Literacy Partners
of Kewaunee County

Literacy Partners of

Kewaunee County

Strategic

Business Plan

2009-2012

June, 2009

Summary of Planning Effort

In spring of 2008, leadership of the *Literacy Partners of Kewaunee County (LP)* undertook a strategic business planning effort. The organization was founded in 2006 and successfully established a well-regarded tutoring program. With a committed student body, strong core of volunteer tutors, and an engaged board of directors, *LP* was ready to chart a course for organizational and program development for the next five years. Kewaunee County UW-Extension was enlisted to provide facilitation and educational assistance for the planning process with the goal of having a strategic business plan completed within the year.

Members of the *LP* Board and UW-Extension conducted a pre-planning meeting to discuss and agree on a process and expectations for the plan. The group committed to and implemented the agreed- upon process, which was loosely based on John Bryson's model for strategic planning, coupled with a basic business planning format. Below is a summary of the key process milestones with document references, as appropriate.

1. **Clarify expectations and review the planning process**. The group decided the plan should cover up to five years for strategic initiatives and action steps for the next three years. The process would include board members, volunteers, and input from key stakeholders.
2. **Clarify mandates, vision & values; conduct stakeholder analysis.** The group reviewed and affirmed organizational mission, vision and values, and reviewed and discussed organizational mandates which are found in Appendix A. Notes from stakeholder analysis are in Appendix B.
3. **SWOT Analysis (Strengths, Weaknesses, Opportunities, and Threats); Collect Stakeholder Input.** Board members discussed LP's internal strengths and weaknesses, along with external opportunities and threats. Notes from the SWOT analysis discussion are in Appendix C. To help define key issues for consideration, UW Extension also conducted a stakeholder input session. Notes from that discussion are in Appendix D.
4. **Develop Strategic Business Goals & Action Plans.** The group then identified and focused on a set of key business issues that evolved into goals for Programming, Facilities, Public Relations, Staffing, Board, and Finance & Fundraising. Specific action steps were identified and accountabilities and timeframes were assigned. The results of these steps are summarized in the next section of the plan.
5. **Draft and Adopt Strategic Plan.** The work was then compiled into a single document for easy reference and plan implementation.

LP staff and board members intend to review this plan once per year by the entire board and staff, and serve as the foundation for an annual operating plan.

Essence

Vision

Literacy training strives to improve participants' basic linguistic skills in order to enrich and expand the potential for family and community life. The goal of an English literacy program is to improve the reading, comprehension, writing, and speaking skills of Kewaunee County participants. Ongoing, locally-driven county literacy programs will be highly visible, easily accessible and will include trained tutors and effective instructional materials.

Mission

The Mission of the Literacy Partners of Kewaunee County, Inc. is to establish a framework to provide literacy education to country adult residents by:

- Promoting an awareness of literacy issues

- Determining literacy needs

- Networking with other counties

- Training and supporting tutors

- Reaching out to those who need the service

- Providing regular, long-term, one-on-one tutoring

- Identifying and securing resources to meet the above goals

Who is Served

Adult residents of Kewaunee County, Wisconsin who wish to improve their English language and literacy skills.

Program Delivery Method

Literacy Partners provides one-on-one tutoring for adults who wish to improve their reading, writing, and English speaking skills. Training for tutors is also provided. Other program delivery methods are planned for the future and are included in this strategic business plan.

Top Priorities for Action

In compiling the strategic business plan, Literacy Partners of Kewaunee County, Inc. has identified a number of organizational and programmatic priorities that should be addressed over the course of the next twelve months.

Plan for Philanthropy – Literacy Partners' successful implementation of the   strategic business plan is dependent on an increased and sustained fundraising effort. Development of a fundraising strategy to support the next three years of operation, include support for a paid staff person, is a top priority. As such, an active donor cultivation program to include broad dissemination of this plan is necessary.

- **Staffing** – Over the course of the next twelve months, as funds are secured, Literacy Partners should begin preparing for its first staff person. A position description and hiring process needs to be developed, as well as a system of reporting to the Board. The strategic business plan calls for the hire to be completed by the end of the twelve month time frame.

- **Board Development** – The board of directors, which has been predominantly a "working" board since the organization's inception, will begin the transition process to a "managerial" or "governing" board. This transition will become appropriate when the paid staff person is hired and much of the board's current responsibilities are shifted.   The board should conduct an evaluation of its committee structure to ensure that it is still responsive to the organization's needs. Position descriptions should be written for board members, officers and committees of the board.

- **Facilities and Equipment –** Access to all necessary facilities, especially Hillcrest School, is a potential issue and should be monitored in case alternate arrangements need to be made. Equipment should be assessed and inventoried.   Needs should be identified and met to ensure preparedness for the paid staff member and maintenance of quality programs.

