

# 2022-2025 STRATEGIC PLAN



# HBCU WALKING BILLBOARD

Promoting awareness of, attendance to, and graduation from Historically Black Colleges & Universities.

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## EXECUTIVE SUMMARY

**In The Beginning...** An idea was birthed to help Kansas City students make informed college decisions. Positively affecting a student's access to an educational opportunity improves that young person's overall quality of life, recognizing education as the way out of poverty.

Therefore, 2020 marks the creation of the 501(c)(3) organization, HBCU Walking Billboard (HBCUWB) targeting three disenfranchised population—first generation college students, low-income high school students, and students of color.

Since 2015, volunteers have hosted college related events for 25 school districts; partnered with over 20 community organizations; took part in over 30 college fairs; assisted over 100 students attend HBCU's; and educated hundreds of students and their families about the impact of attending a historically black college.

HBCUWB promotes awareness of, attendance to, and graduation from Historically Black Colleges and Universities. For over 7 years, we have served the Greater Kansas City community in the areas of college preparation and career readiness. HBCUWB is a vital resource for high school and college students in this region. Through creative programming and highly skilled volunteers, we first assist students and families with the college application process and then support them throughout their HBCU experience.

**Today...** HBCUWB's passionate Board of Directors includes the Founder with HBCUWB college tour experience, higher education, and community professional experience, as well as members from Historically Black College and University (HBCU) alumni. However, the members are just completing their first year on the Board together, and yet, the organization raised over \$100,000 in 2021. The past year's success is largely because of the fund development savvy of the Board and a matching gift collaboration with the corporate donors.

Because the Founder embodies the educational success of their target populous, they do not refuse any participant's request for college resource support. This includes assisting with college, financial aid, housing, and scholarship applications; exposure to financial aid workshops; and mentoring throughout their college career—often tapping resources to meet emergency needs. The need for this effort to be absorbed by the organization is key.

**To Move Forward...** In a first step to development capacity, the Board of Directors partnered with The Sunshine Organization, Dr. Alisa J. Henley, PhD. Dr. Alisa facilitated strategic planning sessions in January and February of 2022. This Plan results from that effort. Years 2022-25 will involve building the Board's capacity, building organizational awareness, and building collaborations—all with the goal of increased awareness and fund development outcomes.

## BOARD OF DIRECTORS

Shanelle Smith

Founder & President

Shanelle Smith is a native of Kansas City, Missouri and a graduate of Fisk University, a historically black college in Nashville, Tennessee. With over 15 years as a public-school educator, Shanelle has served in several roles. Currently, she is the Associate Principal of African Centered Prep at Southeast High School and the English Methods Instructor for the Kansas City Teacher Residency. A huge component of her love for education is rooted in her HBCU experience, which led her to establish HBCU Walking Billboard.

Chantell Garrett

Vice-President

A Dillard alumna, Chantell is the Diversity and Inclusion Manager at the Federal Reserve Bank of Kansas City. In her role at the Kansas City Fed, she leads outreach efforts for business, community and labor leaders, and women, minority, and emerging bank leaders. She founded the nonprofit R.U.B.I.E.S. Inc. (Realizing your Best In Every Situation) to support girls who aspire to be first-generation college graduates. She is a member of the University of Missouri-Kansas City's African American Leadership Alliance, is involved in the Big Brothers Big Sisters' Diversity Task Force, Avila University's Alumni Board and recently was appointed to Teach For America of Greater Kansas City's Champion Board.

Patricia Smith

Treasurer

Patricia Smith is an Accountant at CenterPoint Medical Center. She holds a master's degree in Business Administration with a BS in Business Finance. Patricia is highly organized and detailed oriented with advanced problem-solving skills. She specializes in senior accounting functions and has years of experience in client contracting, accounting, and billing. Her honesty, integrity, and professionalism are qualities many people appreciate. Personal interests include volunteering her services in financial aspects and spending time with family and friends.

Betti Givens

Secretary

Betti Givens is an alumna of Lincoln University, a historically black college in Jefferson City, MO. Currently, she serves as the Coordinator of Student Programs at 20/20 Leadership. She is a creative spirit with an unmatched passion for service to young people. Besides over a decade in youth services, she is a published author, phenomenal crafter, and dedicated baseball mom.

