



# Strategic Plan 2023-2025



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## Letter from Board Chair

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In 2022, Horizons Atlanta proudly reflects upon the challenges we have overcome in the past three years. There has been a fundamental shift in the way education is delivered as a result of a pandemic and social unrest. As the unprecedented COVID-19 pandemic swept across the country, we worked tirelessly to keep up with the educational needs of our students, transitioning our programs from in-person to online and eventually back to in-person again. While we take the time to celebrate our resilience and accomplishments, it is fitting that we also set forth a thoughtful plan to continue our growth and improvement in a post-pandemic world. Our organization's 2023-2025 strategic plan is a way of affirming both our vision and our continuous commitment to closing the opportunity gap through high-quality academics in an engaging and enriching summer learning program.

We have a lot to be proud of. In the summer of 2022, we served 1,262 scholars across 10 sites. We helped develop 311 staff members and provided 253 hours of swim instruction, 229 hours of Social Emotional Learning, 67 field-trips, and 65,624 meals. Following the proven academic achievement model established by Horizons National, our Atlanta team continues to serve as an innovator and thought leader for our overarching organization, forging a regional approach that allows for expansion while maintaining the high quality of our educational programs.

We remain focused on our fundamental belief that “every child in Atlanta, regardless of background, should have the same chance at making a positive impact on his or her community.” By building each young scholar's literacy, mathematics, swimming, and other life skills, our program aims to eliminate the critical barriers to success that he or she may face and clear the path to a world of new possibilities.

Our work continues, and this strategic plan – informed by and crafted alongside our valued stakeholders – will guide our activities over the next three years so that we can sustainably deliver high-quality academics and support to the children and families in need.



*Kevin Glass*

Kevin Glass, Chair

Head of School, Atlanta International School

## Executive Summary

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Horizons Atlanta was established in 2013 as part of Horizons National’s expansion initiative and strategic decision to invest in metro Atlanta. It is one of the largest (supporting over 1,200 scholars in Atlanta during summer 2022), fastest growing, highest impact, and best recognized (visit from the First Lady!) institutions addressing the education equity gap. Organized as its own 501(c)(3), Horizons Atlanta is an affiliate of Horizons National but has its own leadership, including a highly influential board of directors, a dedicated and experienced professional staff, and a community of engaged philanthropic partners. Since its inception in 2013, Horizons Atlanta has grown to house a consortium of ten well-respected host institutions (“sites”), making it the largest concentration of Horizons programs in the country. Through its network of programs, Horizons Atlanta provides students from underserved communities with a tuition free, six-week summer learning experience to address achievement and opportunity gaps between low-income students and their more economically advantaged peers.

In 2018, the Board of Directors of Horizons Atlanta adopted a strategic plan to guide the organization’s growth over the next three years (2019-2021). In 2020, due to broad uncertainty resulting from the COVID-19 pandemic, the board approved a 12-month extension to the on-going strategic plan. This extension also enabled the organization to assess the immediate and lasting impact of the COVID-19-related instruction interruption as well as the particular effects on underserved communities.

In the aftermath of the COVID-19 Pandemic, students face wider achievement and opportunity gaps. Particularly, underserved students were struggling to physically attend learning institutions of any kind for an extended period. Horizons Atlanta rose to the challenge and swiftly provided a response to ensure ongoing learning for these students. All ten of Horizons Atlanta’s campuses adapted to virtual programming in 2020, including virtual instruction, online literacy and math learning apps, and at-home learning kits to accompany the instruction. Horizons Atlanta also set up food distribution across the region to support the communities. School-year activities (instruction, gatherings, etc.) were gradually put back on the calendar and in-person programming was 100% resumed in 2022.

In 2022, the board retained an industry leading consulting firm in a pro bono capacity to facilitate the strategic plan process. This plan was developed over an 8-month process, including inputs from diverse stakeholders.



## Strategic Priorities Overview

The four strategic priorities are interdependent and focus on key qualities and growth areas. Each has associated goals, strategies, descriptive action steps, and tasks along with accountability indicators by which progress and success are measured.

### Strategic Priority 1: High Quality Programs

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Recognizing the importance of consistent and equitable programs of the highest quality, this priority addresses the need to assess, implement, and periodically update fundamental programs core to the mission of Horizons Atlanta, as well as supplemental programs that meet the evolving needs of students.

Goal 1: Provide consistent high-quality programming to students from underserved communities in metro Atlanta.

### Strategic Priority 2: Sustainability

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This priority emphasizes financial sustainability, which includes short-term & long-term revenue generation, growth & diversification of revenue sources, maximization of donor & host institution engagement, budget planning, and review of regional/program site expenses.

Goal 2: Ensure current and future financial sustainability of organization.

### Strategic Priority 3: Human Capital

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Exceptional board members and excellent regional and site staff are key to the success of Horizons Atlanta. This priority addresses leadership and staff structure and responsibilities as well as the importance of continued professional development.

