



A member of the PICO national network 

PENINSULA INTERFAITH ACTION

STRATEGIC PLAN

Fiscal Years 2010, 2011, 2012



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TABLE OF CONTENTS

INTRODUCTION

- Letter from the Chair
- “Steps to a Strong Future, the Planning Process,” introduction from the Executive Director

GENERAL SUMMARY

PIA Overview:

- Mission, Vision & Values
- Who We Are — Our Constituencies
- Why We Succeed

Strategic Plan Overview:

- Vision
- Purpose and Workings of the Plan
- Chief Features of the Plan

PLANNING DETAIL

- 1) Leader Development, Governance, Staff**
- 2) Membership and Growth**
 - Membership Profile with Goals
- 3) Issues and Collaboration**
- 4) Communications**
- 5) Fund Development and Finance**

APPENDIX

A) Task Force Members

B) General Assembly—Comments and Hopes for the Plan

C) Taproot Foundation Team Final Report

D) Who Is PIA?

- PIA Credential
- About PICO
- List of Member Congregations and Organizations
- Roster: Board of Directors
- Organization Chart

E) How PIA Works

- PIA's Approach to Organizing
 - Organizing Process
 - Leadership Methodology
 - Evaluation Methodology
 - PICO Principles for Community Organizing
- Issues and Accomplishments: list
- Recent Press
- Examples of Call-to-Action flyers

INTRODUCTION

LETTER FROM THE CHAIR

Dear Friends:

I am proud to introduce this strategic plan for the future of PIA, Peninsula Interfaith Action.

This is PIA's second strategic plan. It was developed with the leadership and input of nearly 30 PIA leaders, PIA's board, a professional assessment team (assembled by the Taproot Foundation), our staff, a consultant, and input from the larger membership at two General Assemblies.

The plan comes at a critical time for our communities. While our region is no stranger to the economic ups and downs of a volatile world, this recession that began to play out in 2009 is deeper and will last longer than any we have yet lived through. The Peninsula will need Peninsula Interfaith Action more than ever. No other organization here can look out for our communities in the way PIA can. With our large federation of member congregations, we have a rare capacity to work together to share strategies, knowledge, and people power to keep our communities strong and resilient, and to solve urgent community problems.

PIA's chief asset is the capacity of its leaders to work together for the common good. The goals and strategies proposed in this strategic plan are aimed at strengthening that capacity.

This plan is a living document. It is a guide to the future, a proposal that needs fresh reassessment on an ongoing basis. As a document in your hands, it represents the best thinking of one group of people within a constrained period of time. Undoubtedly we have overlooked a number of situations that deserve attention. I invite you to take the time to consider this plan and give us your thoughts, suggestions, and continuing participation as we strive to keep the planning process alive for PIA.

On behalf of the board, I want to thank everyone who worked so hard on developing this strategic plan on a tight timetable. I look forward to enacting this plan together with you over the next few years and, and consequently, to sharing many wins with you over the years to come.

Sincerely,

Ross Weir
Chair, Board of Directors

STEPS TO A STRONG FUTURE, THE PLANNING PROCESS

In 2002, PIA developed its first three-year strategic plan, an effort that engaged PIA leaders in a comprehensive, values-driven effort to review and develop PIA's foundations and goals and to create a plan for a healthy, sustainable future. That plan served PIA well. By 2008, PIA felt it was overdue to renew its plan and undertook a comprehensive process to create a new strategic plan that could serve and support the organization in the new decade.

Good planning is essential to organizational health. It asks and answers the essential questions "What does this organization really need to succeed?" and "Where are the risks?" For PIA, this new strategic plan provides:

- a *clear picture* of what work PIA wants to do, what we think we can achieve in the near future, and how we can get there.
- a roadmap for growing and *attracting financial support*.
- a *stronger capability* to accomplish PIA's goals for the community.

There were many steps in developing this strategic plan. In January, 2009, PIA won a grant of support from the Taproot Foundation, which assembled a team of pro bono consultants to conduct an independent assessment of PIA's operations, image, and services and which then provided corresponding recommendations. The Taproot team conducted interviews with 25 individuals, including PIA leaders (6) and staff (5), donors (6), allies (5), politicians (2), and competitors (1); and reviewed extensive published information concerning area demography.

The Taproot team brought expertise, objectivity, and insight into its assessment of PIA's mission and impact. The team had no prior experience with community organizing, yet they patiently got to know our organization and capably guided us through an environmental scan and SWOT analysis (Strengths, Weaknesses, Opportunities, Threats). They guided us in considering strategic options with consequences. They introduced us to new metrics to improve our organizational performance. Finally, they left us with a wealth of data and useful resources to inform our strategic planning. The Taproot team completed their work and submitted their report in August, 2009.

With this organizational assessment just completed, PIA was in an optimal position to hire a consultant to facilitate the next phase of strategic planning and to produce a finished strategic plan. With the help of a grant from the California Endowment, PIA engaged consultant Marilyn Bancel of The Oram Group, Inc., who worked with leaders and staff, facilitated meetings and consolidated and organized all the ensuing work into a comprehensive, understandable and achievable strategic plan.

At the September 2 General Assembly, a summary of the strategic planning process and Taproot report were presented, and five strategic areas were identified for breakout groups where input was solicited. Those groups were:

- Leadership — leader development, governance and management. Chair, Ross Weir

- Membership — member service and growth. Chair, Joan Kilroe
- Issues — issue development and selection. Chair, Marv Goodman
- Communications — external marketing and internal communications. Chair, Marco Cedillo
- Finances — revenue sustainability and growth, including a comprehensive fundraising plan. Chair, Phil Cosby

The Taproot report with comments was then brought to a September 13 PIA board retreat. Planning the Task Force work constituted the core of the agenda. The job of each group was to:

- Explore the **planning environment** as presented by the Taproot team and add any new or missing information or considerations.
- Define the overall **Vision** of each Task Force area for PIA.
- Propose appropriate **Goals**.
- Propose workable **Strategies** to reach or advance the goals.
- Propose **Persons Responsible** for implementing the strategies and identify what **Resources** will be needed.

Three Task Forces (Leadership, Communications and Finance) were able to convene one or two additional meetings before the next General Assembly on November 4. At that General Assembly, the major trends that had emerged from the planning process by that point were announced, and participants provided written reactions on a questionnaire, especially concerning the results they wanted to see from the planning process. (See Appendix for a complete list of responses.)

All Task Forces met one more time in November / December, Task Force chairs also met in December, and the Board considered the strategic plan at its December and January board meetings. In all, there were eighteen meetings of Task Forces and other committees.

This strategic plan will be a valuable guide to PIA for many years to come, not only these few years immediately ahead of us. I give thanks to all the leaders who worked hard to develop this plan. Thanks also to The Taproot Foundation, whose work provided an essential foundation to the entire effort, to the California Endowment, and to Lisa Hicks-Dumanske, who kept everyone on the same page throughout the process.

Mary Klein
Executive Director

GENERAL SUMMARY

PIA Overview

- **Mission, Vision & Values**

Peninsula Interfaith Action (PIA) creates the capacity in ordinary people to achieve extraordinary results for their communities. Motivated by the values of democracy and diverse faith traditions, PIA develops effective leaders who work together to identify, address, and resolve critical local and regional needs for affordable housing, safer neighborhoods, access to health care, youth services and more.

- **Who We Are – Our Constituencies**

PIA is a federation of congregations incorporated as a nonpartisan, nonsectarian 501(c)(3) nonprofit organization. Our 30 member congregations represent approximately 19,000 households of diverse racial, ethnic, economic and religious backgrounds. Each member congregation is invited to create a Local Organizing Committee (LOC) of volunteers to focus their work.

We develop leaders who enter into partnerships with allied organizations and public officials to transform public policy at all levels. PIA is affiliated with PICO California (a network of 20 organizations like PIA) and the PICO National Network (50 organizations like PIA) and collaborates with them to effect change on the state and national levels.

- **Why We Succeed**

PIA develops **leaders** who listen to the deeply-felt needs of their communities and then, acting together as equals, work to create **collaborations** to resolve community problems. Empowered leaders influence the **formation of policies** that make political, economic, educational and cultural systems **accountable**, ensuring a self-sustaining foundation for **lasting change**.

No other organization in our region is doing what we do. We have discovered that when we act together out of faith-based values for the common good, we create power that makes real and lasting change.

Strategic Plan Overview

Vision

PIA's vision is of a vibrant network of knowledgeable, well-trained citizen-leaders who are based in publicly minded communities of faith, and who act together to identify and resolve issues of mutual community concern. PIA's base of member congregations will continue to sift strategically, allowing PIA to develop power where it is needed. At the same time, the capacity of leaders to act will be strengthened and the levels of participation by member congregations will be heightened.

Purpose and Workings of the Plan

The strategic planning process identified the best and most workable ways to move PIA further towards its vision, beginning in 2010.

The process began with the results of a deep assessment and environmental scan (including a "SWOT analysis" of PIA's Strengths, Weaknesses, Opportunities, & Threats), which were performed by a professional team provided to PIA by the Taproot Foundation. Their excellent report, together with a rich set of recommendations, can be found in the Appendix of this plan.

Beginning with the Taproot report and recommendations, five Task Forces carried the planning process forward to its present state. The Task Force categories were Leadership and Governance; Membership; Issues and Collaborations; Communications; and Fund Development and Finance. Guided and coordinated by a consultant from The Oram Group, Inc., the Task Forces asked PIA board members, leaders, and others for their input in identifying additional underlying conditions that might affect planning. They then developed a corresponding set of goals and strategies that could strongly link current conditions with PIA's vision.

Task Forces and staff recorded and reviewed suggested strategies, considered exactly *who*—and what level of human resources—would be needed to implement the strategies, and then estimated what, if any, *new* expenditures over and above currently budgeted levels would be required.

This plan found strategies to address all but one or two of the desired goals within the cap of what was considered achievable revenues. One of the great virtues of this plan is that most of the strategies suggested involve no additional financial outlay. It is essential, however, that PIA achieve the plan's revenue levels if we are to reach the goals we have set for ourselves.

The current document should be considered to represent a living process. It is a map to our future which needs travelers to continue to fill in some of the map's details. Not all of the strategies are entirely worked out. Other goals might be added.

The plan's success depends on leaders responsibly acting on the suggestions and collaborating in a timely and intentional manner. It depends on leaders *holding us all accountable* to our own progress. A number of *ad hoc* groups and continuing Task Forces named in the plan are needed to implement the work described, and there is a need for new members to join those groups. It will be interesting work. Please join them.

Chief Features of the Plan

In the most general terms, this plan shows how PIA can leverage its own membership and its affiliations with PICO to work smarter and more efficiently in order to be even more effective.

Three initiatives from the plan will affect leaders the most:

- 1) a comprehensive program to **improve communications** at all levels, both external and internal.
- 2) a program to develop more **Organizing Leaders**, who can leverage both staff and leader capacity to provide training.
- 3) a call for a broad and on-going **campaign of one-to-ones** to build knowledge, understanding, and levels of participation both within and outside of PIA at all levels, including financial support.

Task Forces summarized the following main features of their five areas:

1. Leader Development, Governance and Staff:

a. Leader Development:

Major Considerations: Leaders are asking for more support and training.

Strategic Response:

- The plan sets out many ways to give leaders more training and more direct engagement in organizing and to do so without adding more expense. The plan sets out 40 ways to support leaders with set goals that will help measure progress.
- Two key strategies are to: 1) develop more Organizing Leaders to expand organizational capacity to provide training, and 2) enlist more support from veteran PICO staff members in developing newer PIA staff members.

What This Means To PIA Leaders: More leader participation in trainings and communications. Stronger organizer support.

b. Governance:

Major Considerations: The board should and can increase its governance capacity.

Strategic Response:

- The board will employ evaluation tools and activate or re-activate certain committees with specific, clearly defined tasks.

What This Means To PIA Leaders: It will be possible to bring the board to a newly energized level that will help govern PIA better.

c. Staff:

Major Considerations: Staff organizers are overstretched for their level of experience.

Strategic Response:

- PIA staff will take a more aggressive approach to training opportunities.
- prioritize having at least one lead organizer on staff at all times.

What This Means To PIA Leaders: More support and training opportunities for leaders and LOCs.

2. Membership Growth and Engagement:

Major Considerations: In Daly City and South San Francisco, two of our four most important power centers on the Peninsula, there is little or no representation PIA representation. At the same time, the increasing diversity in our area offers opportunities for PIA.

Strategic Response:

- PIA will act to grow our diversity, our power, and our revenue through strategic membership choices.
- While keeping diversity as a central and strategic value, PIA will focus on building active membership levels in un-represented or under-represented power centers and on adding congregations that can participate in PIA financially.

What This Means To PIA Leaders: Greater diversity will stretch leaders' capacity for multicultural understanding. New congregations will call for support and guidance from veteran leaders.

3. Issues and Collaborations:

Major Considerations: PIA is famously able to mobilize people. Much more is possible with greater engagement from LOC leaders and member congregations.

Strategic Response:

- PIA will continue a vigorous calendar of actions, building to eight local actions and one federated action each year.
- PIA will focus on many ways to help leaders gather and use good information and improve leader effectiveness in responding to community needs. One key feature is for each LOC to design an annual listening campaign of 1-to-1s, which will touch at least 20% of PIA's congregational membership over a three-year period. The campaign will strengthen each LOC's capacity for selecting issues and developing actions.
- LOCs will be better equipped to record and share the histories and techniques of recent "wins."
- More emphasis on collaborations can also increase PIA's capacity to win on issues.

What This Means To PIA Leaders: Leaders will understand more clearly how to engage with their communities and become more effective. LOC leaders will engage in at least six 1-to-1s each year.

4. Communications:

Major Considerations: One of PIA's great strengths is research and presentation at actions. In general, communication among and within congregations and leaders needs improvement.

Strategic Response:

- Solid research and compelling presentations at actions will continue to be a core focus.
- We will strengthen our ability to carry our message to external audiences as well as to internal ones.
- We will sharpen our materials and improve all the channels we use to connect with each other.
- A new Communications Committee will prioritize and help support many of the Communications goals. As the plan continues, some staff support for communications will be restored.
- New ways to recognize our leaders will also be a key focus.

What This Means To PIA Leaders: More leader 1-1s. Creation of a highly active volunteer **Communications Committee** with specific goals and strategies.

5. Fund Development and Finance:

Major Considerations: The current economic downturn and other unavoidable factors have resulted in cut-backs to both grants—our primary source of funding—and contributions. PIA's income in 2009 was only 75% of that anticipated at the beginning of that year.

Strategic Response:

- In response to the current economic downturn and specific losses, PIA has cut expenses by about 25%.
- While some new income may be gained from attracting new member congregations, the plan proposes a **strengthened development program** that can build income back to about 90% of previous levels by the end of year three.
- The plan calls for a gradual decrease in PIA's reliance on private foundation funding from almost 80% of total revenues to an ultimate target of about 65%.

- The decrease in foundation grants as a percentage of total revenues will be achieved by strengthening a diversity of revenue sources, especially giving from individuals who are inspired by PIA's work. **Individual major gifts and donations** must be PIA's primary sources of new revenue. This plan proposes that PIA raise its level of individual giving (beyond the Heroes Luncheon) from the current level of \$13,000 to \$65,000 in three years, and engage professional support to achieve this goal.
- - To realize many of the plan's initiatives, PIA will rely upon its leaders to perform specific tasks and provide oversight.

