



PALMER scholars



2019 – 2022 Strategic Plan

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Our Story

The story of Palmer Scholars cannot be told without sharing its beginning--one man's very personal reaction that became a resolution, grew to commitment, evolved to a mission, and, through passion and hard work, became Palmer Scholars. Many of us have an inspired idea, but too few of us apply what it takes to nurture and develop that thought into something that touches and improves countless lives. **Merle Palmer did.**

While serving on a US Navy vessel during WWII, Merle observed sailors of color, perhaps more closely than he ever had in his hometown of Tacoma, WA. Up through the 1960's most or many schools were segregated, if not by design, then by neighborhood distribution. It was rare for people of color to live in the same neighborhoods as whites, and district borders were often drawn to accommodate those social/economic divisions.

Living in the close quarters of a warship, Merle observed that his colleagues of color were assigned to very distinct duties...doing laundry, changing bed linen, swabbing decks, peeling potatoes and other kitchen duties. He also noticed that, no matter how well they followed orders and executed their jobs, his colleagues of color received little recognition and certainly no opportunity for promotion to a higher rank.

This injustice disturbed Merle. Naval service was voluntary. These men had made the same commitment to their country and were exposed to the same dangers as sailors with white skin. He saw their abilities ignored, their skills underutilized and their sacrifice less honored. Merle resolved to find some way....if he returned from the war....to right this injustice.

After returning to Tacoma, Merle, a Christian and active member of a Presbyterian Church, began teaching Sunday School classes to young people at Reverend Al Davis' Eastside Church. In Reverend Davis Merle found a colleague with a similar vision and interest in supporting youth. They would later work together toward their shared goal.

One Sunday after class, Merle was talking to two Lincoln High School seniors and asked, "Hey boys, where are you guys going to college?" The boys were speechless. They looked at Merle like he was crazy. "College?? We're not going to college!! We can't afford college!!"

Merle knew these boys and, like the sailors on the ship, knew they had what was required to do more, to achieve more. What they didn't have was the opportunity or the support.

That day, Merle's resolution began to evolve into the mission that would become Palmer Scholars. That day, both agreed, they would finance a college education for these two young men, as well as provide them with the guidance and mentoring they knew would be needed, blazing the trail as the first Palmer Scholars.

In the fall of 1983 Merle and Reverend Al Davis inaugurated the Eastside Community Church Minority Scholarship Fund with six students and limited funding. Located in Salishan, the church had a congregation of, largely, low income families of color, and it had a strong youth fellowship program. The program attracted students with viable high school grades, an elevated sense of morals, and dreams of improving their financial destiny in life. Few students, however, had the financial means to accomplish their goals. Merle and Reverend Al Davies decided to find a way to financially support these qualified and deserving students.

Funding gradually increased when the program incorporated in 1996 as the R. Merle Palmer Minority Scholarship Foundation, a 501(c)(3) non-profit organization. It had a 15-member Board and served about 35 students. **To date, Palmer Scholars has helped over 450 students earn college degrees, and in 2003 our first Ph.D. was awarded.**

The Foundation is self-perpetuating, with a diverse, passionate Board of 13 directors who govern and guide our work. A group of over 400 committed volunteers provide support as mentors, counselors, office assistants, application readers and event coordinators as well as providing job shadowing and internship opportunities.



Organizational Overview

For 35 years, Palmer Scholars has supported underrepresented Pierce County students to overcome financial, cultural, and social barriers in their pursuit of higher education. We strive to help our Scholars succeed in graduating from college empowered with the essential tools to be leaders in their communities. At Palmer Scholars, we pride ourselves on being more than just a scholarship organization. For our Scholars especially, who are historically underrepresented and underserved in higher education, it is imperative that we serve the “whole Scholar.” Our holistic approach provides a pathway to career and life success for underserved young adults who earnestly want to create a better life for themselves and their families through education.

Mission

We are committed to supporting underrepresented Pierce County students of color to overcome financial, cultural, and social barriers in their pursuit of higher education.

Our Approach

Scholars are selected in their junior year of high school and remain in our program until they attain their postsecondary degree, receiving college readiness training, support from a trained adult mentor, renewable scholarships, and ongoing support from our dedicated staff, Board of Directors, and numerous volunteers. Our core programs include:

College Readiness Training: In their junior and senior year of high school, Scholars participate in 100+ hours of training to prepare them for the transition from high school to college academically, financially, socially, and emotionally. Topics include determining “right fit” for colleges, the application process, FAFSA/WASFA, scholarships, budgeting, self-advocacy, identifying resources while on campus, and navigating college as a student of color.

