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Program growth, engagement, fundraising

Encompass embarks on five strategic goals 'to build the dream' through 2014

NORTH BEND, Wash. — Expansion of programs for children of all ages, engagement of alumni and an ambitious fundraising goal anchor a five-year strategic plan finalized this month by Encompass.

The plan was launched by the Encompass Board of Directors in a two-day retreat last March and refined over the following six months in brainstorming and deliberations by the Encompass staff and board. It charts five major goals with years of achievement ranging from 2010 to 2014.

“This process proves that the call of the future is alive and well at Encompass, that even in a difficult economy we can forge ahead with courage and no loss of heart, and that we are unafraid to continue to build the dream,” says Gregory Malcolm, Encompass executive director.

The five goals, stated in past tense, looking back from their achievement, are:

- By 2010, Encompass has raised \$300,000 in major gifts in one year, amounting to a doubling of fundraising via new and existing events and expanded community contacts.
- By 2012, Encompass has established new and targeted programs for “teens and ‘tweens.’”
- By 2012, Encompass has expanded its wide array of Encompass programs for expectant families, infants and toddlers.
- By 2012, Encompass has engaged its alumni of children and families by way of increased communication, success stories and reunion events.
- By 2014, Encompass has expanded programs and embedded itself in Issaquah and Sammamish, enhancing existing offerings in those communities and adding new ones.

Threaded through the goals are the underlying approaches of maintaining program excellence and proceeding only when justified by data and other research, Malcolm said. While the strategic-plan process was intensive, he adds, “It was easy to perceive a consensus about our destiny.”

For more information, see the attached document “Our Strategic Plan: The Six-Month Update,” call 425.888.2777 or visit <http://www.encompassnw.org>.



Our Strategic Plan – The Six-Month Update

An Executive Report to the Encompass Board of Directors

by Gregory Malcolm, executive director

Monday, Oct. 5, 2009

It is my privilege to present the results of six months of work on the Encompass strategic plan, work that began with your annual retreat held at the Snoqualmie Operations Center of Puget Sound Energy.

Guided by facilitator Tom Colwell, we embarked on a process that has resulted in a strategic plan with five goals that are broad, rich and focused. The process has had several milestones:

- The March 27-28, Encompass board retreat, at which we brainstormed scores of strategic vision statements and organized them into nine strategic threads, including one labeled board training and development.
- Meetings of the Encompass executive team, leadership team and program teams in April and May, at which staff brainstormed vision statements and strategic threads that later were combined with the board-generated list.
- Meetings of the Encompass board in May through August, at which the board discussed the thread of board training and development by focusing on recruitment.
- Meetings of the Encompass executive team (constituted as the vision team) from May through August to sift the vision statements, sorting them by thread, by completion year (one, three and five years from now) and by priority (some statements falling into categories of “parking lot” and “... or not”). The vision team then narrowed the statements into five strategic goals.
- The Encompass All-Staff Fall Start-Up on Sept. 4, at which staff split into five groups to brainstorm strategies and actions needed to accomplish the five goals.
- Meetings of the Encompass vision team in September to refine the brainstormed material into the document that follows this introductory sheet.

The five goals are presented chronologically, from those to be achieved in one year (by 2010) to three years (by 2012) to five years (by 2014). As you will see, listed beneath each of the five goals is a projection of the crucial steps that would need to be taken by staff (and by the board, as appropriate) within the strategic threads assembled at the retreat. (The thread of “excellence” named at the retreat was assumed to be implicit in each goal. You also will see that the operating-data thread, of making us “data driven,” is listed first among the threads for each goal.)

A hugely satisfying result of this six-month process is that the all of the brainstorms paralleled each other, and it is easy to perceive a consensus about our destiny.

This process proves that the call of the future is alive and well at Encompass, that even in a difficult economy we can forge ahead with courage and no loss of heart, and that we are unafraid to continue to build the dream. The five goals summon us into our own best future, and because of this I deeply appreciate your foresight and trust.

And now, on to our strategic plan ...



