



OE Enterprises

## **OE Enterprises 2022-2025 Strategic Plan**

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## **Overview**

This strategic plan is the result of a comprehensive organizational assessment that included interviews and focus groups with board, staff, clients and stakeholders and two half-day virtual board and staff retreats and follow up meeting.

OE Enterprises determined the critical issues to be addressed and discussed strategies to ensure a solid infrastructure, quality and sustainable programming, and effective marketing and public relations strategies, and impactful resource development. The goals, objectives, and strategies outlined in this 3-year plan are based on the issues and strategies discussed during the strategic planning retreat as well as the recurring themes identified through data from all stakeholders. This framework that guided the creation of this plan is summarized below:

**Vision statement** describes what you want the organization to look like in ideal terms in the future—the results you will be achieving and characteristics the organization will need to possess in order to achieve those results. The strategic vision provides direction and inspiration for organizational goal setting.

**Mission statement** is a broad statement of what an organization does, with/for whom you do it, your distinctive competence for doing it, and WHY you do it (the ultimate end).

**Goals** are global and general in nature, providing an overall sense of direction. They often refer to the distant and ultimate “prize” such as the reductions in morbidity and mortality, or increase in quality of life.

**Objectives** or “deliverables” are specific statements describing changes that will be the direct and immediate results of your efforts. They often refer to changes in knowledge, awareness, attitudes, skills, beliefs, behaviors, or organizational infrastructure. More than one objective may be needed to reach your goal. Objectives are specific, measurable, appropriate, realistic, and time-based.

**Strategies** are specific statements about what actions or steps will be taken to accomplish each outcome objective. Strategies are a means to an end. They are things that must be done by someone to accomplish an objective. They might be thought of as “to do lists.”

### **Strategies to ensure successful implementation of the plan are as follows:**

- Quarterly progress reports on strategic planning activities.
- Use the strategic plan as a point of reference when the board and staff are considering the merits of a particular course of action.
- Create action plans for each work group, committee and staff consistent with their responsibilities associated with the plan.
- Have the Executive Director, and OE Enterprises Board Committees and staff provide verbal *and* written updates on their plan-related actions in quarterly reports.
- Celebrate accomplishments and successes as the plan is implemented. Successes can be celebrated through the OE Enterprises events, social media, email blasts and recognition at regular board meetings.



### **Mission Statement**

Creating opportunities for personal and professional growth for persons with disabilities and other barriers.

### **Vision Statement**

OE Enterprises is a thriving business that promotes achievement, self-reliance, life choices and respect through relationships with community partners.

### **Board of Directors**

Sultan Qureshi  
Ingrid Conley  
Lucinda Munger  
Charlie Cleary  
Michael Parker

### **Executive Staff**

Margaret Samuels, Executive Director  
Audra Hamilton  
Donna Musson  
Tracey Craven  
Amy Miller  
Murphy Faber  
Tonya Johnson  
Denise Puryear  
Joe Bumgarner

## OE Enterprises Strategic Plan 2022-2025

### GOAL ONE: Engage in a Fundraising Strategic Planning Process and Implement Goals identified in Fundraising Strategic Plan

**Objective 1:** Engage a consultant to develop Fundraising Strategic Plan.

Strategies	Responsible Person(s)	Beginning Date	Completion Date	Deliverables/Status
1. Hire consultant to engage in Fundraising strategic Plan for OE.	Board, CEO	October 2022	November 2022	Hire consultant
2. Develop a Comprehensive Fundraising Plan. <ul style="list-style-type: none"> <li>▪ Identify resources needed to fundraise.</li> <li>▪ Set goals for fundraising.</li> <li>▪ Identify necessary individuals (Board/Staff) for fundraising.</li> </ul>	Consultant, Board, CEO	November 2022	January 2023	Fundraising plan

### GOAL TWO: To implement a comprehensive and effective marketing and public awareness strategy to increase awareness and outreach.

**Objective 1:** Create a comprehensive marketing strategy to reach OE Enterprises audiences to increase funding, grow client base and community partners.

Strategies	Responsible Person(s)	Beginning Date	Completion Date	Deliverables/Status
1. Review and revise the mission statement and vision statement.  <i>Note:</i> Refer to the OE Mission and Vision Statement Questionnaire summary and compilation. <i>Key suggestion:</i> make clear reference to employment to differentiate from other nonprofits missions.	Ad-Hoc Committee (Sultan, Ingrid, Tracey)	October 2022	October 2022	Revised mission and vision statement
2. Hire marketing/PR consultant to assess and review marketing and PR needs (name recognition, website reach, etc.)	Consultant, CEO, Board Work Group	November 2022	November 2022	Hire consultant
3. Develop a comprehensive marketing plan. <ul style="list-style-type: none"> <li>▪ Identify and understand OE Enterprises target audiences' motivations, needs and interests.</li> <li>▪ Develop specific messages to various audiences.</li> </ul>	Consultant, Board, Staff/CEO	December 2022	April 2023	Marketing plan

Goal Two, Contd.