- **Maintain Core Tutoring Program** – Until a permanent staff member is hired, it is imperative to maintain a high quality tutoring program and an enthusiastic volunteer base. Board members and other volunteers need to be re-enlisted and continually energized as the fundraising campaign builds the foundation for a sustainable organization.

Leadership

Board of Directors 2009-2010

Literacy Partners has a highly committed and tightly-knit board of directors with deep experience in the field of education. During *LP's* start-up years, this motivated group provided the energy necessary to successfully launch its signature tutoring program. As the organization matures and other community needs emerge, the board acknowledges the importance of both broadening the background and expertise of board membership and becoming more purposeful about how new members are brought into the fold to ensure they are welcomed into the organization's culture.

1. **Board Development Strategic Business Goals/Action Steps**

    a. Board Membership will have the skills, knowledge and experience needed to ensure viability of the organization and its programs.
        i.   Skills, knowledge and experience matrix and process developed to identify specific needs (Marketing, Accounting, Legal, Other) on the Board.
        ii. Nominations committee identifies and recruits prospective Board Members according to stated needs.

    b. Board Membership will be reflective of the community that it serves in order to ensure sensitivity and responsiveness toward community issues (in terms of gender, ethnicity, etc).
        i.   Constituent Advisory Committee that includes former and/or current students, high school dropouts and volunteers is developed as contributors to the future development of the program, and as a pipeline for board membership.
        ii. Nominations committee identifies and recruits prospective Advisory members.

    c. New Board and Advisory Committee Members are supported and encouraged in their roles.
        i.   New members have the information and tools they need to succeed; a written board manual and orientation and/or training is developed and shared.
        ii. New members are paired with existing board members for peer mentoring and relationship building to ensure a "welcoming" culture.

    d. The Board proactively transitions from a Working Board to a Managerial Board through the refinement and development of formal job descriptions with roles and responsibilities of officers and board members. See Appendix E.

    e. Revisit and examine Board Committees to enable organization to achieve strategic business goals.

    Administration & Staff 2009-2010

    Literacy Partners currently has no paid staff. All administrative and program duties are carried out by Board members and volunteer tutors.   During the start-up phase this arrangement was tenable due to relatively low numbers of students and tutors in the program.

As the program continues to grow in numbers, and as quality expectations and service offerings increase, the time commitment necessary to ensure high-quality programs supersedes what volunteer labor can provide. Literacy Partners is ready for its first paid staff person.

<u>Executive Director/Program Coordinator Position</u>

The position is responsible for overseeing the successful implementation of the tutoring program and other programmatic, administrative and fundraising responsibilities of Literacy Partners, reporting directly to the Board of Directors. Specifically, this individual is responsible for coordinating the assessment of students (both literacy and English as a Second Language), training of tutors and coordination of student/tutor matches. This person is also responsible for engaging and enlisting volunteer board members and advisory committee members as needed to ensure mission fulfillment.

<u>Volunteer Tutors</u>

Literacy Partners will continue to utilize a growing cadre of volunteers for the one-on-one tutoring program, and for other program areas to be developed and as outlined in the "program" section of this strategic business plan.

2. **Administration & Staffing Strategic Business Goals**

   a. Prepare to hire paid position: develop formal position description, hiring criteria and process based on knowledge gained from other Literacy groups; determine average salary requirements and incorporate into Fundraising Requirements; Board of Directors begins the transition from "working board" to a "managerial board" – See Appendix E.

   b. Paid staff person is hired, oriented and introduced to the community.

   c. Volunteer tutor needs and recruitment goals are established.

   d. Volunteer recruitment, training, mentoring and support programs should be developed and implemented.

Public Relations

Since its inception, Literacy Partners has continually advanced its message to various stakeholder groups in a variety of ways.   However, negative or incorrect stereotypes and prejudices about literacy issues in Kewaunee County persist, which negatively affect Literacy Partner's ability to garner community support in terms of volunteer and student recruitment and fundraising.

A revived and developed public relations plan with strong Board involvement in the form of an Ad-Hoc Committee will be developed in the future. The plan will directly address the various stakeholders of Literacy Partners, which include: volunteer tutors, students, employers, human service organizations, school districts, public libraries, taxpayers and donors. (See Appendix B for notes from the Stakeholder Analysis discussion.)