What This Means To PIA Leaders: More leader participation in encouraging others to give to PIA. More Associate Congregations will support PIA financially.

SUMMARY: STRATEGIC RESPONSES

MAJOR CONSIDERATIONS	STRATEGIC RESPONSE	WHAT THIS MEANS TO PIA LEADERS
<p>LEADER DEVELOPMENT: Leaders are asking for more support and training.</p>	<ul style="list-style-type: none"> - The plan sets out many ways to give leaders more training and more direct engagement in organizing while setting goals that will help measure progress. - Two key strategies are: 1) to develop more Organizing Leaders to expand organizational capacity to provide training, and 2) to enlist more support from veteran PICO staff members in developing newer PIA staff members. 	<p>More leader participation in trainings and communications. Stronger organizer support.</p>
<p>MEMBERSHIP: There is little or no PIA representation in Daly City and South San Francisco – key power centers on the Peninsula. Increasing diversity in our area offers opportunities to PIA.</p>	<ul style="list-style-type: none"> - PIA will act to grow our diversity, our power, and our revenue through strategic membership choices. - While keeping diversity as a central and strategic value, PIA will focus on building active membership levels in un-represented or under-represented power centers and on adding congregations that can participate in PIA financially. 	<p>Greater diversity will stretch leaders’ capacity for multicultural understanding. New congregations will call for support and guidance from veteran leaders.</p>
<p>ISSUES: PIA is famously able to mobilize people. Much more is possible with greater engagement from LOC leaders and member congregations.</p>	<ul style="list-style-type: none"> - PIA will continue a vigorous calendar of actions, building to eight local actions and one federated action each year. - PIA will focus on many ways to help leaders gather and use information and to improve leader effectiveness in responding to community needs. One key feature is for each LOC to design an annual listening campaign of 1-to-1s, which will touch at least 20% of PIA’s congregational membership over a three-year period. This will strengthen each LOC’s capacity for selecting issues and developing actions. - More emphasis on collaborations can also increase PIA’s capacity to win on issues. 	<p>Leaders will understand more clearly how to engage with their communities and become more effective. LOC leaders will conduct at least six 1-to-1s each year.</p>
<p>COMMUNICATION S: Communication among and within congregations and LOCs needs improvement.</p>	<ul style="list-style-type: none"> - Major emphasis on improved communications of all types, external and internal. - Restore some staff support for communications by Year Two of the plan. 	<p>More leader 1-1s. Highly active Communications Committee.</p>

— continued

MAJOR CONSIDERATIONS	STRATEGIC RESPONSE	WHAT THIS MEANS TO PIA LEADERS
<p>FUND DEVELOPMENT: The current economic downturn has resulted in cut-backs to both grants and contributions. PIA's income in 2009 was only 75% of that anticipated at the beginning of that year.</p>	<ul style="list-style-type: none"> - Recent major cuts have reduced expenses in the short term. - This plan can restore close to 90% of previous revenue levels within three years. - While some new income may be gained from attracting new member congregations, individual major gifts and donations must be PIA's primary sources of new revenue. This plan proposes that PIA invest in a strengthened development program to bring individual giving (beyond the Heroes Luncheon) from a base of just \$13,000 to \$65,000 in three years. - To realize many of the plan's initiatives, PIA will rely upon its leaders to perform specific tasks and provide oversight. 	<p>More leader participation in encouraging others to give to PIA. More Associate Congregations will support PIA financially.</p>

	A	B	C	D	E	F	G	H	I	
1	PLANNING 2010 - 2012 blue = from Taproot report	LEADER DEVELOPMENT, GOVERNANCE, STAFF "Stakeholders" Leader, board, staff development; by-laws; evaluation	Goals	Strategies	People & Resources YR 1	New Expenses YR 1	People & Resources YR 2	New Expenses YR 2	People & Resources YR 3	
2	Task Force Members & Work	Ross Weir, Chair. Joy Addison, Phil Cosby, Esther Hill, Pat Kolbe, Monica Olsen, Alvin Spencer. Staff: Mary Klein, Lisa Hicks-Dumanske		1) Set Goals 2) What helps or hinders reaching the goals? 3) Strategies for reaching goals. 4) Cost-Revenue implications?						
3										
4		GENERAL UNDERLYING CONDITIONS:								
5	Strengths	• Building teams • Research • Relationship building • Putting ordinary people into direct relationship with elected officials or other people in power positions • Developing leaders is a								
6										
7		UNDERLYING CONDITIONS	1. EXPAND CORE LEADERSHIP							
8	Strength	• PIA has 250 active leaders and 350 listed. • LOC members are come-and-go by nature (e.g., changing interests, effort, demographics, place in life)	PIA will have at least 262 active members, with overall growth of 5%.							
9	Challenge	• PIA needs to continue to fill and re-fill its pool of Leaders, who currently number 250. • Much opportunity lies in newcomers to congregations, which means outreach orientation and training. • LOCs need help marketing to the rest of their congregation. "Current flyers, calls do not work." • Small LOCs need more ways to recruit.	• Engage and develop 120 new LOC Leaders over the next three years— <u>40 people/year, or 1-2 per LOC</u> . The 120 new people will: -- replace 10% lost through attrition (about 25 people each year). -- grow the number of Leaders overall by 5% (about 15 people each year).	• <u>Each LOC creates a plan</u> to address the goals and "underlying conditions" and sets a goal annually for a focused outreach campaign in their congregation. LOCs will, on average, develop 4 new people each over three years.	LOCs plan. Leaders do one-to-ones. Organizers support.	n/a	LOCs plan. Leaders do one-to-ones. Organizers support.	n/a	LOCs plan. Leaders do one-to-ones. Organizers support.	
10	Strength	o PIA has strong leaders that are well-known and respected: passionate, responsive and available. o PIA is highly valued and praised as the core of community activism.	• Leverage Leader successes to recruit, inform, encourage and help develop new members and Leaders. • Leverage praise of PIA.	• <u>Build an institutional archive of leader stories and testimonials</u> . Make the archive accessible to all Leaders and use the testimonials and records of wins to help recruit new leaders.						
11				• Collect testimonials from PIA and non-PIA people valuing and praising PIA as <i>the</i> (or at least "a") core of community activism on the Peninsula.	LOCs & staff. Collect at least 12 testimonials.	n/a	LOCs & staff. Collect at least 12 testimonials.	n/a	LOCs & staff. Collect at least 12 testimonials.	
12				• Each LOC asks what wins happened as result of an action or forum and records this regularly (get template from PIA staff).	LOCs & Organizers; staff develops a template	n/a	LOCs & Organizers	n/a	LOCs & Organizers	

	A	B	C	D	E	F	G	H	I	
13				<ul style="list-style-type: none"> How to: <ul style="list-style-type: none"> staff & Leaders provide LOCs with samples of: a) an immediate win; b) ripple effects; c) long-term effects. LOCs submit testimonials to staff. Staff treats the text (if needed) for public use and translates. Text is posted to an on-line archive. 	LOCs & Organizers; staff develops a template	n/a	LOCs & Organizers	n/a		
14				<ul style="list-style-type: none"> Develop a <u>powerpoint and/or video</u> to show potential new Leaders how PIA works. (see Fund Development & Finance) Organize around key messages and records of wins and results. — "You want to be part of PIA to create change." 	TBD. To be worked out in concert with a Communications and Development Task Force.				Communications Manager	\$\$
15	Problem	<ul style="list-style-type: none"> LOC members can get discouraged if their LOC loses momentum. 	<ul style="list-style-type: none"> LOCs develop multiple ways to keep their momentum. 	<ul style="list-style-type: none"> Encourage LOCs to find ways to support each other. 	LOCs brainstorm	n/a		n/a		
16				<ul style="list-style-type: none"> Tell LOC members about the history of LOC ebbs and flows; put their efforts in context so they keep heart. 	Staff	n/a	Staff	n/a	Staff	
17	Opportunity	<ul style="list-style-type: none"> Federated PIA meetings, including General Assemblies, are important platforms for encouraging people to participate at the Leader level. 	<ul style="list-style-type: none"> Use General Assemblies to provide basic orientation pointers to newcomers and to generate excitement based on a history of wins. 	<ul style="list-style-type: none"> Structure the agenda of General Assemblies with an eye to giving newcomers more context and orientation. 	E.D. and Exec Comm.	n/a	E.D. and Exec Comm.	n/a	E.D. and Exec Comm.	
18										

	A	B	C	D	E	F	G	H	I	
19		UNDERLYING CONDITIONS	2. LEADER DEVELOPMENT							
20	Weakness/ Problem	<ul style="list-style-type: none"> Leadership development program is too hit and miss, and sometimes too much for people, sometimes too little. What can take us from the formation of a new group to the stage of adding new members? Regular quarterly trainings have slipped in regularity. Too little organizer time is available for all the demands or training needs. "If you're not on the board, you don't really experience PIA as a cross-congregational organization. Regular LOC members don't generally experience 'PIA'." 	<ul style="list-style-type: none"> Create a stronger leader development program. Sharpen how the training program operates. Develop current leaders and new leaders through training offerings to all current and new people. <u>Train 50-100 leaders per year, minimum 150 leaders total.</u> Increase leader participation in PIA-wide assemblies and trainings. 	<ul style="list-style-type: none"> Restore Leader trainings to 3 times/year. Build attendance to 40-50 people attending each training. Customize and diversify the curriculum to relate to LOCs' timely needs. Promote content-specific trainings in a timely way to LOCs. Create multiple "tracks" and make use of break-out groups. 	Train 50-100 leaders	n/a	Train 50-100 leaders	n/a	Train 50-100 leaders	
21				<ul style="list-style-type: none"> Build more understanding of motivations to attend trainings. 	E.D. and organizers	n/a	E.D. and organizers	n/a	E.D. and organizer	
22	Weakness/ Problem	<ul style="list-style-type: none"> Geographic distances can impede organizers spending time on leadership development. 		<ul style="list-style-type: none"> Continue to hold satellite trainings, bringing trainers on site to selected, more populous LOCs rather than hold centralized trainings to which leaders must travel. 	E.D. and organizers	n/a	E.D. and organizers	n/a	E.D. and organizer	
23	Threat	<ul style="list-style-type: none"> There is an insufficient number of organizers for all the work that is desirable to do. Organizers are needed to do lots of 1-1s and develop deep relationships with leaders. An existing Organizing Leader training program has languished due to lack of follow-up. A PICO binder of trainings exists. 	<ul style="list-style-type: none"> Recruit Leaders to act as "organizers" to help fill the organizer gap. Train, field, and have active ten (10) "Organizing Leaders" within 3 years. Train at least 5/year. 	<ul style="list-style-type: none"> Restore a step-wise, consistently sequential, Organizing Leader development program (OLP) using the PICO model. Build in follow-up. <ul style="list-style-type: none"> Re-activate the OLP Committee. Mobilize people already trained through the Organizer/Leader Program (OLP) to conduct leader trainings. Invite caucus participants to become trainers of leaders. Revise the existing "Organizing Leaders" curriculum to include training to do 1-1 trainings as well. 	Staff restores program and trains at least 5 Organizing leaders. PIA ED oversees the Organizing Leader Program and/or delegates it to lead organizer.	n/a	Staff trains at least 5 Organizing leaders.	n/a	Staff trains at least 5 Organizing leaders.	
24				<ul style="list-style-type: none"> Consider holding joint Leader Trainings with PACT. 						
25	Opportunity	<ul style="list-style-type: none"> Relationship-building forms the core of PIA's work. As part of that, being able to state what PIA does, why it matters, and who was listening can greatly benefit all of PIA's work, from LOC recruitment and engagement to fundraising. 	<ul style="list-style-type: none"> Enrich Leaders' relationship-building skills with: <ul style="list-style-type: none"> A) concise ways of saying what PIA does; B) concise ways of saying what difference the work makes (why it matters); and C) personal goals for talking with/reach out to more people with those messages, and D) communicating back the results. 	<ul style="list-style-type: none"> Address how to talk about PIA-credential and PIA in the key messages project funded through Taproot grant (pending). Train LOC leaders to use this credential. 	development director, communications committee to develop; Organizers to train LOC leaders	minimal	Organizers to train LOC leaders	n/a	Organizers to train LOC leaders	
26	Challenge	<ul style="list-style-type: none"> Increasing cultural diversity requires increasing cultural sensitivity 	<ul style="list-style-type: none"> Continue the Multi-cultural initiative. 							
27		<ul style="list-style-type: none"> Diversity trainings have been running through cross-LOC caucuses. 	<ul style="list-style-type: none"> Offer opportunities to participate in an MCI training to at least 2/3 of LOCs over next 3 yrs. 	<ul style="list-style-type: none"> Caucuses will continue trainings by invitation and other means. Two (2) LOC meetings/year include a focus on multicultural training. 	Staff and veteran leaders will host.	n/a	Staff and veteran leaders will host.	n/a	Staff and veteran leaders will host.	
28	Strength	<ul style="list-style-type: none"> PIA is very good at working with under-privileged communities 	<ul style="list-style-type: none"> Expand the MCI in terms of content: include more cultures, religions, etc. 		Staff and veteran leaders will develop.	n/a	Staff and veteran leaders will develop.	n/a	Staff and veteran leaders will develop.	

