NONPROFIT STRATEGIC PLAN

ABSTRACT
Project intended to create mockup of a startup nonprofit strategic plan.

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UT Dallas | PA 6387 | 2016

Level Up

Supplying Equitable Education

STRATEGIC PLAN

October 2016 to October 2017

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INTRODUCTION

"Education is the key to opportunity in our society, and the equality of educational opportunity must be the birthright of every citizen."

-Lyndon B. Johnson

Level Up was conceived after continued witness to a consistent lack of equality in the delivery of public education. Along with an unequal distribution of education comes the unequal distribution of educational funding, leaving students and educators without the necessary tools for success. We continue to see students go without the most basic of needs, from backpacks to uniforms, and even pencils. Not only did we realize that there is an ongoing need for such supplies, there is also a need for advocates to speak out for those children that have been underserved. More importantly, we realized the multitude of organizations, public entities, and corporations that have been championing the efforts to supplement students and educators in the areas that funding has fallen short. Level Up plans to not only aid in these efforts, but also to create a database that will connect all the beforementioned entities and allow for a platform in which supplies can be distributed where they are most needed and in the most efficient manner.

Level Up is truly a grassroots organization. Grassroots has many implications, and for Level Up, it means a blank slate that affords us the opportunity help solve the realized need for a specific service to the community. We decided that creating a cohesive plan to guide us as we grow will be vital to the success of our staff and leadership team but will also serve as a measure in which we can report to our stakeholders and hold ourselves accountable. This plan is intended to serve as a roadmap as well as a tool to ensure transparency. A major ethos of Level Up lies in the collaborative efforts that must exist if the reality of our shared passions will continue to be impactful in the lives of children.

Despite being in its infancy, the Level Up Team already consists of a dedicated group of volunteers that are passionate about our mission. As you will see in this plan, we will create further strategic plans specific to staffing, board management, and succession planning, as well as fund procurement. In this report, you will find not only the organizations that we have learned from and plan to collaborate with, but also the tools we plan to utilize in our continued growth. We are proud of our efforts and hope that you will join us in our passionate pursuit to eradicate inequality in education and advocate for all students.

 Signed,

Elissa Colich, Executive Director

and The Level Up Team

EXECUTIVE SUMMARY

EQUITABLE EDUCATION

For All Students

Regardless of Zip Code or Socioeconomic Status

Board
Staff
Stakeholders

The Plan

Fig.1 *Executive Summary Roadmap*
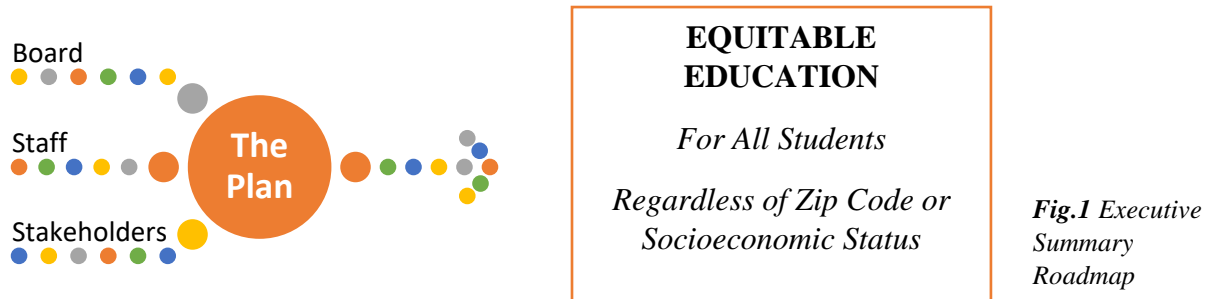
Level Up is a grass roots organization with the greatest of aspirations. Our overarching goal is for all students to receive equal educational opportunities to reach their dreams, regardless of their socioeconomic status or zip code. For this to occur, educators, students, and parents must possess all the necessary tools to ensure that education is delivered unfettered. Level Up will play a significant role in closing the opportunity gap that has historically left many children lacking the most basic of supplies needed to be successful in their academic endeavors. By supplying the tools, Level Up will be reducing the time, effort, and finances normally supplemented by teachers and open the possibilities for them to focus on education.
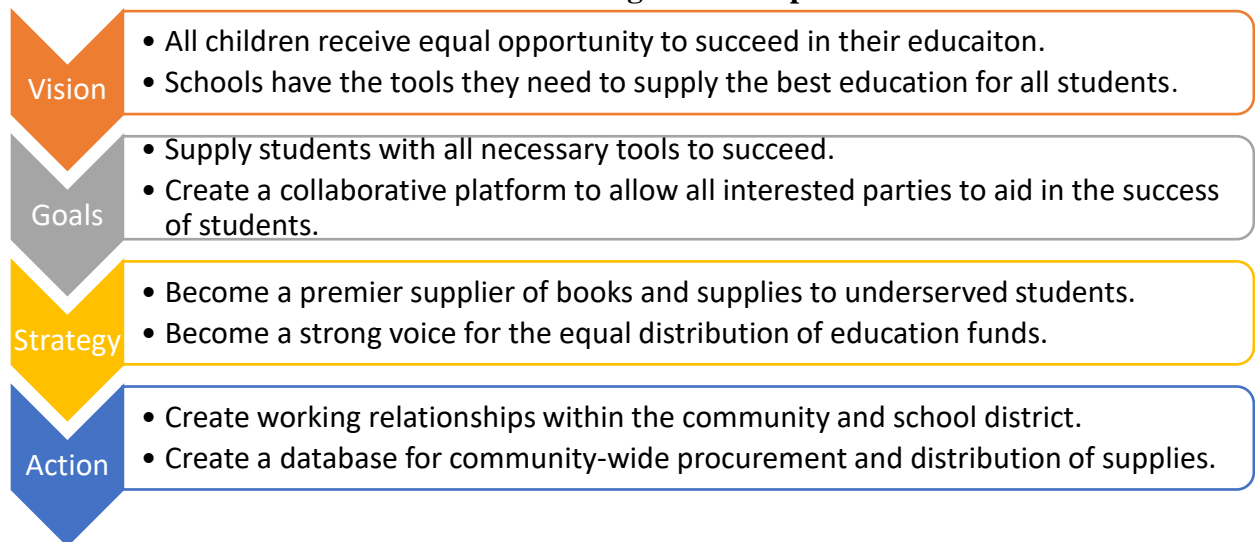
Strategic Roadmap

Vision
- All children receive equal opportunity to succeed in their educaiton.
- Schools have the tools they need to supply the best education for all students.

Goals
- Supply students with all necessary tools to succeed.
- Create a collaborative platform to allow all interested parties to aid in the success of students.

Strategy
- Become a premier supplier of books and supplies to underserved students.
- Become a strong voice for the equal distribution of education funds.

Action
- Create working relationships within the community and school district.
- Create a database for community-wide procurement and distribution of supplies.

Fig.2 *Strategic Roadmap*

To become the premier purveyor of supplemental education supplies, we will plan strategically, considering goals and strategies that account for growth phases as well as possible economic and political downturns and obstacles. We will work collaboratively with our board, volunteers, staff, and peer community organizations to ensures that educators and students have the tools necessary to focus on education, ensuring that all students receive equal education opportunities.

TIMELINE

Level Up will maintain forward thinking throughout the planning process, maintaining the spirit that our goal is not only attainable, but that with the input of our collaborators and stakeholders, we can level the educational playing field by closing the educational opportunity gap.

- **Year 1**
    - Secure warehouse space for storing supplies sufficient for growth, and space for organization and meeting space if applicable.
    - Establish working relationships with a minimum of five schools with fifty percent or more students on the free lunch program (as a general indicator of high poverty schools).
    - Establish relationships with at least two large corporations, two college campuses, two faith based, and two other entities (such as book clubs and giving circles) that are willing to support our efforts.
    - Create a board with a working strategic plan.
    - Hire a skeleton staff consisting of volunteers while having in place a succession plan for growth.
    - Participate in the Mayor's Back to School Fair, Communities Foundation's Giving Day, and college campus volunteer fairs.
    - Establish relationships with organizations working within schools, specifically in learning centers when applicable.
    - Establish working relationships with other organizations that share our goals of enriching the lives of young members in our communities.
    - Create an organization strategic plan including (but not limited to):
        - Budget
        - Staffing
            - Diversity & Inclusion
            - Compensation and benefits
            - Succession
        - Board succession plan
        - Fundraising
        - Collaboration
        - Marketing
    - Secure at least two grants
        - One specific to operations
        - Once specific to fundraising/supply procurement
    - Secure two sustaining donors
    - Secure one major, two middle level, three lower level donors.

- **Year 2**
    - Increase the number of campuses to a minimum of ten.

➢ Create a database to maintain our supplies as well as afford communications across organizations, agencies, and schools that we serve and collaborate.
➢ Secure at least one new grant.
➢ Secure one new major donor.
➢ Create marketing plan.
➢ Create a sustaining donor platform with differing levels of giving.
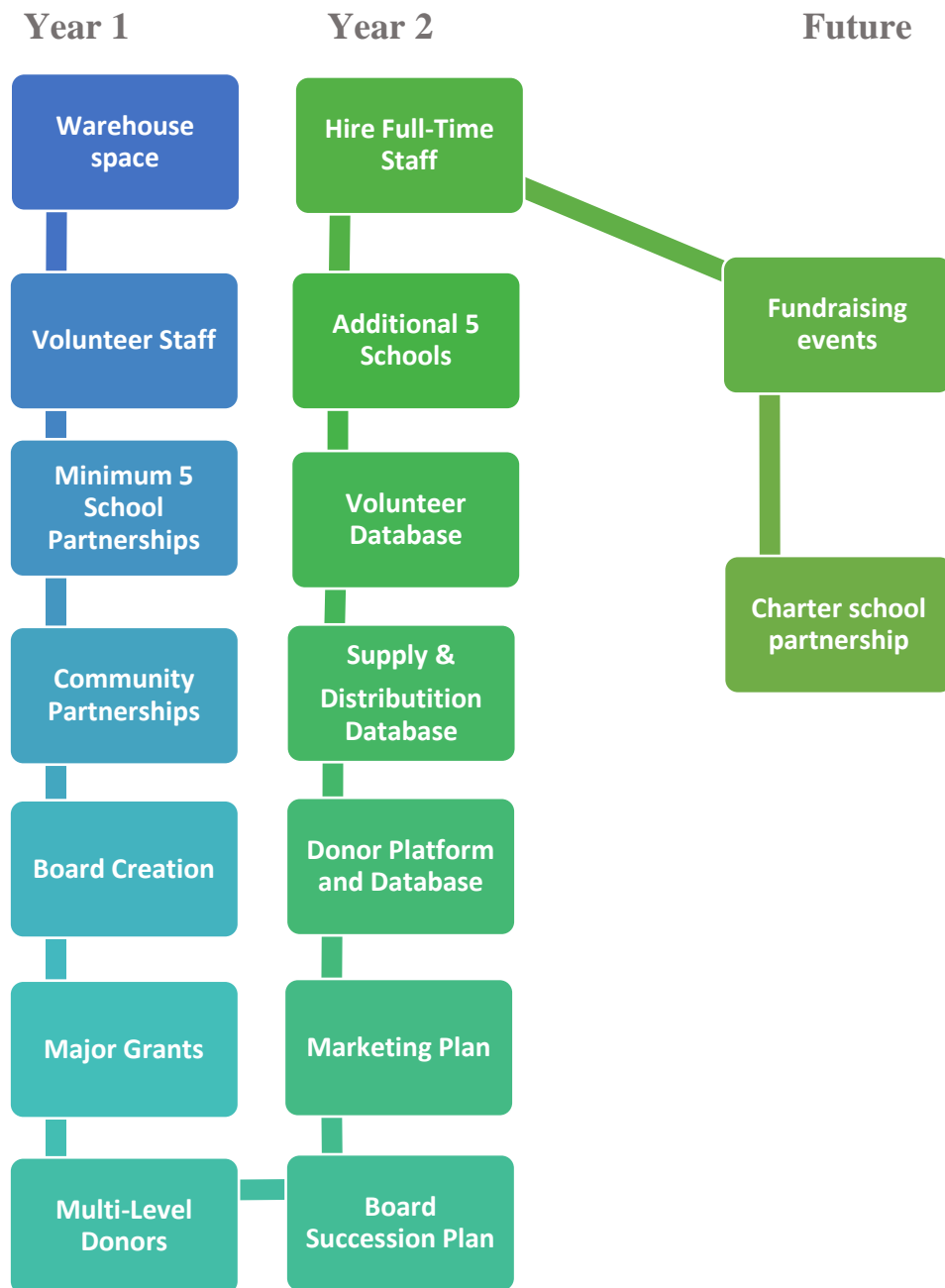➢ Secure at least two sponsorships form new or existing partners.