Mentoring: In January of their senior year, Scholars are carefully matched with a trained mentor who provides ongoing support and guidance through college graduation.

Palmer Cares: Is a two-pronged program that serves our rising college freshmen and our continuing college Scholars.

Rising freshmen Scholars receive a fully stocked dorm room kit filled with bedding and school supplies. We are proud that the first emotion a Scholar feels when entering college no longer has to be one of otherness and shame as they are the only ones in their dorm without brand new and brand name bedding and dorm accessories.

Continuing college Scholars often feel lonely as they progress through their degree program. Many are not able to come back home for holidays or the summer, especially if they are attending school in Eastern Washington or out of state. We have 1:1 visits with each of our Scholars at least once per academic year, in addition to bringing together the entire cohort for a shared meal and fellowship. Through these visits we are able to see the needs of our Scholars firsthand, such as proper winter clothing or an introduction to the campus’ multi-cultural counselors.

Scholarships: Finances are often the first barrier for Scholars hoping to attend college. Our highly impactful, renewable scholarships of up to \$5,000 per year help us ensure that Scholars graduate with as little student loan debt as possible.



Background & Context

This Strategic Plan is the product of months of intentional and deliberate development, including two meetings with the full Board of Directors (one of which a 5-hour retreat), three meetings of an ad-hoc committee composed of staff and members of the Board of Directors, conversations with multiple community partners, and numerous internal (staff) conversations and meetings. We conducted an internal/external analysis of our organizational strengths and growth areas, structuring our conversations around the following guiding questions:

- What is occurring internally that motivated the creation of this plan?
- What internal concerns do we have?
- What is occurring externally that motivated the creation of this plan?
- What are the current needs within the population we serve?
- Have the needs grown?
- How have the needs changed?
- How does this plan allow us to meet the growing/changing needs?
- What will be the benefit of implementing the strategies outlined in this plan?

We then honed in on four primary focus areas, established objectives and priorities within each, and identified strategies for achieving our objectives. Though three-year numerical targets are forecasted within each focus area, this plan is intended to be a fluid document. Regular progress updates will be shared at meetings of the Board of Directors, and the plan will be subject to modification at our annual retreat each spring. The initial phase of implementation (April 2019 – June 2019) will consist of identifying specific three-year targets for each identified objective, prioritizing identified strategies over the course of the three-year plan, and developing the action plan for year two (July 2019 – June 2020). Action plans for each subsequent year will be created by staff in conjunction with members of the Strategic Planning Committee, and approved by the Board of Directors at our annual retreat each spring.

Primary Contributors

Mary Clements, *Program Director*

Jonathan Jackson, *Executive Director*

Kayla Kuboyama, *Development Coordinator*

Amalia Perez, *Board Member & Alumnus*

Dan Powell, *Board Member*

Steve Schain, Ph.D., *Board Member Emeritus*

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Organizational Analysis

Adapted from 12.18.2018 Strengths, Weaknesses, Opportunities and Threats (SWOT) Analysis

What we do well

- Our holistic approach is unique and contributes to our work as a story rather than a set of services
- Our college readiness training is organic and adaptable to the needs of each cohort
- We're actively engaged in student debt management, limiting Scholars to \$5,000 or less per year
- We serve a wide range of students (students that may be turned away from other organizations with stricter GPA requirements or less flexibility for special circumstances)
- We have longstanding relationships with high school personnel and like-missioned organizations
- We have established ourselves as a leader in the college access/college completion space in Pierce County
- We have great connections with local Rotary clubs and other community partners
- We have several opportunities for community members to meaningfully engage with the organization with varying levels of commitment (e.g. application reading, providing meals, mentoring, committee membership, board membership)
- We have a strong team of talented, experienced, and passionate individuals who go above and beyond the call of duty for our Scholars, and the support of a Board of Directors filled with people who share the same sense of dedication.

Opportunities

- Strengthen partnerships with the business community/corporate sector
- Pursue more formal relationships with colleges and universities our Scholars are attending
- Strong support at the state level for career and technical education and career pathway exploration.
- Grow our social media and online presence
- Potential to collaborate with Degrees of Change's new internship program
- Explore additional committee opportunities for non-Board Member participation
- Explore restoration of graduate scholarships
- Explore named/sponsored sponsorship opportunities
- Increase internal data capacity and utilization of external data sets

Concerns

- Annual cost of attendance is increasing each year, even at in-state public universities, and year-to-year increases are difficult to anticipate. Additional scholarship funding will be needed in order to minimize student loans
- We are at capacity with our current staff and will need to hire additional staff in order to maintain and increase our quality of service
- The stock market is unstable which jeopardizes individual and foundation giving
- Changes in the tax code may result in lower donations due to higher standard deductions