### Kimberlee Jones

#### Governance & Compliance Committee

Kimberlee and her family relocated to Kansas City. In her time here, she has become connected to various circles of black excellence to provide her keen insight and share her love for the HBCU experience. An alumnus of North Carolina A & T, she is a member of their local alumni association and a recent inductee into the Kansas City Alumnae Chapter of Delta Sigma Theta Sorority, Incorporated. She brings a wealth of marketing knowledge and a host of youth-centered ideas to the table.

### Sidney Smith

#### Fund Development Committee

Sidney is the CEO of Swope Ridge Geriatric Center in Kansas City, Missouri. An alum of the University of Missouri-Kansas City, Sidney still finds the value in the need for students to be informed about HBCUs and seriously consider them as their college of choice. Having a knack for people and an interpersonal niche, Sidney serves HBCU Walking Billboard as an ally and advocate.

## ASCERTAINMENTS

**Internally**, HBCU Walking Billboard (HBCUWB) Board of Directors just completed a successful first year of service together. The Board members are aware of their governing roles and responsibilities but novices to executing their roles, thus requiring board development training. Founder Shanelle Smith, sit on the Board. Operations are remote, and Board meetings are in person and virtually.

The fund development cycle requires that funds raised the year prior go toward the Summer high school tour dates. And based on the Founders' dedication to the mission outcomes, they have historically used access to personal and/or their networks' financial resources to cover any emergency fund needs of HBCUWB participants in college. The Strategic Planning sessions illuminated this and other matters the organization should shoulder instead, such as building the Board's capacity to diversify financial resources for emergency funds and transition from a Founder-based operation to a governing board operation, as the organization strengthens.

**Externally**, the data is staggering regarding the higher education needs of the targeted populous of foster and low-income youth. According to a study by The Education Trust in Washington D.C., HBCUs provide greater college access for first generation college students, students from low-income backgrounds, and students of color. There are over 100 Historically Black Colleges and Universities across the United States, but only two are within 300 miles of Kansas City. Therefore, when it's time to make college decisions, many students and families are unaware of their existence. Our mission is to grow the number of HBCU attendees and graduates from the Greater Kansas City Metro through our HBCU Prospects and HBCU Rookies. These innovative programs provide high school and college students with college resources and workforce development opportunities.

**Proactively**, HBCUWB address all the above issues. There are other funding organizations and nonprofits (locally and nationally) targeting these vulnerable populations as well, with whom HBCUWB might consider collaborative relationships.

## MISSION

The VISION of HBCU Walking Billboard (HBCUWB) is to be the premiere Black college tour and resource organization in the nation.

The MISSION of HBCUWB is to create the opportunity for first year college students, low-income participants, and students of color to attend 4-year Historical Black colleges and universities and transform their lives.

HBCUWB expresses its VALUES through the stories shared about the HBCUWB participants' experiences—whether as Founder, Board member, Student/Parent, Donor/Prospect, Collaborator/Friend—all are unique and will distinguish the HBCUWB narrative from that of its competitors. It is these real-life stories that HBCUWB values.

The HBCUWB BRAND desires to elicit the following thoughts... Think HBCUWB, Think...

quality	motivational	experience	worthy of support
engagement	safe	life-changing	effective
knowledgeable	up-standing	legitimate	empowering
credible	innovative	comprehensive	college resource
caring	committed	opportunity	loyal

## AUDIENCES, THEMES & MESSAGES

We segment the AUDIENCES targeted by HBCUWB based on their decision-making authority and whether they directly affect the success or failure of the organization. All others are secondary or tertiary to the cause, though may be influential to the primary audience.

HBCUWB's Primary Audience includes... *ANYONE* can be an #HBCUWalkingBillboard:

1. Prospects: Elementary, middle, and high school students who will one day consider an HBCU
2. Rookies: College students currently attending an HBCU
3. Alum: Proud graduates of any HBCU
4. Allies: Supporters who did not attend an HBCU but recognize their inherent value.

