

MANA[®]
DE SAN DIEGO
SINCE 1986



**SOCIAL VENTURE
PARTNERS
SAN DIEGO**

MANA de San Diego

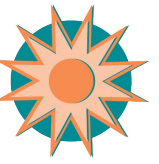
Strategic Planning Project
Approved September 25, 2023



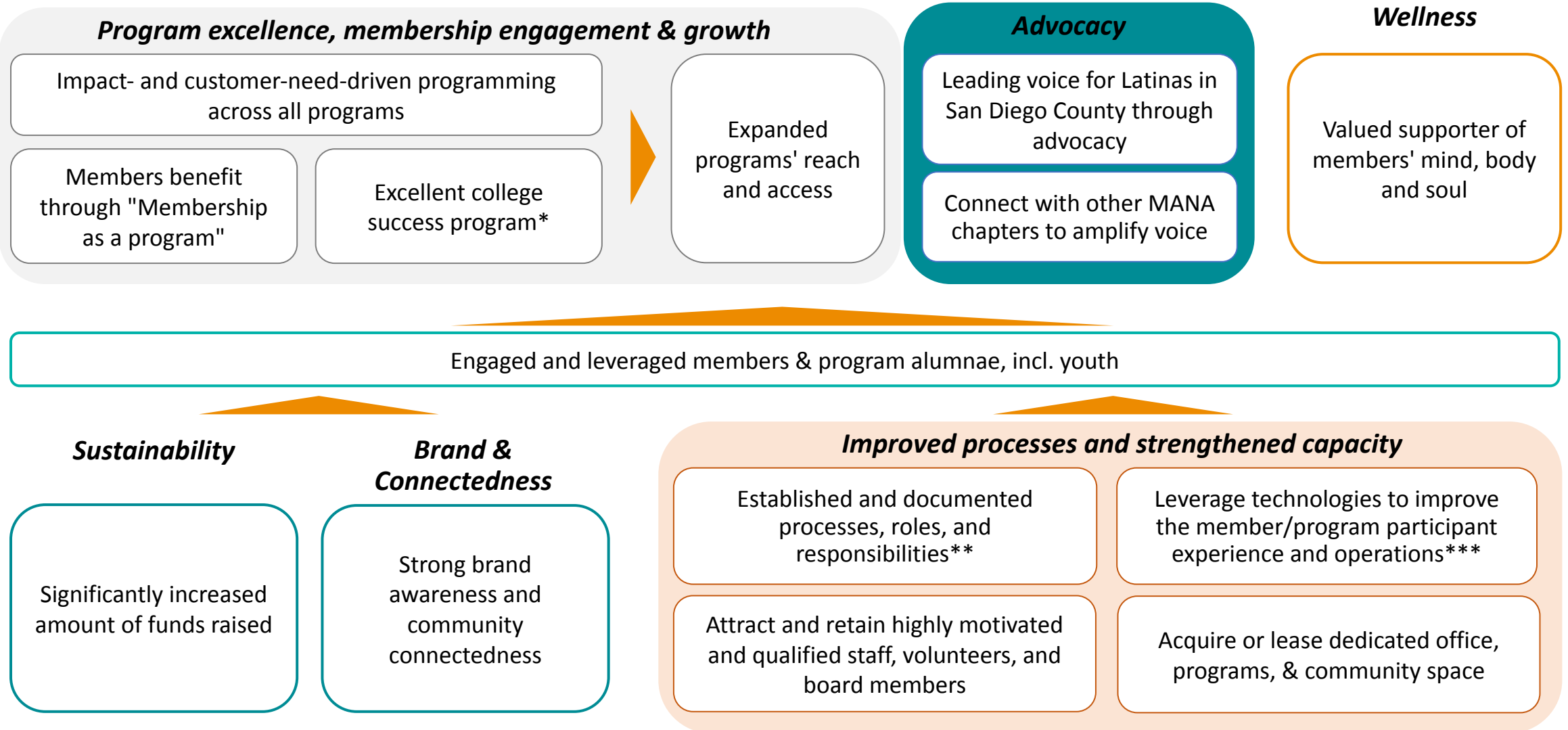
Our Mission, Vision and Values



Vision: MANASD inspires **Latinas of all ages to reach their full potential** through **education, leadership development, community building, and advocacy** by leveraging **engaged members and community partners**