Year 1 **Year 2** **Future**

Warehouse space	Hire Full-Time Staff	
Volunteer Staff	Additional 5 Schools	Fundraising events
Minimum 5 School Partnerships	Volunteer Database	
Community Partnerships	Supply & Distributition Database	Charter school partnership
Board Creation	Donor Platform and Database	
Major Grants	Marketing Plan	
Multi-Level Donors	Board Succession Plan	

Fig. 3: Planning Timeline

FROM IDEA TO REALITY: *Mission, Visions, Values, Guiding Principles*

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                    We ensure the
                    equal distribution
                    of educational
                    opportunities.

   Collabortively    In an inclusive    With equal effort    While having FUN!
                     enviroment          and recognition
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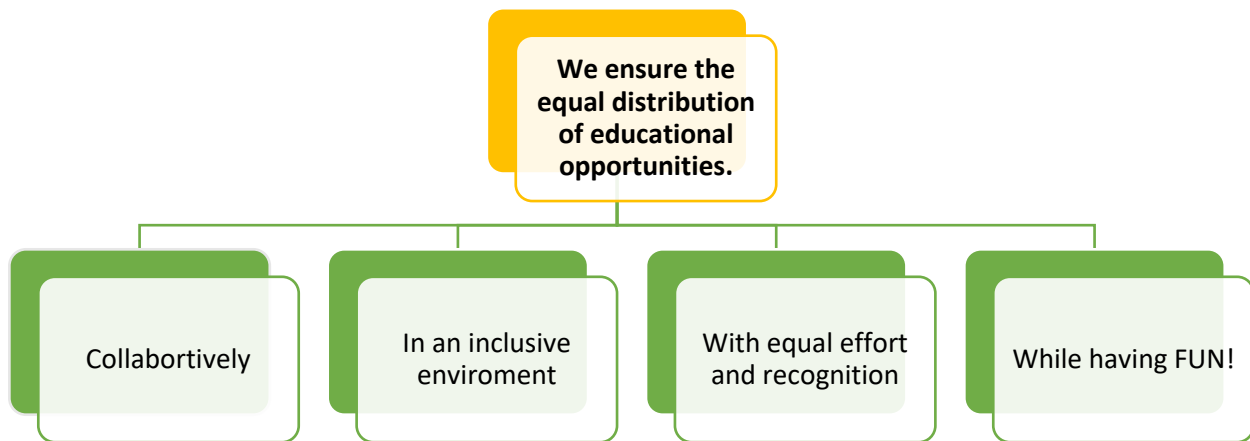
Fig.4 *Mission Success Guide*

Level Up's **mission** *is to ensure the equal distribution of educational opportunity by supplying the tools necessary for every child to succeed.*

We will do this by **leveling the educational playing field** *through collaborative efforts in the community as well as tirelessly advocating for students.*

We will become a vital component of a community-wide group of **education equalizers**.

Our Values	Our Guiding Principle
Collaborate	We accomplish our goals with the connections we make among our schools and in our shared community.
Diversity and Inclusion	Our collective growth is directly connected to our acceptance and inclusion of all people, within our organization, our schools, and our community.
Equality	We begin and remain as equals. We struggle, flourish, and celebrate equally.
Fun	We share our fun-loving spirit with all that we serve.

Fig.5 *Values and Guiding Principles*

Mission

Ensure the equal distribution of educational opportunity by supplying the tools necessary for every student to succeed.

Vision for the Future of Level Up Books

Create a system that allows for the efficient procurement and distribution of books and supplies needed for teachers, parents, and students to focus on education and not on what tools they may lack.

Collect books and school supplies for underserved public schools throughout the Dallas area, and assist in distribution of supplies needed for students and teachers so that they can focus on successful delivery of education, allowing for a more equitable delivery of tools for all students regardless of socioeconomic status.

Explanation of Vision

Often, teachers spend money from their own pockets to purchase the supplies needed to meet the educational goals set forth. This combined with the reality of students coming to class without the most basic of needs, not to mention the large amount of them coming to school hungry, demands a greater need for schools to be equipped with the tools they need to succeed so that they are not burdened with having to find the means, but rather able to come to school and focus on their education.

- All students will be given the same opportunities and tools to succeed academically regardless of race, ethnicity, gender identification, or socioeconomic status.
- Teachers will not have to use their own money to purchase supplies for their classrooms to ensure that all students have what they need to succeed.
- No student will feel like less of a person because they do not have what other students have, whether it be a backpack, or a library full of diverse books.
- School administrators have the tools needed to reach into a collaboration of organizations that can deliver supplemental supplies outside of their budgets, as well as data and information helpful for the continued needs of the district.
- Local, state, and federal policymakers are continually reminded of the value in equal educational opportunities for all students.

As of 2015, 35% (115,000) of children in Dallas were living in poverty, per the Annie E. Casey Kids Count Report (2015). Couple this with research linking poverty to poor academic performance only strengthens the reality that there is a need to ensure that all students are provided with what supplies their families or school systems may not be able to otherwise provide (Annie E. Casey 2015).We believe that if every child is offered equal opportunity to learn and a community that values their education equally, they will not only thrive in school, but be able to see their own value in society. All students will have the supplies necessary to begin and complete the school year without having to wonder where they will get their next pencil.

THE EDUCATION OPPORTUNITY GAP

OF NATIONAL CONCERN

From the idea of free public education for all students as imagined by Thomas Jefferson to the importance of equal educational opportunities for all children regardless of race as fought for in *Brown v. Board of Education of Topeka 347 U.S. 483 (1954)*, citizens, Congress, and Presidents have had their opinions and ideas of how to "fix" the U.S. education system. Funding offered by federal spending comes with strings attached, as seen in many of the reforms throughout public education history, but the ultimate responsibility to maintain the expectations of the federal government are placed in the hands of state regulators and state regulators must contend with reduced funding from national level, as seen in figure 6.
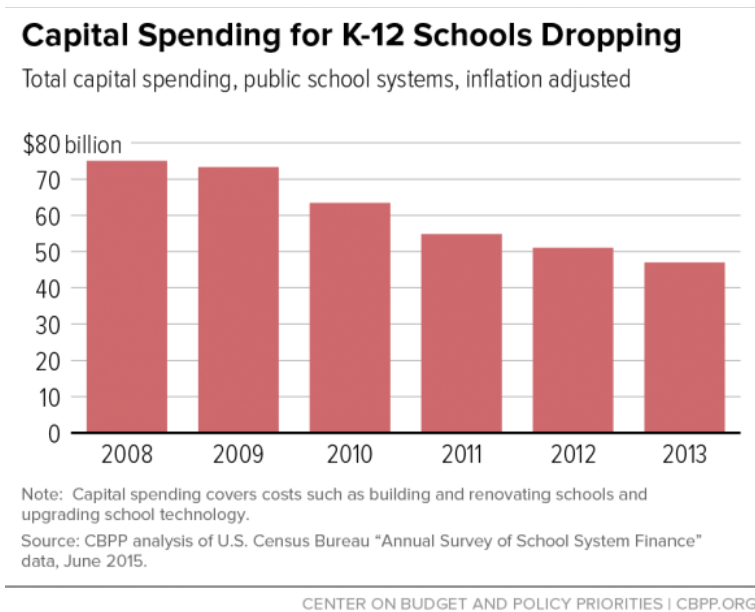

Capital Spending for K-12 Schools Dropping
Total capital spending, public school systems, inflation adjusted

Note: Capital spending covers costs such as building and renovating schools and upgrading school technology.
Source: CBPP analysis of U.S. Census Bureau "Annual Survey of School System Finance" data, June 2015.

CENTER ON BUDGET AND POLICY PRIORITIES | CBPP.ORG

Fig.6 Capital Spending for K-12 Schools

There is no question of the unequal distribution of educational resources throughout the United States. From state to state, within cities, and within school districts, there is an ever-growing divide between the funding for public schools. Evidence has shown that school funding does indeed have an impact on educational outcomes (Greenwald 1996). All levels of disparity must be considered when discussing the resources provided to students and whether states, as responsible parties for school funding policies, are treating all students fairly and providing proper support for quality education.

Many states establish funding principles based on a tax-based system established by zip code, therefore, the divide between funding boils down to wealth; wealth of families and consequently neighborhoods. This has created an aptly coined Two-tiered School System (Carroll 2004). There are two basic types of schools, at-risk and all others. At-risk schools are usually associated with higher poverty rates of students, established by outcomes such as test

scores and graduation rates (Brookes-Gunn et. al 1999; Battistich et. al 1995; Vartanian 1995). If there is indeed a direct link between school funding and outcomes, the reduction in equitable public-school funding across the country is doubly concerning.

States continue to find themselves at odds with the courts on whether their school funding mechanisms are legal, reaching into the 21st century with Parents Involved in *Community Schools v. Seattle School District no. 1et al. 2007*, and persisting today with Texas' ongoing battle over school funding (Collier 2016). Although funding is not the only issue related to school performance, it is a mitigating factor in providing the resources necessary to provide equal education opportunities. Other factors such as poverty, homelessness, mental illness, family dynamics, and other environmental factors outside of the schools themselves pay integral parts in the everyday lives of America's children, also creating barriers to the delivery of education.

Texas school children are expected to supply themselves with a list of necessary items for each school year. This list can ultimately cost a family anywhere from roughly $600 to $1400 a year (Communities in Schools 2015).

STATE LEVEL

In 2015, 21% of America's children were living in poverty, Texas alone accounting for over 1 million (23%) of those children (Annie E. Casey 2015). Texas is not alone in its continued battle with educational outcomes in public schools, but it continues to be in the spotlight for funding and test scores. Although the Supreme Court upheld the current system of funding, it did send back a warning that changes need to be made to create a more equitable system (Turner 2016). There is also continued question of graduation rate legitimacy (Stutz and Hacker 2006), and memory of the Texas Miracle scandal in which schools were found to manipulate graduation and dropout rates to reach expectations of the No Child Left Behind Act (Leung 2006). Combining the link between poverty and educational outcomes with the questionable funding mechanisms and a child poverty rate higher than the national average (Annie E. Casey) provide evidence for needed attention on the resources in the underserved communities of Texas.

