



A Union of  
White-Williams Scholars  
& PHILADELPHIA FUTURES

# FUTURES **FORWARD**

STRATEGIC PLAN: EXECUTIVE SUMMARY

**IMPACT**

GOALS, VALUES, BELIEFS, EXPAND, LEADERSHIP, COMMUNICATION, SUSTAINABILITY, INFRASTRUCTURE, PROGRAM, LONG-TERM RELATIONSHIPS, DIRECT SERVICES, LEVERAGE, FORWARD THINKING, SUCCESS, MISSION, OPPORTUNITY, RESULTS, STRATEGIES, COLLABORATION, STRENGTHS, GOVERNANCE, REACH, RESOURCES, GROWTH, SWEET SPOT, SUPPORT, INTEGRATION, DEPTH, MOMENTUM, ENGAGE

# Uniting for the Future

Philadelphia Futures is a leader in supporting the college aspirations of low-income, first-generation-to-college students. Our ability to make a transformative impact on young people's lives and futures increased significantly in July 2011, when Philadelphia Futures and White-Williams Scholars merged. The union brought together the resources, expertise and supporters of two highly effective organizations with rich legacies and strong records of success. **To fully operationalize the merger and leverage this increased opportunity, we launched a comprehensive strategic planning process.**

The time was right for both the merger and the Strategic Plan. The needs of students attending Philadelphia high schools have never been greater: achievement gaps are widening; a crisis persists in urban education; and colleges face the challenges of diminishing resources and rising costs.

There is no doubt of the increasing

importance of a college degree in creating options for young people. Not only is a college education essential to a fulfilling life, a productive career and individual self-sufficiency, higher education also is the driver of our nation's economic and social vitality. Yet for the student populations we serve, a college education remains an elusive goal.

The strategic planning process, made possible through generous support from The Pew Charitable Trusts through the Pew Fund for Health and Human Services Capacity Building Program, set out to translate the merger's vision into actionable strategies and goals, and chart a strong programmatic and financial course to respond to a greater overall need for our services.

With oversight from a planning committee and four working subcommittees, we gathered information and opinions from more than 150 stakeholders, including staff, Board members, students, parents, alumni, donors, mentors, educators, college partners, funders and community leaders. Their insights and perspectives brought priorities into focus for the new organization. The Board approved the Plan in July 2012, and it will inform operations and year-to-year planning as we move forward.

## MISSION

**Provide low-income, first-generation-to-college students with the tools, resources and opportunities necessary for admission to and success in college.**

## VISION

**Philadelphia Futures will transform lives by breaking down barriers that have historically excluded low-income, first-generation-to-college students from college success.**

## GUIDING PRINCIPLE

**A college education is the key to economic self-sufficiency and a rewarding and successful life.**

## CORE VALUES

**HIGH EXPECTATIONS: We embrace a culture of high performance and achievement for students, staff, Board members and volunteers.**

**FOCUS: We are mission-driven and laser-focused in our service delivery.**

**RESPECT: Our work is rooted in the deep respect we have for our students, their families, our staff, volunteers and supporters.**

**ADAPTABILITY: Our programming is adaptable and reflects current thinking and trends as we continually assess the needs of our students and community, and adjust services accordingly.**

**ACCOUNTABILITY: We are data- and results-driven, and hold ourselves accountable for achieving measurable goals.**

**COLLABORATION: We seek new ways to partner with a range of individuals, businesses, colleges and nonprofit and educational organizations to create opportunities for our students.**

# Engaging in Smart Growth

The strategic planning process enthusiastically reaffirmed the strength of our work while uncovering opportunities to expand our reach and amplify our voice. **The message was clear: to fully leverage the merger we must grow, but we must do so thoughtfully and purposefully.** We must engage in smart growth.

## **REALIZING THE PROMISE OF THE MERGER**

The merger presents an extraordinary accomplishment — born not of necessity but of business savvy. The success of this bold move depends on leveraging our assets, and operating creatively and resourcefully. We must optimize cost savings and streamline our overhead. Only then can we expand programs, pilot new ideas and serve more young people.

## **STAYING TRUE TO OUR “SWEET SPOT”**

Our students are successful because we respond to specific needs and build long-term relationships as we help them navigate the journey to and through college. Intensive, individualized services drive this impact. We will continue supporting low-income, first-generation-to-college students with the services for which we are known: highly personalized, long-term support; academic enrichment; financial incentives; gender-specific programming; and careful, purposeful matches that link students with mentors, resources and higher education options.