Executive Summary

Strategic Focus Area 1 – Scholar Experience / Program Structure

- Priority 1** Ensure excellence in program delivery
- Priority 2** Revisit the recruitment/selection process for identifying new Scholars
- Priority 3** Expand our alumni engagement efforts
- Priority 4** Pursue program expansion/enhancement opportunities

Strategic Focus Area 2 – Communications / Community Presence

- Priority 1** Attain top-of-mind visibility across our service area
- Priority 2** Ensure Palmer Scholars is viewed as a leader in college completion work

Strategic Focus Area 3 – Human Resources Development / Board Development

- Priority 1** Ensure excellence and efficiency in day-to-day operations and short/long-term strategic oversight
- Priority 2** Ensure Palmer Scholars Board membership is highly valued and sought out by skilled individuals
- Priority 3** Ensure Palmer Scholars is seen as an “employer of choice” and sought out by skilled individuals who we are then able to retain

Strategic Focus Area 4 – Financial Sustainability

- Priority 1** Retain current institutional funders and pursue increased funding levels
- Priority 2** Retain current individual donors and pursue increased funding levels
- Priority 3** Pursue new foundation support and increase individual donors
- Priority 4** Ensure annual fundraising efforts are multifaceted and comprehensive



Scholar Experience / Program Structure

Guiding Objectives		
Objective	Baseline	3-Year Target
1.a - College persistence (1st to 2nd year - annual rate)	93%	100%
1.b - All-time college graduation	76%	85%
1.c - Scholars served annually	175	180
1.d - Total applications	183	250
1.e - Applications from male students	52	110
1.f - Applications from African American males	19	40
1.g - Positive satisfaction with college readiness training	97%	100%
1.h - Positive satisfaction with mentoring relationship	60%	100%
1.i - Positive satisfaction with program overall	-	100%
1.j - Alumni giving annually	< 5%	≥ 10%
1.k - Alumni actively involved in program	< 5%	≥ 10%

Priority 1 Ensure excellence in program delivery

Rationale Striving for excellence, defined both by the qualitative impact that Scholars report and performance on key program metrics (graduation rates, persistence, retention, etc.), not only ensures that our work is mission-aligned, but also positively affects the ways foundations, individual donors, the greater Pierce County community, and current Scholars (future alumni/potential donors) view the organization.

Strategies

- 1.1 Revisit targeted program outcomes and data collection methods to ensure we are tracking the most pertinent information in the most effective manner.
- 1.2 Ensure sufficient feedback loops are in place to drive continual program improvement.
- 1.3 Develop a Theory of Change in which to ground our current work and drive future program expansion/enhancement
- 1.4 Pursue formal agreements with colleges and universities to connect our Scholars to existing supports on their campuses
- 1.5 Revisit our College Readiness Training curriculum and topics covered, with particular emphasis on pathway/career exploration
- 1.6 Revisit our Mentor Training curriculum and topics covered, ensuring our mentors have the tools they need to best serve our Scholars



Priority 2 Revisit the recruitment/selection process for identifying new Scholars

Rationale Ensuring that we are identifying Scholars who have the most need and the grit factor to fully benefit from our programs requires that we re-evaluate where and how we are recruiting, as well as the criteria used to recruit Scholars. In doing so, it is critical that we continue to prioritize serving students who are historically underrepresented in higher education and who have the lowest persistence and completion rates. Deliberately serving a Scholar base that is representative of the greater Pierce County community is integral to strengthening our impact, community presence and reputation. Making a quantifiable impact in these Scholars' ability to attain a degree will have positive effects not only for our Scholars, but also for our community as a whole.

Strategies

- 2.1 Establish clear guidelines informed by current data regarding racial/ethnic representation, persistence, and completion in higher education, to ensure we are selecting the students most aligned with our mission and Theory of Change
- 2.2 Establish formal relationships/partnerships with local high schools and key staff to assist with identifying and recruiting potential Scholars
- 2.3 Establish formal relationships/partnerships with local youth-serving organizations (e.g. churches, BGC, YMCA) and key staff to assist with identifying and recruiting potential Scholars
- 2.4 Explore feasibility/value-add of introducing a nomination option in our selection process

Priority 3 Expand our alumni engagement efforts

Rationale Expanding our alumni engagement efforts we will not only help identify the gaps in our program through evaluating growth areas identified by our alumni Scholars, but also steward future mentors, volunteers, and donors. Keeping alumni engaged with the program also allows us the opportunity to collect long-term data on the impacts we have on our Scholars' lives. Increased engagement also keeps us relevant in the minds of alumni, providing free word-of-mouth marketing.