Fig.7 Expected Cost to Students to Attend DISD in 2015

DALLAS OPPORTUNITIES

The ever-rising cost of school supplies provided by families and the decreasing spending per student in Texas (Leachmen et al. 2016) combine to create the perfect storm of educational outcome limitations. Reduced funding in schools in neighborhoods already considered underserved perpetuates the cycle of poverty by not providing greater educational outcomes that historically lead to higher salaries, thus increasing the economics of the neighborhood (Lacour 2011).
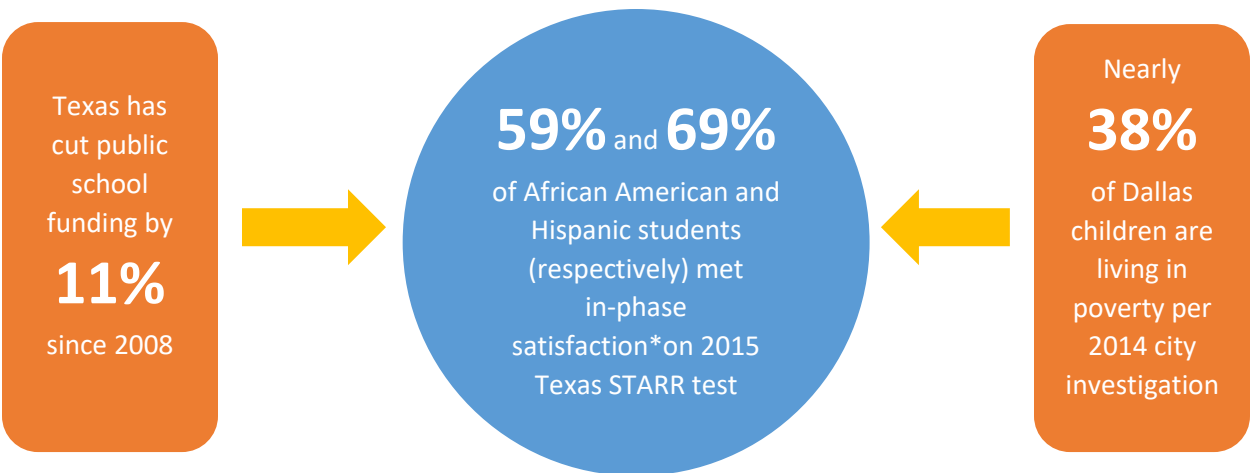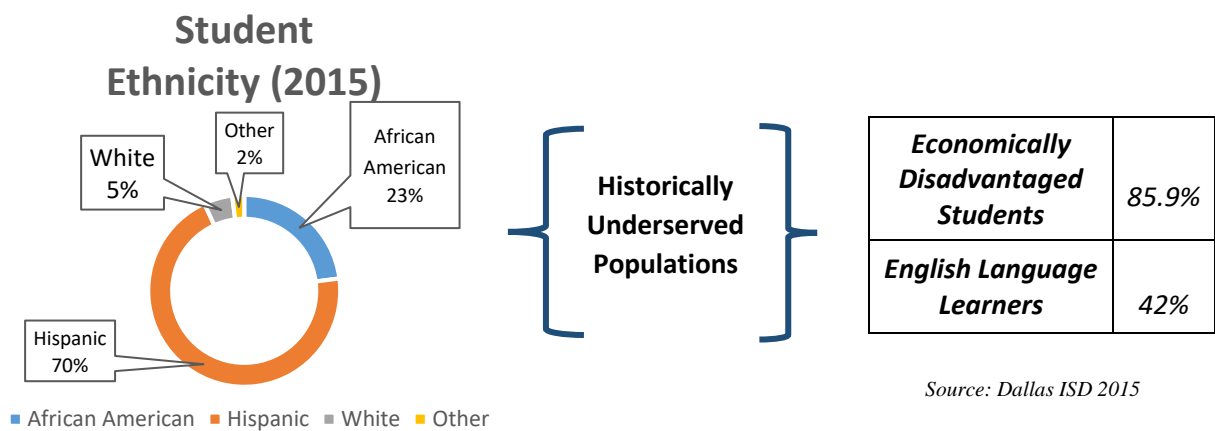
Texas has cut public school funding by **11%** since 2008	**59%** and **69%** of African American and Hispanic students (respectively) met in-phase satisfaction*on 2015 Texas STARR test	Nearly **38%** of Dallas children are living in poverty per 2014 city investigation

Fig.8 *School Funding Cuts and Poverty Rates*   *Source: Dallas ISD 2015; Leachman 201*

*In-phase satisfaction is considered the second of three levels of performance

Dallas Independent School District

Student Ethnicity (2015)

Other 2%
White 5%
African American 23%
Hispanic 70%

■ African American   ■ Hispanic   ■ White   ■ Other

Historically Underserved Populations

Economically Disadvantaged Students	*85.9%*
English Language Learners	*42%*

Source: Dallas ISD 2015

Fig.9 *DISD Demographics*

Despite what appears to be a decline in the number of school dropouts and increase in Dallas Independent School District (DISD) graduation rates (Schutze 2016; Dallas ISD 2015), there are still improvement opportunities. This is especially imperative when considering the high rate of students coming from underserved communities and the disproportionate dropout rate of African American and Hispanic students in comparison to their white peers (Dallas ISD 2015).

Dropout rate disparities between races is not the only area of concern. The segregation of schools is still prevalent in Texas cities and cities across the United States. The chart below shows distinct differences between school districts in comparison with their direct, wealthier neighboring districts. For instance, Dallas ISD (38% poverty rate) compared to neighboring Highland Park ISD's 3.4% poverty rate (Binkowitz 2016). Couple the relationship of race and socioeconomic status with Texas' controversial property tax funding mechanism, and questions around the negative effects of segregation become evident.
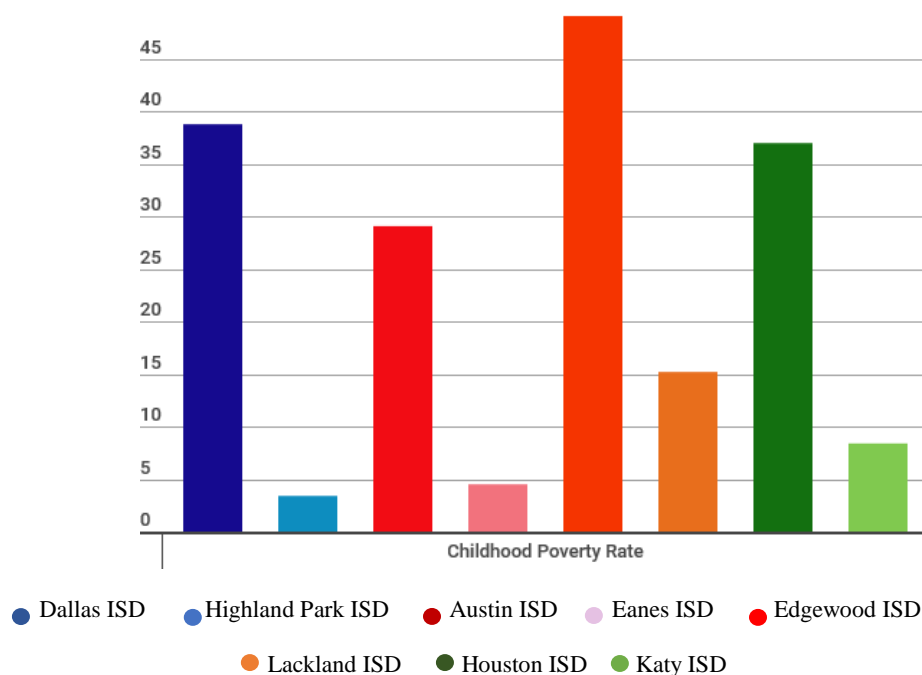

Fig.10. Poverty divides of neighboring Texas school districts

Source: 2014 American Community Survey 5-Year Estimates

CONSEQUENCES OF UNDERFUNDING

Figure 11 below demonstrates the trickle-down effect of underfunding public schools. Underfunding a school does not just impact the leadership of the school by forcing them to allocate limited funds as they see fit, it creates difficulties across all spectrums of the education system. As previously demonstrated by the cost of school supplies and extracurricular activities,

parents are also greatly affected by the unequal distribution of school funds when they find themselves unable to provide the supplies that the school deems their responsibility.

Teachers feel the pinch in numerous ways. One important way is when they find themselves in the position of balancing the lack of tools to do their job with spending out of pocket money to supply them. Teachers can spend an average of $500 of their own money to supply their classrooms per year (Robbins 2004). A lack of necessary tools is just one thing plaguing teachers and students in public schools. Teachers not only deal with the reality that their school does not provide the necessary tools, but also that the students are often unable to come to class with the expected school supplies set forth by the district on top of the reality that many of them are coming to school hungry. The poverty level of public-school children stretches the teachers' roles into the realm of counselor and provider, technically outside of their job descriptions.
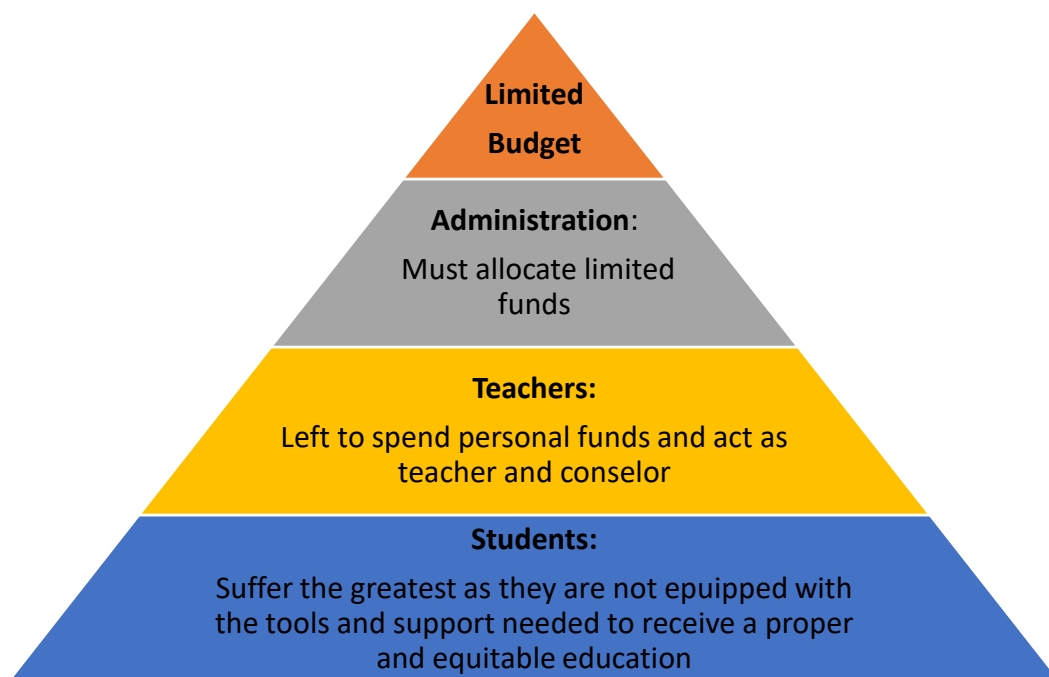
Limited Budget

Administration:
Must allocate limited funds

Teachers:
Left to spend personal funds and act as teacher and conselor

Students:
Suffer the greatest as they are not epuipped with the tools and support needed to receive a proper and equitable education

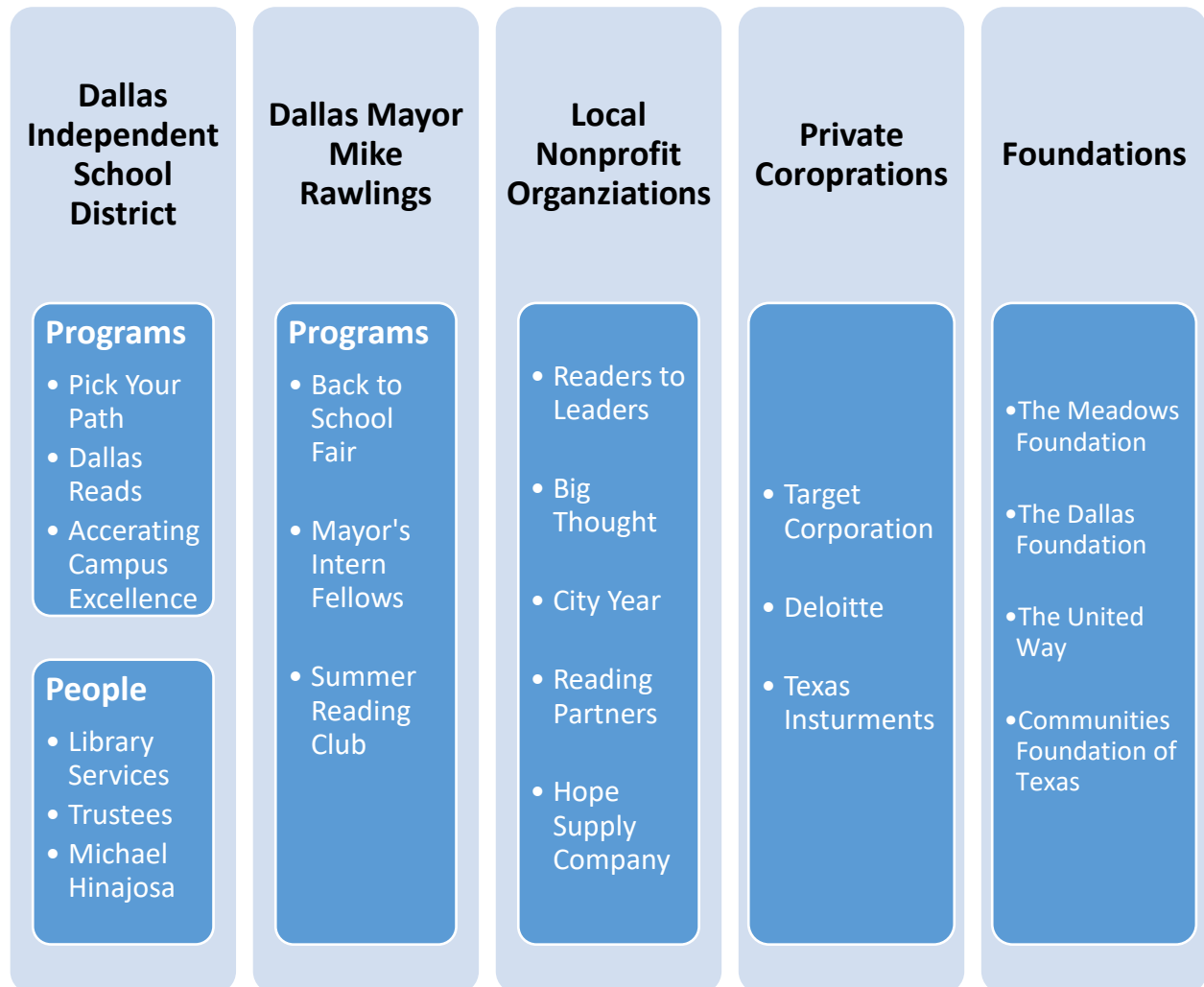*Fig.11 Distributive Effects of Underfunding Public Schools*