3. **Public Relations Strategic Business Goals**

    a. The Board of Directors will guide public relations, marketing and outreach efforts of Literacy Partners.

    b. Communication and relationships with stakeholders will be tailored to meet their individual needs and expectations.

    c. Communication and relationships with stakeholders will be tailored to meet their individual needs and expectations.

    d. Any requests made of stakeholders will be personal, relevant and explicit.

    e. Continual development and improvement of public relations pieces, which include:

        i.   Newsletter development

        ii.   Website updates

        iii. Newspaper press releases, letters to the editor, feature stories

        iv.   Events promotion

        v.   Consistent evaluation of promotional pieces such as letterhead, brochures, website, newsletters, etc.

        vi.   Personal outreach

        vii. Donor cultivation

Facilities & Equipment

Literacy Partners has enjoyed tremendous support from a number of stakeholders and to date has been able to access facilities free of charge. Currently, the administrative and program headquarters are located in a classroom at the old Hillcrest School in the City of Kewaunee. Additional school districts, libraries, churches, and other community organizations have donated use of space for tutors to meet with students.

This "hub-and-spoke" approach, with a centralized (hub) office that includes space for books, literacy resources, and office and tutoring space, and various (spoke) locations around the county where tutors can meet students in a quiet location, has proven very successful in reaching our target audience.

In the future, however, the Hillcrest School location may either require rent or may close altogether. Literacy Partners should plan conservatively and develop relationships with other stakeholder groups with an eye for alternative space possibilities for the central office and library.

Equipment needs for Literacy Partner's programming is minimal. At the central office, equipment needs include: office desk and chair, table and chairs work space, book shelves, chalk board and/or white board, computer hardware and software, printer, internet connection, telephone and basic office supplies. Curricular materials and books are also needed; those items are covered in the "Programs" section of the business plan.

4. **Facilities & Equipment Strategic Business Goals**

   a. Inventory existing equipment needs. Identify and budget for additional equipment purchases in advance of hiring Coordinator/Director staff position.

   b. Identify prospective alternative locations for Literacy Partners headquarters; begin developing relationships with prospects to determine feasibility and cost.

   c. Continue to nurture existing relationships with "spoke" locations and maintain list of prospective alternative locations where tutors can successfully meet with students.

Programs

Target Groups & Expected Outcomes

Through the strategic business planning process, *Literacy Partners* identified stakeholder groups and the respective changes in knowledge, actions or conditions it wishes to influence. Below are the stakeholder groups and the desired outcomes.

- Stakeholders (employers, human service agencies, school districts, faith community, prospective volunteers) will have greater:
  - cross-cultural competence
  - acceptance of difference
  - understand and value the work of Literacy Partners
- Adult immigrants will be able to:
  - adjust to American culture, norms and expectations
  - pass citizenship requirements
- Adult basic education students, high-school dropouts, and English and non-English speaking adult immigrants will improve:
  - proficiency in reading, writing and speaking English
  - confidence in ability to function in society and be a model for others
  - gain employable skills
- Parents of children struggling in school, and parents of children 0-4 will be able to:
  - support their child's language development
  - instill positive values and attitudes about books and education
- Children (ages 0-4):
  - will develop age-appropriate literacy skills
  - will be better to enter school

Programs & Activities

To date, *Literacy Partners* has focused all efforts toward developing activities to support the growth and development of the individual tutoring program.   However, to ensure mission fulfillment, additional program activities will need to be developed to support the intended outcomes for all stakeholder groups. Below is a summary of all future program activities of *Literacy Partners*.

- **Individual Tutoring** – matches volunteer tutors, one-to-one, with adult immigrants, adult basic education students, and high-school dropouts where literacy, life, and employability skills are taught via Individual Learning Plans and a defined educational curriculum.
- **Group Learning Sessions** – volunteer instructors teach small groups of adult immigrants cultural skills and the path to U.S. citizenship.

Programs & Activities (con't)

- **Parent Education Program** – workshops developed in collaboration with schools, libraries, childcare centers or other stakeholder groups. Parents of children struggling in school and parents of children ages 0-4 participate in after-school or weekend educational programs where they learn skills and behaviors that support their child's literacy development. A Parental Education Program for individual tutoring students and tutors also supports this program.

- **Community Outreach** – a proactive public education and marketing program that includes newsletters, web presence, events, press releases, presentations to community organizations, and targeted individual outreach. The goals of this program are to help build a greater understanding of Literacy Partners' mission, cross-cultural competence, and acceptance of difference in our Stakeholders and the broader community.

5.   **Programs Strategic Business Goals**

a. Proactively and publicly broaden target groups served to include stakeholders (employers, human service agencies, school districts, faith community, prospective volunteers), parents of children struggling in school, parents of children 0-4, and children ages 0-4.

b. Develop and define new program activities and offerings to include:

    i. Group Learning Sessions (as identified above)

    ii. Parent Education Program (as identified above)

    iii. Community Outreach (as identified above)

c. Strengthen the core Individual Tutoring Program through

    i. Continuous volunteer recruitment and training

    ii. Evaluation and testing of various program components

    iii. Updating the curriculum and supporting educational materials and resources

d. Collaborate regionally with other literacy programs and literacy stakeholders in North East Wisconsin.