The Secondary Audience includes... Donors (current & prospects); Local government agencies and select funders and other nonprofits serving the same Primary Audience's higher education needs; and High School Counselors

The Tertiary Audience includes... Minority adults & youth; online/print news sources; Black churches & organizations; and fraternities and sororities

The **THEMES** to be communicated to the audiences about HBCUWB originate in the Vision and Mission Statements and are below. Specific to each theme are **MESSAGES** consistently communicated by the Board of Directors and supporters, in referencing the operation of HBCUWB, and are namely:

**Premiere...** Operating over 5 years - HBCUWB offers high quality, credible, transparent execution of Black college tours and resource exposures

**Transforming Lives...** is ministry - through exposure, attendance, and graduation from college

**Opportunity...** HBCUWB opens doors to a new reality

**First-Generation Students, Low-Income Youth, And Students Of Color Targeted...** because they have less access outside the opportunities provided by HBCUWB



## STRATEGIC FRAMEWORK

### Direction and Results

The strategic direction and goals included in this plan are the team's responses to their understanding of what its client's value most about the organization and current opportunities and challenges for offering high-quality support to college students and their families.

The three-year period of this strategic plan will be a time of assessing and deepening HBCUWB approaches to its work. Concurrently, HBCUWB will take more of a leadership role in working with a broader array of educational resources and it will explore actively engaging diverse supporters.

With a fresh perspective on its mission, and understanding what it does well and the environment in which it operates, HBCUWB will pursue the following strategic direction:

1. Review and deepen its existing direct support and services over time to ensure that they are state-of-the art for engaging effectively with college students.
2. Assess educational needs further to identify gaps or needed shifts in service delivery. This assessment will serve as the basis for expanding or adding new services and programs.
3. Explore the feasibility of expanding the organization's visibility in the community and making greater use of volunteers.
4. Emphasize building its discretionary financial resources to invest administratively. This includes building the endowment fund and establishing a scholarship fund.

The goals for HBCUWB over the next three years are the organization's response to the important issues identified in the environmental scan completed as part of the strategic planning process. These goals provide a roadmap for fulfilling the strategic direction.

Successful implementation of this strategic plan will cause more quality support and services delivered to clients, more involvement in community life and a broader array of resources in the community, valuing and supporting those in college. The ultimate result HBCUWB aspires to achieve is far beyond high quality support and services for people desiring to learn more about Historical Black colleges and universities. It is about changing client and educational conditions that make full life possible for every student.

As noted above, this strategic plan is a management tool for HBCUWB. This plan has two purposes. First, it presents the most comprehensive compilation of the plan and its parts. It is a record of the strategic planning process and the decisions reached by the Strategic Planning Team. Second, it is a reference guide for strategic planning. In the future, HBCUWB may choose to produce a summary version of the plan for distribution to its primary and supporting partners and other stakeholders.

## Strategic Planning Process

Strategic planning is an important part of the creation, development, and growth of any organization. Organizations who are interested in growth are not exempt from planning. Organization planning help map out strategic steps to achieve its mission and vision. Organizations can experience a level of success without a plan, but those who invest the time and resources into developing a specific strategy and plan can achieve success at a much quicker pace.

Strategic planning is an organization's process of defining its strategy or direction and deciding on allocating its resources to pursue this strategy, including its capital or people.

Over 4 weeks, the Strategic Planning Team completed:

### **Distinctive SWOT Analysis**

A SWOT analysis is a great exercise to go through because it identifies the key areas of the organization that may need targeted resources and opportunities or opposing environmental factors that could affect organization strategy. The SWOT analysis process can flush out many great ideas to help target development, growth, and improvement.

### **GAP Analysis**

A gap analysis answers the question, "Where are we compared to where we want to be"? The process looks at the vision—where do we want to go—and compares it to where we are currently. The analysis can be in relation to recovery program development, financial viability, or client experience. All areas identified and targeted for strategy through the gap analysis process.

### **Write Organizational Goals**

Post SWOT and gap analysis, the team mapped out the strategic goals. Goals are only as effective as the formalized process of achieving them. Many organizations use the SMART (specific, measurable, attainable, realistic, timely) goal process to ensure their goals are achievable.

The strategic planning process delivered a document that details organizational goals for the short term (three to six months), medium term (one to two years) and long term (three to five years). Update this "living" document as conditions and priorities change. The most important part is getting it written and assigning responsibility, whether an employee or volunteer assigns the task.