Providing equal funding across all socioeconomic neighborhoods can provide the needed funds to supply the books, pencils, notepads, backpacks, and all other fundamental tools students need to be successful and teachers need to deliver the education students deserve. In theory, as Dallas' population continues to grow, so will the number of students in DISD, thus increasing the need for school funding to supply those fundamental educational tools.

CHAMPIONS FOR DALLAS STUDENTS

It is of great importance to our organization that we not only become a premier supplier of education supplies and support in accordance with our vision, but also that we maintain a part of the current and growing collaboration between public and private entities in the Dallas area. It

takes the efforts of more than just parents and administrators to close the educational gap and Level Up plans to be an integral part of the collaborative movement already in place.

Below we have recognized several public and nonprofit groups that are currently championing the public education movement in Dallas. We recognize not only their great efforts, but how Level Up can assist, collaborate, learn from and supplement their efforts.

Dallas Independent School District	Dallas Mayor Mike Rawlings	Local Nonprofit Organziations	Private Coroprations	Foundations
Programs • Pick Your Path • Dallas Reads • Accerating Campus Excellence **People** • Library Services • Trustees • Michael Hinajosa	**Programs** • Back to School Fair • Mayor's Intern Fellows • Summer Reading Club	• Readers to Leaders • Big Thought • City Year • Reading Partners • Hope Supply Company	• Target Corporation • Deloitte • Texas Insturments	•The Meadows Foundation •The Dallas Foundation •The United Way •Communities Foundation of Texas

Dallas Independent School District (DISD)

Despite historical and ongoing criticism of the Dallas Independent School District, it must be noted the great lengths they have gone to find new and innovative ways to improve performance as well as their efforts to recognize the effect of poverty on their students' educational achievements. The school district has several working programs to address the achievement gap of schools and individual students.

DISD Programs

Accelerating Campus Excellence Plan (ACE): http://www.dallasisd.org/domain/12989

Dallas Reads: http://www.dallasisd.org/dallasreads

*The Graduation Plan/Pick Your Path***:** http://www.dallasisd.org/graduationplan

DISD Library Services

One focus area for Level Up is to aid DISD teachers and librarians with the supply and rotation of books for teaches and within the library. We feel that connecting and creating a positive working relationship with the leadership positions concerned with the procurement, tracking, and movement of books within DISD is not only helpful to both Level Up and school staff, but also a sign of respect to the work they already do. We hope to seek insight and collaboration concerning current and needed technological tools for schools.

We hope to seek insight into procurement, rotation, and distribution of books through schools. Level Up will also assist in the Dallas Reads Literacy Campaign to help ensure that students receive books to read over the summer break.

Library Technology Officer: Nana Dosker

Director of Library and Media Services: Gloria Riviera

http://www.dallasisd.org/library

DISD Trustees

Lew Blackburn (District 5): http://www.dallasisd.org/page/649

> Mr. Blackburn has been with DISD in some capacity since 1986, starting as a music teacher. Mr. Blackburn's expertise could prove vital to Level Up in its understanding of school budgeting as well as ways that nonprofits can work together to assist the district. As with the other trustees of interest, Mr. Blackburn's district includes West Dallas, where Level Up hopes to have campus locations.

Jaime Resendez (District 4):

> As a school board trustee for the area of Dallas in which we will be concentrating our efforts (, Mr. Resendez will be a vital source of information and a useful partner in our efforts. Level Up will seek insight into budgeting and priority levels for school libraries and book supply, as well as current/past strategic literacy plans.

Bernadette Nutall (District 9): http://www.dallasisd.org/Page/654

> Ms. Nutall is not only a DISD trustee, but she also has prior experience with coordinating different organizations, faith based organizations, and other volunteers. Level Up will attempt to meet with Ms. Nutall to gain insight on ways we can help her district as well as gain any advice she may be willing to offer in regards to agency and organization collaboration.

Audrey Pinkerton (District 7): http://www.dallasisd.org/Page/650

Ms. Pinkerton is newly elected to the school board, so Level Up will leverage this in offering to assist her district (West Dallas) in hopes of creating an ongoing relationship. Level Up will seek insight into budgeting and priority levels for school libraries and book supply, as well as current/past strategic literacy plans from Trustee Pinkerton.

Dallas Mayor Mike Rawlings

"Since becoming Mayor I am absolutely convinced that by making an investment in the education of our youth we are indeed making an investment in Dallas and our future workforce."
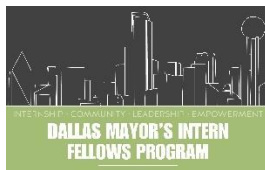-Mayor Mike Rawlings

Mayor's Programs

Back to School Fair: http://www.mayorsbacktoschoolfair.com/

http://www.dallasnews.com/news/education/2016/08/04/free-supplies-immunizations-haircuts-dallas-kids-need-mayors-back-school-fair

Dallas Mayor's Intern Fellows Program: http://www.mayorsinterns.org/

Mayor's Summer Reading Club

Local Nonprofit Organizations

Level Up views other area nonprofits focused on literacy and closing the education gap as fellows versus competitors and will strive to form relationships with each organization that is already involved on campuses to strengthen our shared efforts.

Readers to Leaders

Readers to Leaders is similar to another possible collaborator/competitor in that they focus on more than just reading to students and extend into phonics, comprehension, and skills based on the testing standards of Texas (TEKS). Although initially the organization would pose as an actual competitor to Level Up, our hope is that over time we can establish a collaborative effort and assist them with their on-campus programs and book supply. Readers to Leaders has a Saturday program in which children receive a free book. Level Up would attempt to assist them in the supply of those books to demonstrate our interest in collaborating versus competing.

http://www.readers2leaders.org/

Big Thought

Big Thought serves numerous underserved campuses throughout Dallas. Along with the enrichment programs provided by the organization, they also assist in activities held by the school, including stocking, cleaning, and organizing learning centers. Teaming up with Big Thought will allow Level Up the collaboration schools need to maintain necessary tools and environments so that teachers and administrators are free to focus on education delivery.

Level Up will also assist Big Thought with their off-campus enrichment events as must as possible.

http://www.bigthought.org/

City Year

City Year believes in the power of young people and utilize AmeriCorps members to serve a year in underserved schools to harness that power so that young people can change the world.

City Year is new to the Dallas area and already collaborating with other organizations to create a positive change in the lives of underserved youth. Level Up will become a part of that network and aid City Year in any on-campus book supply needs their students may need, as many of them do not start the school year (or even day) with the tools necessary for success.

https://www.cityyear.org/dallas

Reading Partners

Although Reading Partners (RP) is a direct competitor in the sense that they seek book donations as well as similar funding apparatus, our hope is to collaborate and work with them in their learning centers. As we gain connections and relationships through RP, we will be supplying the necessary books to keep their centers stocked as well as sharing the word about what wonderful success they are having in North Texas schools.

http://readingpartners.org/location/north-texas/

http://www.nbcdfw.com/news/local/Dallas-Non-Profit-Seeks-Reading-Tutor-Volunteers-364624121.html

Hope Supply Company

Hope Supply Company focuses on the everyday necessities that homeless children are lacking, including books and school supplies They're goal is to collect and distribute those items to as many outlets as possible to ensure that items needed end up with the children who need them. Level Up would like the opportunity to collaborate on donation efforts in an attempt to add books for schools to their priority donation list. This

collaboration will benefit both Hope Supply and Level Up by increasing the awareness for the need of books and supplies as well as increase the ability to distribute donations.

http://hopesupplyco.org/

Private Corporations

Corporate giving and service are important to many private companies. The realization that corporate social responsibility (CSR) not only serves the community, but also benefits the company and its employees is becoming clearer for more companies. Level Up recognizes these efforts and will find ways to not just benefit from the grants and volunteer services of companies, but also find ways to aid in their efforts toward CSR by providing speakers and creative ways to involved them in their communities.

There are numerous companies (small and large) that support Dallas communities in numerous ways. Level Up has selected just a few to focus on in our beginning phase of growth.

Target Corporation

Target's education arm of their Corporate Social Responsibility platform supports kids through programs and partnerships "where they live, learn, and play".

https://corporate.target.com/corporate-responsibility/community-impact

Texas Instruments

The Texas Instrument Foundation is its own 501(c)(3) that focuses on improving STEM in schools and addressing critical community needs.

http://www.ti.com/corp/docs/csr/giving.html?DCMP=TI_Giving&HQS=giving

Deloitte

Deloitte encourages employees to do pro bono/volunteer work in the community, holds a day of service, donates to local and national organizations, and runs RightStep, a program to "empower future leaders". Ideally Level Up would like to create an ongoing relationship with Deloitte to garner support in areas of volunteers and research, as well as possible future funds.

http://www2.deloitte.com/us/en/misc/litetopicpage.MF-US-Tags.community-involvement.htm

Foundations

The Meadows Foundation

Education is one of three focus areas for the Meadows foundation. Level Up Books will attempt to secure a grant(s) from the Meadows Foundation.

The foundation also created the Wilson District, which is a revitalized 22-acre district in downtown Dallas and serves as the home for more than 30 nonprofits. As Level Up Books grows in services, more space will be needed, and we hope our working relationship with the foundation may someday offer us the opportunity to be housed in one of the offices in the district.

https://www.mfi.org/

The Dallas Foundation

The Dallas Foundation awards competitive grants to those who will be making a difference in the lives of people within Dallas County. They have a specific category for low-income children. We will attempt to secure a grant, as well as create a close working relationship with the foundation to learn the skills necessary to make our organization more efficient and effective, thus more inviting to donors.

http://www.dallasfoundation.org/

The United Way

Level Up hopes to collaborate with The United Way for volunteering as well as benefit from their extensive training and organizational collaboration programs. United Way is known throughout the nonprofit sector for connecting nonprofits to volunteer and growth opportunities and continues to hold information sessions in areas of education that will prove vital for the success of Level Up.

https://unitedwaydallas.org/

Communities Foundation of Texas

Level Up will attempt to secure a grant as well as begin planning to be a part of the North Texas Giving Day; a day-long online donation day for area nonprofits held by CFT.