## **EXPANDING STRATEGICALLY**

We have identified several outstanding opportunities to scale up. Drawing on current research, trends and lessons learned from our work, we will add a new model that will deliver our targeted services to more Philadelphia students. We also will connect more students to our extensive resources by embracing new media. And we will work with collaborative partners to offer a range of programming that will provide our unique services to the greatest number of students possible.

## **RAISING AWARENESS, INSPIRING SUPPORT**

The next three to five years will see our communications elevated to the next level. We will engage new audiences and raise broader awareness about our work. We will tell student and alumni success stories more widely and make the most compelling case for investing in Philadelphia Futures. We will lead an urgent conversation about the critical need for educational equity and its importance to our collective future.



The success of this bold move depends on leveraging our assets, and operating creatively and resourcefully.



# Defining Our Goals

The Strategic Plan presents **four strategic goals** that will define our aspirations, drive our work and strengthen our capacity to fulfill our mission more widely.

## GOAL 1:

**EXPAND THE DEPTH AND REACH OF OUR SERVICES** while maintaining our reputation for high-quality programming by leveraging the history, strengths and resources of White-Williams Scholars and Philadelphia Futures.

## GOAL 2:

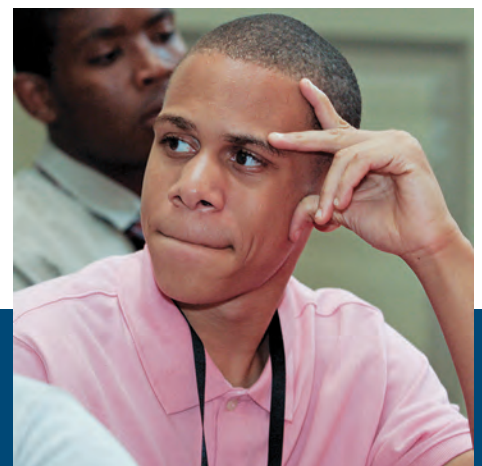
**EMPLOY A RANGE OF STRATEGIES** to impact the greatest number of students possible. We will prepare students to enter and succeed in college; understand the connection between their academic credentials and the workplace; graduate college with manageable debt; and be well positioned to lead fulfilling, financially independent lives.

## GOAL 3:

**BE A LEADER** in providing college preparation, guidance, placement and retention services for low-income, first-generation-to-college students. Our college success program will be a model at the forefront of national college retention efforts. We will be recognized as experts in the field and a valued resource for those engaged in related advocacy and policy development.

## GOAL 4:

**ENSURE OUR SUSTAINABILITY** by attracting and retaining talented employees committed to educational equity, and by deepening our relationships with a broad base of funders, volunteers and supporters who share our mission.



## DRIVING OUR IMPACT

In pursuit of the best outcomes, the strategic planning process identified the following considerations to inform all programs:

- The critical correlation between college success and the development of such non-cognitive skills as resilience, persistence and dependability.
- The need to address academic gaps that can undermine our students' success in college.
- The need to support the unique academic and psychosocial needs of young men and women with targeted, gender-specific programming.
- The critical need for financial support during college.
- The importance of leaving college with manageable debt.
- The connection between academic credentials and the needs of the workplace.
- The importance of identifying viable postsecondary educational alternatives for students for whom a four-year college is not the best option.

# Building on Our Base

To ensure that we fulfill and realize the promise of the merger to expand the depth, reach and impact of our services, the strategic planning process identified **a robust combination of proven and new programs and services** to carry out the organization's strategic goals. We are well positioned to leverage our combined resources and expertise to support student success across a range of populations, needs and desired outcomes.

## COMPREHENSIVE, ONE-ON-ONE SERVICES

### SPONSOR-A-SCHOLAR

Our flagship, highly successful Sponsor-A-Scholar (SAS) Program will continue to serve low-income, first-generation-to-college students attending Philadelphia's public high schools from ninth grade through college completion. SAS will serve approximately 400 students annually, with an emphasis on recruiting students from the City's neighborhood public schools.

We will continue to provide a deep and rigorous array of services and resources, including long-term mentoring; academic enrichment; intensive, personalized college guidance, placement and retention services; gender-specific programming; and \$6,000 for college-related expenses. Recognizing the powerful impact of combining high-touch support services and financial resources, SAS students will be eligible to receive **White-Williams Scholars** financial awards while in high school.