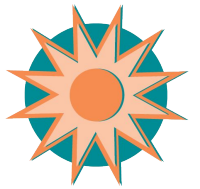
Our Strategic Goals



* incl. scholarships, mentorships, transition to the workforce or graduate programs

** incl. decision making, succession planning and board governance

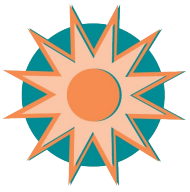
***incl. data collection, systems, and analytics capabilities



Building the MANASD Strategy Storyline

Focusing your actions and resources on where your strategy is

| | |
|-----------------|--|
| Mission | "MANA de San Diego transforms communities by empowering Latinas to achieve upward mobility and a better quality of life" |
| Vision | "MANASD inspires Latinas of all ages to reach their full potential through education, leadership development, community building, and advocacy by leveraging engaged members and community partners" |
| Strategic Goals | <ul style="list-style-type: none">• To achieve our vision, our strategic goals for the next five years are to<ul style="list-style-type: none">- provide excellent and outcome-driven programming for 7-12 grade and college students, Latinas in professional life, and our members at large (incl. membership as a program/wellness)- strengthen and expand the college success program- expand the reach of all our programs to benefit a larger number of Latinas with a focus on underserved communities- strengthen our brand and elevate our voice to influence change as an advocate for Latinas in the workforce and in our community• Enabling our growth, we aim to deepen our member engagement and expand our community partnerships, and augment the foundation of our organization by strengthening our processes and capacity, attracting and developing our talent, and securing our financial sustainability |
| Key Metrics | <ul style="list-style-type: none">• We will measure our success: <u>In five years</u> from now, MANASD aims to<ul style="list-style-type: none">- have helped 80% of its members to achieve socio-economic mobility and a better quality of life- serve 100+ Latina students in its college success mentorship program- have worked with 40+ employers agreeing to become a Latina friendly workplace- have grown its membership by 50% to 600- have doubled the number of Latinas served through its programs and events to 1000+. |
| Initiatives | <ul style="list-style-type: none">• In the pursuit of these goals, we will focus on and invest in several key initiatives over the next 5 years<ul style="list-style-type: none">- Continuous, outcome-driven improvement of existing programs (Hermanitas, LSLP, LSLC, wellness, Pi day)- College Success program enrichment and expansion- Employer partnerships to create Latina-friendly workplaces- Member programming to support professional and personal development- New programs and events to serve more Latinas |

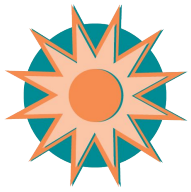


What does growth look like?

Key metrics and targets

Targets 2024-28

| Strategic Goal | Metric | Baseline | 2024 | 2025 | 2026 | 2027 | 2028 |
|---|---|-------------|------|------|------|------|----------------|
| 1. Impact- and customer-need-driven programming across all programs | % of Hermanitas alumnae attending college/post-secondary education | 100% | >90% | >90% | >90% | >90% | >90% |
| | % of LSLP participants promoted to next level in their organization | 65% | 69% | 73% | 75% | 78% | 80% |
| 2. Members benefit through "Membership as a program" | % member retention rate | 43% | 50 | 55 | 60 | 70% | 70% |
| | % of members believing MANASD has helped them to achieve upward mobility or improve their quality of life | TBD | 55% | 65% | 70% | 75% | 80% |
| 3. Excellent college success program (incl. scholarships, mentorships, transition to workforce or graduate programs) | % of CS participants completing college degree or trade certificate within 6 years of high school graduation | 93% | >90% | >90% | >90% | >90% | >90% |
| | # of CS participants completing at least one internship prior to college graduation | 2 | 4 | 6 | 8 | 10 | 15 |
| | % of CS graduates landing a job in their chosen career field or pursuing graduate degrees within 9 m after college graduation | TBD | 15% | 20% | 30% | 40% | 50% |
| 4. Expanded programs' reach and access | # of Latinas served through all MANASD programs | 550 | 600 | 700 | 800 | 900 | 1000 |
| | # college success students | 52 | 62 | 72 | 82 | 92 | 102 |
| | # of MANASD members | 400 | 440 | 490 | 530 | 570 | 600 |