CFT also holds numerous events intended to educate nonprofits, community members and leaders through speaking, teaching, and collaborative events. Level Up will take part in as many of these events as possible in order to enrich our working knowledge as well as create more connections throughout the community.

http://www.cftexas.og/

The Level Up Plan: *Goals, Objectives, Potential Barriers, Collaborators*

Forward Thinking

THE PLAN

Being a new organization, Level Up must balance the realities of being a grassroots organization with the desire to become a large organization able to serve more than the Dallas Independent School District. To do so, we must ensure that we do not limit our goals or merely rest on successes. Level Up will utilize the extensive network that we are building and utilize the advice we solicit from those with expertise in the education, nonprofit, and political arenas to build our knowledge and continually evaluate our goals and methods of service delivery. We will utilize cost/benefit analysis and ongoing program management tools to ensure efficiency in program management. (See template index).
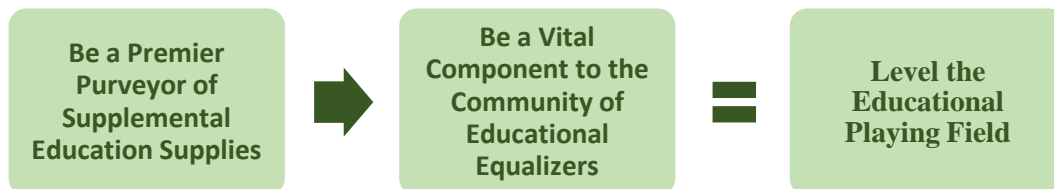
| Be a Premier Purveyor of Supplemental Education Supplies | → | Be a Vital Component to the Community of Educational Equalizers | = | Level the Educational Playing Field |

Fig.12 Goals and Expected Outcome

Internal Focus

- ☐ Human Capital Management
- ☐ School Relations
- ☐ Donor Relations
- ☐ Financial Management
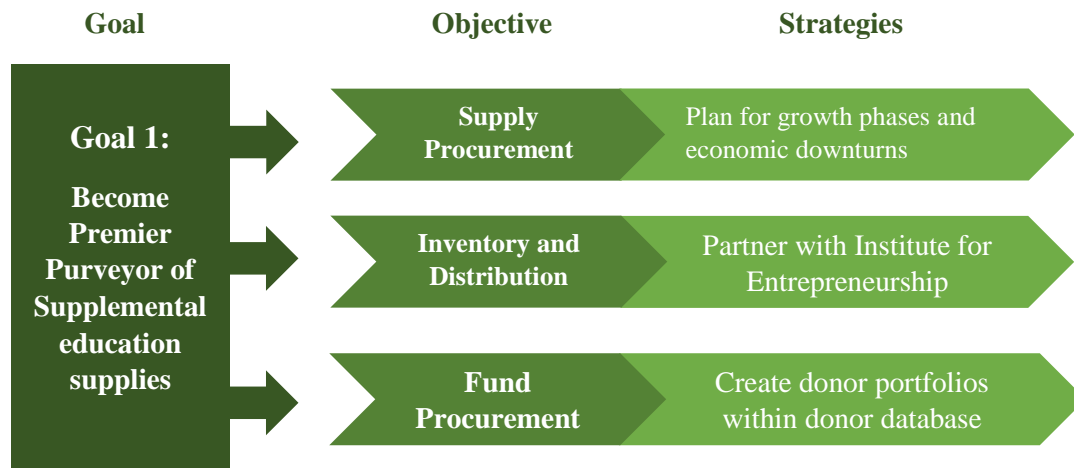
External Focus

- ☐ Outreach/Communication
- ☐ Colloboration
- ☐ Fund Procurement
- ☐ Supply Procurement

Fig. 13. Internal and External Focus

Goal 1

*Become the Premier Purveyor of Supplemental Education Supplies
to Our Partner Public Schools*

Goal	Objective	Strategies
Goal 1: **Become Premier Purveyor of Supplemental education supplies**	**Supply Procurement**	Plan for growth phases and economic downturns
	Inventory and Distribution	Partner with Institute for Entrepreneurship
	Fund Procurement	Create donor portfolios within donor database

Possible Collaborators

Objective 1: Supply Procurement

- Reading Partners
- Big Thought
- Commit
- SMU Budd Center
- Center for Nonprofit Management
- Local Colleges and Universities
- Center for Nonprofit Management

Objective 2: Inventory and Distribution

- DISD Library and Media Services
- School Principles
- DISD Superintendent Michael Hinojosa
- Organizations working in school learning centers
- Institue for Innovation and Entrepreneurship at the Univeristy of Texas at Dallas
- SMU Budd Center

Objective 3: Fund Procurment

- The United Way of Dallas
- Center for Nonprofit Management
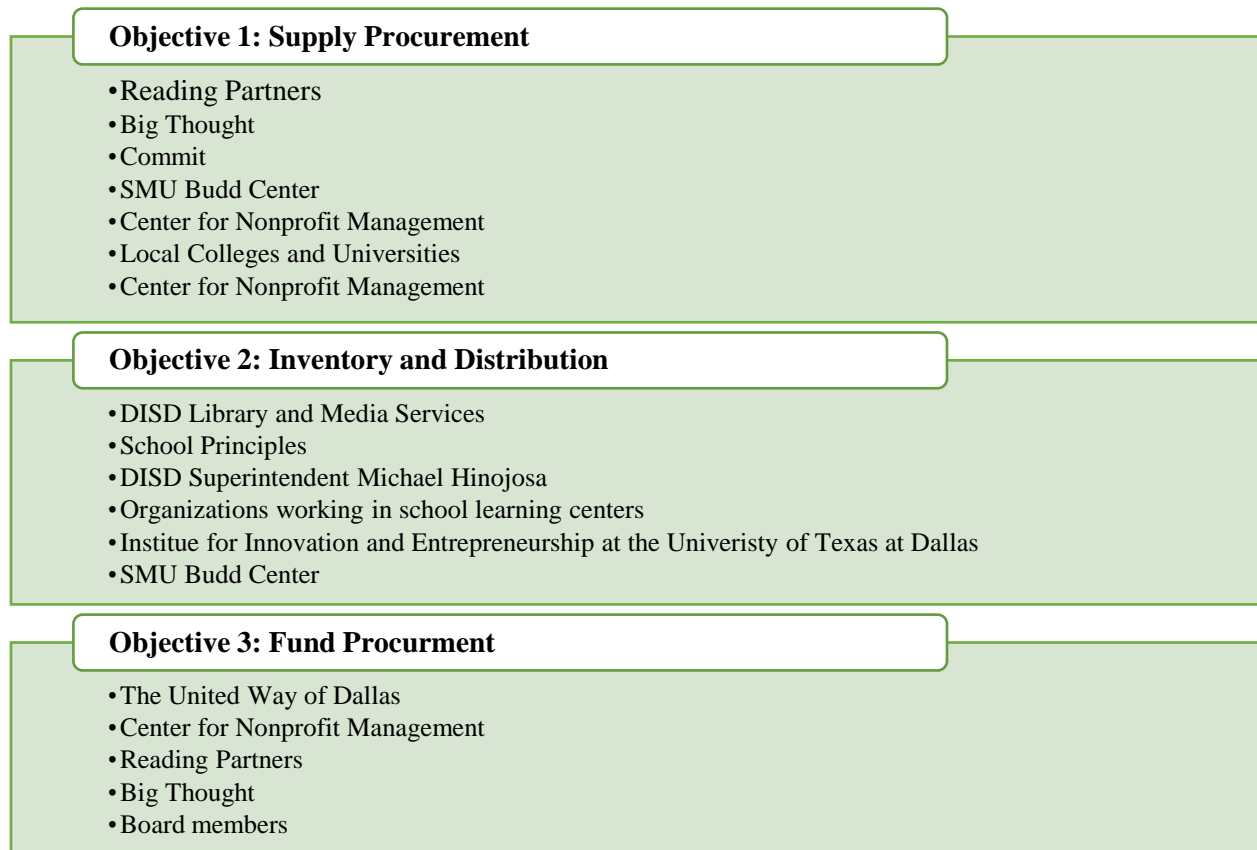- Reading Partners
- Big Thought
- Board members

Fig.14 Goal 1: Objectives, Barriers, and Collaborators

Objective 1: *Supply Procurement*

➢ **Strategy 1***:* Create strategic plan specifically for book/supply procurement that allows for growth phases and possible roadblocks.
  ➢ **Action:** Schedule an initial meeting with staff and other possible stakeholders with knowledge of fundraising efforts.
  ➢ **Action:** Establish a task force for book and supply procurement, including specific day/times to be upheld throughout the year.
  ➢ **Action:** Ensure that supply procurement is in integral part of organizational budget.

  Possible Barriers
  o Fundraising is vital to any nonprofit organization, but as a grassroots organization, we must be diligent in the beginning stages of our fundraising planning and efforts. Time and resources spent must be balanced with the benefits of those efforts.
  o There are many mechanisms used for fundraising throughout the nonprofit world, but many of them involve cost factors that we are not able to incur. As part of our planning process, we will adjust for growth factors, including money, staffing, and time.

➢ **Strategy 2:** Establish list of possible grant options for procurement specifically. Create reports based on extensive research of grant rules and regulations as well as past grantees and their services provided.
  ➢ **Action:** Create list of entities that offer ongoing grants that we may qualify for (now and in the future).
  ➢ **Action**: Research grants received and utilized by other organizations with similar missions and services as ours.

  Possible Barriers

  o Although grants are often quite competitive, there are numerous outlets that offer them. The time it will take to research, collect, and organize all possible entities and grants will be extensive and must come with great organizational efficiency.
  o Many of the organizations we wish to collaborate with will be competing for the same grants. This will leave us likely having to utilize other outlets in which to learn of what grants they have received versus being able to create a dialogue on the subject.

➢ **Strategy 3**: Establish list of community entities that may be willing hold book supply drives throughout the year.
  ➢ **Action**: Research those entities with existing community connections and plans.
  ➢ **Action**: Create a list of entities with a community service aspect, but no apparent plan or designated groups that they are currently committed.

Possible Barriers
- o Supply drives are not a new concept, and in fact are utilized by many organizations, including our competitors. We must be creative in finding new entities to partner with and creative methods/marketing to ensure success. This is where collaboration will serve us best.

Objective 2: *Inventory and Distribution*

- ➢ **Strategy 1:** Establish relationship with schools to ensure most efficient methods for distribution that work within their existing systems.
  - ➢ **Action:** Connect with library and media specialists and leadership for each school on established list.
  - ➢ **Action:** Create database of contacts for each school and plan on how to maintain that database as contacts change.

Potential Barriers

- o The collaborative effort within schools must be multilevel and evenly distributed. With this said, many schools have difficulties that far outweigh what we as a nonprofit may experience or even comprehend. We must learn and appreciate this and attempt to create the most conducive processes for communication and distribution of supplies.

- ➢ **Strategy 2:** Establish format in which books and supplies will be distributed to learning centers currently run by nonprofit organizations on campuses. This will include a working schedule of distribution to ensure an ongoing supply as well as ability to deliver when special needs occur.
  - ➢ **Action:** Creation of the database that will serve as a logistic method as well as communication method for our team as well as others within our collaborative circle.
  - ➢ **Action:** Create a delivery calendar concept for the distribution amongst schools and organizations.
  - ➢ **Action:** Turning the database into a multiuser concept with hopes of utilizing as a web application.

Potential Barriers
- o Not only do we face funding limitations, but as we stand now, our organizational structure does include or accommodate for higher level aspects of technology. The efforts around the database must be creative and collaborative, allowing us to create what we see as a vital and valuable tool while limiting expenses and increased staff.

- ➢ **Strategy 3:** Establish relationship with the Institute of Innovation and Entrepreneurship at the University of Texas at Dallas to create a database that will allow all organizations,

schools, and other entities to have access to the supply of books and supplies throughout the Dallas area with future growth possibilities.

- ➢ **Action:** Set up a meeting to establish the possibility of their assistance in turning our database concept into an app that will allow all our partners and collaborators to have use.
- ➢ **Action:** If this collaboration is not possible, learn ways/means that other entities in the community would be of use.
- ➢ **Action:** Research possible funding mechanisms to offset cost of creation and maintenance of database.

