



# **INCREASING OUR IMPACT**

## **2025 - 2027 STRATEGIC PLAN**

**BRUNER STRATEGIES, LLC**

## Table of Contents

Board of Directors Message	1
Mission, Program, Character Qualities & Life Skills	2
Planning Process & Information Sources	3
Plan Format & Terminology	4
Planning Committee	5
2025 - 2027 Strategic Plan	6
Addendum:	
Summary of Research Findings	

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*Our strategic planning process was facilitated by Bruner Strategies, LLC.*

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## MESSAGE FROM THE BOARD

Elevate Oregon Community,

We are delighted to share with you our plans to increase Elevate's impact.

Last year we embarked on a comprehensive process to develop a thoughtful, actionable plan to guide our work over the next three years. Approximately 100 people engaged in our professionally-facilitated process, which was informed by an array of sources.

We are excited about the path our strategic plan provides for increasing our impact. While we explored many needs, issues, and opportunities, two primary themes emerged consistently regarding Elevate's near-term future:

### The Need and Opportunity for Replication, Growth & Expansion

- Refine our program by clarifying its core components, ensuring consistent implementation across classrooms, and establishing clear outcome metrics.
- Pursue opportunities to provide services in additional Eastside school districts.
- Enhance our capacity and expertise to serve additional communities of color, particularly Latino.

### The Need for Continued Organizational Development

- Strengthen our human resources systems, including compensation, policies and procedures, professional development, and succession planning.
- Improve our fundraising, particularly with individuals and corporations, and increase Board engagement in year-round fundraising.
- Amplify our marketing with compelling messages that motivate and inspire, and effective outcomes-based communications.

To ensure accountability for implementing our plan, we identified goals, strategies, tactics, measurable outcomes, leads, and timelines.

We invite you to read, support, and engage with us to help make our strategic plan a success. Thank you for your continued support of our important work.

**Board of Directors**  
**July 2024**

## **MISSION, PROGRAM, CHARACTER QUALITIES & LIFE SKILLS**

### **MISSION**

Elevate Oregon builds relationships with at-risk youth to promote education, self-reliance, and leadership.

### **PROGRAM**

Class Curriculum. Age-appropriate curriculum that integrates with school district goals.

One-on-One Mentoring. Life-changing guidance from dedicated Teachers/Mentors.

Enrichment Opportunities. Empowering students to step up and take control in academics and beyond.

### **CHARACTER QUALITIES & LIFE SKILLS**

- Vision
- Courage
- Respect
- Caring
- Responsibility
- Positive Work Ethic
- Integrity
- Career-Mindedness
- Communication
- Leadership
- Problem-Solving
- Decision-Making
- Goal-Setting

## PLANNING PROCESS & INFORMATION SOURCES

### OVERVIEW

Elevate identified, gathered, and evaluated both qualitative and quantitative data in the course of our planning.

### PROCESS & INFORMATION SOURCES

The following process and information sources informed our strategic planning:

- *Constituent Survey.* An anonymous web-based survey was developed and sent to our constituents, including community partners, Elevate parents, funders, and donors. 32 responses were received.
- *Key Informant Interviews.* Individual interviews were conducted with 10 stakeholders, including partners, funders, donors, and community leaders.
- *Student Input.* We sought the input of current Elevate students by facilitating a group discussion with 15 participants at Parkrose High School.
- *SWOT Analysis.* The strategic planning committee evaluated our current strengths and weaknesses, as well as our opportunities and threats (SWOT), at a half-day work session.
- *Organizational Review.* We assessed our organization's operations, including its structure, staffing, volunteerism, communications, and Board.
- *Financial Review.* We reviewed trends in our revenue, expenses, liabilities, assets, and net assets for the past five fiscal years.
- *Programmatic Review.* We evaluated our current programming model, structure, eligibility, processes, and utilization over the past five years.
- *Demographic Review.* We reviewed the demographics of the Parkrose neighborhood, Parkrose School District, and Elevate's students, staff, and Board.
- *Assessment.* Our planning committee reviewed a summary of the information gathered above, and identified two goals and associated strategies at a half-day work session.

## PLAN FORMAT & TERMINOLOGY

### OVERVIEW

Elevate's strategic plan exists on a google spreadsheet to allow for ease of access and annual updates, as needed, by designated parties. The plan includes two goals. Both goals have associated strategies, tactics, outcomes, leads, and timelines to guide phased implementation over three years.

### TERMINOLOGY

A definition of terminology used in our strategic plan follows:

- *Goals.* A broad aim toward which our efforts are directed; what we are trying to achieve.
- *Strategies.* A plan of action designed to achieve our objectives; how we will pursue our goals.
- *Tactics.* A specific action step required to deliver on a strategy; the group of actions we will take to fulfill the strategy.
- *Outcomes.* Measurable results we will see if and when we are successful; the specific metrics behind what we are trying to achieve.
- *Lead.* The person(s) or position(s) responsible for championing an area of work, and ensuring that activity is coordinated and progress is tracked.
- *Timeline.* The phased implementation of components of the plan over time.

## PLANNING COMMITTEE

### OVERVIEW

Elevate set out to ensure our planning committee was inclusive of an array of perspectives, variety of positions in our organization, and varying lengths of tenure with us. We convened a group comprised of representatives from our Board of Directors, as well as our entire staff leadership team.

### BOARD MEMBERS

Board members on the planning committee included the following:

- Jordan Bader, Chair
- Sean Gabrio, Vice Chair
- Billy Ladd
- Sarah Raymond
- Kara Adams
- Eva Delgado

### STAFF MEMBERS

Staff members on the planning committee included the following:

- Donell Morgan, Executive Director
- Tony Ande, Chief Operating Officer
- Sarah Dougherty, Program Director
- Kristen Rogers, Development Director
- Angela Taylor, Finance Director

### STAFF SUPPORT

The planning committee and planning process was supported by Jim Wildermuth, Elevate's administrative assistant.

### FACILITATION

The planning committee and planning process was facilitated by Thomas Bruner, Principal with Bruner Strategies, LLC.



## INFRASTRUCTURE

**Chief Operating Officer**  
**Chief Operating Officer,**  
**Executive Director.**



Facilitate growth and sustainability by enhancing our fundraising	Develop a comprehensive onboarding program	100% of staff report onboarding is comprehensive and well-managed	Chief Operating Officer
	Develop and ongoing professional development program	100% of staff report professional development program is robust and useful	Chief Operating Officer
	Develop succession plans for ED and COO positions	Succession plans in place for ED and COO positions	Chief Operating Officer, Executive Director
	Refine and market an individual major donor program	Number of and total gifts from individual major donors increases 100%	Development Director, Executive Director
	Amplify corporate giving and sponsorship program	Number of and total gifts from corporations increases 100%	Development Director, Executive Director
Amplify our communications and marketing	Increase and maintain Board engagement in year-round fundraising	100% of Board members are active in year-round giving and getting	Development Director, Board Chair
	Increase Executive Director's focus on revenue generation, including fundraising	80% of ED's time is consistently spent on revenue generation	Board, Executive Director
	Develop compelling key messages that emphasize outcome and impact	85% of constituents report that key messages are clear and compelling	Development Director
	Increase consistency, frequency, and timeliness of internal and external communication	85% of constituents report that communication is consistent, frequent, and timely	Development Director
	Develop, resource, and implement an external marketing plan	85% of key stakeholders report that marketing efforts are effective	Development Director

