Heritage Works Strategic Plan 2025-2027

Focus Area: *Capacity*

A. Goal:	Expand organizational capacity to serve youth, artists, and residents through innovative programming, operations, and governance.	
B. Key Strategies:	• Develop Leadership Succession Plan • Document and strengthen organizational culture that engages and supports growth and retention • Create compensation package to successfully recruit the "right" team members • Assess board composition (size, skills, engagement) to increase board and organizational effectiveness • Develop and implement strategy to recruit and retain volunteers and increase in-kind services to accomplish priorities • Develop evaluation plan/strategy	
C. Champion/ Accountability:	Monitoring & Data Collection:	*Person(s) responsible for measuring and reporting outcomes and progress towards targets[TBD]*
	Implementation:	*Person(s) responsible for overseeing the implementation of the goal and related activities[TBD]*

D. Measurables	E. Targets (in three years)	F. Monitoring Methods
Quantifiable measure of success	**Specific output**	**How this will be measured (attendance data, surveys, etc.)**
Increased # of HW staff to develop and adequately staff culture hub when it comes online	Increase staff to 10 – 12 people and/or FTEs	HR records
Completion of long-term leadership succession plan	Completed	Board Report
% of staff *satisfied* or *very satisfied* with key elements of HW culture	80%(?) of staff *satisfied* or *very satisfied* in each category [for discussion]	Staff survey measuring organizational culture. This can include questions on access to and effectiveness of professional development, pay and benefits, etc.
% of staff retained year over year	*One out of four recruited is retained*	Human Resources data
% increase in volunteer and in-kind services	*At least 15%(?) increase in volunteers and in-kind services*	Program records
Increased # of board and committee members	Board size is seven people Committee have two members minimum plus committee chair	Board records
Board assesses its effectiveness and good standing via completion rate of gifts, roles, assignments, etc.	2x annually (November Retreat, April meeting)	Board self-assessment.
Resourced and updated compensation package	25% increase Board-fundraised dollars to support HW competitiveness /staffing	Board resources and adopts new compensation package Board and fund development records

	Completed package	
% of employees completed performance management evaluation	100%	Performance survey/document

G. Progress Toward 3-Year Targets:	Progress through 2025	Progress through 2026	Progress through 2027
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Focus Area: Outreach

A. Goal:	Strengthen the Heritage Works brand and the relationships with youth, artists, partners, and residents	
B. Key Strategies:	• Develop marking plan across platforms • Enhance/clarify brand toolkit • Develop messaging/communications plan across platforms • Collaborate with youth, artists, partners, and residents to leverage resources and spark creative and innovative opportunities • Increase impactful storytelling through social media	
C. Champion/ Accountability:	Monitoring & Data Collection:	*Person(s) responsible for measuring and reporting outcomes and progress towards targets [TBD]*
	Implementation:	*Person(s) responsible for overseeing the implementation of the goal and related activities [TBD]*

D. Measurables	E. Targets (in three years)	F. Monitoring Methods
Quantifiable measure of success	**Specific output**	**How this will be measured (attendance data, surveys, etc.)**
Completed marketing plan	Completed	Finalized document/plan
Update tool kit (logos, colors, Hex codes, etc.)	Completed	Finalized document
Completion of messaging/communications plan	Completed	Finalized document/plan
Email List Growth	Grow list by 1900	**Year 1:** 20% growth in mailing list subscribers (400)., **Year 2:** 25% additional growth through collaborations and content optimization (600). **Year 3:** 30% sustained growth with integrated campaigns (900)
Increased Brand Awareness/Visibility	Increase average reach by 114 posts (FB) and ___ (Instagram)	Achieve a 25% increase in social media reach and impressions annually. (Baseline: 111/post) Year 1: Average reach is 143 (FB) Year 2: Average reach is 180 (FB) Year 3: Average reach is 225 (FB)
Build capacity for social listening	Increase training and software	Inventory of Social listening training and social listening investments

Increase social media channels by one min	1 channel per 2 years	Inventory of social media channels (baseline: 2) Podcast or Youtube/Vimeo
Increased Brand Awareness	Increase followers by Instagram (243 min) & Facebook (400 min)	Grow followers by 10% each year across platforms
Strengthen brand by leveraging storytelling	Increase # of story-based posts by 24/year	Track the number of storytelling posts, their impact, and adjust strategy as necessary.
Strengthen brand by leveraging storytelling	Increase views and rates by 10%	Track views and engagement rates for storytelling posts and adjust strategy as necessary

G. Progress Toward 3-Year Targets:	**Progress through 2025**	**Progress through 2026**	**Progress through 2027**
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Focus Area: Equity