Finance & Fundraising

As part of the strategic business planning process, Literacy Partners has projected a budget and fundraising goals for the remainder of 2009 and the next three fiscal years. This budget has accounted for all expenses related to staffing increases, board development needs, facilities and equipment changes, marketing and fundraising efforts, program expansion, and improvement efforts outlined in the previous sections of this document. Also included are all assumptions related to the expense and revenue forecasts.

6. **Finance and Fundraising Business Goals**

   a. Literacy Partners develops an annual operating budget and an annual update of a three year business plan financial projections that are reviewed by staff and the board of directors.

   b. An annual audited financial report is completed by an external accounting firm.

   c. A three-year fundraising plan that includes community outreach and donor cultivation is developed to achieve annual revenue goals; currently estimated at $170,500.

Literacy Partners Proposed Budget 2009-2012

Cash at beginning of year	$9,100	$7,000			

REVENUES:	2,009	2010	2011	2012	Goal
Sale of Materials	$300	$300	$300	$300	
Fees	$300	$150	$150	$200	
* Foundation/Corp Grants	$3,500	$32,500	$34,500	$36,500	$107,000
United Funds of Kewaunee					
* County	$500	$500	$500	$500	$2,000
* Net Special Events	$0	$1,000	$5,000	$8,000	$14,000
* Corporate Donations	$4,000	$8,000	$10,000	$12,000	$34,000
* Organization Donations	$500	$1,000	$2,000	$3,000	$6,500
* Individual Donations	$500	$1,000	$2,500	$3,000	$7,000
TOTAL REVENUES:	**$18,700**	**$51,450**	**$54,950**	**$63,500**	
Total Fundraising					
* **Goal**					**$170,500**

EXPENSES:				
Salary	$0	$20,000	$20,600	$21,220
Travel	$0	$3,500	$3,850	$4,235
Conferences	$0	$1,300	$1,500	$2,000
Equipment	$0	$4,500	$5,000	$5,250
Internet fees	$0	$775	$775	$775
Office Supplies	$0	$1,700	$1,750	$1,800
Tutor & Other Training	$1,000	$1,200	$1,300	$1,400
Equipment Repair	$0	$500	$1,000	$1,000
Literacy & Educational Materials	$6,500	$3,500	$3,000	$7,500
Dues/Memberships	$200	$200	$225	$250
Community Outreach	$300	$300	$400	$450
Legal & Technical Support	$1,100	$1,000	$1,500	$1,750
Fundraising	$300	$500	$1,000	$1,250
Rent/Utilities	$3,000	$6,000	$7,000	$8,000
Insurance (liability and contents)	$0	$325	$325	$375
Student & Stakeholder Recognition	$3,000	$2,500	$2,500	$2,500
Accounting	$0	$500	$600	$700
Continuing Education & Support	$500	$500	$500	$1,500
Misc Expenses	$1,300	$1,000	$1,500	$1,500
TOTAL EXPENSES	**$17,200**	**$49,800**	**$54,325**	**$63,455**

Budget Assumptions

REVENUES:	Assumptions
Sale of Materials	Students pay $10.00 for a book when they finish a text.
Fees	Tutors are charged a $10.00 material fee for tutor training.
Foundation/Corp Grants	Foundation and corporate grants pursued as outlined in fundraising plan.
United Funds of Kew. County	Grant for student and tutor materials.
Net Special Events	Current events will be continued and at least one new fundraising event will be planned in the future.
Corporate Donations	Corporations will be asked to make annual contributions and help underwrite events and other aspects of programming as identified in the plan for philanthropy.
Organization Donations	Local clubs and organizations will be asked to donate.
Individual Donations	Donations will be through our "Gift of Literacy" program.
EXPENSES:	**Assumptions**
Salary	Coordinator's salary is based on scan of similar positions. 2011-2012 salaries include 3% increase. See Leadership section of 5 Year Plan.
Travel	Includes in and out of county travel for staff, evaluators, and officers.
Conferences	Registration, meals and lodging (if necessary) for staff and volunteers.
Equipment	Lap top computer, printer, and software for coordinator and two student computers with software will be provided in 2010. In 2011 and 2012 student computers and software will be purchased. New copier in 2011.
Internet fees	Annual rate based on past expenses.
Office Supplies	Includes supplies for coordinator and board members (duplicating paper, toner, printer ink, stamps, notebooks, etc).
Tutor & Other Training	Compensation pay for tutor trainers, training teaching materials, supplies, equipment, etc. The Coordinator will be part of the training team and will be compensated for training sessions.
Equipment Repair	Repair of computers, printer, copier, TV/VCR.
Literacy & Educational Materials	Text books and Resource Center materials. Text book committee will study our present series in 2011 with a possible change of series in 2012.
Dues/Memberships	Wisconsin Literacy and ProLiteracy dues.
Community Outreach	Promotional projects. See IV Public Relations of our 5 Year Plan.
Legal & Technical Support	Lawyer fees and maintenance of website.
Fundraising	Seed money for fundraising and benefit projects.
Rent/Utilities	See part V Facilities and Equipment of the 5 Year Plan.
Insurance	Covers damage to contents and liability at Resource Center.
Student & Stakeholder Recognition	Recognition Day activities and recognition pins to be purchased in 2009.
Accounting	Annual audit and IRS forms.
Continuing Education & Support	See VI number 5 part iiii of our 5 Year Plan.
Misc Expenses	Possible regional meeting in 2012.