	A	B	C	D	E	F	G	H	I
29	Opportunity	• PIA needs to measure more things and then use those measures to good effect—who gets trained on what and when.	• Invest staff and volunteer time in measuring leader development. (We have some metrics developed.) (EDITED)	• Develop a way to track leader trainings; both quantity of trainings and content.	ED and staff will develop and implement system.	n/a	ED and staff will sustain system.	n/a	ED and staff will sustain system.
30	Opportunity	• PICO is available as an important resource.	• Participate more actively in PICO-National.	Send at least 5 PIA representatives to each of 6 PICO-National meetings per year. Subsidy of \$200/each/yr)	Send 5 PIA Leaders	incl.	Send 7 reps.	400	Send 9 reps.
31	Opportunity	• PICO is available as an important resource.	• Participate more actively in PICO-CA.	Send at least 4 PIA representatives to each of 6 PICO-CA meetings per year. \$600/yr)	organizers and leaders	incl.	organizers and leaders	incl.	organizers and leaders
32	Opportunity	• Community-based organizations are experiencing a wave of popularity among youth as a result of the current Obama administration.	• Existing youth organizing committees will be strengthened as separate LOCs within their congregations. At the end of Year 3, PIA will include at least 3 active youth LOCs.	• PIA will assign adequate staff time to nurture the development of one new youth LOC per year.	organizers and leaders	n/a	organizers and leaders	n/a	organizers and leaders
33	Opportunity	• Funding is available for youth initiatives.	Achieve financial support for youth organizing efforts.	• Seek alignments between work of youth LOCs and goals of funders.	organizers and leaders (help from Devp Dir & ED)	n/a	organizers and leaders	n/a	organizers and leaders
34									
35		UNDERLYING CONDITIONS	3. LEADER INVOLVEMENT						
36	Weakness	<ul style="list-style-type: none"> • Have just 18 active LOCs within 30 member congregations. • What is the role for weaker congregations? • Problem of the Charismatic Leader ("Tom is doing a great job.") i.e. we don't have to commit if Tom is doing so well. • Some of PIA's most active people are still reluctant to see themselves as "leaders." • Balancing top-down and bottom-up identification of issues is key to keeping leaders involved. 	• Retain 90% of PIA member congregations.	<ul style="list-style-type: none"> • Each LOC creates an annual plan with goals for the topics: <ol style="list-style-type: none"> 1) What are the measures of success for our LOC? 2) What are our benchmarks for size, quantity of connections, etc. with our congregations? 3) How do we expand our LOC? 4) What are our training objectives? Each LOC meets at the end of the year to evaluate progress set next the year's goals. 	organizers and leaders		organizers and leaders	organizers and leaders	
37				• PIA staff develop a calendar to track annual training and recruitment objectives of all LOCs —to be evaluated twice/year by the LOC.	organizers and leaders		organizers and leaders		organizers and leaders
38				<ul style="list-style-type: none"> • Institute better tracking of leader engagement by organizers - organizers complete bi-annual LOC assessments highlighting issue work, leader devp, political climate changes, etc. Document progress and changes within each LOC. • Update the template on file and use it. 	ED updates template Organizers use template		Organizers use template		Organizers use template
39	Weakness	• Loss of momentum after the completion of an action or issue.	• After each action, each LOC always takes good stock of where it is in the organizing cycle and acts accordingly.	<ul style="list-style-type: none"> • Each LOC develops a multi-year vision of whether or not its current issue work fits into an issue campaign; each LOC schedules intentional follow-up meetings for negotiations with elected officials after each action. • After an action, each LOC invests effort in going back to elected officials to negotiate actual outcomes stemming from commitments made by those elected officials during the action. LOC then decide whether to take new actions. 	organizers and leaders		organizers and leaders		organizers and leaders

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	Threat	• Alienation of politicians	• Encourage leaders to develop other relationship opportunities with politicians outside of actions.	• Improve LOC discipline of conducting sufficient research actions with elected officials before and after actions that LOCs can sustain good working relationships with elected officials. • invite business reps and public officials to participate in forums or workshops as appropriate.	organizers and leaders		organizers and leaders		organizers and leaders	
40										
41										

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42		UNDERLYING CONDITIONS	4. LEADER SATISFACTION							
	Strength	<ul style="list-style-type: none"> The Hero's luncheon is impressive as a fundraiser and recognition event 	<ul style="list-style-type: none"> Maintain PIA's tradition of recognizing community members and leaders at all levels with a recognition event every year. 	<ul style="list-style-type: none"> Continue the local hero aspect of the annual Heroes event. It improves relationships, creates new skills, and can be modified. It enhances the experience of acting in relationship from a thanking aspect—not just asking for something. 	staff	n/a	staff	n/a	staff	
43			<ul style="list-style-type: none"> Measure stakeholder perception of organizational effectiveness, responsiveness, personal satisfaction, etc. In three years, PIA can demonstrate that 70% of communications are responded to within 48 hours. 	<ul style="list-style-type: none"> Track leader development with an assessment tool. Create an assessment form (tool) for leader satisfaction. (include measurement of leader response time) Attach to other assessments of how PIA is have an impact in the community. Increase the use of metrics by organizers to track changes in LOCs. 	E.D. updates template & assembles an <i>ad hoc</i> assessment team.	n/a	All organizers are using the tool.	n/a	All organizers are using the tool.	
44				<ul style="list-style-type: none"> Collect a minimum of 12 testimonials expressing positive experience per year. 	staff and communications committee members	n/a	staff and communications committee members	n/a	staff and communications committee members	
45										
46										

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47		UNDERLYING CONDITIONS	5. GOVERNANCE: BOARD DEVELOPMENT							
48		• Weak board attendance and participation on committees.	• PRIMARY GOAL: Increase governance capacity of the board of directors.							
49			1) Evaluate the effectiveness of the board.	• Conduct a board self-evaluation . Ask PICO for materials as a start. Conduct an annual survey each year, perhaps with results presented at annual board retreat in Sept.	Staff acquires PICO survey. Directors' Committee adapts. TO DECIDE: 1) email or Survey Monkey, e.g. 2) who tallies. Directors Committee presents.	n/a	Directors' Committee edits board survey. TO DECIDE: 1) email or Survey Monkey, e.g. 2) who tallies. Directors Committee presents.	n/a	Directors' Committee edits board survey. TO DECIDE: 1) email or Survey Monkey, e.g. 2) who tallies. Directors Committee presents.	
50			2) Evaluate and update the bylaws.	• Activate a Board Bylaws Committee . Review and refresh board officer and member terms, participation obligations and qualifications. Review language guidelines for Board meetings. Clarify the role of youth on the board.	Co-chairs appoint and activate. Six-month task force.	n/a		n/a		
51				• Consider preparing a list of actions and activities constituting a minimum level of board participation that board members would agree to and sign.	Co-chairs appoint and activate. Six-month task force.					
52			3) Strengthen board participation, communication and recruitment procedures.	• Expand the duties of the Nominating Committee to include general communications with board members as well as nominate new members.	Nominating Committee with ED & Exec Comm	n/a	Nominating Committee with ED & Exec Comm	n/a	Nominating Committee with ED & Exec Comm	
53			• Increase attendance at board meetings.	• Nominating Committee members and delegates reach out to current board members to gather feedback and to connect with those who have missed meetings.	Nominating Committee and ED		Nominating Committee and ED		Nominating Committee and ED	
54			• Increase attendance at board orientations.	• Nominating Committee members and delegates reach out to new board members and inform them why attendance is important. • Set up a Buddy System with newer board members.	Board holds orientation with staff support in early February.	n/a	Board holds orientation with staff support in early February.	n/a	Board holds orientation with staff support in early February.	
55			• Improve communications with congregations that do not have a member on the board.	• Nominating Committee establishes how to communicate with congregations with no board representative and assigns a board liaison.	Nominating committee and Board Members		Nominating committee and Board Members		Nominating committee and Board Members	
56			• Improve capacity for board recruitment.	• Create written board service materials : —what is expected; what are the benefits; the wins. • Train Nominating Committee members how to use the materials.	Staff		Staff	\$0	Staff	
57			4) Improve board member knowledge and skills, including increasing cultural capacity.	• Hold board trainings in boardmanship . • Hold board multicultural trainings to improve cross-cultural communications on board	Executive Committee and ED organize ONE training.	\$??	Executive Committee proposes number and type of trainings.	\$??	Executive Committee proposes number and type of trainings.	
58			5) Monitor PIA's tracking of the Strategic Plan.	• Appoint a Strategic Plan Task Force in August of each year to report on progress/changes at the Board Retreat and General Assemblies.	Co-chairs appoint and activate a Strategic Plan Task Force with counsel of the E.D.	n/a	Strategic Plan Task Force	n/a	Strategic Plan Task Force	

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59			6) Conduct an annual Organizational Assessment	• Create a detailed organizational assessment tool. Refer to PICO tool. Conduct assessments.	ED outline vision for an assessment.		Strategic Plan Task Force Chairs with Exec. Committee of Bd develops the tool.		Strategic Plan Task Force conducts assessments
60									
61		UNDERLYING CONDITIONS	6. STAFF DEVELOPMENT						
62	Strength	• A PICO binder of trainings exists as a resource.	• Organizers support development of a stronger Leader development program.	• Create a more systematic (intentional) approach to Leader trainings: topics, who trains, who attends, what is to be learned	ED in consultation with PICO staff		ED in consultation with PICO staff		ED in consultation with PICO staff
63	Weakness	Majority of organizer staff is new to PIA and relatively inexperienced, with about one year's experience. There are currently 3.5 FTE organizer positions.	• Reduce staff turnover. Retain and develop current organizers.	• At least ONE organizer must be an experienced/lead organizer on staff at all times.	retain 3.5 FTE organizer positions	n/a	retain 3.5 FTE organizer positions	n/a	retain 3.5 FTE organizer positions
64	Strength	• PIA's current organizers have a lot of potential.		• Develop and apply an intensive training program to bring all organizers up to speed asap.	ED in consultation with PICO staff		ED in consultation with PICO staff		ED in consultation with PICO staff
65	Weakness	• There is a danger of overworking organizers during this stressful period. • Organizers have matching weighted workloads, determined by many factors including the complexity and stages of different LOCs, but there is just too little organizer time available for all the demands or training needs.	• Institute better planning by organizers	• Organizers complete bi-annual LOC assessments (template on file) planning & strategizing issue work, leader development, political climate challenges, etc.	organizers with ED support		organizers with ED support		organizers with ED support
66	Weakness	In-house training capacity is currently weak. Need more support for organizer development.	• Improve training and support for the organizers. Give more attention and support beyond just getting them trained and up to speed.	• Take advantage of all staff training opportunities offered through PICO-CA and PICO National Network.	all PIA staff		all PIA staff		all PIA staff
67		PICO is not actually a super-structure to which we can appeal for support-on-demand. It is a network of peer organizations like PIA. So we would be turning to other small staffs like PIA's for them to share their own staff's precious time with us. "PICO" staff are generally subject-area experts on particular topics. We can turn "to PICO" for support on a sort of emergency basis, but otherwise are expected to take advantage of opportunities as they are offered by PICO staff, according to evolving issues and funding potentials.		• Incorporate more personal and spiritual development into new organizer trainings.	ED in consultation with PICO staff		ED in consultation with PICO staff		ED in consultation with PICO staff
68				• Organizers shadow more experienced organizers in neighboring PICO affiliates one day/month, getting mentoring and coaching in the process. E.D. will monitor organizers to schedule this.	organizers with ED support		organizers with ED support		organizers with ED support
69				• Provide mentoring and coaching for organizers.	consultant for staff training (\$5k) already in budget for 2010.		Rely on Lead Organizer for staff development & training	n/a	Rely on Lead Organizer for staff development & training
70				• Send all organizers to Applegate for a one-week training. Offered one time per year.	4 Organizers,+ED, Development Director	incl.	4 Organizers,+ED, Development Director	incl.	4 Organizers,+ED, Development Director
71									
72				TOTAL NEW EXPENSES		\$0		\$400	
73									

	A	B	C	D	E	F	G	H	I	J
1	PLANNING 2010 - 2012 blue = from Taproot report	MEMBERSHIP: GROWTH & ENGAGEMENT "Stakeholders"; "Socio-Economic Demographics"; Growth	Goals	Strategies	People & Resources YR 1	New \$\$ YR 1	People & Resources YR 2	New \$\$ YR 2	People & Resources YR 3	New YR
2	Task Force Members & Work	Joan Kilroe, Chair. Thomas Atwood, Karyl Eldredge, Siv Nickerson, Michelle Rosenaur, Alma Lalonde, Lillian Sacun. Staff: Mary Klein		1) Set Goals 2) What helps or hinders reaching the goals? 3) Strategies for reaching goals. 4) Cost-Revenue implications?						
3			Add 3-4 new congregations total.	A profile of PIA's membership and goals at November 2009 is included in this plan.						
4		UNDERLYING CONDITIONS	1. POWER							
5	Opportunity / Challenge	Some cities have more ability to influence public policy than others. When those cities respond to PIA, other districts tend to line up behind them. In San Mateo County, PIA can strengthen its results by building power in the four cities that are power centers: South San Francisco, Daly City, San Mateo, and Redwood City. It is a priority, therefore to build actively organizing LOCs in these four cities.	• BUILD membership strength in power centers. Add at least TWO active LOCs in new member congregations in <u>South San Francisco</u>.	• Work through denominational connections to gain introductions to congregations / clergy in SSF. Initiate relationship-building 1-1s with key clergy. Follow through with exploratory trainings were possible.	E.D., organizers, PIA clergy		E.D., organizers, PIA clergy		E.D., organizers, PIA clergy	
6		How congregations translate into power centers when an LOC is established: 1) The visibility of PIA increases. 2) Turnout is greater. 3) Collaborations with other congregations amplify everything. Congregations synergize and cross-energize each other.	• DEVELOP at least TWO congregations who are actively organizing in each of the other power centers in San Mateo County.	• Organizers will assess power dynamics in key cities through the bi-annual LOC assessment tool.	ED, organizers		ED, organizers		ED, organizers	
7		• Membership exists in all but one district, # 1 (South San Francisco).	• Build member strength in each Supervisorial district.	• Use strategies above.						
8										
9		UNDERLYING CONDITIONS	2. DIVERSITY							
10	Weakness/Problem	• Membership is currently too weighted toward white, middle-class congregations. • There is increasing diversity on Peninsula. Diversifying the demographic base can provide both more support for issues and access to more donors.	• Expand the Ethnic and Religious Diversity of the Congregation base to better reflect the diversity of the Peninsula.	• Work through denominational connections to gain introductions to congregations / clergy in SSF. Initiate relationship-building 1-1s with key clergy. Follow through with exploratory trainings were possible. (Same as above.) • Prioritize focused organizer efforts in key congregations in key demographics.	E.D., organizers, PIA clergy		E.D., organizers, PIA clergy		E.D., organizers, PIA clergy	
11	Weakness/Problem	• PIA needs more diversity, yet most diverse congregations are low-income and cannot contribute very much in membership dues. Bringing on more wealthy congregations without adding other more diverse members may skew the balance.		• Articulate clear categories of congregational membership with clear expectations from congregations and PIA staff.	ED, Development Director, Membership Committee		ED, Development Director, Membership Committee		ED, Development Director, Membership Committee	

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12	<p>Opportunity</p> <p>Weakness/Problem</p> <p>Strength</p>	<ul style="list-style-type: none"> • People-of-color communities besides Latino are growing on the Peninsula • External perception of taking on too many issues of one demographic (Latino/Hispanic) • Some Asian communities are quite self-contained. It will take more than the usual to recruit in this community. • Clarity of mission: Faith-based social justice issues provide "grounding" for issues" 	<ul style="list-style-type: none"> • Expand membership into Asian and Pacific Islander congregations. • add at least one more Asian American congregation 	<ul style="list-style-type: none"> • Employ PIA's clergy network to reach prospect clergy in other cultures. • Work through denominational connections to gain introductions to congregations / clergy in SSF. (as above) 	ED (Mary Klein) initiates.	n/a				
13			<ul style="list-style-type: none"> • add at least one more Jewish congregation 		ED and organizers		ED and organizers		ED and organizers	
14	<p>Opportunity</p>	<ul style="list-style-type: none"> • Congregations exist beyond Judeo-Christian on the Peninsula 	<ul style="list-style-type: none"> • add at least one congregation of a non-Judeo-Christian faith 		ED and organizers		ED and organizers		ED and organizers	
15			<ul style="list-style-type: none"> • PIA congregations will represent a wide socio-economic spectrum of communities. DETERMINE SPECIFIC GOAL(S) 	<ul style="list-style-type: none"> • Membership Committee will determine average income levels of congregations and compare spread of income levels with general spread on the Peninsula. Reflecting socio-economic profile of the Peninsula will be one criterion when recruiting new member congregations. 	Membership committee and ED					
16										