### COLLEGE CONNECTION **NEW**

Our redesigned College Connection Program will provide intensive and personalized college guidance, placement and retention services to low-income, first-generation-to-college students who demonstrate college readiness. College Connection will serve students attending Philadelphia's public, public charter and parochial high schools beginning in eleventh grade and continuing through college completion. College Connection students will receive the benefit of Philadelphia Futures' college partnerships and also will be eligible to receive **White-Williams Scholars** financial awards during college.

The new College Connection will have the potential to serve 800 students each year. The per-student cost for the College Connection model is projected to be approximately 50% of the per-student cost for the SAS Program, thus allowing for greater scale.

## COMMUNITY OUTREACH

### STEP UP TO COLLEGE

Philadelphia Futures' popular guide, *Step Up to College*, will continue to be published annually in hard copy and, to eliminate any barrier to access, will be distributed without cost to students attending Philadelphia's public, public charter and parochial high schools.

To broaden our reach, *Step Up to College* content will be made available through new media platforms. Facebook, Twitter and cell phone text alerts will provide timely college admissions information to students and their families.

### CONSULTING/MANAGEMENT/ ADMINISTRATIVE SERVICES

We will offer organizations and institutions a range of consulting services that reflect our know-how and incorporate elements of our proven programs, including scholarship and award management and college retention services.

Our continued administration of the **Charles E. Ellis Trust for Girls** will allow us to impact and improve the academic lives of over 600 Philadelphia girls annually, who live in low-income, single-parent households and attend public, public charter, parochial and independent high schools. We will use our expertise to enhance the experience of Ellis Trust grant recipients as they prepare for postsecondary success.

### PUBLIC EVENTS, WORKSHOPS AND CONFERENCES **NEW**

We will offer a variety of public events, workshops and conferences in partnership with high schools, colleges and community-based and other youth-serving organizations. These events will reach low-income, first-generation-to-college students and their families in our target population who are interested in applying to college. Programs will provide information about college admission, guidance in college selection and assistance in the college application and financial aid processes.



# Leveraging the Merger

When Philadelphia Futures and White-Williams Scholars came together in July 2011, **we were a bit like Noah's Ark**. We had two of everything — from staffs and Boards, to offices and financial systems. On the technology side, we had two computer systems and even three database programs.

The success of the merger clearly depended on our ability to engage subcommittees of the Planning Committee in the tasks of eliminating these redundancies, maximizing cost efficiencies, integrating the staffs, and bringing energy and focus to issues of infrastructure, Board governance and development.

Our development efforts will focus on forging a robust fundraising program that will deepen relationships with long-term funders of both organizations.

## STREAMLINING OUR INFRASTRUCTURE

The Infrastructure Subcommittee took a disciplined, thoughtful approach to considering the many issues associated with a merger of this type.

**Office Space:** Fortuitously, the office suite adjacent to Philadelphia Futures' offices at 230 South Broad Street became available. We decided to expand this space and sublet the White-Williams Scholars office. The move was completed by June 26, 2012, reducing overall square footage by 20%.

**Technology:** We integrated all computers into one system with a powerful network server that will accommodate a growing organization. The more advanced of the organizations' existing databases were chosen to support our student-tracking, program evaluation and development functions.

## BUILDING A STRONG, COHESIVE BOARD

The Board Governance Subcommittee performed a complete review of Board governance issues and how the newly combined Board would function moving forward.

**Bylaws:** We identified the bylaw provisions that would best reflect current Board thinking and offer the strongest foundation for effective governance. The Board adopted the proposed amendments to the bylaws in July 2012.

**Board Composition:** It was important for the new organization to maintain stability and continuity and honor the terms of all existing Board members while constructing a Board of optimum size and composition, allowing for new members. Future candidates for membership will reflect our commitment to having a Board that offers a diverse set of backgrounds, expertise and perspectives.

## EXPANDING OUR BASE OF SUPPORT

The Development Subcommittee identified core tactics to meet the funding needs driven by the Strategic Plan and ensure the sustainability of the combined organization.

Our development efforts will focus on forging a robust fundraising program that will deepen relationships with long-term funders of both organizations; expand cultivation efforts of new donors; launch a major gifts program; develop a case for support for the new organization; and engage alumni as a source of funding, volunteer resources and professional networks for our students.



PHILADELPHIA  
FUTURES

A Union of  
White-Williams Scholars  
& PHILADELPHIA FUTURES

230 South Broad Street  
7th Floor  
Philadelphia, PA 19102  
215-790-1666  
[www.philadelphiafutures.org](http://www.philadelphiafutures.org)

Joan C. Mazzotti  
Executive Director

 [www.facebook.com/philadelphiafutures](http://www.facebook.com/philadelphiafutures)

 @PhillyFutures