Potential Barriers
- o This database is the most elaborate of our goals. It will entail significant time, resources, finances, and maintenance.
- o The time, effort, and cost that comes with the success of this database may not be utilized by our partners. We must accept this reality and be prepared to alter it so that it is more conducive to whatever our partners need.

Objective 3: *Donation procurement*

- ➢ **Strategy 1:** Connect with other nonprofit organization to gain insight into best practices for procuring one-time and recurring donors as well as fundraising best practices.
  - ➢ **Action:** Create list of nonprofit organizations (both inside and outside of the Dallas area) that have a strong donor base.
  - ➢ **Action:** Research nonprofit education opportunities available to organizations, with emphasis on fundraising and donor considerations.

  Possible Barriers
  - o Some organizations may not be willing to share fundraising and donor best practices if they feel we are competition. We will rely on connections that we have made in our efforts to collaborate, and use the services offered by those groups that educate nonprofits as well.

- ➢ **Strategy 2:** Create a working list of possible individual donors based on research into local donors that currently and previously supported organizations with similar mission and vision. Also, include a list of donors that staff and board members have a relationship with, while maintaining a diverse and balanced portfolio of donors.

  - ➢ **Action:** Create donor portfolios based on internet based research of frequent donors in the area, frequent donors to education based organizations, and individuals that have been known to donate to our possible competitors and collaborators.
  - ➢ **Action**: Establish possible donors for strict concepts, such as donations specifically earmarked for fundraising, operations, and volunteer appreciation.
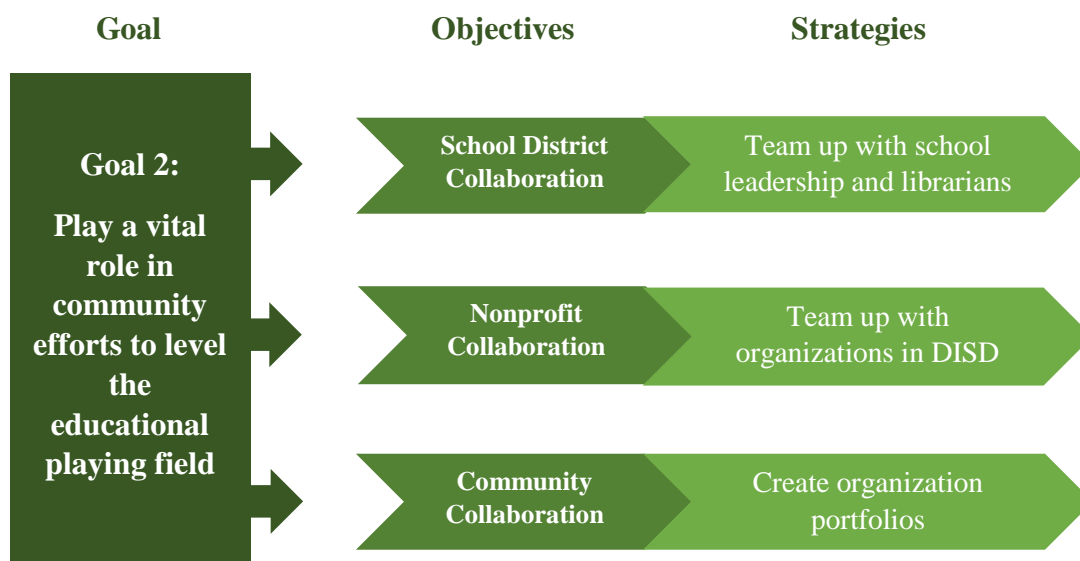
Possible Barriers
- o Being a grassroots organization, we are already one step behind our peer organizations, but this does not mean that we cannot garner donations and even establish a strong working donor base. We must remain forward thinking to maintain upward mobility.
- o Considering the competition for securing donations, especially sustaining donors, we must be strategic and allowing donors options for specific use of their money. This will hopefully allow for a pool of dedicated donors as they will know specifically where their
- o donations go, allowing us to demonstrate our success in the use of their money.

- ➢ **Strategy 3:** Establish succession plan of possible donors based on expected phases of organization growth and level of donor's standing in the community, understanding the differing expectations of different levels of donors.

  - ➢ **Action:** Create a designated time, whether part of general meetings or as a separate task force, where the sole focus is on donor procurement.
  - ➢ **Action:** Create a strategic plan that aligns with our budget that allows for reorganization of granting and donor mechanisms that will account for possible changes in our structure, services, and changes in the economy.

Possible Barriers

- o The list process of making and maintaining the list must have a built-in mechanism for establishing and monitoring the diversity of our donors. Economic and political changes can alter the interests of donors of any size. We must remember this throughout donor evaluation period.
- o Having a limited staff at the onset of our path leaves us with less connections, so we must remain steadfast in our focus and creative in our endeavors.

Goal 2

Play a Vital Role in the Combined Community Efforts to Level the Educational Playing Field

Goal	Objectives	Strategies
Goal 2: **Play a vital role in community efforts to level the educational playing field**	**School District Collaboration**	Team up with school leadership and librarians
	Nonprofit Collaboration	Team up with organizations in DISD
	Community Collaboration	Create organization portfolios

Possible Collaborators

Objective 1: School District

o Office of Superintendent Michael Hinojosa
• Media and Library Services
• School Counselors
• Reading Partners
• Communities in Schools
• The Budd Center
• Big Thought
• School Principles

Objective 2: Community and Nonprofit

o The Budd Center
• DISD leadership
• Communities Foundations of Texas
• The United Way of Dallas
• Reading Partners
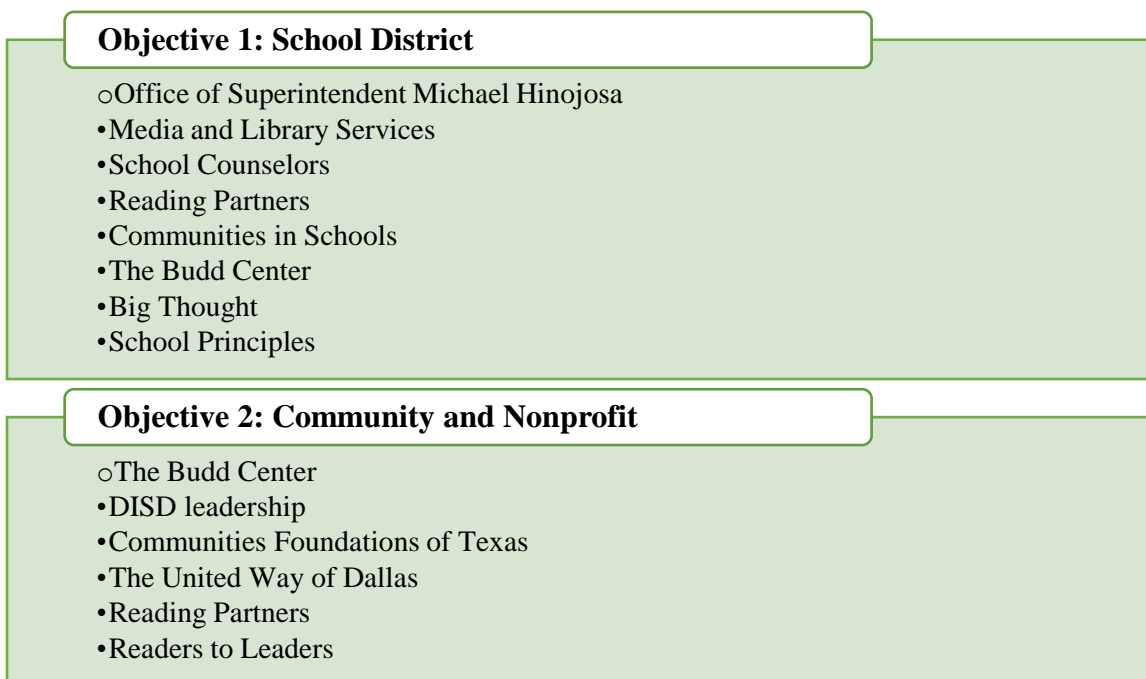• Readers to Leaders

Fig.15: Goals 2: Objectives, Barriers, and Collaborators

<div align="center">**Objective 1:** *School district-wide collaboration*</div>

- ✓ **Strategy 1:** Secure a relationship with DISD leadership to establish what role Level Up can play within the district as well as establish criteria for choosing schools to participate, with the expectation of eventually being district wide
    - o **Action:** Connect with the office of Superintendent Michael Hinojosa to obtain a meeting and create next steps for our growth within the district, with a goal of supporting the entire district's poorest students.
    - o **Action:** Setup a meeting with DISD Media and Library Services staff to create strategic plan for collaborative efforts and learn what areas of service they need the most.
    - o **Action:** Establish acceptable and best method for connecting with school counselors to learn of the needs of their students as well as their needs as counselors. Also, create a plan for continued communication between Level Up and themselves that is conducive to their schedules.

Potential Barriers

   - o Public schools are bureaucratic institutions by their very structural nature. The hierarchy and potential obstacles faced by Level Up in our attempts to not only make a connection with school leadership, but also manage to create a structured collaboration, could be hindered, but not altogether ruined by the typical implications of working with such entities.
   - o Public schools, especially the schools that we wish to serve, tend to have limited resources based on their budgets and often organizations working within the school system must incur all, or the majority of, cost of their services. We must keep this in mind as economic and budget aspects continually change with time, possibly altering all aspects of shared cost responsibilities between us, the school system, and even other organizations.

- ✓ **Strategy 2:** Create a timeline and number of locations that Level Up will collaborate with as we grow.
    - o **Action:** Establish agreed upon number of schools that match our current capabilities with the school's capabilities.
    - o **Action:** Establish the number of schools with fifty percent or more students receiving free lunch as a baseline, while planning for growth into all schools in the future.
    - o **Action**: Focus on schools currently on the "must improve" list to establish if we can be of assistance.

Potential Barriers

   - o With limited school budgets comes limited staff with limited time. This will inhibit the ease in which Level Up would prefer to receive information on schools

that would most benefit from our services. We must be creative and diligent in our quest for valuable information.

- o A simple list of school names does not infer availability for services to be delivered. Often school leadership changes as much as budget capability, and often because of. Level Up will need to continually evaluate their method for choosing schools to include considerations for school leadership commitment, school campus capacity, as well as feedback from other organizations already or previously involved on those campuses.

Objective 2: *Community and nonprofit organization wide connection:*

✓ **Strategy 1:** Create list of nonprofit organizations working within DISD on literacy skills to connect and collaborate with. Complete extensive research of their mission and objectives. Create portfolios for each organization that can be updated over time.
   - o **Action:** Create a portfolio for all potential nonprofit organization already involved on DISD campuses in any capacity.
   - o **Action:** Include profiles of each organization (from portfolio) in database for ease of communication and distribution.
   - o **Action:** Connect with each organization to set up a meeting (in person or via other options).

Potential Barriers

   - o Much like our organization, nonprofit organizations have finance opportunities that leave their staff with little time and resources. This consideration must be valued with each attempt to connect with organizations to demonstrate our appreciation for their mission as well as their time.
   - o There is a significant amount of organizations involved in some capacity throughout DISD and the time it will take to research them all and input the findings will be significant. We will need to have a system in place to ensure efficiency for the creation and maintenance of this process and ensure that it allows for an equally efficient mechanism for adding organizations as they enter the picture.

✓ **Strategy 2:** Create list of nonprofit organizations that are also working with the underserved youth population, whether it is those collecting similar supply items or also working to close the education gap.
   - o **Action:** Mimic the system and processes used to create the list of those organizations working in the school district.
   - o **Action:** Set up meetings with these organizations, remembering that we must demonstrate our interest in collaboration despite possible conflicts of interest and competition.

Potential Barriers
   - o Organizations in this area of consideration may have competitive interests that may deter them from wishing to connect with us. We must be sure to be

considerate of their efforts that equal ours and find ways to demonstrate that our collaborative efforts will ultimately benefit both organizations' efforts.

- o As with organizations working within schools, these organizations often have limited funding which hinders their staffing capacities and time. This will be a factor when attempting to connect and create functioning communication methods.