	A	B	C	D	E	F	G	H	I	J
17		UNDERLYING CONDITIONS	3. ECONOMIC SUPPORT							
18	Threat	<ul style="list-style-type: none"> Cut-backs in congregations threaten PIA revenues. 	<ul style="list-style-type: none"> Preserve and develop maximum income from congregational membership. 	<ul style="list-style-type: none"> Quantify membership potential. 	ED through conversations with pastors		ED through conversations with pastors		ED through conversations with pastors	
19		[Dues for active members = 1% of a congregation's operating income.]		<ul style="list-style-type: none"> Clarify existing levels of congregational membership and involvement. Articulate the benefits of membership—and of having an LOC—for any particular congregation, or customize the benefits for each type of congregation. Explain the "wins" for the community. 	Bd Membership Committee or an <i>ad hoc</i> committee: (6 mos.)					
20	Opportunity Strength	<ul style="list-style-type: none"> Many affluent unaffiliated congregations exist. Clarity of mission: Faith-based social justice issues provide "grounding" for issues 	<ul style="list-style-type: none"> Add at least ONE congregation with sufficient financial capacity to carry full membership dues structure. 		ED through conversations with pastors		ED through conversations with pastors	\$1,500	ED through conversations with pastors	\$1
21		<ul style="list-style-type: none"> Affiliate members currently exist, but their duties or benefits are not clearly spelled out. 	<ul style="list-style-type: none"> Add at least FIVE affiliate members. (See Finance - \$5k & \$10K levels) 	<ul style="list-style-type: none"> Market affiliate memberships to congregations in more well-to-do areas. 	ED through conversations with pastors	\$1,000	ED through conversations with pastors	\$3,000	ED through conversations with pastors	\$5
22										
23		UNDERLYING CONDITIONS	4. ENGAGEMENT							
24	Weakness/Problem	The engagement of member congregations and their capacity to act varies greatly and has recently weakened.	<ul style="list-style-type: none"> Strengthen the engagement of member congregations: PIA LOCs will participate in at least 8 local actions and 1 federated action each year. At least 3/4 of PIA congregations will send representatives to all PIA assemblies and leader workshops. 	<ul style="list-style-type: none"> Develop a flexible action calendar for the year, update at least bi-annually. Include turn-out goals and activities in the calendar. 	ED, organizers, <i>ad hoc</i> committee of leaders including some board members.		As YR 1		As YR 1	
25	Opportunity Weakness/Problem	<ul style="list-style-type: none"> PIA's model supports diverse stakeholders and issues Changing profile of member congregations 	<ul style="list-style-type: none"> Monitor and measure LOC engagement. 	<ul style="list-style-type: none"> Quantify the impact of having an active LOC in PIA. Metrics? Use Taproot materials to find a meaningful metric we can start to track/use. 	ED, organizers, <i>ad hoc</i> committee of leaders including some board members.		As YR 1		As YR 1	
26				<ul style="list-style-type: none"> Define and understand "engagement success." 	ED, organizers, <i>ad hoc</i> committee of leaders including some board members.		As YR 1		As YR 1	
27				<ul style="list-style-type: none"> Showcase success. 	Communications Committee		Communications Committee		Communications Committee	
28	Opportunity	<ul style="list-style-type: none"> Increased public recognition of organizing 	<ul style="list-style-type: none"> Enrich the relational cultures within the congregations. Motivate individuals to stand up for their values in the community. 	<ul style="list-style-type: none"> Throughout all member congregations, PIA leaders will accomplish a significant number of relationship-building conversations on a regular basis – in a manner that can be quantified. 	ED, Organizers, LOC members		ED, Organizers, LOC members		ED, Organizers, LOC members	
29				TOTAL NEW REVENUES		\$1,000		\$4,500		\$6,500

	A	B	C	D	E	F	G	H	I	J
30		UNDERLYING CONDITIONS	5. NON-CONGREGATIONAL ORGANIZATIONS							
	Opportunity?	• Other social justice organizations in the community may wish to collaborate with PIA on selected issues.	•Do not add more non-congregational member institutions <u>at this time</u> . However, such memberships might evolve naturally from future organizing campaigns and are not to be discouraged. PIA will judge these case by case if approached by a group. (For instance we are affiliated with the Dorothy Street Center for Social Change at New York University)							
31										
32			Positives	Negatives						
			Could bring in more money.	Might detract from PIA's image of "non-partisan"						
33										
34			More diversity	Would take more resources						
35			Increases community representation	Harder to maintain a unified vision						
36			Increases number of issues	Multiple agendas						
37			Increases visibility	Gives PIA a complex identity and could detract from the power of "faith-based"						
			"The main thing about PICO is there has to be an organizing principle. Congregations have worked best because there is a definable community and often someone - like a pastor - who will support the organizing. If the group can substitute for a viable congregation then it makes sense, otherwise not - and PICO would stay away." --Henry "Hank" Goldstein, PICO Board Member							
38										
39										

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	
1	PIA MEMBERSHIP PROFILE & GOALS		POWER CENTERS					DIVERSITY-Religious				DIVERSITY-Ethnic				
2	MEMBERS	Location	So San Fran	Daly City	San Mateo	Redwd City		Protestant	Catholic	Jewish	Other	Prim. Asian/Pac Island	Prim. African-Amer	Prim. Cauc / White	Prim. Hispanic	
3	SAN MATEO COUNTY Supervisorial Districts		1	5	2	4	3									
4	MEMBERS:															
5	Broadmoor Presbyterian Church	Daly City		1				1						1		
6	Chalice Christian Church	San Carlos					1	1						1		
7	Church of the Good Shepherd	Pacifica					1		1			0.5		0.5		
8	Community United Church of Christ	San Carlos					1	1						1		
9	Congregational Church of San Mateo	San Mateo			1			1						1		
10	Daly City United Methodist Church	Daly City		1				1				1				
11	El Buen Pastor - Iglesia Episcopal	Redwood City				1		1							1	
12	Faith Missionary Baptist Church	East Palo Alto					1	1					1			
13	Peninsula Sinai Congregation	Foster City					1			1				1		
14	Second Baptist Church	Redwood City				1		1					1			
15	St. Bartholomew Parish Community	San Mateo			1				1					1		
16	St. Dunstan Church	Millbrae					1		1					1		
17	St. Francis of Assisi Church	East Palo Alto					1		1						1	
18	St. Matthew Church	San Mateo			1				1			0.2		0.4	0.4	
19	St. Peter Church	Pacifica					1		1					1		
20	St. Samuel, Church of God in Christ	East Palo Alto					1	1					1			
21	St. Vincent De Paul Society, San Mateo County Council	San Mateo			1				1			0.25	0.25	0.25	0.25	
22	Unitarian Universalist Fellowship of Redwood City	Redwood City				1					1			1		
23	Unitarian Universalists of San Mateo	San Mateo			1						1			1		
24	Walls of Faith, Church of God in Christ	Menlo Park					1	1					1			
25	Woodside Road United Methodist Church	Redwood City				1		1						1		
26	Youth Organizations															
27	Youth Leaders of Our Community	East Palo Alto					1	0.5	0.5				0.5		0.5	
28	Affiliated Members															
29																
30	SAN MATEO COUNTY TOTALS		0	2	5	4	11	11.5	7.5	1	2	1.95	4.75	12.15	3.15	
31																
32	STRATEGIC PLAN GOALS: ADD & BUILD STRENGTH IN POWER CENTERS															
33	NEW CONGREGATION MEMBERS		2													
34	ACTIVE LOCS		2	2	2	2										
35	DIVERSE MEMBERS									1	1	1				
36																
37	SANTA CLARA COUNTY Supervisorial Districts (NO POWER CENTERS)			Sunnyvale 3	Santa Clara 4	PA/Mtn View 5	Other									
38	All Saints Episcopal Church	Palo Alto				1		1						1		
39	Catholic Community at Stanford	Palo Alto				1			1					1		
40	Congregation Beth Am	Los Altos Hills				1				1				1		
41	First Presbyterian Church of Palo Alto	Palo Alto				1		1						1		
42	St. Athanasius Church	Mountain View				1			1					0.5	0.5	
43	St. Joseph Church	Mountain View				1			1					0.5	0.5	
44	St. Mark's Episcopal Church	Palo Alto				1		1						1		
45																
46																
47																

	B	C	D	E	F	G	H	I	J	K
	ISSUES & COLLABORATION	Goals	Strategies	People & Resources YR 1	New Expense YR 1	People & Resources YR 2	New Expense YR 2	People & Resources YR 3	New Expense YR 3	
1	Building power and winning change									
2	Mary Goodman, Chair. Phil Cosby, Pastor Clifton Bennett, Marva Monje, Diana Reddy, Jean Wolman. Staff: Mary Klein		1) Set Goals 2) What helps or hinders reaching the goals? 3) Strategies for reaching goals. 4) Cost-Revenue implications?							
3										
4	UNDERLYING CONDITIONS:									
5	<ul style="list-style-type: none"> Clarity of mission: Faith based social justice issues provide "grounding" for issues. Strengthens communities and families 	<ul style="list-style-type: none"> Influencing or bringing about systemic change. PIA can change the "system." 								
6	<ul style="list-style-type: none"> Common set of issues among PIA members: Healthcare, immigration, home finances, jobs and youth issues. 	<ul style="list-style-type: none"> Ability to work at local, state, and national levels. Such scope is exceedingly rare among social justice organizations. 								
7	<ul style="list-style-type: none"> Identifying issues and working on priority problems held in common 	<ul style="list-style-type: none"> Direct communication with politicians 								
8	<ul style="list-style-type: none"> Bringing people together for mutual benefit 	<ul style="list-style-type: none"> Aligns well with community issues: well respected and credible 								
9	<ul style="list-style-type: none"> Leveraging shared power 	<ul style="list-style-type: none"> Record of victories 								
10	<ul style="list-style-type: none"> Ability to mobilize people 									
11										
12	UNDERLYING CONDITIONS	1. SCOPE OF ACTIVITY — ISSUE SELECTION								
13	<ul style="list-style-type: none"> Staff burn-out: Overworking organizers. There are now 22 active LOCs and 3 full-time organizers. 2-4 LOCs are expected to drop out over the next few years or migrate to affiliate status as the membership diversifies. Actions depend on the local organizing committees (LOCs) Every action must have an organizer. Organizers are expected to organize a minimum of two actions/year, building to three as they develop their LOCs. Local actions may engage: <ol style="list-style-type: none"> Only one LOC A "cluster" of LOCs PIA must be careful to develop only as many actions as it has experienced organizers to manage. 	<ul style="list-style-type: none"> For every full-time organizer, balance assignments so that only 2-4 of their congregations are moving towards action within a year, and 2-4 other congregations engaged in support activities, reflection, or are in affiliate status. 	<ul style="list-style-type: none"> Conduct quarterly staff development sessions to assess and rebalance organizer workloads. 	ED and organizers		ED and organizers		ED and organizers		
14	<ul style="list-style-type: none"> "Actions" are defined variously as: <ul style="list-style-type: none"> presentations before county supervisors or other public officials in a manner that will hold them accountable. candidate forums other 	<ul style="list-style-type: none"> Each organizer will develop at least TWO LOCAL actions per year with PIA congregations to win positive changes at the city or school-district level. 	<ul style="list-style-type: none"> Organizers will move congregations to action 	3.5 organizers = 7 actions		4 organizers = 8 actions		4 organizers = 8 actions		

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15	<ul style="list-style-type: none"> • More people are in need due to the economy and due to aging. • Middle class is feeling the pain. • Issues lose relevance with changing demographics, esp aging boomers. 		<ul style="list-style-type: none"> • Congregations will continue to choose issues for action that will strengthen our LOCs. What will strengthen our LOCs are issues that reflect the pain in our communities, that unite people, and that inspire PIA leaders to build support for those issues by talking with people individually throughout their congregations. 	LOC leaders and organizers		LOC leaders and organizers		LOC leaders and organizers		
16			<ul style="list-style-type: none"> • Use cross-congregational collaborations to help identify issues and actions 	LOC leaders and organizers		LOC leaders and organizers		LOC leaders and organizers		
17	PIA's federated area covers two counties: San Mateo and Santa Clara.	<ul style="list-style-type: none"> • Each year, PIA will organize at least ONE federated (PIA-wide) action to win positive change on an issue that affects multiple congregations. 	<ul style="list-style-type: none"> • Use cross-congregational collaborations to help identify issues and actions 	3.5 organizers = 1 action		4 organizers = 1 action		4 organizers = 1 action		
18	<ul style="list-style-type: none"> • A federated action committee comprised of PIA leaders and/or PIA staff identifies issues for possible action by doing the following: <ul style="list-style-type: none"> a) discovers which issues are shared by multiple members. b) discovers opportunities of funding and/or political feasibility. 	<ul style="list-style-type: none"> • Choose issues for federated (PIA-wide) action that are issues which foster collaboration between communities from multiple cultures, and which motivate cross-cultural training and multi-cultural relationship-building. 	<ul style="list-style-type: none"> • Use cross-congregational collaborations to help identify issues and actions 							
19	UNDERLYING CONDITIONS	1. SCOPE OF ACTIVITY — ISSUE SELECTION, cont'd								
20	<ul style="list-style-type: none"> • Balancing top-down and bottom-up issue identification is critical to keeping constituents actively involved. 	<ul style="list-style-type: none"> • Issues and platforms will strike good balances between congregational self-interest / needs and realistic opportunities 	<ul style="list-style-type: none"> • In developing their issues and platforms, LOCs will balance information gained from listening campaigns within congregations with information gained from community sources through research actions. 	LOC leaders and organizers		LOC leaders and organizers		LOC leaders and organizers		
21	<ul style="list-style-type: none"> • Many PIA leaders are unclear or do not know how federated issues are developed. 	<ul style="list-style-type: none"> • Describe more clearly how federated issues develop and communicate to PIA leaders. 	<ul style="list-style-type: none"> • For every federated issue campaign, a clear statement of its history and rationale is developed early in the process of going to action. 	An experienced PIA leader drafts. PIA staff edits.						
22	<ul style="list-style-type: none"> • PICO efforts are issue-specific and irregular. PICO -CA and PICO national come to PIA to ask for support on selected issues. PIA decides on a case-by-case basis whether, or to what degree, to get involved. Particular organizers are then assigned responsibility for particular issues. 	<ul style="list-style-type: none"> • PIA will contribute Leader participation to PICO California & the PICO National Network. 	<ul style="list-style-type: none"> • Establish a PICO Committee of leaders who link LOCs to PICO California and PICO National issue work. 	At least 6 Leaders participate on a PICO Committee		At least 6 Leaders participate on a PICO Committee		At least 6 Leaders participate on a PICO Committee		
23	<ul style="list-style-type: none"> • There has not been a clear reporting mechanism for when Leaders participate in LOCs. The board hears about it, but LOCs do not. Don't really have a good way to disseminate the good information we get from PICO back to the LOCs. 	<ul style="list-style-type: none"> • Create a consistent, reliable way to communicate PICO-CA and PICO-National information and experiences back to the LOCs. 	<ul style="list-style-type: none"> • Need to systemize how Leaders report back to the LOCs about PICO California and PICO National and make them accountable. Another possible use for metrics to be developed and used. 	PICO Committee and Organizers determine criteria, selection procedures & reporting procedures.		PICO Committee and Organizers		PICO Committee and Organizers		
24			<ul style="list-style-type: none"> • PIA's board of directors will regularly take up PICO business on its agenda. 	PIA Board		PIA Board		PIA Board		
25			<ul style="list-style-type: none"> • PIA continues to act proactively to send leaders to regular PICO meetings. 	PICO Committee and Organizers		PICO Committee and Organizers		PICO Committee and Organizers		
26										
27	UNDERLYING CONDITIONS	2. GREATER LOC ENGAGEMENT								