<b>Objective 1:</b> Create a comprehensive marketing strategy to reach OE Enterprises audiences to increase funding, grow client base and community partners.				
<b>Strategies</b>	<b>Responsible Person(s)</b>	<b>Beginning Date</b>	<b>Completion Date</b>	<b>Deliverables/Status</b>
<p>4. Revise collateral materials to ensure consistency of language/terminology.</p> <ul style="list-style-type: none"> <li>▪ Clients vs consumers; clients, employers and staff (Employee Council)</li> </ul>	Staff/CEO	April 2023	October 2023	Revised terminology on all materials
<p>5. Revise collateral pieces/website and incorporate key data points/impact data and statistics that make a case for the need and support organizational success. (national and local data; data related to youth/young populations)</p> <ul style="list-style-type: none"> <li>▪ Create collateral materials to leave with employers who are actively hiring that specifically describe the organization’s focus and capabilities.</li> </ul>	Staff/CEO Consultant	April 2023	October, 2023	Revised website
<p>6. Develop and implement an ongoing social media strategy.</p> <ul style="list-style-type: none"> <li>▪ Use appropriate social media platforms as informed by member preference.</li> <li>▪ Established a robust LinkedIn page. Expand social media presence by creating an Instagram account.</li> </ul>	Staff/CEO Consultant	January,2023	December, 2023 Ongoing	Ongoing strategic social media posts
<ul style="list-style-type: none"> <li>▪ In collaboration with fundraising goals-assess feasibility of event and create a strategy with the primary goal of fundraising and raising awareness.</li> <li>▪ Assess feasibility of holding events in collaboration with local communities to recognize employers and employees affiliated with OE Enterprises with certificates for Employer/Employee of the Year.</li> <li>▪ Events will serve to celebrate successes and promote the organization.</li> <li>▪ Enhance virtual activities.</li> </ul>	Consultants; Board; Board fundraising committee	January 2023	March, 2024	Written event assessment Telehealth/virtual event enhancements

Goal Two, Contd.

<b>Objective 1:</b> Create a comprehensive marketing strategy to reach OE Enterprises audiences to increase funding, grow client base and community partners.				
<b>Strategies</b>	<b>Responsible Person(s)</b>	<b>Beginning Date</b>	<b>Completion Date</b>	<b>Deliverables/Status</b>
1. Create paths for sharing success stories.	PR & Marketing Committee/Staff	March 2023	Ongoing	Shared success stories
2. Engage clients and families to get involved with social media posts so that it facilitates the organization's marketing efforts.	Clients/Caregivers/Staff	March 2023	Ongoing	Documented client/family involvement

**GOAL THREE:** OE Enterprises will strengthen infrastructure to ensure and grow organizational capacity.

<b>Objective 1:</b> To enhance the current orientation and onboarding program for board members, board chairs and committee members and ensure engagement and to assist with recruitment efforts to ensure expansion a diverse board.				
<b>Strategies</b>	<b>Responsible Person(s)</b>	<b>Beginning Date</b>	<b>Completion Date</b>	<b>Deliverables/Status</b>
1. Develop position descriptions for the board officers, committee chairs and members.	Executive Director Governance Committee	January 2023	April 2023	Position descriptions
2. Develop an inventory of board member's expertise and skills to align with organizational needs and develop a recruitment process to fill the gaps.	Governance Committee	February 2023	February 2023	Matrix showing board inventory
3. Provide a comprehensive board packet and orientation session to new board members including: timeline of history, accomplishments, minutes, conflict of interest, harassment free work place, by-laws.	Executive Director Governance Committee	February 2023	April 2023	Enhanced board orientation packet and onboarding session
4. Develop a board member scorecard to assess participation and contributions of members.	Executive Director Board Development	February 2023	April 2023	Board scorecard

Goal Three, Contd.

**Objective 1:** To enhance the current orientation and onboarding program for board members, board chairs and committee members and ensure engagement and to assist with recruitment efforts to ensure expansion a diverse board.