What does growth look like?

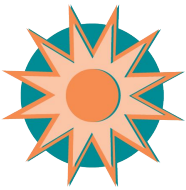
Key metrics and targets



| Strategic Goal | Metric | Baseline | 2024 | 2025 | 2026 | 2027 | 2028 |
|---|---|-----------|-------|-------|-------|-------|-------|
| Engaged and leveraged members & program alumnae, incl. youth | % engaged program alumnae | 20% | 30% | 40% | 50% | 65% | 80% |
| | % of members contributing their professional skills and expertise to MANASD for career-specific events | 10% | 17% | 25% | 30% | 40% | 60% |
| Leading voice for Latinas in San Diego County through advocacy* | #employers with 50 or more employees sign MOU to be a Latina friendly workplace by adopting relevant policies to include the elimination of Latina pay gap in org | 0 | 2 | 10 | 20 | 30 | 40 |
| | % of LSLP alumnae serve on Boards and Commissions | 10% | 25% | 35% | 40% | 50% | 50% |
| Valued supporter of members' mind, body and soul | # people attending wellness events (platicas and Wellness Fair) | 0 | 100 | 175 | 250 | 300 | 350 |
| Strong brand awareness and community connectedness | # of middle and high school partnerships in underserved areas | 2 | 2 | 3 | 3 | 4 | 5 |
| | # of college partnerships developed | 6 | 8 | 10 | 12 | 13 | 15 |
| Significantly increased amount of funds raised | \$ of funds raised | \$900,000 | 1.2 M | 1.4 M | 1.4 M | 1.4 M | 1.4 M |

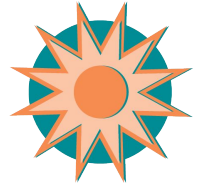
Additional detailed metrics will be tracked

Program excellence, membership engagement & growth – initiatives



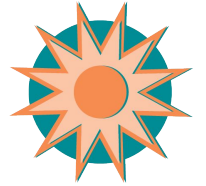
| Goal | Proposed initiatives | Initiative Start Date | Initiative Duration |
|---|--|--|--|
| 1. Impact- and customer-need-driven programming across all programs | <ol style="list-style-type: none"> Excellent program design, integration, and continuous improvement: surveys, curriculum, evaluation, reporting <ul style="list-style-type: none"> Create/redesign surveys to collect data on participant needs/preferences, and to improve programming Review/collect program evaluation data Reporting process development | <ul style="list-style-type: none"> Q2 2024 | <ul style="list-style-type: none"> 21 months |
| 2. Members <i>benefit</i> through "Membership as a program" | <ol style="list-style-type: none"> Membership as a program (platicas/speaker series) Establish affinity / networking groups | <ul style="list-style-type: none"> Q1 2024 Q1 2025 | <ul style="list-style-type: none"> 12 months 12 months |
| 3. Excellent college success program (incl. scholarships, mentorships, transition to workforce or graduate programs) | <ol style="list-style-type: none"> Scholarship integration with/expansion of CS – invite non-Hermanitas scholarship recipients to join CS Workforce readiness (including internships) College mentorship/coach program College Success Evaluation | <ul style="list-style-type: none"> Q1 2024 Q1 2025 Q1 2025 Q3 2024 | <ul style="list-style-type: none"> 27 months 24 months 24 months 18 months |
| 4. Expanded programs' reach and access | <ol style="list-style-type: none"> Parent information session/summit (community event) Latinas in SD Needs Assessment for potential expansion | <ul style="list-style-type: none"> Q1 2025 Q3 2024 | <ul style="list-style-type: none"> 12 months 54 months |