- ✓ **Strategy 3:** Create initial list of other entities in the community that Level Up can utilize for volunteer, book supply drives, and advocacy support. Create a timeline based on priority and secondary connections. Create portfolios for each entity to be updated over time.
  - o **Action:** Create list of possible sources of volunteers that can support in the areas of warehouse/in school, supply drives, logistics (database maintenance, social media), and advocacy.
  - o **Action:** Include list into the database to utilize format that allows ease of distribution of volunteer efforts and needs.
  - o **Action:** Create portfolios for each volunteer entity to track volunteer hours as well as maintain contact information.

  Potential Barriers
  - o The amount of research and time to make meaningful connections with these entities will be extensive. We must ensure that we have an efficient system in place before beginning this process to ensure that we are organized as not to waste the time of our new partners.
  - o Creating partnerships with companies that may not have an extensive understanding, and therefore forgiveness, for the opportunities faced by nonprofit organizations creates a high level that we must perform under. We must understand the format and motivations of each entity and utilize the knowledge to maintain a respectful relationship to ensure that the connection is sustained.

- ✓ **Strategy 4**: Establish succession plan of community entities to collaborate with utilizing existing connections.

  Potential Barriers
  - o This step will be time consuming and likely one that the organization will likely want to put on the back burner, but it is vital to the success of our growth from a grassroots organization to a leader in the community.

OUR CHAMPIONS

Level Up will be strategic and deliberate in our attempt to secure everlasting relationships within the Dallas community. These relationships will aid our organization in its growth of knowledge, funding, support, and advocacy through multiple avenues. These relationships will also allow our grassroots organization to grow our network and the network of organizations and interested parties within the community at large. The relationship between all stakeholders is vital and not to be taken lightly. We will continually evaluate the relationship with all stakeholders on a yearly basis. (See templates index).
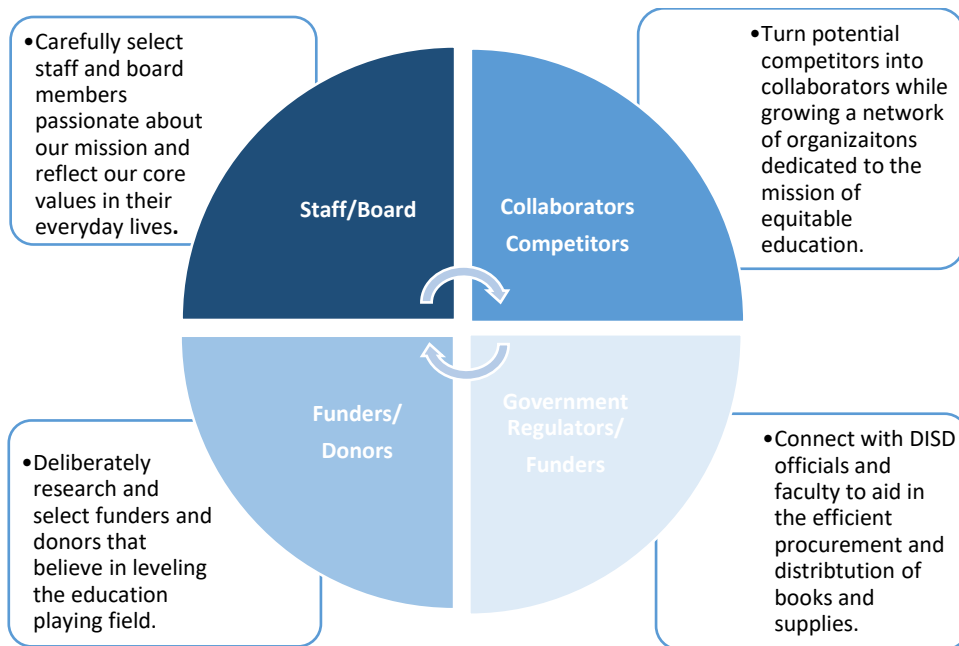
- Carefully select staff and board members passionate about our mission and reflect our core values in their everyday lives.

Staff/Board

Collaborators Competitors

- Turn potential competitors into collaborators while growing a network of organizaitons dedicated to the mission of equitable education.

Funders/ Donors

Government Regulators/ Funders

- Deliberately research and select funders and donors that believe in leveling the education playing field.

- Connect with DISD officials and faculty to aid in the efficient procurement and distribtution of books and supplies.

Fig.16 Strategic Relationship Between Stakeholders

- **Donors**
  - We will secure diverse and multi-level donors.
  - We will procure specific donor funds to match specific organizational needs
    - Fundraising
    - Marketing
    - Volunteer/staff appreciation
    - Operations
  - We will also account for general donations affording us flexibility of use
  - We will seek out members of the community that have a history of donating in the areas of education, poverty, and child welfare.

Without the funds garnered by donations from individuals, companies, and groups, we cannot succeed in our vision to supply all students with the tools they need to succeed. Creating a diverse portfolio of donors allows an organization to tap into differing levels of support that offer both large, small, and ongoing funding and account

for possible economic downturns or changes in the future. Within this category, we will also consider funding from outside sources such as grants.

- o **Tools to Succeed**
    - New innovations in online fundraising concepts could help us save time and staff efforts.
    - Utilizing giving circles.
    - Foundation groups such as Communities Foundation of Texas could be vital for getting the word out about Level Up and for securing funding.
    - Create portfolio of possible individual donors and foundations to be used as Level Up grows. (See appendices A)

- ➢ **Volunteers**
    - ➢ Staff positions can, and will, be made up of part-time, full-time, and volunteers.
    - ➢ Volunteers will also serve in varying capacities
    - ➢ We will create a list of sustaining volunteers as well as one time considerations and on-call volunteer lists.

There are numerous reasons that a person may volunteer, and just as many for why they may discontinue their participation. We will garner the knowledge of other organizations, education entities in the community specializing in volunteer activity, and research about the motivations of volunteers. We must also consider how our culture is, or is not, conducive to volunteer participation, as we value the time that our volunteers dedicate to our organization and want to ensure we are respectfully using it wisely. We believe that using volunteers in our organization will benefit our efforts as much as the volunteers themselves (Psychology Today).

- o **Tools to Succeed**
    - Using newest software and programs to aid in the onboarding and information sharing for new and existing volunteers.
    - Utilize programs such as Survey Monkey to solicit feedback from volunteers.
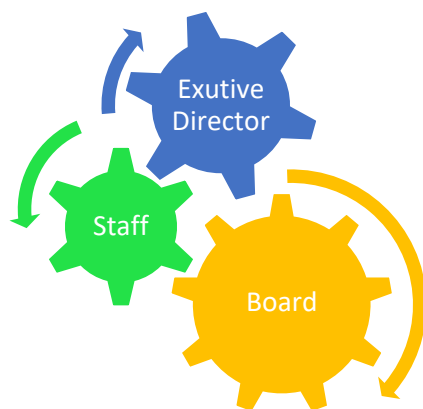
Level Up will work collaboratively with the Board with the expectation that they uphold their fiduciary and legal responsibilities while having power to make decisions in the best interest of the organization.

The board leads the organization using authority to direct and control provided by the owners and the legal act of formation. They set initial direction and have the full authority to act in the owners' best interests. Governing boards function at arm's length from the operational organization. They focus on the big picture, future-oriented and act as a single entity.[3]

➢ **Staff**
- Executive Director
- Treasurer/Secretary
- Community liaison
- Technology officer

There are many challenges around staffing a nonprofit organization. It is a sector that often finds itself caught at the crossroads of being a public-sector entity having to utilize some private sector practices to remain competitive.

We must remember that our staff chooses to be a part of our team based upon our mission and shared passion for children and education, and utilize this to ensure that we find alternative ways to keep our staff satisfied and motivated. Public sector entities face many challenge to human resources, such as compensation, leadership, talent management, diversity, and efficiency (Personnel today). Compensation is an obvious challenge. As a public entity funded mostly by outside sources, we must remain honest and wise with our spending, while still being fair to our talent. As generations and the economy changes, we will continue to monitor not only what motivates our staff, but ways to compensate and motivate them, as well as tools available to be efficient in building and maintaining our valuable human capital. An integral part of strategic planning will be focused on staff and how we can incorporate actives and benefits that will fit into our budget.

  o **Tools to Succeed**
  - Find most affordable and efficient up to date computer programs for human resource maintenance that will serve the current size of our organization and allow for additions to our staff size.
  - Choose best partner discount program available that will meet the interests of our staff and fit within our budget.
  - Create portfolio of possible staff for future recruitment. (See appendix B)

➢ **Board**
- Our initial goal will consist of four board members with a succession plan of adding one a year for three years while rotating members on differing timelines.

Boards serving nonprofits, like any successful group, must be diverse and allow for differing levels of expertise, but equal commitment for the organization to fully benefit. Level Up cannot simply create a list of close friends or contacts to create our board. We must research and seek out individuals that not only share in our mission and values, but also represent the communities we serve as well as the Dallas area at large. There is also

consideration for how the dynamics of boards are changing across the public sector. No longer consisting of big donors, we have an advantage of starting small and working our way into a larger donor-based board with time (Raymond James & Associate).

We will utilize outside resources such as the Center for Nonprofit Management and The United Way of Dallas to enrich our knowledge of board creation, planning, and maintenance, but also continually take the temperature of our board and its interactions with staff and volunteers to ensure that we are using their talents and expertise fully.

- o **Tools to Succeed**
    - Utilize templates and tool kits that are free or affordable to aid in our board management, including succession planning.
    - Create portfolio of possible board member candidates for future recruitment as part of succession planning. (See appendix C)

Index

Appendix A: Example of Donor Portfolio

Possible Donor	Bio and Possible Fit with Level Up
Daniel Webb	Mr. Slottje is a retired University of Dallas professor, current expert witness in economics and statistics, and published author of children's books. Level Up will seek financial contributions and copies of his books if/when applicable.
Michael and Karen Smith	Mike and Karen are heavily involved in the community and Mike (as Principle of his company) donates a minimum amount to charity each year. Mike also has an extensive knowledge of real estate in the Dallas area and would be a source for knowledge on procuring an affordable storage or office location, if not a donated space.
Sam and Gretchen Fletcher	Sam and Gretchen Williams are a powerful, civic- minded, heavily involved couple that have extensive interactions with numerous organizations, businesses, civic and religious groups throughout Dallas. Both will be possible donors and considerations for future board members.
Pat and Emmitt Smith	Mr. Smith is a former Dallas Cowboy that continues to be heavily involved in the community through philanthropic and program venues. Mr. Smith has been known to supply schools and organizations with necessary tools. Our hope is to team up with Mr. Smith for book donations. Mr. Smith and his wife also have a foundation that holds a back-to-school event that Level Up will attempt the take part it any capacity possible. http://www.emmittsmith.com/pat-and-emmitt-smith-charities
The Dallas Foundation	The Dallas Foundation awards competitive grants to those who will be making a difference in the lives of people within Dallas County. They have a specific category for low-income children. We will attempt to secure a grant, as well as create a close working relationship with the foundation to learn the skills necessary to make our organization more efficient and effective, thus more inviting to donors. http://www.dallasfoundation.org/

Appendix B: Example Portfolio of Possible Staff Members

Possible Members of Staff	Bio and Possible Fit with Level Up
Karen Smith	Mrs. Smith is a law graduate of SMU and heavily involved in the Dallas community. Karen has ties throughout the Dallas area. Mrs. Smith is also an active volunteer and fundraiser in the community. Her connections and expertise could prove useful to Level Up. Mrs. Smith volunteer spirit and genuine concern for the success of others fits our mission and values as an organization.
Veronica Preston	Ms. Preston is a PhD student in the Education Leadership program at University of Texas at Arlington, as well as a pastor on the SMU campus. Both Ms. Preston's educational background and connections/knowledge in the religious community will prove vital to the community outreach aspect. Veronica will prove useful in making connections in the faith-based sector as well as bring an understanding of educational leadership in the public sector.
Dominque Rodriquez	Ms. Rodriquez is an Education graduate student at UTA and has been highly involved on public school campuses throughout the North Texas area. Ms. Rodriquez's experience with students and teachers within the Dallas area will help Level Up get a better idea of what the needs, concerns, and possible obstacles for Level Up may be.
Telesa Walton	Ms. Watson has extensive work history in the nonprofit sector of North Texas. Ms. Watson's last position was at Reading Partners and her area of focus was community engagement where she successfully created collaborative efforts and increased volunteer activity. Ms. Watson supplements her nonprofit experience with her connections in the faith-based community to prove a vital force in community engagement.