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28	<ul style="list-style-type: none"> Insufficient ongoing 1-1s 	<ul style="list-style-type: none"> Conduct an annual campaign of 1-to-1s, including house parties. Touch 20% of our PIA community with a 1-to-1 over a three year period. <u>Goal: 1,200 1-1s each year = 6 1-1s per LOC leader each year.</u> 	<ul style="list-style-type: none"> 19,000 families x 20% ÷ 3 yrs = approx 1,200 people per year. 1200 ÷ 200 LOC leaders = 6 1-1s per LOC leader per year. 	LOC leaders		LOC leaders		LOC leaders		
29		<ul style="list-style-type: none"> On average, every LOC will send 5-10% of the congregation's membership to PIA-federated actions. Goal: Increase numbers of people attending at least one PIA federated action each year: Yr. 1: 500 people; Yr. 2, 750 people; Yr. 3, 1,000 people 	<ul style="list-style-type: none"> Every LOC will develop a plan for fostering a culture of follow-through 	LOC Leaders Goal: 500 people		LOC Leaders Goal: 750 people		LOC Leaders Goal: 1000 people		
30	<ul style="list-style-type: none"> Some leaders report not being clear about how to start a 1-to-1 or what to say. PIA jargon leaves some people unclear. 	<ul style="list-style-type: none"> Continue regular trainings on one-to-ones, in LOCs and in PIA-wide leader trainings. Develop a set of clear hand-outs on one-to-ones. 	<ul style="list-style-type: none"> Reduce jargon or clarify word usage. 	Organizers and ED		Organizers and ED		Organizers and ED		
31	<ul style="list-style-type: none"> Connecting faith values to issues; and issues to faith values LOCs should spend at least 5 minutes at each meeting exploring a PICO principle. This should be happening already, so if not, recommit to doing so. 		<ul style="list-style-type: none"> At least 5 minutes of every LOC meeting will be devoted to consideration of a PICO principle. 	LOC leaders and organizers	n/a	LOC leaders and organizers	n/a	LOC leaders and organizers	n/a	
32	<ul style="list-style-type: none"> Inadequate training of organizers 	<ul style="list-style-type: none"> Move LOCs from dependence on their Organizer as the action manager to using the Organizer more as a resource. 	<ul style="list-style-type: none"> Provide more practice sessions for Organizer Leaders. (Addressed under Leadership) 							
33		(Addressed under Leadership)								
34										

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35	UNDERLYING CONDITIONS	3. GREATER CONGREGATION ENGAGEMENT								
36	<ul style="list-style-type: none"> Need more clergy involvement, support (activism). Most clergy attend some LOC meetings and are engaged. Many are not engaged. 	<ul style="list-style-type: none"> Get clergy who are not involved in their LOCs more engaged in PIA organizing. Goal: All PIA clergy will attend at least one PIA-related function/meeting/event per year. 	<ul style="list-style-type: none"> LOC members will build a relationship with a clergy member for their congregation. Help the clergy see the value of the LOC to the entire congregation. Request clergy leadership to encourage congregations to participate in actions. 	LOC leaders and organizers	n/a	LOC leaders and organizers	n/a	LOC leaders and organizers		
37	<ul style="list-style-type: none"> At present, all PIA clergy (about 40) are invited to monthly luncheons. Typically, 6-8 clergy members come. 	<ul style="list-style-type: none"> Keep PIA clergy luncheons vital and relevant as well as bridge-building. 	<ul style="list-style-type: none"> Ask a broad sampling of clergy about which topics would draw them in. Develop programs around the results. 	ED and key PIA clergy.		ED and key PIA clergy.		ED and key PIA clergy.		
38			<ul style="list-style-type: none"> Ask clergy who are engaged to buddy with the clergy who are not involved. 	ED and key PIA clergy.		ED and key PIA clergy.		ED and key PIA clergy.		
39	<ul style="list-style-type: none"> Size of constituency needed to serve an issue? (Based on the 2000 census info, there are 319,000 people in the cities in which PIA organizes.) 	<ul style="list-style-type: none"> Issues and platforms will strike good balances between congregational self-interest / needs and congregation's current level of power. 	<ul style="list-style-type: none"> In developing their issues and platforms, LOCs will balance the congregation's need for change with a realistic assessment of the congregation's power to affect change. 	LOC leaders and organizers		LOC leaders and organizers		LOC leaders and organizers		
40										

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41	UNDERLYING CONDITIONS	4. IMPACT / EFFECTIVENESS								
42		• Help congregations understand other congregations' needs and culture in order to mobilize larger actions.	• Include cross-cultural understanding as a component of testing congregations' willingness to support federated actions or to support other LOC's actions.	Organizers, ED, and LOC leaders.		Organizers, ED, and LOC leaders.		Organizers, ED, and LOC leaders.		
43	• Need to understand how to evaluate overall organizational effectiveness when there are differing goals: organizing (leader development); and mobilizing (producing lots of people to hold officials accountable).	• PIA will systematically collect information about various impacts of PIA actions.	• Develop and use a standard post-action assessment that captures a meaningful picture of issue advancement, leader development, and organizational development.	Organizers, ED, and Board Executive Committee develop. Organizers and ED implement.		Organizers and ED implement.		Organizers and ED implement.		
44	• Collaborations can increase capacity to win on issues. (The principle is "no permanent allies, no permanent enemies, only permanent interests")	• Increase Commitment to Collaboration. • Improve collaboration among congregations.	• PIA's vision and mission as an <i>interfaith organization</i> should be articulated clearly and marketed well to support greater collaboration among congregations on issues.	LOC leaders and organizers		LOC leaders and organizers		LOC leaders and organizers		
45			• Identify and adopt best practices for collaboration.	Organizers, ED, and Board Executive Committee develop. Organizers and ED implement.						
46	• Increased public recognition of organizing	• Leverage PICO reputation to expand reach of issues and actions	• PIA's vision and mission as a participant in a national network should be articulated clearly and marketed well to enhance PIA's reputation as a powerful and effective agent of change on issues.	Organizers, ED, and Communication Committee develop. Organizers and LCO leaders implement.		LOC leaders and organizers		LOC leaders and organizers		
47	• Existing social justice groups may offer allied strength.	• As a step in planning each action, PIA leaders will evaluate the potential benefits and risks of collaborating with allied organizations to achieve solutions.	• Organizers will ensure that each action-planning team deliberately weighs the advisability of joining and/or initiating collaborations with other organizations.	LOC leaders and organizers		LOC leaders and organizers		LOC leaders and organizers		
48	• Alienation of politicians	• Work on the development of real relationships with our city, county, state and federal politicians.	• "Assign" individual to be the liaison to a particular politician during a particular action/issue campaign so that a real relationship is established that could be developed and maintained.	LOC leaders and organizers		LOC leaders and organizers		LOC leaders and organizers		
49			• Explore how best to uphold values of respect in political interactions.	E.D. and Board of Directors	Minimal new \$\$.	E.D. and Board of Directors	Minimal new \$.	E.D. and Board of Directors	Minimal new \$.	
50			• Teach leaders how to observe opportunities to cultivate mutual respect between PIA leaders and those PIA wishes to hold accountable.	LOC leaders and organizers		LOC leaders and organizers		LOC leaders and organizers		
51			• Ask a PIA- friendly public official to address the board.	E.D. and Board of Directors	Minimal new \$.	E.D. and Board of Directors	Minimal new \$.	E.D. and Board of Directors		
52			• As part of our standard organizing cycle, explore steps to take after an action that might strengthen relationships: e.g. follow up with public officials after an action as well as before. Help them see the wins. Develop and implement protocols and expectations.	Organizers and ED develop protocol / expectations. Organizers and LCO leaders implement.		LOC leaders and organizers		LOC leaders and organizers		
53			• Frame issues more consistently in ways that appeal to politicians' shared interests.	LOC leaders and organizers		LOC leaders and organizers		LOC leaders and organizers		

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54			• Frame issues in terms of national context whenever possible	LOC leaders and organizers		LOC leaders and organizers		LOC leaders and organizers		
55										
56			TOTAL NEW EXPENSES		o		o		o	

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1	COMMUNICATION S Internal & external communications, media,	Goals	Strategies	People & Resources YR 1	New Expense YR 1	People & Resources YR 2	New Expense YR 2	People & Resources YR 3	New Expense YR 3
2	Marco Gedillo, Chair. Thomas Alwood, Caryl Hughan, Edie Keating, Maria Marroqui, Laura Withers. Staff: Mary Klein, Nadya Sigona		1) Set Goals 2) What helps or hinders reaching the goals? 3) Strategies for reaching goals. 4) Cost-Revenue implications?						
3									
4	UNDERLYING CONDITIONS	1. EXTERNAL MARKETING							
5	[PIA's work and accomplishments not widely known about or understood.]	• Strengthen Marketing capacity	• E.D. will appoint an <i>ad hoc</i> Communications Committee early in 2010 to implement strategies.	E.D. will appoint an <i>ad hoc</i> Communications Committee early in 2010					
6		• Broadly and regularly communicate PIA's accomplishments with on-going, active communications.	• Develop key messages and descriptions of wins and importance addressed under "Case" (Fund Development) and "Leader Recruitment"	Communications committee, ED, and organizers.		Communications committee, ED, and organizers.		Communications committee, ED, and organizers.	
7			• Continue to use Heroes Luncheon as a way to market PIA widely.	all PIA leaders and staff.		all PIA leaders and staff.		all PIA leaders and staff.	
8	• Finding values held in common		• Develop a marketing piece / talking points that communicate at least 10 of PIA's unique strengths and capacities.	Communications committee, ED, and organizers.		Communications committee, ED, and organizers.		Communications committee, ED, and organizers.	
9	• Can be difficult to describe PIA simply.	• Find a crisp way of describing PIA. Make it more than just another acronym.	• Think of fresh ways to present the credential, unique to person and context. • Emphasize in "Tips for Success" • Share via the web and other channels.	Communications Committee, ED, and organizers will develop key messaging; Organizers and LOC leaders will		Organizers and LOC leaders		Organizers and LOC leaders	
10			• Review PIA's image and brand ASAP.			Reconsider logo and all other related identity pieces. - Communications Committee, Development Committee, Development Director, Board, ED		Communications Committee, Development Committee, Development Director, Board, ED	
11	• Clarity of mission: Faith based social justice issues provide "grounding" for issues		• PIA will communicate a clear and consistent message that it is a faith-based organization that respects the dignity of each person while challenging elected officials to make policy changes for the common good.	Communications Committee, ED, and organizers will develop key messaging; Organizers and LOC leaders will		Organizers and LOC leaders		Organizers and LOC leaders	
12		• Strengthen the perception that PIA is part of a sophisticated state and national movement network.	• PIA's vision and mission as a participant in a national network should be articulated clearly and marketed well to enhance PIA's reputation as a powerful and effective agent of change on issues. • PICO can make PIA look larger and stronger. Leverage news and communications from PICO CA and PICO National. (See "Forms of Communication")	Organizers, ED, and Communication Committee develop. Organizers and LCO leaders implement.		LOC leaders and organizers		LOC leaders and organizers	
13		• Improve PIA's image via better materials.	• Draw upon PICO's excellent materials, those of other local PICO affiliates and other non-profits when revising and reprinting a new PIA brochure and other print materials.	Communications Committee leads. Communications Committee, Development Committee, Development Director, ED, and organizers all participate in development of key messaging and presentation.	Foundation support?	Communications committee, Development Director, and ED will implement production of new materials.	?? \$20K ??		
14		• PIA spokespersons will represent different languages and cultures.	PIA will consistently draw upon multicultural representative in all PIA public outreach.	Organizers, ED, and LOC Leaders.	2/9/2010	Organizers, ED, and LOC Leaders.		Organizers, ED, and LOC Leaders.	

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15	• Different media must be tailored to different audiences	• Identify the forms of communication most used by each group of stakeholders and use	• Consider using radio, social media, and other channels to gain exposure.	Communications Committee.		Communications Committee.		Communications Committee.	
17	UNDERLYING CONDITIONS	2. MORE CONGREGATION ENGAGEMENT IN ISSUES — INTERNAL COMMUNICATIONS							
18	• PIA is Inspirational— Proactive on a wide range of issues • On-going, active communications are a must	Get the vision of PIA out better to our church and synagogue communities.	• Develop a PIA "Caravan" – Dog and Pony Show that would highlight: a. What we've done b. Who we are c. What we're doing It would be an opportunity to show off PIA to our members and perhaps attract more than the LOC members to the "road show." Could also be an opportunity to learn about each other's faith.	Communications Committee, organizers, and ED to develop. LOC leaders and organizers to implement.		LOC Leaders and organizers.		LOC Leaders and organizers.	
19			• Develop a PIA You-Tube Video to also work on spreading the word about the work of PIA. • Post new videos once or twice per year. • Consider using radio, social media, and other channels to gain exposure.	Communications Committee.		Communications Committee.		Communications Committee.	
20	• Inadequate communication between PIA office and leaders.	• improve communications between PIA office and LOC leaders.	• Clarify expectations for leaders about what level of communications they can expect from office. Office meets those expectations.	Communications Committee, PIA Board, PIA office staff and ED develop expectations; PIA office staff implement		PIA office staff.		PIA office staff.	
21			• PIA will produce a quarterly or biannual LOC update that organizers can have on hand to give out to LOC members	Communications Committee, organizers, and LOC members.		Communications Committee, organizers, and LOC members.		Communications Committee, organizers, and LOC members.	
22			• PIA will develop a better internal email system	Communications Committee, and PIA staff.		Communications Committee, and PIA staff.		Communications Committee, and PIA staff.	
23	• Inadequate communication among (between) congregations & LOCs. • Unity of PIA with congregation	• improve communications <u>between</u> LOCs, Leaders, and congregations.	• PIA will strengthen and maintain a schedule of regular opportunities for inter-congregational interactions	ED, organizers, and board.		ED, organizers, and board.		ED, organizers, and board.	
24	• Leaders are not enough known to each other as resources.	• Create a list of all experienced leaders along with their particular areas of PIA experience and contact information. Distribute to Leaders.	• Add info about "area of experience" to our current database. Collect this information from all LOC leaders and enter in database. • Pass out list at General Assembly (1x/year at least).	Organizers, LOC Leaders, and PIA office staff (possibly volunteer enters data)		Organizers, LOC Leaders, and PIA office staff (possibly volunteer enters data)		Organizers, LOC Leaders, and PIA office staff (possibly volunteer enters data)	
25	• Inadequate communication within congregations & LOCs	• improve communications <u>within</u> LOCs and congregations. • In three years, every LOC will have built and will maintain a list of at least 20% of the congregation's members who are interested in PIA's work and with whom the LOC maintains contact. Goals for 1-1s: 1,200 each year = 6 per LOC leader each year. (See Issues: Greater LOC Engagement)	• Every LOC will build and maintain a phone tree comprising at least 20% of a congregation's membership, and will have a plan for conducting 1-1s with all those people within three years. • 19,000 families x 20% ÷ 3 yrs = approx 1,200 people per year. 1200 ÷ 200 LOC leaders = 6 1-1s per LOC leader per year. (See Issues: Greater LOC Engagement)	LOC leaders		LOC leaders		LOC leaders	
26	• Response to Leader calls and invitations can be anemic. For example, a leader may receive only three return calls or emails from 25 placed or sent.	• 70% of all communications within PIA will be responded to within 48 hours.	• Every LOC will develop a plan for fostering a culture of follow-through	All PIA leaders and staff. ED to lead commitment.		All PIA leaders and staff. ED to lead commitment.		All PIA leaders and staff. ED to lead commitment.	
27	• Inadequate communication within/between all groups	• Improve the channels that can facilitate communications between all PIA staff, LOCs, Leaders and congregations.							
28	• Many new communications media exist	• Study and adopt appropriate new technologies.		Communications Committee.					

