



THE JUNIOR LEAGUE OF SAN FRANCISCO, INC.

Strategic Plan (2021-2024)

Approved May 11, 2021

Mission Statement:

The Junior League of San Francisco, Inc. is an **Organization of Women committed to:**

- **Promoting Volunteerism**
- **Developing the Potential of Women** and
- **Improving Communities**

through the Effective action and Leadership of Trained Volunteers. Its purpose is exclusively educational and charitable.

Introduction:

The 2021-2024 Strategic Plan is based on feedback from the members of the Junior League of San Francisco (“the League”) and our community partners. The Strategic Plan aims to create meaningful engagements across the organization and focus on foundational goals to operate in a more effective and fulfilling manner internally while aligning to the mission statement and our priorities.

Success of the plan is predicated on partnering with all members, committees and leaders across the League. While Diversity, Equity and Inclusion (“DEI”) goals are not specifically written into the plan, the Strategic Planning committee should work closely with the DEI committee to ensure that the goals are inclusive and in support of diversity.

Goal 1: Education and Training

With the new membership model rolling out, and other organizational changes to the Junior League of San Francisco, it is essential that the League’s training plan is purposeful, transparent, and flexible. It should highlight leadership opportunities and be relevant to members of any status (Prospective to Sustainer). To support this, the training plan should build-in both required and á la carte training for members at every level. When members were asked to select which goal was most important to them, one-third of respondents selected “education and training.”

What Success Looks Like:

- A trained leadership team that is ready to implement the JLSF’s goals and objectives.
- Annual “refresher” trainings regarding important topics¹
- The Junior League of San Francisco being viewed as a training organization by both League and community members.

¹ Possible sources: Training Ad-Hoc documents/leader from 2019-20, Annual Member Survey



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By 2024, the Junior League of San Francisco will develop and implement a comprehensive education and training program for members at every level of engagement.

1. By May 2022, the League will draft guidelines for training that touch every aspect of League membership: prospective and new members, active members, sustainers, and current leadership (Board, EMT, chairs).²
 - a. By 2022-2023, The League will establish succession guidelines for the education and training plan.³
2. By 2022-2023, the League will assess and identify gaps in member training and education, utilizing past research and current member feedback.⁴ The League will also assess gaps in conjunction with the revised purpose and community focus area.
 - a. Identify Categories for all trainings/events.⁵
 - b. Develop a framework⁶ for categorizing and connecting all trainings and events to each member's personal membership plan.⁷
 - c. Create a template for a database of outside trainers and consultants that have worked with JLSF in the past and establish protocol for building a database.
3. By 2023-2024, the League will implement the plan.
 - a. With the intention of having the ability to evolve the plan based on feedback and League needs for 2023-2024 League year and beyond.

Goal 2: Defining and Communicating Our Priorities

At this time, there is no defined consensus on the priorities of our Mission Statement. In order to create a mission-based culture, the League will need to identify a set of priorities and examine our current programs and fundraising in order to align activities to the priorities within the Mission Statement.

What success looks like:

- A clear understanding of the League's mission and priorities by members that can be articulated in a common way
- Understanding and recognition of the League's purpose and priorities within our community partners

² Including opportunities for AJLI conferences, Organizational Development Institute, etc.

³ For example, training EMT and Board members in the logistics of the committees they supervise; clearer guidelines for committee leadership handoff.

⁴ For example, Fundraising, DEI Responsibility, Member Requirements, Leadership Paths, etc. These are akin to "Sexual Harassment Prevention Training" in a workplace.

⁵ Examples: Core Competencies, JLSF Required, Mission, Impact Area, Community Interactions, Personal Growth, etc.

⁶ This can be based on AJLI recommendations, other Leagues' frameworks, or by hiring a consultant.

⁷ New Membership Model, when established



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- Alignment of the purpose and priorities in key League activities like fundraising, community involvement and education

By 2024, the Junior League of San Francisco will identify our priorities within the Junior League Mission Statement and enable League members to feel connected to the priorities, thus creating a mission-based culture. The League will ensure members can clearly articulate the mission and the priorities and connect our work through fundraising, community service and training and education.

1. By May 2022, the priorities within the League's Mission Statement will be clearly defined. The priorities should be inclusive of the League for individual members, the organization as a whole, and the community.⁸
 - a. By May 2022, a process for reviewing and updating priorities will be developed to ensure the priorities remain aligned with League and community needs.
 - b. By May 2022, a process will be developed for auditing other community organizations offerings to prevent overlap and broaden League members' opportunities.
2. By May 2023, all League members will be able to identify the priorities and can promote the work of the League, internally and externally.
 - a. By May 2023, a rationale should be developed so that individual members can develop an "elevator pitch" for League priorities.
 - b. By May 2023, a library of communication materials will be developed for internal and external use helping to illustrate the Mission Statement and the League's priorities.
3. By May 2024, the Junior League of San Francisco will communicate the priorities and the purpose to the broader community in San Francisco through an awareness campaign.