A. Goal:	Promote asset development and self-determination among youth, artists, partners, and residents	
B. Key Strategies:	• Promote economic inclusion * Responsive, Just and Representative Governance • Promote social capital of stakeholders * Disrupt power imbalances and asymmetries • Cultivate and promote safe and just spaces * Elevate youth, artists, and resident voice and agency • Engage youth in education and workforce training (including those focused on equity and disparities/justice)	
C. Champion/ Accountability:	Monitoring & Data Collection:	*Person(s) responsible for measuring and reporting outcomes and progress towards targets [TBD]*
	Implementation:	*Person(s) responsible for overseeing the implementation of the goal and related activities [TBD]*

D. Measurables	**E. Targets (in three years)**	**F. Monitoring Methods**
Quantifiable measure of success	**Specific output**	**How this will be measured (attendance data, surveys, etc.)**
% or # of participants reporting increased employment/matriculation opportunities	*25%*	Data sharing and Interviews with culture bearers and participants
Increase in # of participants reporting empowering wage/salary opportunities	*20%*	Survey (e.g., wages, network expansion/development, work experience, identity/authenticity)
Increase neighborhood-based resources that contribute to opportunity rich and/or Inclusive neighborhoods	*Three/year*	Survey/Inventory of resources for opportunity and inclusion in NoCo and sister communities
# of times the needs of youth and their families are addressed; included in government/corporate initiatives	*2 gov't or corporate initiatives* 80% of decisions	Externally: Monitor and track community recommendations from community engagement are included in government, HW, partner, and corporate initiatives

		Internally: Increase number of decisions/outcomes that reflect stakeholder priorities annually
HW leaders reflect the demographic of its communities	*80% of HW Board and staff reflect demographics of community constituents*	Comparison of HR records and demographic assessments of communities we serve
Design of HW's new home promotes safe/just spaces (What can we do now? In leased spaces?)	*All spaces include design elements that promote safety/justice;*	Assessment of design indicates inclusion of elements (e.g., biophilic, sensory design, natural lighting, clean sight lines, universal design for living/learning) that promote safety, universal access, and justice. As indicated by participant surveys and feedback
Increase in the number of power imbalances identified and addressed	*4/year*	Team and participants indicate an organizational culture that they feel good identifying power imbalances, and imbalances are addressed.
Increased professional network expansion/development among stakeholders (e.g., youth, bearers)	*1/Intern or Staff*	Stakeholder assessment/data sharing
# of trained ambassadors speaking on safe spaces/equity	*5 people /year*	Social media posts, event records

G. Progress Toward 3-Year Targets:	**Progress through 2025**	**Progress through 2026**	**Progress through 2027**
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Focus Area: Sustainability

A. Goal:	Increase sustainability of Heritage Works' mission and vision through a secure financial position	
B. Key Strategies:	● Complete and own community center building (debt-free) ● Diversify funding streams ● Establish endowment ● Grow reserves ● Develop operating model	
C. Champion/ Accountability:	Monitoring & Data Collection:	*Person(s) responsible for measuring and reporting outcomes and progress towards targets Accountant, Lisa Prince*
	Implementation:	*Person(s) responsible for overseeing the implementation of the goal and related activities Lisa Prince, Everybody*

D. Measurables	**E. Targets (in three years)**	**F. Monitoring Methods**

Quantifiable measure of success	Specific output	How this will be measured (attendance data, surveys, etc.)
% Debt owed for building	*0%*	
# new major donors ($10k +)	*42*	Btw 2025-2026 in celebration of HW 25th yearr would like to secure 25 new major donors. By YE 2026, secure 10, and YE 2027 secure 5 new major donors while still cultivating the previous 35.
15% of donors will represent a new demographic (e.g., age - under 35 years old,	15%/year (estimate 60 individuals)	Data will be collected on new donors and tracked in our CRM database (Bloomerang); Square Foot Club campaign would be an engagement tool. 2025 = Assessment and 10 people; 2026= 25; 2027= 25
# of gifts from Donor Advised Funds	*27*	
$ raised for endowment	*$1,000,000*	Endowment only -These funds will not be allotted to programming or Capital Campaign.
# of months of reserves	*6*	Monthly spending is ~$50,000. Six months is $300,000
New financial/business model	*Implemented*	Development and implementation of business model that grow earned income revenues.
% of total revenues as unrestricted funds	*40%*	Baseline is $150K of $600K revenues (25%). Goal is $400K of $1 million dollar revenues.

G. Progress Toward 3-Year Targets:	**Progress through 2025**	**Progress through 2026**	**Progress through 2027**
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