	B	C	D	E	F	G	H	I	J
29	• Different media must be tailored to different audiences	• Identify the forms of communication most used by each group of stakeholders and use them.		Communications Committee.		Communications Committee.		Communications Committee.	
30	UNDERLYING CONDITIONS	2. INTERNAL COMMUNICATIONS, cont'd							
31	• PIA wants and needs a web site that is as powerful and effective as it can be. • Online space is where younger people live and work. PIA will have to set up ways to be there as well as for non-online spaces	• Create an open source web site for community reports and input.	• Task Force plans and recommends for a web site. • Consider Joomla software. • Site will need a monitor to protect privacy and sensitivities. • Consider use of a "zone" on the PICO web site.	E.D. and Communications committee appoint a Web Site task force to plan and recommend.		Web site task force and PIA office staff.	we're already paying something here. \$1k/yr increase?	Web site task force and PIA office staff.	\$1,000
32	• Web site can attract and engage many more people.	• The PIA community will expand its use of on-line tools & social networking tools so that PIA leaders will have access to up-to-date information about PIA, via the website.	• Web site: e.g. Web becomes the primary center for exchange of information?/ All activities posted in a timely way? / Forums set up to discuss common issues? "Higher interest levels."	E.D. and Communications committee appoint a Web Site task force.		Web site task force and PIA office staff.		Web site task force and PIA office staff.	
33			• Improve use of the internet linked with email to expand issue work and successful actions.	E.D. and Communications committee appoint a Web Site task force.		Web site task force and PIA office staff.		Web site task force and PIA office staff.	
34			• Monitor Internet metrics	E.D. and Communications committee appoint a Web Site task force.		Web site task force and PIA office staff.		Web site task force and PIA office staff.	
35		• Maintain other channels for people who cannot access the web, e.g. the monthly calendar.		staff		staff		staff	
36		• Provide language interpretation at all PIA public events	• Implement PIA language interpretation guidelines consistently.	All PIA leaders and staff. ED to lead commitment.	n/a	All PIA leaders and staff. ED to lead commitment.	n/a	All PIA leaders and staff. ED to lead commitment. Equipment-headsets.	\$5,000
37			• PIA leaders will receive regular training in the advantages to PIA for all leaders to listening patiently during interpretations and will provide strategies and practice for doing so. Use all federated events to model the type of interpretation standards we want PIA to embrace.	ED and organizers will develop training. Organizers and organizing leaders will deliver annually.	n/a	organizers and organizing leaders	n/a	organizers and organizing leaders	n/a
38	• (IF) Expand ethnic diversity of congregation base to better reflect the diversity of the peninsula.--many implications.	• Study how best to adapt all PIA communications to its diverse, growing membership.	• Include new languages in PIA communications as congregations with other languages join PIA	All PIA leaders and staff. ED to lead commitment.	n/a	All PIA leaders and staff. ED to lead commitment.	n/a	All PIA leaders and staff. ED to lead commitment.	\$5,000
39									

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	UNDERLYING CONDITIONS	3. HEROES LUNCHEON							
40	• HL is a highly effective communication tool.	<ul style="list-style-type: none"> Use the HL as a major opportunity to communicate critical and inspiring information about PIA's to a broad audience: <ul style="list-style-type: none"> importance accomplishments strength of acting from commonly-held values strength of acting together as faith-based congregation and organization members 	<ul style="list-style-type: none"> Script remarks strategically. Ensure that Luncheon programs communicate key messages. Keep the several keynoters on equal footing. Use AV to project images and play music. 	Development director, advisory council, ED.		Development director, advisory council, ED.		Development director, advisory council, ED.	
41	• More PR in advance of the luncheon is an opportunity to gain general visibility for PIA.		<ul style="list-style-type: none"> Invite more advanced media coverage of Heroes Lunch 	Development director, advisory council, ED.		Development director, advisory council, ED.		Development director, advisory council, ED.	
42	• PIA's image needs improvement among some collaborators, donors, politicians & congregations. • Antagonistic, adversarial style at times	<ul style="list-style-type: none"> Continue to use Heroes Luncheon to build human bridges to Leaders and public figures as well as funders. 	AT THE EVENT: <ul style="list-style-type: none"> Continue to honor outstanding public servants. Ensure that each sponsor's name is read along with their Honoree Hero's name. Seat external public reps at engaging, friendly tables. 	Development director, advisory council, ED.		Development director, advisory council, ED.		Development director, advisory council, ED.	
43	• The Luncheon is a primary opportunity to build cross-sector relationships.		AFTER THE EVENT:						
44			<ul style="list-style-type: none"> Post past programs to the web site. 	PIA office staff.		PIA office staff.		PIA office staff.	
45			<ul style="list-style-type: none"> PIA leaders maintain relationships with local reporters and editors to promote potential stories and publicity about PIA. 	LOC leaders and organizers.		LOC leaders and organizers.		LOC leaders and organizers.	
46			<ul style="list-style-type: none"> PIA leaders thank sponsors and other participants in the Luncheon. 	Advisory Council & LOC table captains		Advisory Council & LOC table captains		Advisory Council & LOC table captains	
47	• The Heroes Luncheon is impressive as a fundraiser and recognition event	<ul style="list-style-type: none"> Keep the Heroes Luncheon from getting stale. 	<ul style="list-style-type: none"> Communicate the importance of putting values into action: acknowledge and recognize work well done; spotlight the power of organized people 	Development director, advisory council, ED.		Development director, advisory council, ED.		Development director, advisory council, ED.	
48	• It's a challenge finding the right people year after year to honor who will both accept and attend		<ul style="list-style-type: none"> Luncheon Committee continue to focus on finding high-profile speakers. 	Development director, advisory council, ED.		Development director, advisory council, ED.		Development director, advisory council, ED.	
49	• It improves the status of an LOC within a congregation if you can bring the right people to your table. • The Luncheon energizes new people especially.	<ul style="list-style-type: none"> Use the Luncheon to re-energize LOCs and staff. 	<ul style="list-style-type: none"> LOCs focus on putting together tables that bring in other members of the congregation. Add music. 	LOC leaders and organizers. Staff.		LOC leaders and organizers. Staff.		LOC leaders and organizers. Staff.	
50	• Heroes themselves are too rushed through.		<ul style="list-style-type: none"> Balance event time to put more focus on LOCAL awards and recognition for LOC Heroes, to see the Heroes and their accomplishments as "organized people" 	Development director, advisory council, ED.		Development director, advisory council, ED.		Development director, advisory council, ED.	
51									
52	UNDERLYING CONDITIONS	4. RECOGNITION & ACKNOWLEDGEMENT							
53	Leaders often work with too little recognition.	<ul style="list-style-type: none"> Support LOCs to find ways to develop more paths to recognition within their own groups and congregations (than the Heroes Luncheon). 	<ul style="list-style-type: none"> Reward LOCs for reaching incremental goals that they set for themselves, especially 1-1 goals. 	PIA board, organizers, and ED.		PIA board, organizers, and ED.		PIA board, organizers, and ED.	
54			<ul style="list-style-type: none"> Present awards at General Assemblies or the winter fund-raiser. (The LOC Oscars?) or at another event held just for LOCs. 	PIA board, organizers, and ED.		PIA board, organizers, and ED.		PIA board, organizers, and ED.	
55			<ul style="list-style-type: none"> Announce awards in general publications/web news. 	Communications committee, PIA staff.		Communications committee, PIA staff.		Communications committee, PIA staff.	
56									
57									

	B	C	D	E	F	G	H	I	J
58	UNDERLYING CONDITIONS	5. ISSUE / ACTION PRESENTATIONS							
59	• Good research and preparation for scripted presentations	• Continue to do good research and preparation for scripted presentations.	• Make sure research report is high-quality in every action.	LOC Leaders and organizers.		LOC Leaders and organizers.		LOC Leaders and organizers.	
60	• Tips help people overcome their fears, even simple ones, like "setting up an appointment with a legislator."	• Strengthen "Tips for Success". Set up checklists for LOCs of all the steps that are useful in understanding how best to prepare an action.	• Combine experienced people with new leaders to create checklists. • Reference the "Resources" page on PIA's website.	Organizers and organizing leaders.		Organizers and organizing leaders.		Organizers and organizing leaders.	
61			• Ensure that all desired resources are on the PIA resource page.	PIA staff.		PIA staff.		PIA staff.	
62	• At present, staff takes notes of actions.	• Keep accurate records and lists of all actions and their details.	• Develop and use a standard post-action assessment that captures meaningful picture of issue advancement, leader development, and organizational development. (See "Issues, row 47") • Report on results in monthly calendar and post to website.	Organizers, ED, and Board Executive Committee develop. Staff implements.		Staff implements.		Staff implements.	\$2,500
63			• Set up web posting protocols.	Communications committee and staff.		Communications committee and staff.		Communications committee and staff.	
64	• Good reputation in the community and with politicians: PIA serves a		• Improve use of the internet linked with email to expand issue work and successful actions.	Communications committee and staff.		Communications committee and staff.		Communications committee and staff.	
65									
66	UNDERLYING CONDITIONS	6. EVALUATION							
67	• Can market PIA better with tangible data and metrics.	• Measure effectiveness of communication • Develop ways to measure effectiveness.	• "leader satisfaction surveys" / focus groups • "leader satisfaction surveys" / focus groups	Communications committee, PIA staff.		Communications committee, PIA staff.		Communications committee, PIA staff.	
68		• Monitor Internet metrics	• Set up and monitor "counters" on web site	Office staff		Office staff		Office staff	
69									
70									
71	UNDERLYING CONDITIONS	7. SUPPORT FOR COMMUNICATIONS							
72	When the Operations Manager resigned in 2009, the position's responsibilities were distributed to other staff members EXCEPT for the communications responsibilities	• Ensure that Communications support is adequate to demand.	• Analyze real types and levels of support needed. • Look to new volunteer resources in PIA's leadership base: create a new Communications Committee. • Contract for or hire Communications support. the amount projected in years 2 & 3 is a bare minimum estimate.	Staff and Communications Committee take on responsibilities and conduct analysis.	n/a	Contract some support for communications. Look for pro-bono support.	\$4,000	Contract some support for communications. Look for pro-bono support.	\$4,000
73									
74			TOTAL NEW EXPENSES		\$0		\$4,000		\$17,500

	B	C	D	E	F	G	H	I	J
1	Fund Development & Finances Task Force "Support and revenue planning"	Goals	Strategies	People & Resources 2010	\$\$ YR 1 2010	People & Resources 2011	\$\$ YR 2	People & Resources 2012	\$\$ YR 3
2	Phil Cosby, Chair. Edie Keating, Linda Kilby, Carol Marchi, Mark Ruzon, Ross Weir. Staff: Lisa Hicks-Dumanske, Mary Klein		1) Set Goals 2) What helps or hinders reaching the goals? 3) Strategies for reaching goals. 4) Cost-Revenue implications?						
3			<ul style="list-style-type: none"> Analyze revenue needs for organization's activities and operations: a) current, b) projected. Identify maximum revenue strategies foreseeable. Negotiate variances with projected costs. 						
4	UNDERLYING CONDITIONS	DIVERSIFY AND STABILIZE PIA'S REVENUES							
5	• Current economic downturn								
6	• Middle class feeling the pain								
7		RATIONALE / CASE FOR GIVING							
8	<ul style="list-style-type: none"> PIA's Case: Faith based social justice; developer of the people strengths that make for a healthy democracy— People Power Clarity of mission: Faith based social justice issues provide "grounding" for issues Hard to tell people what PIA does in a compelling, concise way. 	<ul style="list-style-type: none"> Maximize PIA's strengths to build a compelling case for giving. Leverage PIA's strength as a force for good and decency based on common values held by a wide variety of faith-based congregations and organizations. 	<ul style="list-style-type: none"> Create key messages for use in cultivation and solicitation materials. Examples of key messages: PIA "re-weaves the fabric of communities" and accomplishes three great things: 1) change society to create a more level playing field for life and opportunity; 2) empower people to become responsible leaders in improving their lives and the lives of their communities; 3) strengthen communities through bridging cultural differences and creating alliances for common cause. 	A Communications Committee & E.D. will oversee (See Communications section). Staff will apply to Taproot for a grant to develop key messages.					
9			<ul style="list-style-type: none"> Develop a tagline for general use. Refer to PICO's materials, e.g. "Re-weaving the fabric of communities" or the current "Unlocking the Power of People." 	A Communications Committee & E.D. will oversee (See Communications section).					

	B	C	D	E	F	G	H	I	J	
10	<ul style="list-style-type: none"> Perception of PIA as primarily serving Latino/Hispanic population is limiting in a restrictive economy. 		<ul style="list-style-type: none"> Using the identified key messages, create donor cultivation materials that frame PIA's history and impact, method of organizing, and direction. Adapt materials for different target audiences, e.g. corporations, foundations, and individual donors. Materials can also be used to inform or cultivate elected officials, Leaders, prospect congregation members, and prospect Heroes Luncheon participants. (See "Tutelary powerpoint" in the Leadership section.) Materials can include a brochure, Fact Sheet, Web site pages, powerpoint presentation, etc. Contents can include text, captioned photos, testimonials, and the graphic presentation of important data. 	<p>Board & E. D. will create a Marketing Materials task force with members of both the Communications and Development Committees, led by an experienced volunteer. Committee will collect a "library" of suitable photos, testimonials, & facts to illustrate the key messages.</p>		\$0		\$0	n/a	n/a
11			<ul style="list-style-type: none"> Search for a marketing professional among PIA's members to volunteer. Explore PICO network resources in depth. 	<p>Communications Committee & E.D. will oversee.</p>						
12										