Strategic Goal #1

By 2010, we have raised \$300,000 in major gifts in one year

Operating and performance statistics/data/measurement (including market research)

- We have expanded the techniques we use to conduct and maintain research on our current and prospective donors.
- We have improved the technical infrastructure by which we manage contacts with current and prospective donors.

Marketing/branding/communication

- We have developed and begun to use and disseminate a new “Ways of Giving” brochure.
- We have improved the form and frequency of our communications with targeted levels of current and prospective donors.
- We have developed and trained ourselves to tell success stories that are immediately understandable and inspiring.

Fund development

- We have increased the number and size of major gifts contributed in association with our fundraising events.
- We have conducted a regular series of small receptions and tours to cultivate major gifts.
- We have hosted an inaugural open house to expose the public to our mission, staff and facility.
- We have increased the number of volunteers at fundraising events and for other development tasks.

Staffing and professional development

- We have hired and fostered the success of a new major-gifts officer.
- We have conducted fund-development training for all staff.
- We have increased efficiency and expanded support staff within fund development.

Program and products

- We have infused in all our programs the task of educating the public by showcasing what we do.

Space and facilities

- We have reconfigured facilities to allow current and prospective donors to easily see what we do.

Board training and development

- We have conducted fund-development training for the board.
- We have secured 100 percent board participation in giving, major-gift prospecting and solicitation.



Strategic Goal #2

By 2012, we have targeted programs for teens and ‘tweens

Operating and performance statistics/data/measurement (including market research)

- We have researched and assessed demographics and existing programs (and those tried previously) in our service area and nearby communities to understand gaps in service and successful strategies.
- We have surveyed parents and teens/’tweens for data on what programs they want and need and what characteristics would engage other teens/’tweens.
- We have refined a list of targeted programs to offer that may or may not duplicate others in our service area, based on our research.

Marketing/branding/communication

- We have promoted the new programs in schools and on social-networking sites.
- We have established a system to seek continually updated feedback from teens/’tweens.
- We have developed relationships with high-school student government, Natural Helpers, Key Club, DECA and sports teams to enhance modeling and word of mouth about the new programs.

Fund development

- We have secured grants from governmental and foundation sources, including drug and alcohol prevention programs, to provide ongoing support.
- We have secured corporate sponsorships for the new programs.
- We have showcased programs for and solicited support from the parent constituency.

Staffing and professional development

- We have hired a program manager who reflects and embodies teen/’tween communication styles.
- We have contracted with experts who can lead individual programs.
- We have set up an internship system engaging teens and college students to aid program delivery.

Program and products

- We have established targeted enrichment and education classes that fill gaps in our service area.
- We have secured organizational partnerships to provide the new programs most efficiently.
- We have set up an internship program for teens/’tweens that fosters leadership and volunteer skills.

Space and facilities

- We have adapted and/or secured appropriate facilities in which to offer the new programs.

Board training and development

- We have engaged and inspired our board about the new programs so that members can champion the programs to current and potential donors and other audiences.



Strategic Goal #3

By 2012, we have expanded programs for expectant families, infants and toddlers

Operating and performance statistics/data/measurement (including market research)

- We have researched and assessed demographics and existing programs (and those tried previously) in our service area and nearby communities to understand gaps in service and successful strategies.
- We have surveyed parents for data on what programs they want and need, what characteristics would engage other parents and what opportunities exist for bilingual programming.
- We have refined, based on our research, a list of targeted programs to offer may or may not duplicate others in our service area.

Marketing/branding/communication

- We have promoted the new programs in hospitals, clinics and among medical and parent groups.
- We have established a system to seek continually updated feedback from parents.
- We have developed relationships with parental organizations to enhance modeling and word of mouth about the new programs.

Fund development

- We have secured grants from governmental and foundation sources to provide ongoing support.
- We have secured corporate sponsorships for the new programs.
- We have showcased programs and solicited support from the parent constituency.
- We have implemented fee-for-service support for appropriate programs.