Goal 3: Develop the board, regional office, and site organizational capacity to support Horizons Atlanta's mission.

### Strategic Priority 4: Growth

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This priority explores strategic, intentional, and sustainable opportunities for Horizons Atlanta to grow the reach of its comprehensive programs within and beyond metro Atlanta. This may include the creation of new sites, increase in seat capacity, and broader community awareness.

Goal 4: Pursue sustainable internal and external growth opportunities.

### Concluding Steps

Horizons Atlanta staff reviewed and made final revisions to the strategic plan followed by presentations to the appropriate board committees.

The Horizons Atlanta Board of Directors adopted the 2023-2025 strategic plan on November 11, 2022. Implementation will begin in 2023.



## Organization Mission

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During the strategic planning process, Horizons Atlanta reviewed its mission to ensure the organizational purpose was clearly defined and aligned with its future direction. The strategic planning committee concluded that the current mission statement continued to clearly communicate the organization's aspirations.

Current Mission Statement: [Closing the opportunity gap through high quality academics in an engaging summer learning environment.](#)

## Methodology

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Members of the consulting team used a multi-phased process that began with the regional team participating in a reflection exercise (e.g., identifying strengths, opportunities, big ideas, and challenges to address) across the four pillars (i.e., high quality programs, sustainability, human capital, and growth). Simultaneously, over 100 site staff members participated in a survey assessing strengths and opportunities of Horizons Atlanta.

Horizons Atlanta created a 13-member strategic planning committee consisting of board members, staff, and site directors to continue the work (Appendix A: Strategic Planning Committee). Additionally, during this process we aimed to:

- Understand “moonshot” goals of various stakeholders and help create a roadmap for where we are going and how we want to get there.
- Complete a landscape analysis, identifying our strengths and growth opportunities compared to others who exist in this space.
- Identify how to have sustained program and funding growth to continue providing high-quality programs to deserving scholars.
- Ensure accountability for how to move forward, while continuing excellence in programming and considering additional sites and/or expansion of grades.

The team used the information gathered from the reflection activity, stakeholder interviews, site director survey, and board retreat to develop insights included in this plan.

## Findings and Themes

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Six initial themes were identified during the 2022 strategic planning process:

1. The quality of the program is high: Stakeholders recognize Horizons Atlanta as an organization committed to high quality programs. Stakeholders noted investing in staff professional development and retention are critical. Additionally, stakeholders advised that Horizons Atlanta continually balance organizational and site growth with quality to ensure the high impact as the

organization adds new sites and/or services.

2. Leadership is strong: Stakeholders find that the board leadership is well-known and respected. There is strong board oversight and support. To ensure diverse representation, stakeholders recommend that Horizons Atlanta consider ways to include community voices through board membership and/or advisory groups. In addition, stakeholders would like Horizons Atlanta to consider expanding the board's core membership to ensure continued diverse representation from all stakeholders.
3. Horizons Atlanta should continue to consider growth opportunities: Stakeholders have advised Horizons Atlanta to continue to be intentional and mission-centered when considering growth opportunities. Several possible growth areas are: (1) the addition of new sites beyond the metro-Atlanta area, (2) expansion of programs to include year-round support, (3) expansion to include high school programs, and (4) re-evaluation of the regional capacity model to align with growth objectives.
4. There is an opportunity to improve by assessing inequities across sites: Stakeholders have noted that sites have different levels of capabilities based on their maturity and the capacity of site directors. Further identifying and addressing these inequities in the next three years is essential.
5. Horizons Atlanta may need varying levels of financial investment to be successful: Horizons Atlanta should further diversify its revenue stream beyond foundation, corporate, and individual giving. Sites also have varying financial need due to inconsistent support from host institutions (e.g., public, private universities, independent school and private schools have varying levels of resources). The current site funding model of 75/25 and \$2,000 per student cost, which has remained unchanged over 10 years, should therefore be re-assessed.

Following the discussion of the themes, the planning committee identified four strategic priorities for 2023-2025. Strategic priorities contain goals, specific strategies,

high level action items, and accountability measures. A timeline for action and champions for each priority were also identified.

## Strategic Priority 1: High Quality Programs

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Recognizing the importance of consistent and equitable programs of the highest quality, this priority addresses the need to assess, implement, and periodically update fundamental programs core to the mission of Horizons Atlanta as well as supplemental programs that meet the evolving needs of students.

Goal 1: Provide consistent high-quality programming to students from underserved communities in metro Atlanta.

Strategy 1.1. Promote equity and excellence in teaching, programming, and youth development

- Attract and retain top site-level talent
- Provide regular site-level staff feedback and communication to ensure instructional quality
- Develop and offer professional development opportunities
  - Accountability measures
    - Schedule hiring and create updated standards for how to measure qualifications by March 2023
    - Support SDs transitioning to FTE (ongoing)
    - Maintain monthly site director meetings and/or feedback forms at sites
    - Give incentives for SDs & teachers who hit metrics – implement by June 2023
    - Devise and regularly schedule professional development activities by June 2023

Strategy 1.2. Measure performance of required Horizons National program components through nationally recognized benchmarks.

