Orientation.	In progress	All new employees are well-versed in our EDI values from the start.	N/A	Continue
6	Deepen and continue mandatory Foundations Training annually.	Not Started	TBD - January to June 2025	N/A	Continue
7	Establish Quarterly Routine CQI Communication Between EDI Team and Executive Team	In progress	Structural anti-racist changes occur with the awareness and support of the Executive Team. Q1: SWOT Analysis reviewed; Q2 24/25 Workplan reviewed	Working in Silos	Continue
8	Sustain and Expand Capacity and Programming for future EDI initiatives, including speakers, hosting conferences, third-party evaluations and more.	Not Started	TBD - Secure Funding for Future EDI Programs and Projects	Funding	Continue



SAY San Diego Strategic Plan

Vision – Mission – Values – Priorities

Vision (our ideal future): Opportunity, Equity and Well-Being for all San Diegans

Mission (our daily purpose): To partner with youth, adults, families, and communities to reach their full potential

Values (what we stand for):

- Celebrate diversity and inclusion
- Bridge gaps and create opportunities
- Stand shoulder to shoulder in partnership
- Empower youth-led, family-led and community-led solutions
- Believe in the integrity of all
- Lead with trust and credibility

Four Strategic Priorities (strengthening our community response):

1) Equity, Diversity and Inclusion: We will ensure that equity, diversity and inclusion actions are visible and broadly inclusive, to produce structural, anti-racist changes within SAY San Diego, across our spheres of influence, and in the systems and communities where we work.

***Rationale:** SAY San Diego is well positioned to do more to “live out” our values and to lead in the mission of expanding and advancing Equity, Diversity and Inclusion.*

2) Communications: We will strengthen and support all staff, board members and partners to confidently talk about SAY San Diego’s overall results and mission.

***Rationale:** “If you don’t know it, you can’t show it.” Build one team, with one voice, ensuring that the community knows we’re here, our impact, and what we have to offer.*

3) Leveraging Resources: We will improve whole person/whole family care by implementing a SAY San Diego resource and referral hub.

***Rationale:** SAY San Diego is complex, so it is difficult to know the details of all the ways that we can assist youth and families. We seek to expand access to everything we have to offer.*

4) Sharing Expertise: We will actively share staff expertise in healthy living and healthy relationships across our communities, partners and workforce.

***Rationale:** SAY has substantial, growing expertise in areas of healthy living, wellness and healthy relationships etc. This information could benefit all who we serve and all of our employees.*

About the Plan: SAY San Diego began to develop this plan before the global Coronavirus Pandemic ravaged lives and communities, and tested our resolve as a society, and before heightened racial and social justice awareness and activism emanated from the killing of George Floyd by police in Minnesota underscoring the need to eradicate ongoing brutal injustices. These events changed us at a heart level, as individuals and as an organization. These are more than matters of rising to the occasion as individuals, they call on us to be even more conscious and conscientious of the larger role SAY San Diego can play in creating social good, building on our 50 years of community service and leadership. In this plan, we rise to new challenges. We also seek to deeply reflect on our own practices, to stay open to feedback and fresh thinking, be dedicated to increasing our impact, and focused on strengthening all of the ways we can, with grit, grace and humility, do better to promote our vision, mission and values.

Timeline: This plan is for the next 3 years, July 1, 2021 to June 30, 2024.

Why these strategic priorities? The plan captures ideas and input from hundreds of staff, program participants, board members, partners and stakeholders.

Guiding Principle: The plan calls for organization-wide action, led by staff from all roles, programs and units. This cross-programmatic/cross-unit approach is designed to pull together individuals and programs so that we become ***greater as a whole than the sum of our parts.***

Implementing the Plan:

Everyone has a Part to Play: SAY San Diego wishes to make the most of the abundant ideas, talents and expertise throughout our large and diverse workforce. To implement the plan we will invite and support involvement of staff-driven leadership committees devoted to each strategic priority and composed of staff members from many programs and roles. Beyond the work of the committees, the plan is meant to spark involvement of staff, programs and partners who can incorporate a strategic priority into their daily work.

Investments: To truly move forward, the work requires investment of staff time and targeted financial resources from the organization. Therefore, new staff and consultants will be employed to facilitate progress. Staff time to work on the plan will be supported and celebrated.

Annual Action Plans: To be authentically staff driven we will support shared ownership of the actions and our progress on strategic priorities. All staff will have opportunities to learn about the plan, and to brainstorm actions and goals. Staff-driven leadership teams will be given time and support to develop annual action plans based on this input, based on SMART goals. As objectives and goals are achieved, they will be recognized for all to see!