Staffing and professional development

- We have provided appropriate infrastructure and support staff for the new programs.
- We have trained staff in curricula and cultural competency.
- We have contracted with experts who can lead individual programs.

Program and products

- We have established prenatal, Bringing Baby Home and new-parenting classes to fill service gaps.
- We have incorporated in-home visits and taken other measures to insure the new programs are accessible and convenient.
- We have secured organizational partnerships to provide the new programs most efficiently.

Space and facilities

- We have adapted and/or secured appropriate facilities in which to offer the new programs.

Board training and development

- We have engaged and inspired our board about the new programs so that members can champion the programs to current and potential donors and other audiences.



Strategic Goal #4

By 2012, we have engaged Encompass alumni

Operating and performance statistics/data/measurement (including market research)

- We have defined what we mean by “alumni.”
- We have accessed existing data and developed and refined a database to track all information useful to foster connections and aid in fund development.
- We have collected, organized and deployed data to achieve longitudinal study outcomes.

Marketing/branding/communication

- We have established multiple communication systems (e-mail newsletter, social networking, print materials) that reach and foster interaction among alumni of all strata.
- We have gathered, written, photographed and publishes stories that reflect the success of alumni from all strata and bolster the message that Encompass has a positive, tangible effect in the life of every participant – and, by extension, the participant’s family and community.

Fund development

- We have established and executed an inaugural “friends” event to bring alumni back to Encompass so that they can share their success stories and embrace the opportunity to contribute financially.
- We have refined our fundraising message so that alumni are able and eager to embody the message to embrace the commitment to contribute so as to give others the same experience they enjoyed.

Staffing and professional development

- We have enhanced the communication staff to achieve the goal of alumni engagement.
- We have infused in all program offerings and in the mindset of all staff the tangible benefits to all participants and to Encompass as a whole of alumni engagement.

Program and products

- We have established an active, energetic and visible Encompass Alumni Association.
- We have created programs that engage alumni of every age – and their families.
- We have developed post-participation support groups for participants in fixed-term programs such as parenting classes and coaching

Space and facilities

- We have enhanced our facilities to showcase the key role of alumni engagement.

Board training and development

- We have engaged and inspired our board about the alumni quest so that members can champion Encompass to current and potential donors among the alumni.



Strategic Goal #5

By 2014, we have expanded programs and embedded ourselves in Issaquah and Sammamish

Operating and performance statistics/data/measurement (including market research)

- We have researched the extent to which Encompass services already are offered in Issaquah and Sammamish and created a summary indicating the prime opportunities for our expansion.
- We have mastered the use of library, social-service, school district and federal census data and databases to build dependable statistics to use in proceeding with expansion.
- We have conducted (helped conduct) an extensive local survey of community wants and needs.

Marketing/branding/communication

- We have established local public recognition for Encompass, our mission and what we do.
- We have become visible in Issaquah and Sammamish via participation in local public events.
- We have refined a consistent rationale to explain our expansion to Issaquah and Sammamish.
- We have established a regular presence among service clubs, the local chamber and other gatherings of opinion leaders in Issaquah and Sammamish.
- We have deepened our relationships with local newspapers and other media.

Fund development

- We have established a significant and growing donor base in Issaquah and Sammamish.
- We have hosted a regular series of fundraising events in Issaquah and Sammamish.

Staffing and professional development

- We have recruited a greater number of staff from Issaquah and Sammamish to enhance our community presence and enable shorter commutes to programs we offer there.
- We have trained our entire staff on our expansion opportunities in Issaquah and Sammamish.

Program and products

- We have developed programs based on our market research.
- We have expanded portable versions of programs before adding permanent space.
- We have explored offering Early Head Start and expanding parenting classes, community activities, therapy visits, enrichment and ELL classes, teen/'tween programs and Pediatric Therapy.

Space and facilities

- We have secured program space in local library, community center, school and city buildings.

Board training and development

- We have recruited new board members from Issaquah and Sammamish.
- We have secured active board participation (with staff) in outreach opportunities.