Appendix A

Notes from Organizational Mandates Exercise

Mandate	Key Requirements of Mandate	Effect of Mandate on what is expected of KCEDC and how it does business.
Nondiscrimination clause in bylaws	Race, religion, gender, etc.	We had a discussion on the future need to do background checks – do we need a policy on this?
501c3 requirements	Conflict of Interest Can't be politically active Regulations on nonprofits	Can't jeopardize nonprofit status – fiscal and fundraising requirements; board leadership requirements; must remain true to mission as identified in our tax exempt ruling.
Confidentiality	- can't ID students in marketing & PR - tutors must keep confidentiality requirement too.	This causes difficulties in promoting the program and educating the community about its benefits. We must guard personal information about students and tutors.
IRS laws change if our budget exceeds $25,000	We would need to file a 990	We need knowledge and expertise about 990 requirements – possibly more accounting/legal expertise on board.
Build Trust with students	Allow them to remain anonymous	There is a stigma associated with literacy. We need to conduct good tutor training about how to build trust with students – develop scenarios for training purposes. Safety and well-being of tutors is important – they always need to meet in public places.

Appendix B

Stakeholder Analysis Notes from June 19, 2008

Stakeholder Group: Volunteers/tutors

***Criteria they use to assess Literacy Partner's Performance*:**

- Do they see successes in the newsletter, in accomplishments reports, and at the recognition banquet?
- How is their student progressing?
- What awards have been received by LP?
- Is volunteer training and support of high quality? Do mentor relationships match?
- How successfully are students matched with tutors?
- Are their expectations are being met?

How does this stakeholder influence us?

- Our organization is stronger because of the diversity brought to us by volunteers/ tutors.
- Volunteers and tutors reinforce and enable mission fulfillment.

What do we need from them?

- We need them to share their experiences and information at meetings and through reports.
- We need them to commit time to tutor and give us feedback on materials.
- We need them to be aware of development needs of students.
- We need them to provide a mutual support network for one another.

Stakeholder Group: Students

***Criteria they use to assess Literacy Partner's Performance*:**

- Do they feel accepted by our organization/their tutor?
- Do they feel there is quality in the instruction they're receiving?
- How well they are being mentored?

How does this stakeholder influence us?

- They motivate us to continue this work

What do we need from them?

- Feedback on program, how things are going (proactive not reactive communication).
- We need them to sign-up and commit to the program.
- We need them to make a commitment to learn to their fullest potential.

Stakeholder Group: Employers

***Criteria they use to assess our performance*:**

- Do they feel their employees have a better comprehension of English, making them more efficient in their job?
- Do they see good press, hear good word-of-mouth, and attend recognition events?
- Are employees more self-reliant in their daily living skills?
- Is our work helping to develop a stable workforce, reducing turnover?
- Can our literacy group respond to specific, urgent training needs – safety concerns?

How does this stakeholder influence us?

- They can refer students, or choose not to.
- They can bring high priority issues/needs to the table.
- They can promote LP to other producers.
- We are accountable to them, especially if they provide financial support.
- They can support the program - monetary philosophically or the provision of other resources.

What do we need from them?

- We need regular and consistent time release for students/employees.
- We need financial & "moral" support.

- We need them to encourage and maintain active communication between employer and student.

Stakeholder Group: County Agencies – Human Service Organizations

Criteria they use to assess our performance:

- Do our students demonstrate increased productivity with reduced need for county services?
- Do their clientele have a greater ability to communicate their staff?

How does this stakeholder influence us?

- Do they promote the program and connect students to the program?
- Do they partner in assessing community needs for literacy?

What do we need from them?

- We need Space to work and learn.
- We need support/encouragement of students in our program.
- We need professional development for tutors.
- We need clarification and tech assistance on various issues reg students/tutors.