## Distinctive SWOT & Gap Analysis

The SWOT analysis is an extremely helpful tool that can help assess situations before the organization leaders decide regarding their actions and strategy. This analysis helps an organization determine what are **its Strengths and Weaknesses** in terms of resources and processes, and what **Opportunities and Threats** they will have to deal with if they pursue a certain course of action. This way, an organization can have a clear idea of the internal and external factors that come into play during a situation like a new program, a clientship campaign, or a program launch.

The Distinctive SWOT template is connective and allows organizations to **develop a relationship between their internal and external factors**. This creates a grid-like structure with categories including Strengths-Opportunities, Weaknesses-Opportunities, Strengths-Threats, and Weaknesses-Threats. This structure can help analyze how to implement the results of a SWOT analysis to turn around a situation in HBCUWB's favor. In addition, it will reveal **factors that need enhancement or eliminating**. The advantage of this SWOT template is that it has four quadrants that make it easy to identify where internal and external strategic environments interact quickly and simply.

These four quadrants are...

- **Area of Opportunity**, where your internal strengths will help you take advantage of your external opportunities.
- **Area of Missed Opportunity**, where your internal strengths will help you mitigate your external threats.
- **Area of Work**, where your internal weaknesses restrict your ability to take advantage of your external opportunities; and
- **Area of Concern**, where your internal weaknesses will restrict your ability to mitigate your threats.

Below, summarizes strengths, weaknesses, opportunities, and threats highlighted by the Team.

What's Left? Weaknesses...	What's Right? Strengths...
Partnerships-community, donor/funder maintenance; lack of commitment Collaboration Size, knowledge, and diversity of Board Board recruitment plan Getting Board info out Board structure Division of duties Appreciation Capturing data (metrics)	Support from community Funding/fund raising Other organizations seek us out (awareness) Partnerships with those who benefit org/working partnerships Branding-social media Youthful Board Convening alums Supporting black students
Threats...	Opportunities...
College tours from other organizations Location Funding-black organization COVID/pandemic Racism/Discrimination HBCUs (practices, communication, etc.)	College tours from other organizations Location Funding-black organization COVID/pandemic Racism/Discrimination HBCUs (practices, communication, etc.)

### **Area of Opportunity**

*Where internal strengths will help take advantage of external opportunities*

- Growth of partnerships
- Communicate how people can become supporters- marketing
- System of follow up/ continue to engage
- Re-evaluate Board Assessment
- Partnering with local companies and organizations to provide a set amount of HBCUWB internships
- Events to raise funds (gala, smaller ones, etc.)
- Diversity event
- Core Services
- Grow social media and website (with assistance)
- Ongoing Board training

### **Area of Missed Opportunity**

*Where internal strengths help mitigate external threats*

- Growing partnerships
- Keeping donors engaged
- Burnout

- Racism/Discrimination

### **Area of Work**

*Where internal weaknesses restrict ability to take advantage of external opportunities*

- Organizational Structure
- Revise and revisit board documents such as bylaws, org chart, and handbook
- On Board
- Being committed to tasks assigned in a timely manner
- Board Training
- Fund Development
  - Exploring ways that people can give
  - Developing a fund development plan and calendar of fund development
  - Engaging donors
- Marketing
  - Develop a marketing plan
  - Create social media calendar
- List of core services

### **Area of Concern**

*Where internal weaknesses will restrict ability to mitigate threats*

- Funding
- Creating more/solid revenue streams

## Strategic Planning Outcomes

In strategic planning, all parts of the process are important, but perhaps the most important part involves developing strategic goals, objectives, and tasks. Much of the analysis done in strategic planning helps develop achievable goals that reflect the service realities in a sector and environment. The actual writing may be easy but connecting the goals to the rest of the strategic planning process requires high analytic and logical skill.

Objectives are usually specific statements (they are a particular goal) that contribute to the achievement of “bigger” goals. They are goals, but they are more specific. Another term for objectives within a strategic planning framework is “enabling goals,” since meeting all your objectives will contribute to the achievement of the larger strategic goal(s) they enable.

Though, we use the word “goals,” rather than make the distinction. It is more than a semantic difference but trying to decide what a goal versus an aim is can bog down the strategic planning process.