Goal 3: Streamlined Operations

A streamlined approach to operations enables the League to meet strategic goals while also giving members a meaningful and satisfying experience. Financial sustainability is critical to the League's long term success and needs to be embedded and prioritized within the organization. Improving efficiency, both structurally and operationally, reduces burnout and allows focus where the League can have the most impact. Streamlined and purpose driven processes improve the member experience, empower members to take action, and reduce friction for members and leaders.

What success looks like:

- Operational responsibilities are distributed more evenly throughout the League, reducing burnout and increasing member empowerment, agency and enjoyment.

⁸ The priorities should address, but are not limited to: fundraising and financial objectives, training and education, community impact, diversity, equity and inclusion, and be compared to what other organizations are offering in the San Francisco community.



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- League members understand how to document and share their League work and how to transition year over year, resulting in fewer issues related to knowledge transfer raised via membership surveys and other forums.
- Clearly defined roles and processes for finance will result in more interest to participate on finance, audit and endowment committees.
- Financial policies and procedures will be clearly outlined so there is less friction during budgeting and audit cycles.
- The League is able to leverage the endowment to support new engagement.

By 2023, the League will develop, document and implement processes to ensure continued organizational alignment with the League's purpose and to ensure continued operational and financial sustainability.

1. In 2021-2022, Operational processes will be streamlined and simplified to provide a framework for efficient decision making and member empowerment for getting things done. All frameworks will be reviewed by the Diversity, Equity, and Inclusion Officer for feedback.
 - a. The Secretary will guide the leadership team in developing operational guidelines, an authority matrix, and remediation process for handling issues as they arise.
 - b. The Membership Events and Programming (MEP) committee⁹ will develop and document best practices on documentation, knowledge management and knowledge transfer. Best practices will be updated annually.
 - c. A best practices training module will be developed as either required training for all members or by training an accountable committee member or Chair¹⁰ from each committee who will train her committee.
2. Beginning in 2022-2023, the Strategic Planning committee will evaluate the effectiveness of the League structure annually
 - a. The committee will develop a framework to assess organizational functionality to support execution of the Strategic Plan. Changes proposed and approved by the Board will be implemented in the following year.
3. By 2023, financial management practices and processes will be evaluated and changes will be implemented.
 - a. In 2021-2022, a JLSF committee¹¹ will review, simplify and document clear expense, audit, budgeting and reporting processes¹².
 - b. In 2021-2022, a JLSF committee, in collaboration with Finance, the Treasurer, and the

⁹ Or it's successor

¹⁰ Including New Member Education

¹¹ Committee to be identified by the Strategic Planning committee in partnership with the Finance committee

¹² Processes could include: a chart of accounts including accountability, process and cadence to support simplified operations, moving to a 3 year budget cycle; Non profit financial KPIs to be reported monthly to the Board, including important ratios required for non profit status.



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Treasurer-Elect, will review and clarify financial roles and responsibilities.¹³

4. In 2021-2022, the investment advisory committee will review and update the endowment strategy so that it enables the organization to achieve the goals set in the Strategic Plan.

Goal 4: Community Focus

While the current focus areas are important to the community, they do not meet all of the League's needs. A coherent, clear, and relatable focus area will drive clearer decision making, connection, and communication for the Junior League of San Francisco.

What success looks like:

- Members are able to articulate the focus area, root causes, facts and the League's impact.
- Junior League San Francisco ("JLSF") members can demonstrate its impact on the community via its focus area in its fundraising and recruiting efforts.
- League programming will be aligned to the focus area in order to educate League members on the focus area.
- The League will be able to act to community needs in a timely fashion.

By 2024, the League will transition to a new focus area that is connected to our League's Mission Statement and priorities. The new focus area will be prevalent across training and education, fundraising and programming.

1. By May 2022, the Strategic Planning committee will identify and make a recommendation for a meaningful focus area.
2. By May 2023, the League should begin its transition of community partners to the new focus area.
 - a. Transition will include the shift of community partners as well as evaluation and budget inclusion of spending mix for direct community partner grants enabling funds.¹⁴
3. By 2023-2024, the JLSF should develop a programming and education track to support member training in the focus area and how we support.¹⁵

¹³The following will occur as changes are implemented: knowledge transfer best practices will be developed in conjunction with the MEP committee; Training will be developed in partnership with the MEP committees to support all roles/responsibility; The Audit committee and the Treasurer will meet with the Strategic Planning Officer on an annual basis to ensure the League is structured to meet financial sustainability goals.

¹⁴ Determination and justification of the right balance of focus area partnerships and League agility to enable response to critical issues throughout the year

¹⁵ Included in the training should be recognizing members' own privilege and how to support our community partners effectively.