Strategies	Responsible Person(s)	Beginning Date	Completion Date	Deliverables/Status
5. Explore a structured interview process for board recruitment. <ul style="list-style-type: none"> <li>▪ Invite potential board members to participate in a board meeting and/or serve on a board committee.</li> <li>▪ Create a standardized candidate questionnaire.</li> <li>▪ Develop platforms/processes for members to meet candidates.</li> </ul>	Executive Director Governance Committee	February 2023	April 2023	Implemented structured board recruitment interview process

**Objective 2:** Ensure organizational capacity and support practices for a flourishing work environment

Strategies	Responsible Person(s)	Beginning Date	Completion Date	Deliverables/Status
1. Assess the feasibility and funding (fundraising) for a care coordinator personnel to ensure the existence and maintenance/updates of referral list and support system for clients and partnership opportunities.	Program Directors/Managers/ CEO	January 2023	April 2023	Job description for care coordinator position

**Objective 3:** To assess staffing needs, provide appropriate training and support to existing staff and engage external expertise as needed.

Strategies	Responsible Person(s)	Beginning Date	Completion Date	Deliverables/Status
1. Expand and review IT strategic plan. <ul style="list-style-type: none"> <li>▪ Identify and prioritize technological needs and new ways to provide services using technology.</li> <li>▪ Identify the appropriate level of technology that is compatible to government agency platform when applicable.</li> </ul>	Consultants/Staff	July 2022	December 2022	IT strategic plan
2. Enhance agency offerings for staff that may include tuition reimbursements and additional paid professional development opportunities and consider milestone incentives.	HR/CEO	December, 2022	Ongoing	Documented tuition reimbursements and professional development



Goal Three, Contd.

<b>Objective 3:</b> To assess staffing needs, provide appropriate training and support to existing staff and engage external expertise as needed.				
Strategies	Responsible Person(s)	Beginning Date	Completion Date	Deliverables/Status
3. Explore possibilities with local universities; community colleges; etc. to support staff and provide a path for hiring and training. <i>Note:</i> The nature of work may be subject to regulations limiting the scope of available applicants.	Staff/CEO	February 2023	June 2024-25	Partnership with 2-3 universities and colleges (MOU Established)

**GOAL FOUR:** To build a solid infrastructure to support and maintain a quality Community Integrated Services and services model that is efficient, appropriate and impactful. *Note:* The focus of programming will be that which drives outcomes and impact.

<b>Objective 1:</b> Ensure that OE is providing cutting edge; evidence based/informed and effective services that meet the needs of clients, caregivers and the community.				
Strategies	Responsible Person(s)	Beginning Date	Completion Date	Deliverables/Status
1. Conduct a gap analysis of current and potential services offered. Consideration funding sources private pay, venture capital and general fundraising to support expansion.	Staff, CEO, Program Committee	September 2023	September 2024	Written gap analysis of programming/ services
2. Develop a criteria for new program and program enhancements. <ul style="list-style-type: none"> <li>▪ Identify programs that are sustainable and align with OE mission.</li> </ul>	Program Staff	September 2023	September 2024	Written criteria for program enhancements
3. Explore long-term expansion that includes: expanding summer offerings for transition programs; high school transition services; additional MCO endorsed services and private pay for individuals with disabilities.	Staff, CEO, Program Committee	September 2023	September 2024	Summary and prioritization of potential long-term expansion

Goal Four, Contd.

<b>Objective 2:</b> Establish partnerships with high schools expanding to 2-3 additional counties over a 3-year period.				
<b>Strategies</b>	<b>Responsible Person(s)</b>	<b>Beginning Date</b>	<b>Completion Date</b>	<b>Deliverables/Status</b>
1. Identify and contact local schools to establish partnerships.	Transition Staff	September 2022	December 2025	2-3 partnerships with schools
2. Identify homeschooled students via the homeschool network.	Transition Staff	January 2023	December 2025	2-3 partnerships with homeschool networks

<b>Objective 3:</b> Build current partnerships/referral sources and maximize existing relationships.				
<b>Strategies</b>	<b>Responsible Person(s)</b>	<b>Beginning Date</b>	<b>Completion Date</b>	<b>Deliverables/Status</b>
1. Continue to build partnerships with nonprofits and agencies to meet the needs of clients and their families. <ul style="list-style-type: none"> <li>▪ Identify needed services and referrals like financial planning housing referral sources and those that address social determinants of health.</li> </ul>	Program Staff	October 2022	Ongoing	List of needed services and established partners to assist
2. Implement a recognition and appreciation strategies for employer partners to help increase network of employers.	Community Staff	January 2023	June 2023	Quarterly recognition strategies
3. Build partnerships with trade groups, restaurant associations and chambers of commerce.	Community Staff	June 2023	December 2023 Ongoing	2-3 new partnerships
4. Identify geographical area where the majority clients are concentrated and tailor employer recruitment efforts accordingly.	Community Staff	June 2023	December 2023 Ongoing	Documented recruitment efforts in identified areas

Goal Four, Contd.

