



UPSTATE STRATEGIC PLANNING 2018 - 2023 CIRCLE

OF FRIENDS

THE STRATEGIC PLANNING PROCESS

- Many thanks to the **Graham Foundation** for providing the support that made this Upstate Circle of Friends Strategic Planning process possible; and the stakeholders led by Helena Dixon, who all contributed their time, feedback, and talents to a process resulting in a focused roadmap for the future.

SWOT ANALYSIS

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Strengths

- The Board of Directors
- Executives
- Financial growth
- Funding sources
- Collaboration
- Contract staffing
- Campus/property
- Stability

Weaknesses

- Short private donors list
- Overworked executives
- Limited marketing
- Financial transparency
- Small volunteer base
- Staff pay
- Lack of staff benefits
- Limited community awareness
- Security systems upgrade

Opportunities

- Partner with churches
- Crime reduction initiatives
- Affordable housing / VetForward initiative
- Services for children under 4, young adults, parents, senior adults to include Financial Literacy Classes
- Expand use of property and grounds in collaborations with other organizations, ie Greenville County Rec, etc.
- Skilled labor internships
- District 25 awarded tax breaks
- Community Development Corporation

Threats

- Affordable housing in the community
- Crime
- Cancellation of government programs
- Financial stability of Quest Leadership Academy
- 25% of homes in Belle Meade community vacant
- Teens fall through the cracks or have no follow-up care after short-term programs

ORGANIZATIONAL ASSESSMENT

What we do well:

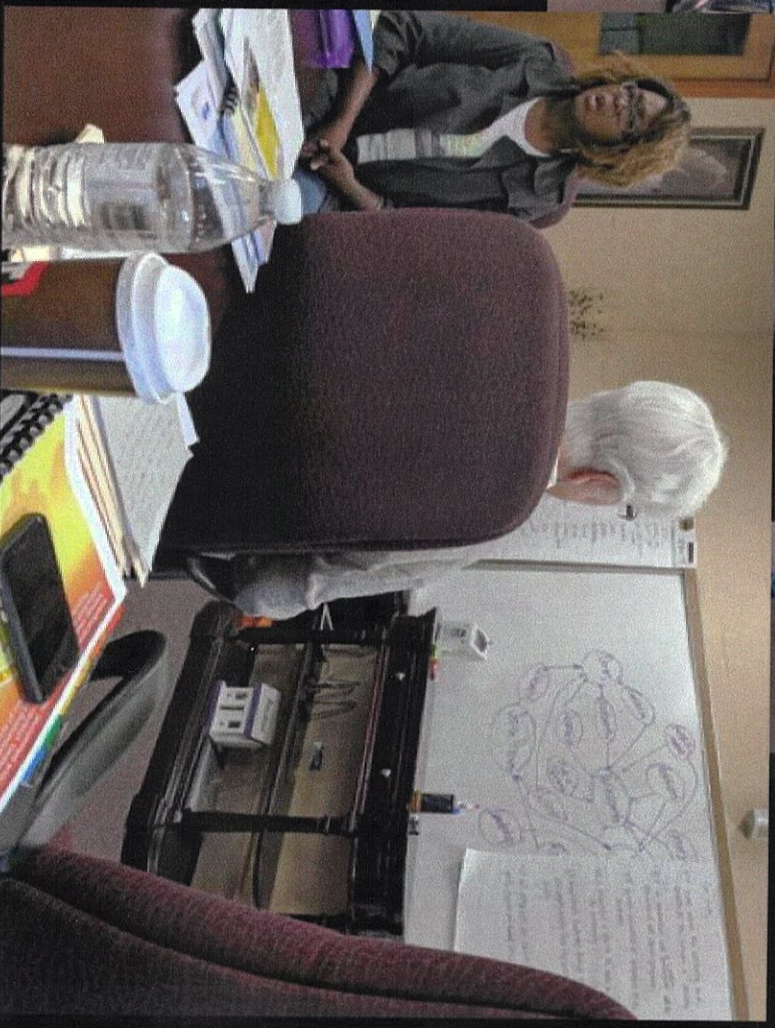
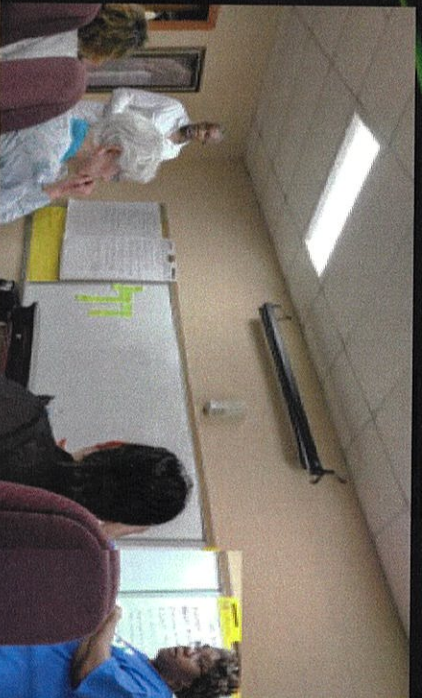
- Talented Board of Directors
- Experienced Executive Directors
- Existing building and grounds
- Collaborate with funders
- Growing financially
- Create stability in the neighborhood
- Low overhead with strategic staffing and collaboration with other agencies