Strategies

- 3.1 Form an alumni committee composed of alumni, Board Members, and staff
- 3.2 Develop a targeted, intentional communications plan to reengage alumni
- 3.3 Survey alumni on current needs and ways in which we can continue to serve them
- 3.4 Develop a graduated giving campaign for alumni

Priority 4 Pursue program expansion/enhancement opportunities

Rationale Focusing our efforts on expansion and enhancement increases our community presence and opens us up to more funding opportunities. It also enables us to more clearly articulate the impact we have on growing our local and state workforce. Program expansions have the potential not only to allow us to serve a larger and more diverse group of Scholars, but also provide new/additional avenues to success that may be better suited to individual Scholars.

Strategies

- 4.1 Explore the feasibility of expanding our program to include students interested in pursuing vocational/technical credentials
- 4.2 Explore the feasibility of restoring supports to graduate-level students
- 4.3 Pursue additional "scholarship administration" partnerships (e.g. Sunrise Rotary/Tacoma Links)



Guiding Objectives		
Objective	Baseline	3-Year Target
2.a - Total Facebook likes	416	850
2.b - Total Twitter followers	39	100
2.c - Total Instagram followers	87	250
2.d - Annual website hits	6,342	8,000
2.e - Annual mentions in print media	1	3

Priority 1 Attain top-of-mind visibility across our service area

Rationale Visibility is marketing. Whether through a specific communications plan or participation in community gatherings and events, visibility increases opportunities for funding from foundations and individual donors, to recruit/identify mentors, volunteers, staff, Board members, and other volunteers, and form high-impact partnerships with organizations doing important work throughout Pierce County.

Strategies

- 1.1 Develop a targeted, intentional communications plan in order to attract new supporters and cultivate current supporters.
- 1.2 Place key staff and Board Members in service organizations with whom we currently partner or desire to partner.

Priority 2 Ensure Palmer Scholars is viewed as a leader in college completion work

Rationale Continuing to attain positive qualitative and quantitative results for our work will ensure our reputation as a leader in college completion continues to grow, increasing the number and type of partnership opportunities we have access to, financial and otherwise. We must strive to maintain an excellent reputation throughout our service area in order increasing our visibility and viability with potential Scholars, potential volunteers/mentors, individual donors, foundations, and organizations looking to create partnerships.

Strategies

- 2.1 Maintain active participation in pertinent community groups, gatherings, associations, etc.
- 2.2 Present regularly to diverse audiences throughout our service area to increase knowledge of and support for our programs
- 2.3 Develop a regular schedule for issuing press releases and other large announcements around program developments

Human Resources Development / Board Development

Guiding Objectives		
Objective	Baseline	3-Year Target
3.a - Staff indicating high levels of satisfaction	N/A	100%
3.b - Staff indicating they have what they need in order to be successful	N/A	100%
3.c - Staff participating in meaningful professional development annually	50%	100%
3.d - Board Members indicating high levels of satisfaction	N/A	100%
3.e - Board Members participating in meaningful professional development annually	0%	66%

Priority 1 Ensure excellence and efficiency in day-to-day operations and short/long-term strategic oversight

Rationale Deliberately working to ensure the organization's governance and operations are effective and efficient will positively affect staff/Board experience, leading to an increased quality of services, a stronger reputation, and will enable us to have the largest impact possible in our community.

Strategies

- 1.1 Revisit staff job descriptions and division of labor to ensure we are effectively leveraging the unique skills and abilities of our staff.
- 1.2 Create opportunities for cross-training of staff on all elements of our programs/operations
- 1.3 Revisit Board Member expectations, meeting structure, and committee structure to ensure we are effectively leveraging the unique skills and abilities of our members.
- 1.4 Develop a plan for intentionally growing our Board of Directors to increase diversity both demographically and in terms of skills and talents.

Priority 2 Ensure Palmer Scholars Board membership is highly valued and sought out by skilled individuals

Rationale Attracting a skilled set of individuals to join the Board increases our viability as an organization and our potential for growth. Diversifying the skill set of Board members expands the base from which we are able to secure funding, partnerships, and recruit Scholars, staff, and volunteer. Further, ensuring that our Board is demographically representative of the Scholars we serve will help maximize our impact by ensuring decisions are shaped by diverse voices.