Strategic goals, as part of the strategic planning process, **MUST** reflect the analyses used in the strategic planning process. HBCUWB's strategic goals reflect:

- the general themes of their vision, role, and mission,
- business realities outside of the organization (as identified in your environmental scan)
- capabilities internal to the organization (also has identified in your environmental/internal scan)
- strengths, weaknesses and opportunities and threats identified in the SWOT analysis

Since strategic goals are so important in linking strategic planning to strategy and to operational or tactical planning, they need to be defined effectively. What are the characteristics of good strategic goals?

**Measurable:** Strategic goals and objectives should be measurable so you can track success.

**Specific:** Strategic goals are more specific than, let’s say, your vision. However, they cannot be too specific either, because you do not want too many in your strategic plan. As an example, you might write, “increase clients by ten percent,” but you clearly will not want to write, “hire Jack the mechanic.” There is no absolute way to say in any aim way in which specific a goal should be.

**Important:** Strategic goals need to be important to the organization’s success. You could define hundreds of goals as part of your strategic plan but identify the most important. Less important “enabling goals” need not be lost; It can include them in *operational* plans.

**Reflective:** Your strategic goals need to reflect the analytical work done in the rest of the strategic planning process. They need to be based on your best understanding of your business environment, strengths, abilities, opportunities, and so on. That, in fact, is **WHY** we do all this work in strategic planning before setting the strategic goals.

## KEY STRATEGIES

The GOALS and STRATEGIES outlined below reflect information noted in the previous pages of this document, all based on the inputs and materials addressed at the Board of Directors' January/February 2022 Strategic Planning sessions.

Goal 1: Normalize Board/Executive Director (ED) Operations... Develop a succession plan for keyboard and staff roles.

Outcome: Encompass highly effective and structured board with greater impact.

Strategies	Tasks	Target Dates	Responsible Contact
Use Board development resource tools and organizations to increase board efficiency.	<ol style="list-style-type: none"> <li>1. Review and revise board member descriptions.</li> <li>2. Implement annual board training/retreat.</li> <li>3. Develop a board recruitment plan, application, and orientation program.</li> </ol>	<ol style="list-style-type: none"> <li>1. 3/15/22</li> <li>2. 10/4/22</li> <li>3. 3/15/22</li> </ol>	Chantell and Board Governance Committee
Revise bylaws to reflect future structure.	Review, update, and revise bylaws to reflect current 501 C 3 status and board growth.	<ol style="list-style-type: none"> <li>1. 3/15/22</li> </ol>	
Engage the board in deepening current stakeholder relationships to convert them into advocates.	<ol style="list-style-type: none"> <li>1. Define who a stakeholder is.</li> <li>2. Make a list of current stakeholders.</li> <li>3. Assign small groups of stakeholders to board members.</li> <li>4. Develop a plan to create more advocates.</li> </ol>	<ol style="list-style-type: none"> <li>1. 5/17/22</li> <li>2. 5/17/22</li> <li>3. 5/17/22</li> <li>4. 8/16/22</li> </ol>	
Develop a board performance plan that aligns with the HBCUWB strategy.	<ol style="list-style-type: none"> <li>1. Research board performance tools.</li> <li>2. Create a customized performance tool.</li> <li>3. Implement a performance review plan/schedule.</li> </ol>	<ol style="list-style-type: none"> <li>1. 11/15/22</li> <li>2. 11/15/22</li> <li>3. 2/21/22</li> </ol>	



**Goal 2: Visibility...** Expand awareness of the HBCUWB’s programs and services through responsive and transparent communication.

**Outcome:** Improved and streamlined communication through assertive, respectful, and reflective sharing of information, ideas, and opinions.

Strategies	Tasks	Target Dates	Responsible Contact
Enhance image and awareness of the programs and services through innovative, comprehensive, and dynamic branding, marketing, and promotion strategies.	<ol style="list-style-type: none"> <li>1. Update website and social media outlets to make it more interactive and user friendly.</li> <li>2. Research and implement a marketing plan or outsource marketing.</li> <li>3. Create digital deck(s) compatible with 1 sheet.</li> </ol>	<ol style="list-style-type: none"> <li>1. 8/16/22</li> <li>2. 8/16/22</li> <li>3. 11/15/22</li> </ol>	Sidney Shanelle
Improve communication to maximize engagement among constituencies such as educational organizations, HCBU alumni, and families of HBCU students.	<ol style="list-style-type: none"> <li>1. Learn psychosocial generational differences in primary audiences.</li> <li>2. Survey families on how HBCUWB can support them.</li> <li>3. Develop and implement a membership program for HCBU alums.</li> <li>4. Start 3 satellite groups on college campuses over the next 5 years.</li> </ol>	<ol style="list-style-type: none"> <li>1. 2023</li> <li>2. 2022/2023</li> <li>3. 2023/2024</li> <li>4. 2023/2024</li> </ol>	
Streamline communication with prospective and current students to improve awareness and engagement.	<ol style="list-style-type: none"> <li>1. Survey prospects and rookies on how HBCUWB can support them and expand their reach.</li> <li>2. Increase visibility among target</li> </ol>	<ol style="list-style-type: none"> <li>1. 11/15/22</li> <li>2. 2/21/23</li> <li>3. 2023 /2024</li> </ol>	