Stakeholder Group: School Districts

Criteria they use to assess our performance::

- We're not sure/don't know – our relationship with them is just developing: some thoughts about how they might assess us:
  - Are parents more successfully helping their kids with schoolwork?
  - Are kids getting more support at home?
  - What about school drop-outs – might we fill a gap there?

How does this stakeholder influence us?

- Do they provide referrals of adult students to us?
- Do they provide space/equipment/financial?
- Do they help parents understand their role in the child's success in school?
- Do they offer professional development?
- Do they serve as a collaborator in obtaining funding?

What do we need from them?

- We need better communication about prospective students – active referrals.

Stakeholder Group: Public Libraries

Criteria they use to assess our performance:

    Can we help them generate more library users? They want higher numbers of people coming through their doors as a result of our Literacy Partners.

- Do they see us as an active group – often communicated through newsletter?
- Are there a number of tutoring session at the library?

How does this stakeholder influence us?

- Do they provide relevant materials (ie Rosetta Stone & bilingual books)?
- Do they lend support on grants – other funding resources?
- Do they show awareness in community for bilingual education?
- Do they share our core beliefs & values?

What do we need from them?

- We need their help in increasing multi-cultural awareness – creating an appreciation for this in the community.
- We need them to provide space for tutoring.

Stakeholder Group: Tax payers

***Criteria they use to assess our performance*:**

- We don't know how they assess our performance; they don't know about us and our work.
- There is a lot of community education that needs to occur about literacy and the people who use our services.
- People need to learn how to read and speak English.
- Taxpayers don't want to foot the bill.
- Taxpayers would be interested in our success stories – how we help develop self-sufficient citizens.

How does this stakeholder influence us?

- They make us lead by example.
- Public education regarding literacy issues is becoming a necessary component to our mission.
- Need to help overcome negative stereotypes regarding immigrant communities.

What do we need from them?

- Moral support – not necessarily financial.

Stakeholder Group: Donors

***Criteria*:**

- Donors are interested in seeing individual impacts regarding advancements in literacy.
- How many people are we helping?
- How many hours are volunteered?
- Is the organization growing and dynamic?
- How have students contributed to their employer?

How does this stakeholder influence us?

- They help keep us focused.
- They keep us responsive to their individual missions, visions and goals.
- We share a partnership.

What do we need from them?

- We need funding, moral support, and presence at events and other public gatherings.
- We need to be able to use their name for public correspondence.
- We need their help in fundraising – especially in donor research.
- We need their help to recruit students and tutors.

Group: Civic Organizations

***Criteria*:** How we can help them reach/fulfill their missions?

How does this stakeholder influence us? They are our partners.

What do we need from them? We need finances and referrals of tutors/volunteers/students.

Appendix C

SWOT Analysis Notes– July/August, 2008

Assessing Internal Strengths and Challenges

	Strengths	Challenges
Board - structure - recruitment/retention - development	• Strong board • Clear bylaws • They understand the program and are passionate about the mission. • Good chemistry. • Complimentary backgrounds • Board geographically represents the county. • Board orientation is good because it is 1-1.	• We need more diversity on the Board – top heavy with former teachers. • We should consider rounding out the mix of experience, to include more: accountant, lawyer, ethnic diversity, younger board members. • Board is very bonded. How to bring in new board members? • May need to prepare/develop board for more diversity.
Administration - volunteer/paid staff - structure - development	• Volunteer board is a working board – they are very committed. • Structure and division of jobs. • Board structure in bylaws is clear.	• Work is getting to be too much for a working board. • Tutors are maxed out on their time commitment; can't give more for committee work. • There is an over-reliance on "multiple hat" people. We need more specialized expertise. • Transition from board to staff would need to be identified. • Involve more males in the process – this is important for clients as well.
Facilities	• Hillcrest - Currently they're free, in an educational setting, accessible, large. • Churches are a resource. • Libraries have been helpful. • We can continue to use other facilities for the near term.	• Future of building is unclear. • It is not centrally located; a Casco location would be best. Communities are not equally served because of our main location. • Computer labs are needed. • Need sense of permanency.
Program(s) - development - administration - evaluation	• For basic and ESL programs, we have our own trainer and can schedule as needed. • Pre GED, GED, Learning Disability are new programs. • Curriculum itself is strong. • Tutor's skills and their ability to train others is strong. • We've expanded to serve many types of students. • Evaluation and testing is strong because it is flexible and works with students.	• Need to evaluate the ESL curriculum and other programs themselves, in the future – they may be out of date. • Content of materials and stories are out-of-date – Laubach specifically. • As an organization we're confident with the curriculum, but perhaps a little bored. • We need to establish an annual calendar. • We need to expand continuing education of tutors – provide them with sharing sessions, keeping tutor training cohorts together a bit more with ongoing networking opps.