Strategies

- 2.1 Survey board for satisfaction, ideas for growth, and how they would like to engage
- 2.2 Develop individual engagement plans for Board Members
- 2.3 Develop a plan for Board Member professional development
- 2.4 Develop a plan for Board Member recognition/appreciation



Priority 3 **Ensure Palmer Scholars is seen as an “employer of choice” and sought out by skilled individuals who we are then able to retain**

Rationale Working towards becoming an “employer of choice” will not only increase the expertise among staff, whose knowledge and experience will positively impact our programs, but will also encourage retention. Retention, specifically, is integral to the reputation of the organization among current Scholars, alumni, and partner organizations. Our Scholars look to our staff for support and guidance, and consistency is key. Ensuring we retain our staff will enable us to strengthen our programs over time without the burden of onboarding new staff and acclimating them to the organizational culture and the needs of our Scholars. Through this, we will meet and exceed more objectives over time, which will create a better reputation among foundations and individual donors enabling us to more effectively carry out our mission.

Strategies

- 3.1** Develop a plan for staff professional development
- 3.2** Develop a plan for staff recognition/appreciation
- 3.3** Identify office space that will more adequately accommodate current staff and allow for expansion

Guiding Objectives		
Objective	Baseline	3-Year Target
4.a - Annual Operating Budget	\$733,560	≥ \$1,000,000
4.b - Endowment Balance	\$657,405	≥ \$700,000
4.c - Organizational Reserves	\$255,239	≥ \$300,000
4.d - Scholarship Awards	\$302,944	\$450,000
4.e - Scholarship Reserves	\$5,000	\$20,000
4.f - Individual Donor Revenue	\$133,218	\$140,000
4.g - Foundation Revenue	\$397,060	\$700,000
4.h - Stand Up & Cheer Sponsor Revenue	\$59,200	\$80,000
4.i - Stand Up & Cheer Day-of Revenue	\$98,500	\$110,000

Priority 1 Retain current institutional funders and pursue increased funding levels

Rationale Many of our current institutional funders have a historical relationship with us and have given for at least 5 consecutive years. Grants from these organizations form the bulk of our annual operating budget. Retaining current institutional funders provides financial sustainability and helps us to maintain a positive reputation with our individual donors. Pursuing increased funding is not likely to carry much risk due to our strong historical relationships with these funders, and is therefore a safe strategy for increasing funding.

Strategies

- 1.1 Ensure timely completion of application and reporting for all current funders
- 1.2 Approach funders who have funded us for several years about multi-year funding commitments

Priority 2 Retain current individual donors and pursue increased funding levels

Rationale Retaining individual donors allows us to receive funding without the restrictions placed on most grants. Current individual donors are largely a part of the “Merle Palmer” generation. This not only means that they have a high sense of loyalty and relational embeddedness to the organization, but they have also likely aged 20+ years since their first interaction with the organization. With children leaving the nest and accumulated retirement savings, these donors may have a higher capacity to give than they did when they first started donating. Similar to the historical institutional funders, there is a low risk in asking for a higher gift. Additionally, there are more avenues for giving for these individual donors to consider, including planned gifts.

Strategies

- 2.1 Grow revenue from annual Stand Up & Cheer fundraiser event
- 2.2 Initiate a campaign targeted at increasing the number of donors who make monthly gifts
- 2.3 Approach donors who have given consistently, but below their perceived capacity, about increasing the size of their gifts.

Priority 3 Pursue new foundation support and increase individual donors

Rationale Our historical relations with foundations also have a potential downside in that changes in leadership may come with a change in giving priorities/focus, especially for family foundations. Additionally, with the bulk of our donors being older adults, we are at risk of losing a large portion of our faithful donors within the not-too-distant future. Diversifying our support from both foundations and individuals ensures that we can maintain financial stability in either event.

Strategies

- 3.1 Establish a development advisory committee composed of Board Members, longtime supporters, and other key community members
- 3.2 Identify and approach foundations giving to like-missioned organizations for support
- 3.3 Identify and approach state and national foundations that may be interested in supporting our work

Priority 4 Ensure annual campaign is multifaceted and comprehensive

Rationale Through a more comprehensive annual campaign, we can expand the avenues through which donors give. Ensuring that our systems for donating are as streamlined as possible increases the likelihood that we will receive donations. Additionally, working to secure financial gifts from school districts, colleges and universities, and other community partners will diversify the funding we receive, leaving the organization both more financially sustainable and with better visibility among community members and organizations.

Strategies

- 4.1 Explore “automated” giving opportunities (POS campaigns, AmazonSmile)
- 4.2 Implement planned giving structures
- 4.3 Engage colleges/universities with high enrollment of Palmer Scholars for annual gift/sponsorship
- 4.4 Explore feasibility of additional fundraising events
- 4.5 Explore “Sponsor a Scholar” model