What do we need to improve:

- Donor base
- Marketing
- Succession planning
- Staff pay and benefits
- Computer systems
- Financial transparency
- Communications with community
- Volunteer base

The first steps look closely at

- Vision Statement
- Mission Statement
- Core Values
- Focus Areas
- and update
for the future



Over 24 hours of
review, research, and
brainstorming

MISSION

Upstate Circle of Friends expands **OPPORTUNITIES**, enhances the **QUALITY** of life, and **EMPOWERS** citizens of surrounding communities through multiple educational, recreational, and social programs.



VISION

The Belle Meade community is a **VIBRANT** and **ACTIVE** neighborhood where residents have all the needed **RESOURCES** to be successful.

With Upstate Circle of Friends at the center, residents invest in each other to sustain a high quality of life.



CORE VALUE

Our Core Values include:

Upstate Circle of Friends believes **every individual** is part of a family, neighborhood, and community. Therefore, the more equipped they are to responsibly navigate life, the greater positive effect they have on their surroundings.

- Caring about the wellbeing and growth of the citizens it serves
- Striving to be a dependable conduit for educational and social programs
- Partnering with area agencies and businesses to provide needed resources and assistance
- Demonstrating that dignified services can be offered through leadership based on awareness, resourcefulness, and respect
- Endeavoring to make a difference for youth and adults of all ages
- Collaborating with trustworthy service providers and community leaders to provide credible services
- Investing passionately in fulfilling needs of participants so they can succeed and in return positively impact their community

FOCUS AREAS

Goal 1: Expand Facilities

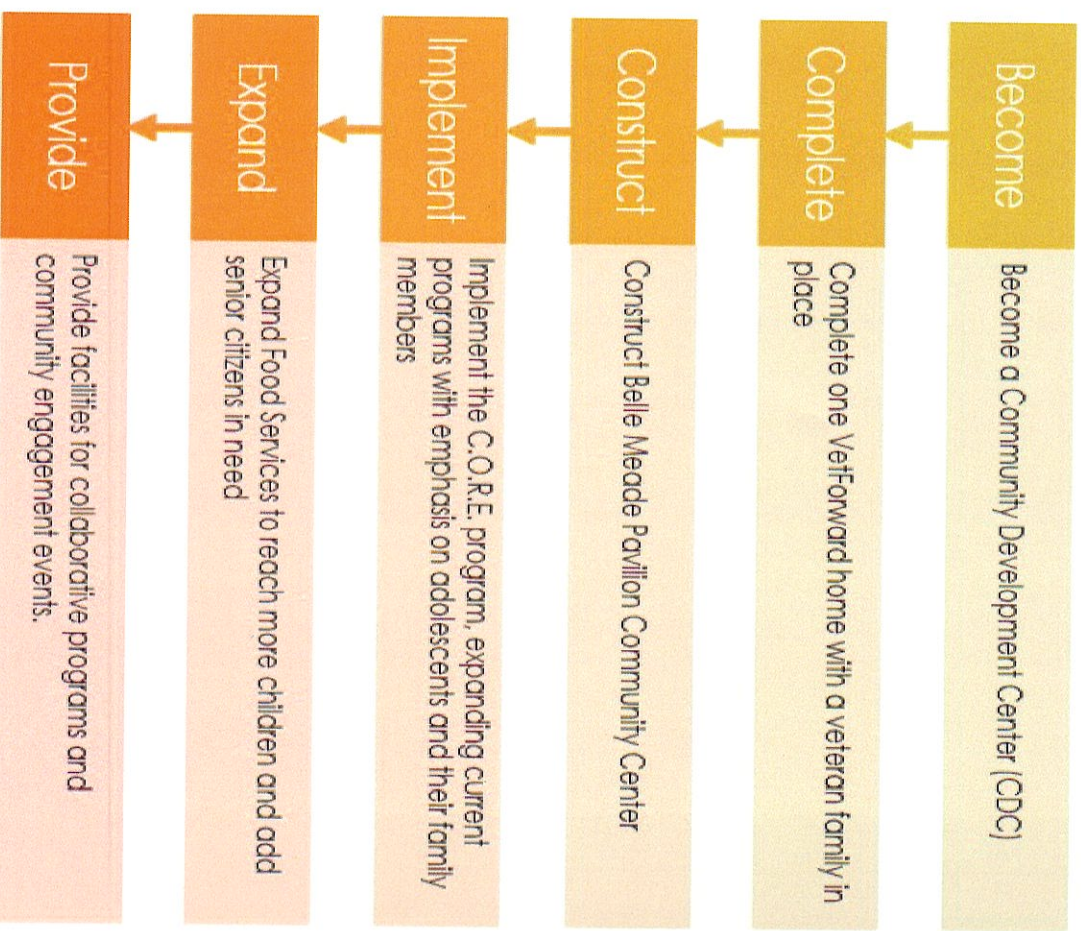
Facilitate a community center, office spaces, and veteran housing.