Engaged and leveraged members & program alumnae – initiatives



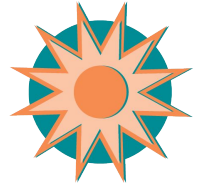
| Strategic Goal | Proposed initiatives | Initiative Start Date | Initiative Duration |
|--|---|------------------------|----------------------------|
| 5. Engaged and leveraged members & program alumnae, incl. youth | 1. Alumnae engagement | • Q3 2024 | • 9 months |
| | 2. Speakers bureau / ambassador program | | |
| | 3. Member welcome/onboarding (including formalized volunteer engagement expectations) | • Q1 2026 | • 9 months |
| | 4. Provide leadership training/coaching to volunteer leaders/emerging leaders | • Q3 2024 • Q1 2025 | • 12 months • 12 months |

Advocacy – initiatives

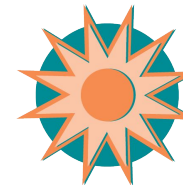


| Strategic Goal | Proposed initiatives | Initiative Start Date | Initiative Duration |
|--|---|--|--|
| 6. Leading voice for Latinas in San Diego County through advocacy | 1. Policy Watchlist 2. Voter Initiative 3. Boards & Commissions 4. Latina Friendly Workplace | <ul style="list-style-type: none"> • Q1 2024 • Q2 2024 • Q1 2025 • Q3 2024 | <ul style="list-style-type: none"> • 12 months • 12 months • 12 months • 24 months |
| 7. Connect with other MANA chapters to amplify voice | 1. MANA SoCal regional meetings | <ul style="list-style-type: none"> • Q1 2024 | <ul style="list-style-type: none"> • 12 months |

Wellness – initiatives



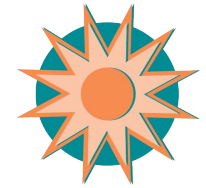
| Goal | Proposed initiatives | Initiative Start Date | Initiative Duration |
|--|---|---|--|
| 8. Valued supporter of members' mind, body and soul | <ol style="list-style-type: none">1. Wellness Fair2. Wellness platicas (including financial literacy, caregiving resources, etc.)3. Wellness resource webpage | <ul style="list-style-type: none">• Q1 2024• Q3 2024• Q4 2024 | <ul style="list-style-type: none">• 12 months• 12 months• 9 months |



Brand & Community Connectedness – initiatives

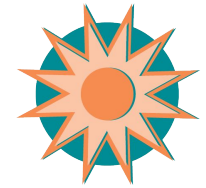
| Goal | Proposed initiatives | Initiative Start Date | Initiative Duration |
|---|--|---|---|
| 9. Strong brand awareness and community connectedness | <ol style="list-style-type: none">1. Marketing Plan2. Collaborative partner development | <ul style="list-style-type: none">• Q1 2024• Q1 2024 | <ul style="list-style-type: none">• 12 months• 24 months |