<b>Objective 4:</b> Explore land use revenue opportunities and program enhancements.				
<b>Strategies</b>	<b>Responsible Person(s)</b>	<b>Beginning Date</b>	<b>Completion Date</b>	<b>Deliverables/Status</b>
1. Establish a work group to determine how to utilize OE property in Hillsborough (paid parking spaces, onsite childcare services, onsite housing or rentals for tourism.) <ul style="list-style-type: none"> <li>▪ Focus on scope and use of land and how government regulations impact any plan.</li> </ul>	Land Use Work Group	June 2023	December 2024	Confirmation of utilization of OE property and steps for implementation

<b>Objective 5:</b> Evaluate OE’s comprehensive evaluation methodology to monitor and report program impact.				
<b>Strategies</b>	<b>Responsible Person(s)</b>	<b>Beginning Date</b>	<b>Completion Date</b>	<b>Deliverables/Status</b>
1. Ensure that software and data programs capture and track data includes performance metrics and quantitative data collection.	Senior Management Senior Staff	January 2023	January 2024	Analysis of software and data reports
2. Enhance and build on current evaluation methodology for all program components and create reports. <ul style="list-style-type: none"> <li>▪ Determine measure objectives/success metrics.</li> <li>▪ Determine data collection methodology.</li> <li>▪ Develop various reports that need to be prioritized.</li> </ul>	Senior Management Senior Staff	March 2023	December 2023 Ongoing	Written evaluation methodology and data reports
3. Expand an evaluation process to assess community partnerships/events.	Senior Management Senior Staff	January 2024	April 2024	Written evaluation methodology and collection of data

**GOAL FIVE:** OE Enterprises will build and sustain impactful legislative and advocacy activities.

**Objective 1:** OE Enterprises will build and sustain impactful legislative and advocacy activities and respond to emerging policy issues.

Strategies	Responsible Person(s)	Beginning Date	Completion Date	Deliverables/Status
1. Engage elected officials to understand the needs of the community.	Board, CEO, Clients and Caregivers	January 2023	Ongoing	Presentations to public officials
2. Continue to build relationships with current advocacy partners and consider developing an educational or marketing component to OE advocacy work.	CEO/Staff	January 2023	Ongoing	Added advocacy components
3. Engage employees to help them understand partnering with the organization and employing their clients.	Community Staff	January 2023	Ongoing	Session with employees and documented engagement
4. Identify like-minded organizations with which to partner to advance advocacy work collectively.	CEO/Staff	January 2023	Ongoing	Confirmed partnership with 2-3 new organizations annually
5. Continue to implement an effective advocacy campaign to engage clients and families to participate in OE advocacy work. <ul style="list-style-type: none"> <li>▪ Use social media platforms to promote advocacy work being done and reach members who not already engaged.</li> <li>▪ Work through the clients within a geographic area to provide access to networks of clients and their caregivers to assist with advocacy work.</li> </ul>	Staff/CEO	January 2023	Ongoing	Annual campaign completion Documented increase of clients involved

**GOAL SIX:** OE Enterprises will continue to build a culture that supports and values diversity and inclusion.

**Objective 1:** OE Enterprise board, staff, consumers and partners will reflect diversity of the profession and the communities served.

Strategies	Responsible Person(s)	Beginning Date	Completion Date	Deliverables/Status
1. Continue to offer ongoing REI training for staff.	HR	July 2022	Ongoing	Annual REI training
2. Assess current policies that support diversity, accessibility and inclusion and address those areas for which there is a disconnect.	HR/CEO/Board	October 2022	March 2023	Review and revision of policies
3. Define the dimensions of diversity that exist in the communities served.	Program Staff	January 2023	March 2023	Analysis of landscape and alignment with strategic services

## EVALUATION AND MANAGEMENT PLAN

Evaluation and management must go hand-in-hand with implementation of the OE Enterprises Strategic Plan. Ongoing assessment is vital for several basic reasons: accountability, quality improvement, and predicting future needs and resources. Evaluation and management of the strategic plan will help to provide a clear understanding of the strengths and effectiveness of the organization's program, marketing, and advocacy strategies and will help identify areas that need addressing.

OE Enterprises will take the following steps to ensure implementation and evaluation of the Strategic Plan:

- The Board Chair and CEO will request that each person(s) responsible for carrying out specific goals and objectives provide *brief* written reports/updates on a quarterly basis and will be distributed in board packets.
- The Board Committee Chairs and Senior Management will share summary of written reports with the full Board to ensure board engagement.
- The Board will use the strategic plan document as a guide for discussion and next steps. Board Committee Chairs and Staff will serve as the key group of leaders who will provide ongoing review of the plan.
- The Board and the CEO will modify the evaluation and management plan as needed.
- The Board and the CEO will hold a designated meeting specifically to thoroughly review, assess and update the strategic plan at least annually.