	<p>audiences via social media outlets.</p> <p>3. Evaluate feasibility of virtual tours and other outreach efforts.</p>		
<p>Improve communication with HBCU campuses through assertive, respectful, and reflective sharing of information, ideas, and opinions.</p>	<p>1. Survey HBCU contacts on the best way HBCUWB can support their outreach.</p> <p>2. Implement a quarterly plan for engagement with college campuses.</p> <p>3. Implement a plan to keep campuses engage during winter, spring, and summer breaks.</p>	<p>1. 2023</p> <p>2. 2023</p> <p>3. 2023/2024</p>	

**Goal 3: Fund Development Infrastructure...** Establish and maintain a fundraising plan for the next three-year period that provides financial sustainability.

Outcome: Maximize HBCUWB’s ability to fulfill its mission and accomplish its strategic goals and objectives while strengthening its financial position.

Strategies	Tasks	Target Dates	Responsible Contact
Identify, cultivate, and solicit major donor prospects to request gifts in the range of \$2,500 or more; and increase the number of individual donors.	<ol style="list-style-type: none"> <li>1. Create a profile and appeal for all levels of donors.</li> <li>2. Develop a case statement, drawing on previous year data/success.</li> <li>3. Collect giving history and tour outcomes for donor prospect insight.</li> </ol>	<ol style="list-style-type: none"> <li>1. 2023</li> <li>2. 2023</li> <li>3. 2023</li> </ol>	Shanelle Fund Development Committee
Create emergency and other fund policies.	<ol style="list-style-type: none"> <li>1. Review current strategies.</li> <li>2. Determine needed policies.</li> <li>3. Develop and implement policies.</li> </ol>	<ol style="list-style-type: none"> <li>1. 8/16/22</li> <li>2. 8/16/22</li> <li>3. 8/16/22</li> </ol>	
Launch board and staff annual giving campaign.	<ol style="list-style-type: none"> <li>1. Set annual Board give or get funding policy and targets.</li> <li>2. Develop a Board toolkit to engage their personal asset base (appeal emails, letters, phone scripts, talking points).</li> </ol>	<ol style="list-style-type: none"> <li>1. 2/21/23</li> <li>2. 2023/2024</li> </ol>	

**Goal 4: Increase Contributions...** Maximize HBCUWB’s ability to fulfill its mission and accomplish its strategic goals and objectives while strengthening its financial position.

Outcome: Improved proactive and integrative planning and budgeting processes through a multi-year financial master plan.

Strategies	Tasks	Target Dates	Responsible Contact
Develop and implement an annual budgeting process	<ol style="list-style-type: none"> <li>1. Research &amp; select budget templates.</li> <li>2. Develop the process.</li> <li>3. Roll out the new process and budget.</li> </ol>	<ol style="list-style-type: none"> <li>1. 3/15/22</li> <li>2. 5/17/22</li> <li>3. 11/15/22</li> </ol>	Tricia
Increase fund reserves and strengthen financial position to ensure future financing of strategic initiatives.	<ol style="list-style-type: none"> <li>1. Create an investment portfolio.</li> </ol>	<ol style="list-style-type: none"> <li>1. 2024/2025</li> </ol>	
Increase giving opportunities from external entities.	<ol style="list-style-type: none"> <li>1. Increase corporate sponsors by 1 to 2 per budget cycle.</li> </ol>	<ol style="list-style-type: none"> <li>1. 2023/ongoing</li> </ol>	

**Goal 5: Student Success...** Improve student emotional intelligence skills, learning outcomes, success, and completion through high-contact programs, advising, and student development programming.