	Strengths	Challenges
Promotion & Outreach	• Great community partnerships, esp with schools and churches. • Have a newsletter. • Good word-of-mouth outreach – tutors help recruit other tutors. • Hispanic dance event was very positive • Connections and listing w/ WI Literacy • Eye-catching pamphlet Letterhead w/donors.	• To ensure that newspaper reporting is accurate and stays true to our mission. • Word-of-mouth can also be a challenge. Misinformation can be perpetuated, specifically negative stereotypes. • Need to outreach more to Spanish language media. • We don't have our website up yet. When we do, it will be a strength.
Finance **- fundraising** **- budget**	• So far we have been able to fundraise enough to cover our budget essentials. • We have a small but solid and well-cultivated donor base. • Informal donor research has been conducted. • Strong treasurer	• We don't have a long-term, steady income strategy that will fund growth, specifically an employee. • We need to expand and deepen donor base to fund growth. • We need to formalize donor research to determine giving potential. • We need to further develop our donor recognition program. • Enlisting volunteers for fundraising work has been a challenge.

Assessing External Opportunities and Threats:

Opportunity ◄——————————————————————► Threat

Forces or Trends: Political, Economic, Social, Educational, Environmental, Other			
We are viewed largely as a social-service type organization, and as a point-of-entry for other agencies.	To date, we have been independent of federal dollars.	Fed literacy funding is getting cut - subject to political tides.	More competition for literacy $ from private or other funding sources.
Educational institutions have more awareness than ever about reaching out to all groups (i.e. ESL) and are more open to working with groups like LP.		Algoma couldn't find an ESL Teacher.	There currently is political confusion about how to handle undocumented workers – no consensus.
Kewaunee School District has a literacy initiative; wants to work on Family Literacy but this is out of their realm and budget.	Schools are not accustomed to working with community partners – they are self-contained bureaucracies.		Schools can't go beyond the "student" in terms of literacy – they need help with family literacy.
Resource Controllers: Stakeholders, Funders, regulators, etc			
L-C District has let us use classroom/equipment for various efforts for free.	We haven't made strong efforts to keep School Boards in-the-loop about our activities at their District facilities.	We may soon need to pay for space.	Hillcrest School may close.
Some school districts are more concerned than others about drop-outs and are more willing to work with Literacy Partners.	Media, and the image they portray to the public can be either an asset or a liability to Literacy Partners.		Other school districts prefer not to spend additional resources tracking their school drop-outs.
Competitive/Cooperative Forces			
We have good experience cooperating w/other organizations; service clubs, churches, etc. We have more opportunities to expand these efforts.		We have a cooperative & competitive nature with other agencies; we cooperate programmatically, but to a degree we compete for funding sources. How can we work with other organizations while competing for diminishing funds?	
NWTC – perhaps we could develop more referrals, or are we competing with them?		We haven't made strong connections with County depts (HHS). We may need to "go on their turf" to relay cross-culture	

	competence.

Appendix D

Stakeholder Focus Group Meeting Notes

Hillcrest School, October 8, 2008

Present: Bob Garfinkel, Mark Kanz, Barb Baldwin, Jerry Waara, Rita Schiesser, Mary Ann Albert, Mary Novak, Maureen Kinnard, and Sara Nelson

The purpose of the meeting was to gather input from key stakeholders of Literacy Partners for consideration in the strategic planning process. Claire Thompson from UWEX facilitated the group discussion around several key questions:

1. What emerging issues should *Literacy Partners* consider as it develops its strategic plan?
2. What community impacts should *Literacy Partners* strive to make?
3. How can *Literacy Partners* best structure itself to meet the challenges ahead?

1. Emerging Issues
1.1 Childhood Illiteracy

- Literacy skills normally begin to develop at a very young age. Prevention of illiteracy is very important to fulfilling LP's mission – beyond just the "intervention" strategies of tutoring illiterate adults. Pushing children to read and learn through book discussions, field trips to libraries, reading & writing contests, bookmobiles and other literacy-related social activities geared toward children should all be considered.
- Parents are less likely to encourage children to read if they themselves don't read very well or at all. How can LP support parents in those early years to help children "learn to read" and "read to learn." Reaching out to illiterate adults who may normally not seek out LP could be accomplished through their children.
- Technology has been/could be a help or a hindrance. Digital and web-based media are supplanting traditional reading and book learning, which often requires a different type of reading attention and skill set. How can LP work to promote the benefits of traditional reading while capturing the advantages of the digital age? On-line chats are a possibility, but have been too staff-intensive in the past.
- As the non-English speaking immigrant population grows, LP should consider how it can support the children of these families in becoming literate.