Appendix C: Example Portfolio of Possible Board Members

Possible Board Member	Bio and Possible Fit with Level Up
Harold Henderson	Mr. Henderson is a successful Dallas-based attorney and believes in the positive effects of community involvement in the lives of underserved youth. Mr. Henderson has extensive knowledge in Human Relations and nonprofit board leadership that we feel would serve us well. His law expertise will supplement the actions of the board as the organization grows in size and services. Mr. Henderson also has an extensive network within the Dallas area that will serve Level Up well with donor contributions as well as succession planning for the executive board.
Errol McKoy	Mr. McKoy is the retired President of the Texas State Fair, as well as a successful inventor of roller coasters and other patents. Mr. McKoy's obvious connections aside, his expertise with the public sector is second to none. He has a history of extensive and continued growth with the State Fair, as well as a life-long history of innovation and creativity. The level of knowledge in the areas of fundraising, community relations, law, growth, and politics will serve Level Up well, especially in the grassroots stages.
Dr. Young-Joo Lee	Dr. Lee is a professor at The University of Texas at Dallas in the Public and Nonprofit Management program as part of the Economics, Political Science, Public Affairs, and Sociology department. Level Up believes that Dr. Lee's expertise in the nonprofit field would prove vital to our grassroots organization's efforts to successfully plan and grow. Even if Dr. Lee was unable to fit into our organization's board dynamics, we will still see advice on strategic planning efforts from her. https://explorer.utdallas.edu/editprofile.php?pid=14511&onlyview=1

Template Index
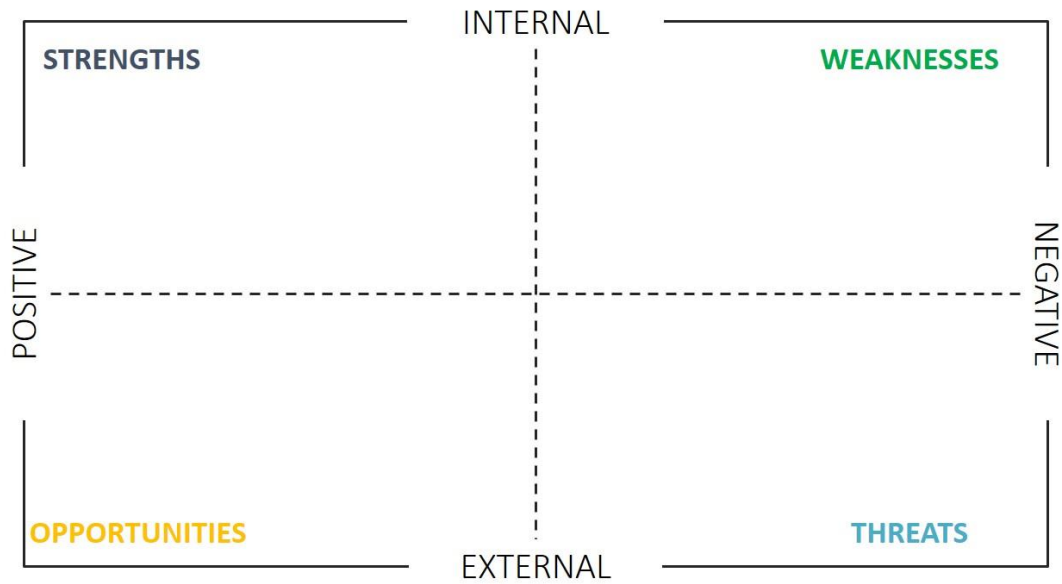
Strategic Planning:

External Environment Analysis Template

Area of Concern	Past	Present	Future	Plan
Budget				
Client				
Programs/Services				
Demographics				
Legal				
Political				
Technology				
Social				
Economic				

Internal Analysis Template

Program	Current State	Areas for Improvement	Future State (if Applicable)	Future Needs

Strategic Planning:

SWOT Assessment

Source: slidemodel.com

Goals and Objectives Template

Goal:				
Objective	**Measure Of Success**	**Barriers**	**Timeframe**	**Who is Responsible**
			Start: End:	
			Start: End:	
			Start: End:	
			Start: End:	
Date of Review:	**Notes:**			

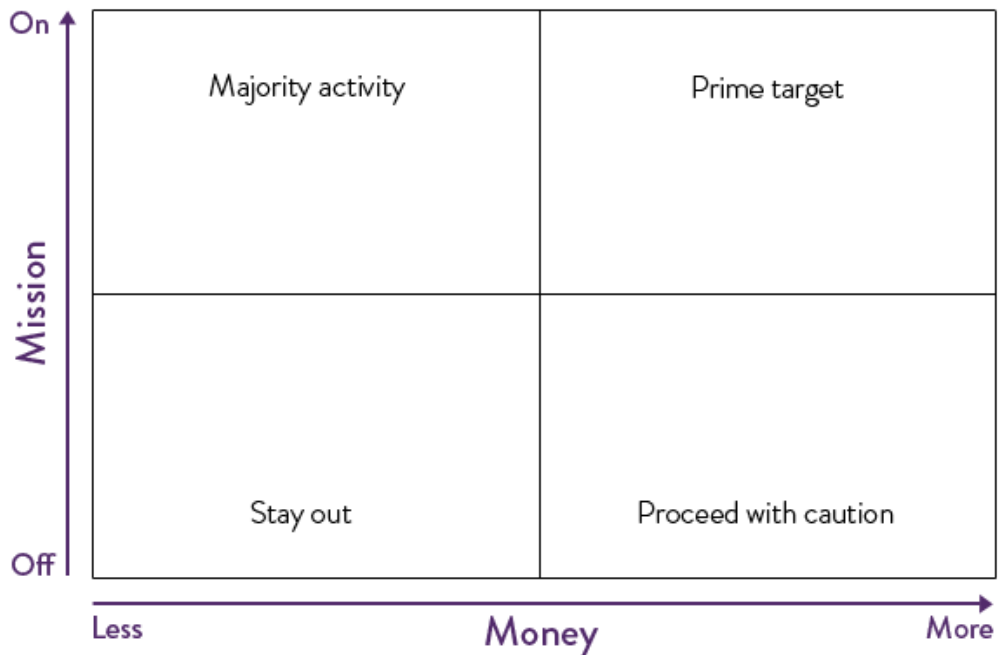*Source: Kentucky and Appalachia Public Health Training Center*

Program Planning and Management:

Program Cost/Benefit Analysis

Program:

Benefit

Outline

To Client

Background

Cost

To Organization

To Organization   To Stakeholder
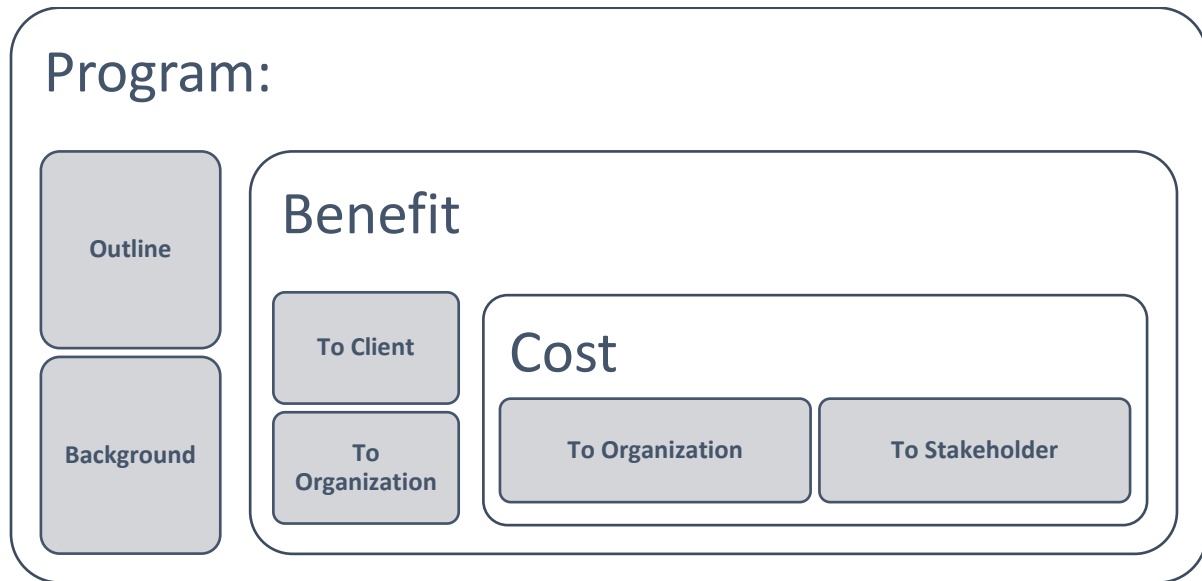
Cost Benefit Analysis as Aligned with Mission

On

Majority activity   Prime target

Mission

Stay out   Proceed with caution

Off

Less   Money   More

Source: knowhownonprofit.org

Name of Stakeholder	Role in Project	Type of Stakeholder	Type of Communication	Expectations	Influence on Project Outcome

Stakeholder Relationship:

Stakeholder Register Template

Project Name: **Date:**

Project Phase:

Source: brighthubpm.com

Stakeholder Relationship Template
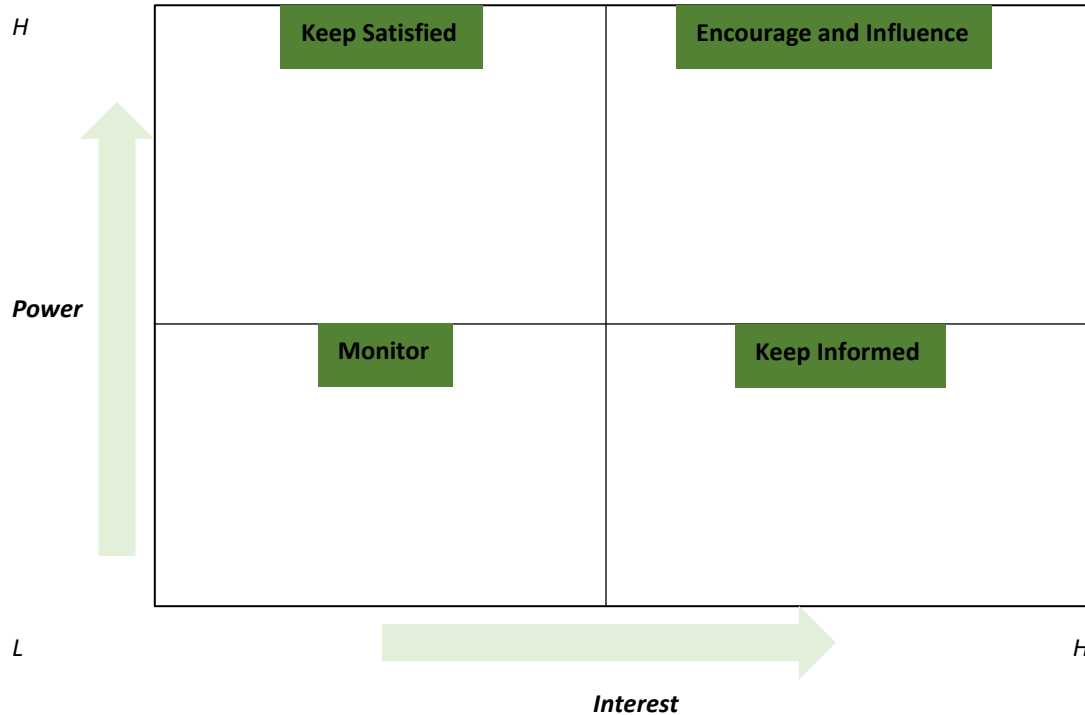
Source: knowhownonprofit.org

Source Index

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