**Outcome:** Strengthened college and program advising to maximize student success, retention, and completion of college courses.

Strategies	Tasks	Target Dates	Responsible Contact
Facilitate student success through initiatives designed to increase student engagement.	<ol style="list-style-type: none"> <li>1. Develop deliverables for outcomes to HUBCWB Rookie program.</li> <li>2. Establish internship partnerships with corporations.</li> </ol>	<ol style="list-style-type: none"> <li>1. 2023</li> <li>2. 2024/2025</li> </ol>	Bettie Shanelle
Improve students' ability to overcome challenges through enhanced emotional intelligence and resiliency skills.	<ol style="list-style-type: none"> <li>1. Create a database for rookies.</li> <li>2. Develop a list of resources for mental health and intelligence opportunities for students.</li> <li>3. Offer more targeted virtual workshops to help students navigate through challenges.</li> </ol>	<ol style="list-style-type: none"> <li>1. 11/15/22</li> <li>2. 2023</li> <li>3. 2023/2024</li> </ol>	
Facilitate cultural understanding and enrichment through education and awareness of HBCUs.	<ol style="list-style-type: none"> <li>1. Develop a calendar of events HBCUWB Board and Staff can take part in.</li> <li>2. Form 2 collaborations per year for the next 5 years.</li> <li>3. Create a workshop for prospects in high school.</li> <li>4. Increase college tours from 1 to 3 over the next 5 years.</li> </ol>	<ol style="list-style-type: none"> <li>1. 8/16/22</li> <li>2. 2024/2025</li> <li>3. 2023</li> <li>4. 2024/2025</li> </ol>	

## REVISING & UPDATING THE STRATEGIC PLAN

A strategic plan measures the organization's health and standing within its industry and guides future movement. Because of its importance and far-reaching affect, the plan should be revised and updated at planned intervals. As a minimum, evaluate the plan annually to measure the organization's progress toward its established goals.

### Semi-annual Review

There are certain areas within a strategic plan where organizational leadership may require a semi-annual review – especially the first year of a plan.

- Are resources still adequate to meet the needs?
- Are goals still achievable and realistic?
- Is the timeline still adequate?

### Leadership Annual Review

The annual review by leadership helps the organization's leadership to take stock of the progress. As a minimum, leadership should look at:

- Have the immediate goals been met in the plan?
- Are the resources allocated meeting demands or are there shortfalls?
- Are there major changes within the organization not addressed in the plan?
- Are there any legal changes made or on the table that voids any portion of the plan?
- Is the plan's budget within programmed expectations?
- Have planned improvements in tactics met expectations?
- With the experience garnered this year working the plan, is there anything missing in the plan? If so, does this issue need to be addressed immediately, or can it wait for the planned overall review?

### Revising & Updating the Plan

One of the first things that should take place six months out with the initial start of the review is for leadership to review the plan and discuss the gains and misses that took place during the year.

At a minimum, a strategic plan review by leadership should:

- Compare actual with projected results
- Compares estimated timetables with documented completion dates
- Grade the plan on whether it's on time and target

#### Sample Strategic Questions to Ask When Revising and Updating Plan

When reviewing the strategic plan, instructions being sent within the email should dictate that individuals closely look at the plan's tactics and goals and ensure all are still valid.

Questions that individuals should ask when validating various components of the plan are:

Has the internal capacity changed significantly since the last review?

- Has the mission changed?
- Any new goals implemented?
- Has the organization taken on any additional responsibilities that affect goals?
- Have the organization's finances dramatically changed and affected the budget?
- Have organization procedures changed through regulations or improved innovation?
- Have audits turned up repeated or significant findings?

Are there any major changes in the organization's external industrial environment?

- Is there any new legislation affecting the organization?
- Have there been any economic or other external shifts that could affect the organization?

Are tactics and goals on schedule within the plan and meeting all expectations?

- If this is the case, is the organization capitalizing on this positive outcome?
- If goals are being exceeded, should they be raised?
- Goals that are not being met, should they be revised or are other changes needed? What is the cause behind the failure?

Are meeting the plan's goals enough of a report card to indicate the plan's progress and guide leader's decisions?

- Are there enough execution indicators built-in to the tactics to chart progress and flag management when changes are needed?