1.2 Employment and Training of Adults

- Reaching illiterate adults through their workplace could become a focus of LP. Developing literacy trainings, such as how to read and follow instructions, especially for technology industries could be a valuable community service.
- Offer training for non-English speaking adults in workplace- specific settings.

- Develop community partnerships with workforce development agencies.
- Preparing students for GED high school equivalency, partnering with NWTC.

1.3 The Economy

- Families are experiencing extra financial stress at this time and may not have the time to educate themselves/become literate. Many people are working multiple jobs and juggling many demands. Travel to tutoring sessions is also more expensive with fuel costs.
- Donors have fewer funds to give away, and competition is greater than ever.
- LP should consider various measures to counteract these external influences, such as: developing distance learning/tutoring options, developing a regional center for tutors, co-locating LP with compatible community partner, and hiring a paid coordinator to help the organization raise funds and facilitate improved access to LP services.

1.4 Recruiting Tutors

- Recruiting, sustaining and maintaining the tutor pool will continue to be a key issue for LP – demand for tutors is greater than supply in the foreseeable future.
- LP must often educate prospective tutors about the needs of illiterate community members – there still exists a stigma for basic education

1.5 Recruiting Students

- In order to recruit more students, LP will need to overcome social stigmas associated with illiteracy, especially among native English-speakers.

1.6 Acceptance of Recent Immigrants in Neighborhoods

- Recent immigrants are often "hidden" in our community – where they live, socialize and shop are not always visible, making assimilation difficult.
- Negative stereotypes are pervasive; and affects our ability to recruit tutors and in recruiting students.
- Tell me more program – helps promote cross-cultural understanding by putting Spanish in a broader cross-cultural context to broaden global perspective ,so the focus is not just in Spanish, but all languages.
- Help is needed to assist recent immigrants become good neighbors, assimilating to local culture and expectations.

1.7 Citizenship

- Citizenship is a highly politicized and systemic issue that blocks the ability of undocumented workers to assimilate – it also inhibits learning and literacy.
- Many students wonder what why they should continue with literacy instruction if they can't advance with their education due to citizenship barriers.

- LP can respond by staying up-to-date on citizenship issues and other opportunities for undocumented workers; could provide citizenship classes.
- LP should prepare to work with other immigrant populations beyond the Hispanic population as the demographics of the State change.

2. Community Impacts

- LP should be a "go to" source for <u>employers</u> as a resource for comprehension training. Utilize employers as a conduit to promoting literacy.
- Literacy Partners should continue to develop relationships with partner organizations, to help fulfill mission.
- Parents should have a better understanding of illiteracy problems and have a greater impact on helping their children achieve literacy.
- Survival of LP for the long-term is clear: we have appropriate staffing levels and former students should be encouraged to be tutors.
- We should have a system in place where parents can support children in early literacy – that looks at the whole piece.
- "Drop In" center for literacy should be developed – perhaps a sort of "Welcome Wagon" geared to recent immigrants that may include other human service needs.
- The ultimate goal would be to have literacy levels at such a high rate that the organization would go "out of business."

3. LP Structure

- We need to hire a staff person to coordinate LP efforts
- Public outreach and education is a cornerstone issue and must be accommodated within the board/volunteer and staffing structure to include regular newspaper articles, public education about the above issues, and regular use and updates to web site. This will help us get the word out and stay organized.

In closing the focus group session, participants were asked to state one word that summed up their feelings about the meeting and future of Literacy Partners. Below are the responses:

- Invigorating
- Encouraged
- Future
- Formative
- Thought-provoking
- Stimulating
- Hopeful
- Positive
- Fun

Appendix E

STAGES OF BOARD DEVELOPMENT

	Foundation Building	Working	Managerial	Governing
Important Board Director Attributes	Lots of time, willingness to work	Willingness to work, planning skills	Planning skills	Policy skills
Board's Focus	Organization's structure & operations	Operations	Governance	Governance
Board's Planning	Day to Day	Day to Day	Long Range	Strategic
Board Composition	Founders	Founders & Recruits	Founders & Recruits	Recruits & maybe founders
Committee Structure	Works as a whole, possibly with working committees	Work as a whole with one or two committees	Working committees	Oversight and policy-making committees
Board's Fund-raising activity	Events	Events, grant seeking	Grant-seeking, individual solicitations (staff does event)	Individual and institutional solicitations (staff does event & grant-seeking)
Staff's Role	No staff	Focus on operations	Focus on operations, assist board in defining roles	Focus on operations

Source: Enterprise Foundation. (2001) Board basics: A primer for community development organizations. Presented at 2001 Network Conference, Washington D.C.