Goal 2: Create the Upstate Circle of Friends Community Development Center.

Offer quality services to all local citizens, cradle-to-grave.

Goal 3: Expand Programming and Partnerships

Continue and expand quality services currently provided to local children and their families.



GOAL 1 – Expand Facilities

OBJECTIVE	MEASURE	ASSIGNMENT	RESULTS	TIME-FRAME
VetForward Home	Home built and move-in ready for a veteran family in need.	George Singleton/ BOD Committee	Veteran family moved in and established.	3rd Quarter 2019
Belle Meade Pavilion	<ul style="list-style-type: none"> Awareness/Fundraising Ground Breaking Construction Ribbon Cutting 	George Singleton / UCF Coordinator / BOD Committee	<ul style="list-style-type: none"> Funds raised Pavilion completed Community services and events being provided 	2019 – 2022

GOAL 2 – Create the Upstate Circle of Friends Community Development Center (CDC)

OBJECTIVE	MEASURE	ASSIGNMENT	RESULTS	TIME-FRAME
Complete 501(c)3 Applications	Completed and submitted	Deloris Summers/BOD Committee	501(c)3 certified	3rd Quarter 2019
Leadership in providing area daycare center	Site and Provider Identified	BOD Committee	Children enrolled and receiving quality services	By 2022
Initiate and Host Neighborhood Association	Created with Calendar of Meetings distributed	George Singleton/NA committee	Association established and involved.	2020
Provide facilities for community related meetings.	Calendar of meetings confirmed and distributed.	George Singleton/Program Coordinator	Regular community usage of Facility	2019 – 2023

GOAL 3 – Expand Programming

OBJECTIVE	MEASURE	ASSIGNMENT	RESULTS	TIME-FRAME
Add before and after-school care and drop-in.	Before and after-school programming provided for area students.	UCF Coordinator with committee consisting of school administrators and UCF BOD.	Students receiving age and grade appropriate enrichment activities in a safe, supervised environment.	2020 - 2023
C.O.R.E. afterschool/summer programming thru collaborations to: -Expand # of teens served -Provide wrap-around services to include counseling, tutoring, mentoring, etc. -Offer parental support -Coordinate Internship programs	At-risk and disadvantaged youth being served to reduce criminal association, parent involvement increased, high school graduation rate improved, higher % of graduates in secondary school, employed, or in military.	George Singleton / BOD Committee	Up to 60 youth served the first year, with reduced recidivism by 50% and minimum 30% increased parent involvement.	2019, ongoing
Health/Nutrition: Food Services Expanded	Number of Greenville County youth served increased, senior citizens in need added.	Deloris Summers, Food Service Staff	20% increase in children served, up to 100 senior citizens, 10% increase annually thereafter	2019, ongoing
Financial Literacy Programming	Partner with like agencies, engage minimum of 25 teens and separately 25 adults monthly.	George Singleton/ Collaborating Agencies	Establish/increase credit score, decrease non-mortgage debt, increase savings, open bank or credit union account.	2019, ongoing
Create and Grow Volunteer Committee	Increased number of regular, active volunteers	George Singleton / UCF Coordinator	-Two plus volunteer orientations per year -Increased number of volunteers -Four Volunteer planned/assisted events annually	2019, ongoing

MOVING FORWARD

The **Upstate Circle of Friends Strategic Plan** is a living document to be reviewed quarterly and updated and/or adjusted as needed to ensure appropriate progress toward the goals and objectives set forth in this plan.

Most importantly, this document will serve as the guiding force behind decisions, resource distribution, personnel allocations, professional development, and program expansion for the next five years.

In reviewing the plan, the priorities adopted by the Board of Directors are evident and intertwined among multiple goal areas.

Ultimately, the main goal of Upstate Circle of Friends is to be fiscally responsible while improving the quality of life for citizens of Belle Meade and surrounding neighborhoods.



UPSTATE
CIRCLE
OF FRIENDS

Expanding the

Circle

Join us

www.UCFGreenville.com

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