	B	C	D	E	F	G	H	I	J	
13		VISIBILITY AND CREDIBILITY								
	<ul style="list-style-type: none"> • Must have good marketing materials 	<ul style="list-style-type: none"> • Produce professional-looking marketing materials. 	<ul style="list-style-type: none"> • <u>Re-write and re-design all public-face materials</u>, including brochures, web site, letterhead and other identity pieces, etc. The review will include the logo design. • First, change messaging as a result of the key message work to be done (see Case, in this section). • Then, engage a graphic designer who will work at a discount or pro-bono. • Allot up to \$10,000 over 3 years, with the understanding that funds will be spent as efficiently as possible as soon as possible, beginning as early as Year 2 of the plan, according to further planning by a Marketing Materials Task Force, and with the consent of the Board. 	<p>Create a Marketing Materials task force with members of both the Communications and Development Committees & E.D.</p> <ul style="list-style-type: none"> • Review key messages work. • Write texts. • Search for a graphic designer. 		\$0	Re-design and produce materials	(\$5,000)		
14										
15	<ul style="list-style-type: none"> • Pejorative impression of PIA in some quarters due to aggressive tactics. 	<ul style="list-style-type: none"> • Improve PIA's image as an organization and case worth investing in for the betterment of the community. Become valued as an organization, even when people may disagree or be unable to act on individual issues. 	<ul style="list-style-type: none"> • Frame issues for specific audiences to achieve the most appealing effect. 	Executive and development staff guidance						
16			<ul style="list-style-type: none"> • Add to the curriculum for organizers and LOCs: how to frame issues to reach diverse audiences more effectively, how to be mindful of the various audiences PIA wants to reach. 	E.D. and PICO staff will develop.		\$0				
17			SUB-TOTAL VISIBILITY			\$0		(\$5,000)	\$0	
18										
19		MEMBERSHIP & CONGREGATIONS								
20	<ul style="list-style-type: none"> • Current no. of members: 30 	<ul style="list-style-type: none"> • Retain current membership. 	<ul style="list-style-type: none"> • Maintain congregational dues at current levels. • <u>Keep dues at current levels through this plan??</u> • Maintain flexible payment plans with members. 		\$41,000		\$43,000		\$45,000	
21	<ul style="list-style-type: none"> • Congregational financial support is not consistent or auditable. • Middle class is feeling the pain 	<ul style="list-style-type: none"> • Improve accountability of membership agreements. 	<ul style="list-style-type: none"> • Conduct focused conversations with clergy of congregations where agreement is unclear, and clarify. 							
22	<ul style="list-style-type: none"> • Diversifying demographic base can provide more support for issues and access to more donors. 		<ul style="list-style-type: none"> • Explore how best to attract new "champions" of PIA, whether through dues or group gifts to the Heroes Luncheon. 	TBD						
23	<ul style="list-style-type: none"> • Many affluent unaffiliated congregations exist. • Tapping affluent populations could unlock more funding opportunities 	<ul style="list-style-type: none"> • Add more affluent congregations. Build toward at least five congregations joining PIA with support, either dues or contributions, at \$1K to \$5K levels. 	<ul style="list-style-type: none"> • New Memberships and Affiliate giving--links to MEMBERSHIP TASK FORCE. 	Board Membership Committee	\$1,000		\$4,500		\$6,500	
24		<ul style="list-style-type: none"> • LOC DIRECT SUPPORT 	<ul style="list-style-type: none"> • Seek HEROES LUNCHEON Sponsorships 		\$20,000		\$20,000		\$20,000	
25			SUB-TOTAL MEMBER GIVING		\$62,000		\$67,500		\$71,500	
26										

	B	C	D	E	F	G	H	I	J
27		FOUNDATIONS / INDIV. & FAMILY FUNDS							
28	<ul style="list-style-type: none"> • Foundations have made up 4/5 of total revenue (79%). The percentage is too high for reliable fiscal stability. • Much recent foundation giving has been due to an emphasis on health care. Other issues may not attract support. 	<ul style="list-style-type: none"> • PIA will gradually shift to a revenue plan in which foundations and family funds eventually make up no more than 60% of the budget. This plan sets a goal of reducing foundation grants from 79% to 65% of revenues by year three. 	<ul style="list-style-type: none"> • Continue to research and write proposals for grants 	<ul style="list-style-type: none"> Dev. Director Board accepts staff projections for foundations. 	\$389,650		\$390,000		\$390,000
29	<ul style="list-style-type: none"> • "Foundation giving will likely decline by more than 10 percent in 2009...(with) continued reductions ... expected in 2010....(and) the field of philanthropy will become more strategic as a result of having weathered the crisis." ** 	<ul style="list-style-type: none"> • Become much better known to corporate donors and philanthropists 	<ul style="list-style-type: none"> • E.D. or Development Director will go with a Leader/Devp Committee member to visit funders, taking a list of issues under development for the next year. Build the relationship. Set up potential giving. Everyone sees the future. 	<ul style="list-style-type: none"> E.D. or Development Director and Leaders/Board members 					
30			<ul style="list-style-type: none"> • Seek HEROES LUNCHEON Sponsorships (Fnds & Corps together = \$20,000 in 2010) 		\$4,000	Advisory Committee creates more linkages	\$5,000	Advisory Committee creates more linkages	\$5,000
31	<ul style="list-style-type: none"> • PICO is available as a resource in several ways. (PICO is not a source of funding in the sense that we can apply to them for support. We collaborate with other PICO affiliates on issue work and receive a share of funds PICO receives for that work.) 	<ul style="list-style-type: none"> • PIA will fully engage in all PICO fund-development trainings. 	<ul style="list-style-type: none"> • PIA will send at least one staff person and two board members to every fund-development training offered by PICO. 						
32	<ul style="list-style-type: none"> • Collaborations with new partners could unlock new funding. 		How this happens and who does it have yet to be determined.	TBD					
33			SUB-TOTAL FOUNDATIONS		\$393,650		\$395,000		\$395,000
34									
35		CORPORATIONS / PRIVATE SECTOR							
36	<ul style="list-style-type: none"> • Distance of/cut-backs by corporate donors. • Corporate donors fund initiatives that align with their own interests. Often these objectives conflict with PIA's. 	<ul style="list-style-type: none"> • Expand corporate funding from existing donors. Explore all avenues for corporate giving. • Become much better known to corporate donors. 	<ul style="list-style-type: none"> • Seek: Sponsorships. Grants. Employee funds. Marketing funds. Seek several "doors" into each prospect because common self interest may be through one door and not another. 		\$7,000		\$8,000		\$9,000
37	<ul style="list-style-type: none"> • Some issues still appeal to/match funding guidelines. 		<ul style="list-style-type: none"> • Continue to match PIA priorities to extant funder guidelines to the extent possible. Seek several "doors" as above. 	<ul style="list-style-type: none"> Dev. Director / no new costs 	n/a				
38			<ul style="list-style-type: none"> • Determine the metrics that most appeal to corporate (and foundation donors) and collect appropriate data (if cost effective). 	<ul style="list-style-type: none"> Dev. Director / no new costs (to develop metrics?) 	n/a				
39			<ul style="list-style-type: none"> • Seek HEROES LUNCHEON Sponsorships (Fnds & Corps together = \$20,000 in 2010) 		\$16,000	Advisory Committee creates more linkages	\$18,000	Advisory Committee creates more linkages	\$21,000
40			SUB-TOTAL CORPORATIONS		\$23,000		\$26,000		\$30,000
41									
42		RELIGIOUS ORGANIZATIONS							

	B	C	D	E	F	G	H	I	J
43	<ul style="list-style-type: none"> • There is less giving to large organizations like PIA and more giving directed to small, emerging organizations. • More giving sources exist than have been fully explored by PIA. 	<ul style="list-style-type: none"> • Maintain overall level of giving from religious organizations. 	<ul style="list-style-type: none"> • As existing donors rotate out, research and cultivate new sources for replacement funding and new support. 	Dev. Director / no new costs	\$15,000		\$15,000		\$15,000
44			SUB-TOTAL RELIGIOUS ORGANIZATIONS		\$15,000		\$15,000		\$15,000

	B	C	D	E	F	G	H	I	J
45		INDIVIDUAL GIVING							
46	<ul style="list-style-type: none"> Loss of significant revenues from foundations and one major donor cannot be balanced entirely with cuts to expenses. Other revenue sources are unlikely to grow much. Individuals offer the best potential source for revenue growth. The number of donors giving \$200 or more to an annual giving appeal = 52 (in 2008) The number of congregation members in LOC congregations = about 19,000 families. [I consistently use 20k families in everything I write, so if we are serving 19k then I should be consistent. LHD] It is difficult to estimate the potential of the new programs proposed, therefore a modest escalation in income is projected for the three years of this plan. 	<ul style="list-style-type: none"> Strengthen programs at all levels to build giving from individuals. Increase levels of leader involvement in asking for support. Become much better known to philanthropists. 							
47	<ul style="list-style-type: none"> Leaders are available to learn donor cultivation and solicitation practices. 	<ul style="list-style-type: none"> Achieve 100% giving at the Board level. 	<ul style="list-style-type: none"> Conduct a <u>Board giving campaign.</u> Foundation and general community giving goes up when it is known that every board member has stepped up in the same way they are asking the community to do. Timing of the campaign should allow 100% pledging before any Board Members participate in any other solicitation programs. 	<p>Board Co-Chairs with support of the Development Committee asks each board member for a specific gift amount.</p>	Included in general numbers below.	<p>Board Co-Chairs with support of the Development Committee asks each board member for a specific gift amount.</p>	Included in general numbers below.	<p>Board Co-Chairs with support of the Development Committee asks each board member for a specific gift amount.</p>	Included in general numbers below.
48		<ul style="list-style-type: none"> Double annual giving at levels below \$2,500. Build gradually from the current \$13,000/year from smaller gifts (\$8,000 plus one \$15,000 family gift) to an eventual \$40,000/ year. 	<ul style="list-style-type: none"> Implement a development plan encompassing several programs spread across the year. It will take longer than three years to get to the \$40k per year level. These \$8k, \$11k and \$15k goals for the next 3 years represent what is considered to be achievable. 	Dev Staff and an expanded Development Committee	\$8,000	Dev Staff and an expanded Development Committee	\$10,500	Dev Staff and an expanded Development Committee	\$15,000
49			<ul style="list-style-type: none"> Conduct an <u>annual mail appeal.</u> Include: <ul style="list-style-type: none"> PIA congregation individual members donors to/ prospects for Heroes Luncheon 	<p>Dev Staff and an expanded Development Committee</p> <p>Prepare/distribute X,000 letters (X00 letters per PIA congregation); est 5% response; est. average gift of \$25.</p>		<p>Prepare/distribute X,000 letters (X00 letters per PIA congregation); est 7% response; est. average gift of \$25.</p>		<p>Prepare/distribute X,000 letters (X00 letters per PIA congregation); est 10% response; est. average gift of \$25.</p>	
50	<ul style="list-style-type: none"> Have just 18 active LOCs within 30 member congregations. 		<ul style="list-style-type: none"> All PIA board members and at least 20 other veteran leaders agree to hand write notes asking for specific levels of support ("Can you give as much as \$XXX?") on individual letters and then distribute them to their congregations and contacts (with PIA support as needed). 	<p>Dev Staff and an expanded Development Committee</p> <p>Leaders/Board: each member agrees to write notes on approx/at least 50 letters</p>		<p>Leaders/Board: each member agrees to write notes on approx/at least 50 letters</p>		<p>Leaders/Board: each member agrees to write notes on approx/at least 50 letters</p>	
51			<ul style="list-style-type: none"> Conduct <u>special appeals</u>, such as: <ul style="list-style-type: none"> email appeals envelope inclusion in Newsletter Winter Celebration, a low-cost fundraiser and party 						

	B	C	D	E	F	G	H	I	J		
52	<ul style="list-style-type: none"> New issues and new demographics can mean new donors 		<ul style="list-style-type: none"> Explore the option of <u>Staging house parties</u> to help identify and cultivate new donors. Migrate to major gifts status as soon as prospects are ready. Staff and Leaders identify prospects; invite and encourage prospects to attend; follow-up with calls & visits. 	Dev Staff and an expanded Development Committee. Hold 1 house party. Staff & leaders put together. Costs include: invitations, food & bev.		(\$500)		(\$1,000)	Hold 2-4 house parties. Staff & leaders put together. Costs include: invitations, food & bev.	(\$1,500)	
53	<ul style="list-style-type: none"> Inadequate resources, financial and human, restrict accomplishments. Addition of staff support/consulting to development can support increased individual gift fundraising generally. 		<ul style="list-style-type: none"> Engage Individual donor campaign support. Listed in 2010 budget as "Consulting: Individual donor campaigns". Seek training in this area through PICO with the goal of avoiding consultant fees. 	Hire consultant. Dev Staff and an expanded Development Committee		(\$15,000)	Hire development staff support.	(\$15,000)	Development staff support.	(\$15,000)	
54			<ul style="list-style-type: none"> "Annual Appeal Campaign Expenses" 	Dev Staff		(\$1,500)		(\$1,500)		(\$1,500)	
55		<ul style="list-style-type: none"> Maintain giving levels to the Heroes Luncheon from individuals. 	<ul style="list-style-type: none"> Seek HEROES LUNCHEON Individual Sponsorships and ticket sales 			\$10,000		\$10,000		\$10,000	
56	<ul style="list-style-type: none"> PIA's one \$30k/yr. major trust folded in 2009 - no more support. We have urgent motivation to replace this funding. 	<ul style="list-style-type: none"> Grow gifts of \$2,500 and above by creating an individual major donor program. 	<ul style="list-style-type: none"> Last year for Lane Family Trust gift. 			\$15,000		\$0		\$0	
57			<ul style="list-style-type: none"> Initiate a major donor campaign for gifts at \$2,500 and above to replace the loss of the Lane Family Trust gift after 2010 and grow giving at this level. 	Dev Staff and an expanded Development Committee.		\$0	Dev Staff and an expanded Development Committee.	\$15,000		\$25,000	
58			<ul style="list-style-type: none"> RENEWALS / UPGRADES -- donors to/ prospects for Heroes Luncheon (leverage Heroes Luncheon) -- capable PIA congregation members -- community members & funders -- people who do not know PIA -yet- and who have the capacity to give at the \$2500 and above level 	<ul style="list-style-type: none"> Dev Staff and an expanded Development Committee : research additional prospects; complete major gifts solicitation plan and training 			\$20,000	<ul style="list-style-type: none"> Staff and Leaders: Begin campaign to visit prospects 2-to-1. 	\$23,000	<ul style="list-style-type: none"> Staff and Leaders: Visit prospects 2-to-1. 	\$25,000
59			<ul style="list-style-type: none"> NEW DONORS -- people who do not know PIA -yet- and who have the capacity to give at the \$2500 and above level 	<ul style="list-style-type: none"> Staff and Devp Com Leaders: research prospects; complete a cultivation and solicitation plan 			\$0	<ul style="list-style-type: none"> Staff and Leaders: Begin campaign to visit prospects 2-to-1. 	\$10,000	<ul style="list-style-type: none"> Staff and Leaders: Visit prospects 2-to-1. 	\$15,000
60	<ul style="list-style-type: none"> Leaders are available to learn donor cultivation and solicitation practices. 			<ul style="list-style-type: none"> Hold trainings about how to cultivate, then ask for gifts. PHASE IN. 	<ul style="list-style-type: none"> Consultant: conducts one training 	Included in expenses above.		<ul style="list-style-type: none"> Consultant: conducts one training 	Included in expenses above.	<ul style="list-style-type: none"> Consultant: conducts one training 	Included in expenses above.