Improved processes & strengthened capacity – initiatives



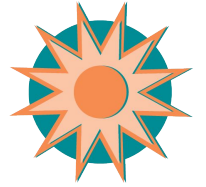
| Goal | Proposed Initiatives | Initiative Start Date | Initiative Duration |
|---|--|--|--|
| 10. Leverage technologies to improve the member/program participant experience and operations , including data collection, systems, and analytics capabilities | <ol style="list-style-type: none"> 1. Review Neon intake forms and data 2. Member communication platform texting platform 3. Systems and data assessment - evaluate data needs and current systems and data capabilities including Neon for membership management & analytics and program & outcome analytics | <ul style="list-style-type: none"> • Q3 2024 • Q2 2024 • Q4 2024 | <ul style="list-style-type: none"> • 6 months • 12 months • 15 months |
| 11. Attract and retain highly motivated and qualified staff, volunteers, and board members | <ol style="list-style-type: none"> 1. Compensation/benefits benchmarking (incl. retirement plan, professional dev) 2. Board development 3. Volunteer management program (and certification) 4. Align staff goal setting with strategic plan | <ul style="list-style-type: none"> • Q3 2025 • Q4 2024 • Q3 2024 • Q2 2024 | <ul style="list-style-type: none"> • 12 months • 12 months • 12 months • 24 months |

Improved processes & strengthened capacity – initiatives

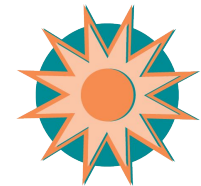


| Goal | Proposed Initiatives | Initiative Start Date | Initiative Duration |
|---|--|--|--|
| 12. Established and documented processes, roles, and responsibilities | <ol style="list-style-type: none"> 1. Decision making for organization 2. Succession planning 3. Board governance (including policy to grow endowment) 4. Strategic Plan data analytics and performance management | <ul style="list-style-type: none"> • Q2 2024 • Q2 2024 • Q2 2024 • Q3 2024 | <ul style="list-style-type: none"> • 12 months • 15 months • 12 months • 24 months |
| 13. Acquire or lease dedicated office, programs, & community space | <ol style="list-style-type: none"> 1. Commercial real estate expertise | <ul style="list-style-type: none"> • Q2 2024 | <ul style="list-style-type: none"> • 12 months |

Sustainability – initiative



| Goal | Proposed initiatives | Initiative Start Date | Initiative Duration |
|---|---|--|---|
| 14. Significantly increased amount of funds raised | <ol style="list-style-type: none"> 1. Grant funding expertise and capacity 2. Member/Individual giving campaign 3. Funds Development Board Training 4. Funds development strategy and execution plan (incl. storytelling, grant-writing, funder relationship building & management) | <ul style="list-style-type: none"> • Q3 2024 • Q3 2024 • Q2 2024 • Q1 2024 | <ul style="list-style-type: none"> • 12 months • 12 months • 9 months • 12 months |



Strategic Plan Incremental Budget

| | 2024 | 2025 | 2026 | 2027 | 2028 | Total 2024-2028 |
|---|---|---|---------------------------|---------------------------|---------------------------|-------------------------|
| Incremental budget over 2024 approved budget | \$100,000 | \$200,000 – \$225,000 | \$200,000 - \$225,000 | \$200,000 - \$225,000 | \$200,000 - \$225,000 | \$900,000 - \$1,000,000 |
| Total annual budget | \$1,200,000 | \$1,300,000 - \$1,325,000 | \$1,300,000 - \$1,325,000 | \$1,300,000 - \$1,325,000 | \$1,300,000 - \$1,325,000 | na |
| % budget growth over previous year | 33% above 2023 actual revenue; 9% above 2024 approved budget | 8% - 10% | 0% | 0% | 0% | na |
| Key Initiatives launching that are included in incremental budget | <ul style="list-style-type: none"> • 1 new FTE: data analytics, impact & grant writing project manager • CS expansion • Latina Friendly Workplace • Volunteer management & onboarding | <ul style="list-style-type: none"> • CS mentorship / coach & workforce readiness programs • Parent info session • Boards & Commissions • Leadership training for volunteer leaders • Systems assessment & enhancements | | | | |

- Incremental budget includes staff, professional services, and systems resources necessary to execute initiatives and raise funds to achieve the strategic plan goals.
- Immediate priority is to secure approval of a new staff position responsible for grant writing and data analytics to raise funds and support the creation and execution of MANA’s fund development plan.