	B	C	D	E	F	G	H	I	J
61			• Invite and involve donors in actions.	Staff and Leaders: reach out to donors		Staff and Leaders: reach out to donors		Staff and Leaders: reach out to donors	
	• Aging population will bring new issues and opportunities	• Strengthen a legacy program.	• Use PIA newsletters and periodic reports for reminders and information about bequests and other planned gifts. Leaders can supply personal testimonials and stories about wanting to leave PIA a legacy.	Staff: Use PICO materials; copy other standardized materials Leaders: supply personal testimonials and stories.	Some staff time		Some staff time		Some staff time
62									
63			SUB-TOTAL INDIVIDUAL GIVING		\$36,000		\$51,000		\$72,000
64									
65		BENEFIT EVENTS:							
66	• The Hero's luncheon is impressive as a fundraiser and recognition event	• Increase net income from the Heroes Lunch from \$28K to \$40K.	• Increase levels of leader involvement in Heroes Luncheon asking for support.		[See donor categories for revenue]		[See donor categories for revenue]		[See donor categories for revenue]
67			• Maintain Heroes Expenses. Listed in PIA budget as "Special Event Expenses."		(\$18,000)		(\$20,000)		(\$22,000)
68	• Event's growth is topped out with currently limited PIA staff and resources and network in the corp community.		• A dedicated and effective Advisory Council (min. 10 members) will work to seek sponsorships and leverage the corp community.	Advisory Committee, (which renews itself year to year.)		Advisory Committee, (which renews itself year to year.)		Advisory Committee, (which renews itself year to year.)	
69	• Adequate staffing to add another benefit event?	• Add a fall, low-cost fundraiser.	[See Individual Giving for revenue]	Development committee, ED, and organizers	included above	Development committee, ED, and organizers	included above	Development committee, ED, and organizers	included above
70			SUB-TOTAL BENEFIT EXPENSES		(\$18,000)		(\$20,000)		(\$22,000)
71									
72		EARNED INCOME, INTEREST, MISC:			\$4,000		\$4,000		\$5,000
73									
74	Contingency line item not budgeted, but reserves are maintained.	OPERATIONS CONTINGENCY	Maintain three months' cash on hand up to \$150,000 as an operating reserve.	Finance Committee of the Board	\$0	Finance Committee of the Board	\$0	Finance Committee of the Board	\$0
75									
76		IN-KIND CONTRIBUTIONS							
77	TOTAL ANNUAL REVENUES *				\$515,650		\$538,500		\$566,500
78	* Net of selected fundraising-related expenses								
79			EXPENSES						
80			Salary: Executive Director (1 FTE)		63,980				
81			Salaries: Community Organizers (3.5 FTE)		155,235				
82			Salary: Development Director (67% FTE)		52,904				
83			Salary: Office Mgr/Translator (1 FTE)		40,000				
84			Health Insurance		14,681				
85			Payroll Taxes		25,543				
86			Retirement Plans		13,776				
87			Merit Fund		1,500				
88			Worker's Compensation		5,303				
89			Recruitment Expense		500				
90			Payroll Fees		2,225				
91			Recognition Fund		400				
92	Reflects half year at reduced salaries and half year of original salaries before 6% (7% Mary) cuts.		Subtotal Regular Personnel		376,047		389,209		402,831
93			Expenses: Program (display only Plan highlights)						
94			Staff: Auto Expense		20,700				
95			PICO Dues		15,000				

	B	C	D	E	F	G	H	I	J
96			Leadership: Training		1,000				
97			Staff: Training & Prof. Devp.		4,000				
98			Staff: Organizing Meeting Expense		600				
99			Dir & Off Liability Insurance		1,900				
100			Board: Meeting/Convention Expense/Issue Committees		300				
101			National & State Meeting Expenses		1,500				
102			Actions Expense		1,500				
103			Accountant/Bookkeeping		7,000				
104			Miscellaneous Program & Devp. Expense		250				
105			Books & Periodicals & Dues		500				
106			Multicultural Initiative (training)		0		0		0
107			New Initiatives: interpretation & strategic plan		0		0		0
108			Consulting: staff training	1 year only	5,000				
109			Consultants' Fees & Expenses (computer, IT, development, babysitting, website (& interpreters in 2010))		5,000				
110			Annual Audit		7,000				
111			Subtotal Program		71,250		68,744		71,150
112			Expenses: Office (display only Plan highlights)						
113			Rent & Utilities		20,280				
114			Telephone & Internet		11,000				
115			Office Supplies		5,000				
116			Filing Fees & Licenses, Notary & Bank Fees		750				
117			Miscellaneous Office Expense		100				
118			Equipment (incl. new interpretation devices)		1,000				
119			Equipment Depreciation Expense		10,000				
120			Postage		2,500				
121			Equipment Maintenance (incl. copier)		6,000				
122			Printing		6,000				
123			Annual Report Printing		2,000				
124			Office Insurance		2,000				
125			Janitorial Service		1,000				
126			Subtotal Office		67,630		69,997		72,447
127									
128			TOTAL ANNUAL EXPENSES		514,927		527,949		546,428
129			ANNUAL INFLATION ESCALATION			3.50%		3.50%	
130			NET/(NET) REVENUE <i>before</i> NEW PLAN COSTS		\$723		\$10,551		\$20,072
131		TASK FORCE RECOMMENDATIONS with ADDITIONAL COSTS	Desired Additional Expenditures	Above 2010 projections:	Above 2011 projections:	Above 2012 projections:			
132		LEADERSHIP, GOVERNANCE, STAFF	<ul style="list-style-type: none"> Send organizers to Applegate Send at least 4 PIA representatives to each of 6 PICO-CA meetings per year. 	included in 2010 budget	(\$400)	(\$800)			
133		ISSUES	NONE	\$0	\$0	\$0			
134		COMMUNICATIONS	<ul style="list-style-type: none"> Implement PIA language interpretation guidelines consistently; Include new languages in PIA communications as congregations with other languages join PIA 	\$0	\$0	(\$13,500)			
135			<ul style="list-style-type: none"> Revise and reprint a new PIA brochure and other print materials. 		TBD				
136			<ul style="list-style-type: none"> Contract for or hire support for Communications 	\$0	(\$4,000)	(\$4,000)	See Leadership/Staff Development		
137		FUND DEVELOPMENT & FINANCE	<ul style="list-style-type: none"> House parties 	(\$500)	(\$1,000)	(\$1,500)			
138			<ul style="list-style-type: none"> Re-write and re-design all public-face fundraising marketing materials 	\$0	(\$5,000)	\$0			

	B	C	D	E	F	G	H	I	J
139			Subtotal Desired Additional Costs		(\$500)		(\$10,400)		(\$19,800)
140			NET/(NET) REVENUE <i>after</i> NEW PLAN COSTS		\$223		\$151		\$272
141									

	B	C	D	E	F	G	H	I	J
142	MARIES								
143									
144			PLAN REVENUE SUMMARY by Donor Source						
145			SUB-TOTAL MEMBER GIVING		\$62,000		\$67,500		\$71,500
146	**• Cut-backs in foundations.		SUB-TOTAL FOUNDATIONS	71%	\$393,650	69%	\$395,000	65%	\$395,000
147	Foundation giving will likely decline by more than 10 percent in 2009 according to survey findings released by the		SUB-TOTAL CORPORATIONS		\$23,000		\$26,000		\$30,000
148	Foundation Center. Based on responses of close to 600 foundations, Foundations Year-end Outlook for Giving and the		SUB-TOTAL RELIGIOUS ORGANIZATIONS		\$15,000		\$15,000		\$15,000
149	Sector also finds that continued reductions are expected in 2010.		SUB-TOTAL INDIVIDUAL GIVING		\$53,000		\$68,500		\$90,000
150	However, more than three-quarters expect that the field of philanthropy will become more strategic as a result of having weathered the crisis." (Nov. '09, www.foundationcenter.org		EARNED INCOME, INTEREST, MISC		\$4,000		\$4,000		\$5,000
151			TOTAL ANNUAL REVENUES		\$550,650		\$576,000		\$606,500
152			HEROES LUNCHEON SUMMARY						
153			GROSS REVENUE, all sources		\$50,000		\$53,000		\$56,000
154			EXPENSES		(\$18,000)		(\$20,000)		(\$22,000)
155			NET REVENUE		\$32,000		\$33,000		\$34,000
156									
157									
158		TASK FORCE PROJECTIONS with CHANGES TO REVENUES over 2009 (all revenue changes are already incorporated in plan sections above)	Additional or (Reduced) Revenues Projected over 2009 Budget				Added to (reduced in) 2011 over base year 2009		Added to (reduced in) 2012 over base year 2009
159		MEMBERSHIP	• Current congregational dues		(\$2,000)		\$0		\$2,000
160			• Add at least ONE congregation with sufficient financial capacity to carry full membership dues structure.		\$0		\$1,500		\$1,500
161			• Add at least FIVE affiliate members. (See Finance - \$5k & \$10K levels)		\$1,000		\$3,000		\$5,000
162		FOUNDATIONS			(\$119,016)		(\$118,666)		(\$118,666)
163		CORPORATIONS / PRIVATE SECTOR			(\$1,000)		\$0		\$1,000
164		RELIGIOUS ORGANIZATIONS			\$10,000		\$10,000		\$1,000
165		INDIVIDUAL GIVING	• Giving at levels below \$2,500.		\$5,000		\$7,500		\$12,000
166			• One bequest commitment terminates in 2010 with a final, reduced payment.		(\$15,000)		(\$30,000)		(\$30,000)
167			• Seek replacement of bequest grant (\$15K in 2011 and \$25K in 2012)		\$0		\$15,000		\$25,000
168			• Renewals, upgrades of larger gifts		\$10,000		\$13,000		\$15,000
169			• New Donors		\$0		\$10,000		\$15,000
170		BENEFIT EVENTS / HEROES LUNCHEON			\$0		\$3,000		\$6,000
171			NET REVENUE PROJECTIONS RELATIVE TO 2009 BUDGET		(\$111,016)		(\$85,666)		(\$65,166)

PIA Strategic Planning – 2010, 2011, 2012

TASK FORCES & PARTICIPANTS

Leadership, Governance, Staff

Ross Weir, Chair. Joy Addison, Phil Cosby, Esther Hill, Pat Kolbe, Monica Olsen, Alvin Spencer. Staff: Mary Klein, Lisa Hicks-Dumanske

Membership

Joan Kilroe, Chair. Thomas Atwood, Karyl Eldredge, Alma Lalonde , Siv Nickerson, Michelle Rosenaur, Alma Lalonde, Lillian Sacun. Staff: Mary Klein

Issues and Collaborations

Marv Goodman, Chair. Phil Cosby, Pastor Clifton Bennett, Marva Monje, Diana Reddy, Jean Wolman. Staff: Mary Klein

Communications

Marco Cedillo, Chair. Thomas Atwood, Caryl Hughan, Edie Keating, Maria Marroqui, Laura Withers. Staff: Mary Klein, Nadya Sigona

Finance

Phil Cosby, Chair. Edie Keating, Linda Kilby, Carol Marchi, Mark Ruzon, Ross Weir. Staff: Lisa Hicks-Dumanske, Mary Klein

Planning Consultant

Marilyn Bancel, CFRE, The Oram Group, Inc.

COMMENTS FROM GENERAL ASSEMBLY ATTENDEES, NOV. 4, 2009

1. What inspires you to personally give time and effort to PIA?

- How the leaders are working.
- The community aspect inspires me to add my talents to other PIA members.
- Justice and being fair to all people. Helping those who can't help themselves.
- Engaging in meaningful action.
- Working with various church congregations has broadened my understanding.
- Putting Christian values into practice without regard to denomination.
- Participation gives me a way to live in accordance with my faith.
- To meet the challenges of this new day and age we must develop leaders and develop the capacity to respond to one another in public settings.

Re: LEADERSHIP

2. What would it mean to you to reach the Leadership Goals?

- I would like to have information that encompasses accomplishments in the past as well as what is *not* working right now. How have issues been approached in the past?
- I care about effective understanding.
- This will require practice within each LOC. If PIA could supply us with information about how to accomplish this, that would be helpful.
- Overall, in my years of being in PIA, I think the organizers need to be teaching skills for one-on-one interaction. Most of us do not find approaching “strangers” easy. We feel intrusive. Somehow, once an issue has been identified, it is less threatening. So the big problem is getting to an issue that will spark the interest of our congregation.
- Learning how to tell our stories.
- I have a hard time telling people what PIA does in a compelling, concise way.
- It is important to identify those who are directly benefiting from the work of PIA to make it easier to track progress.
- Training, goal-setting, measuring results, share information.
- Be coherent in a way of explaining: Results-based.
- I think a lack of accountability of LOC members is a big issue that needs to be addressed.
- We need to figure out a way for shy people to be brought into discussions.

Re: COMMUNICATIONS

3. What would it mean to you to reach the Communications Goals?

- It would make me feel more effective as a member of PIA and as a member of my LOC.
- This would help our LOC with up-to-date information.
- The jargon of PIA is a barrier to understanding. Simultaneous and sequential interpretations have improved! Good for PIA! Still double length of meetings, but definitely better organized.
- Should we be putting energy into meetings with a lot of people? I think it may be less effective.
- It is important to introduce English to non-English speakers in order to help unify.
- Expand the website to be more informational/inclusive with partners.
- I have a hard time telling people what PIA does in a compelling, concise way.
- I would like to have information that encompasses accomplishments in the past as well as what is *not* working right now. How have issues been approached in the past?
- Expand the website to be more informational/inclusive with partners.

Re: MEMBERSHIP

4. What would it mean to you to reach the Membership Goals?

- An increase in membership would make PIA more effective and the LOCs more useful to PIA.
- The more diverse we become, we'll strengthen what we will be able to accomplish.
- Important lesson: New-to-PIA folks need a conversation with an organizer or experienced leader before coming to the 1st meeting. Otherwise, the process is confusing and vague. Non-Christian congregations must feel respected in terms of faith. E.g. 'prayers' which are clearly Christian are a huge turn-off to non-Christians.
- More religious diversity is a good idea.
- Expansion is necessary, especially in considering new and varied congregations. It is good to define different levels in order for members to see their own contributions and goals being met.
- This goal will only be reached if we can increase the one-on-one outreach of our congregations and successfully interface with local communities

Re: ISSUES

5. What would it mean to you to reach the Issues Goals?

- We could use some helpful training in developing issues. Small group discussions of what PIA does; ask each member of our LOC what PIA does to directly benefit.

Taproot Report on PIA, 2009

The Taproot Foundation is:

A non-profit organization that forms teams of professional consultants to provide pro-bono organizational-development services to other nonprofit organizations.

The Taproot Process for PIA

Interviewed:

- Six PIA leaders and five PIA staff
- Six Donors: California Endowment, Haas Foundation, Cargill Foundation, Wells Fargo, and two individual donors
- Five Allies: HEART, HPSM, PACT, SFOP, PICO California
- Two Politicians: Adrienne Tissier, Tom Means
- One competitor: ACORN

Reviewed published information from:

- US Census; *California Cities, Towns & Counties 2009*; Pew Hispanic Center; etc.

Taproot Findings on PIA

SWOT Analysis

SWOT analysis is:

- Strengths (internal), Weaknesses (internal), Opportunities (external), and Threats (external)

Strengths of PIA

- Clarity of mission
- Respected leaders
- Ability to mobilize people
- Record of victories

Weaknesses of PIA

- Inadequate resources, human and financial
- Inadequate communication among congregations
- Inadequate training of organizers

Opportunities for PIA

- Middle class feeling the pain
- Increased public recognition of organizing
- New communications media
- Increasing diversity on Peninsula

Threats to PIA

- Cut-backs in congregations & foundations
- Alienation of corporate donors & politicians
- Issues lose relevance with changing demographics
- Staff burn-out

Taproot Findings on PIA (continued)

Environmental Scan

Environmental scan is:

- Context that PIA works within
- Broad trends
- New developments
- Dominant social forces

Leader development and governance environment:

- Increasing cultural diversity requires increasing cultural sensitivity
- Leader involvement can and should be measured
- Leader development can and should be measured
- Leader satisfaction can and should be measured

Membership environment:

- People-of-color (P-O-C) communities besides Latino are growing on the Peninsula
- Congregations exist beyond Judeo-Christian on the Peninsula
- Diverse staff is required for diverse membership

Issues and collaborations environment:

- More people are in need due to the economy and due to aging
- Collaborations can increase capacity to win on issues
- Balancing top-down and bottom-up identification of issues is key to keeping leaders involved

Communications environment:

- Many new media exist
- Different media must be tailored to different audiences
- On-going, active communications are a must
- PIA should not be the “best-kept secret” in the neighborhood

Financial environment:

- Current economic downturn
- Many affluent unaffiliated congregations exist
- New issues and new demographics can mean new donors
- Corporate donors will fund initiatives that align with their own interests
- Collaborations with new partners could unlock new funding