- Set baseline performance minimums and targets for each required component and ensure all sites perform at or above those levels
- Establish teams / processes to prioritize benchmarks and consistently assess and analyze data against prioritized benchmarks

- Ensure accountability for meeting benchmarks by setting a clear plan of action for meeting missed targets with follow up
  - Accountability measures
    - Identify new baseline performance targets by June 2023
    - Perform annual site reviews for adequate performance levels (ongoing)

Strategy 1.3. Achieve consistent, equitable, engaging, and effective learning opportunities for every student at each site.

- Identify equity gaps in delivery of program components and the specific performance gap(s) or drivers (e.g., pool access)
- Develop a plan to address gaps and then create a path to implementation
- Determine resource needs at each site to lift component delivery to standards
  - Accountability measures
    - Assemble a team to interview site leaders about site needs/pain points and report findings by May 2023
    - Complete second task by December 2023
    - Implement plan by March 2024 and set up quarterly progress reviews

Strategy 1.4. Provide site-specific supports to underperforming sites, commit to continuous quality improvement, and augment region-wide supports to all sites.

- Identify and promote best practices for program component delivery within regional and national affiliate network and industry
- Assess which strategies are applied at the site level and / or which can be delivered region-wide and develop implementation plan
- Properly resource sites and regional office to conduct regular, thorough, and continuous improvement assessments, with accompanying accountability measures
  - Accountability measures
    - Create a system of regular feedback forms or meetings to share best practices by May 2023
    - Leverage and train on tools such as IXL, Lexia, etc. (ongoing)

- Assemble a team to reassess resource allocation and propose changes to the board by December 2023

## Strategic Priority 2: Sustainability

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This priority emphasizes financial sustainability, which includes short-term & long-term revenue generation, growth & diversification of revenue sources, maximization of donor & host institution engagement, budget planning, and review of regional/program site expenses.

Goal 2: Ensure current and future financial sustainability of organization.

Strategy 2.1. Increase revenue generation to support growth while building on existing capital reserve and liquidity cushion.

- Grow individual giving with a strategic plan for fundraising
- Formalize individual stewardship plan
- Grow corporate giving with a strategic plan for fundraising
- Build corporate engagement strategy
- Maintain three-year financial planning strategy
  - Accountability measures
    - Devise a new three-year strategic plan for individual fundraising by June 2023 with set goals and targets for new donors and funds raised
    - Devise a new three-year strategic plan for corporate fundraising by June 2023 with set goals and targets for new corporate relationships and funds raised
    - Monitor progress of fundraising plans on an annual basis (ongoing)

Strategy 2.2. Expand and diversify funding at the regional and site level through innovative approaches, including marketing campaigns to increase awareness of Horizons Atlanta's impact.

- Develop a menu of fundraising strategies that sites can review and adopt based on site fundraising needs
- Design a robust annual campaign
- Set annual donor goals and implementation metrics (contacts, solicitations, etc.) by category

- Create and maintain site specific 2-year financial plans that include fundraising goals
  - Accountability measures
    - Complete the first task above by June 2023
    - Set goals and metrics by June 2023

Strategy 2.3. Refresh current financial cost model (e.g., update seat cost, reevaluate cost sharing model).

- Update seat cost by site
- Reevaluate cost sharing
- Model costs for future site-launches for full life cycle from inception to maturity
  - Accountability measures
    - Based on findings from team assembled in 1.3, update seat cost by June 2023
    - Set new cost sharing standards and metrics by June 2023
    - Create a model for determining future sites' overall costs by June 2025

Strategy 2.4. Prioritize funds deployment on most impactful initiatives and support sites (through coaching and sharing best practices) to improve expense management.

- Perform detailed budget analysis to understand site level spend in key expense categories
- Evaluate ROI on expense categories to prioritize fund allocation (site- and regional-level)
- Develop trainings on expense management and finance for appropriate site staff and fundraising.
  - Accountability measures
    - Create and approve budget analysis methodology by June 2023
    - Conduct analysis and evaluate ROI by June 2024
    - Develop finance trainings for sites by December 2023, to be implemented by June 2024

## Strategic Priority 3: Human Capital

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Exceptional board members and excellent regional and site staff are key to the success of Horizons Atlanta. This priority addresses leadership and staff structure and responsibilities as well as the importance of continued professional development.

Goal 3: Develop the board, regional office, and site organizational capacity to support Horizons Atlanta's mission.

Strategy 3.1. Ensure board represents diverse experiences and is structured to enable oversight and impact across all strategic priorities.

- Embed board committees around a common goal of completing each component of the strategic plan
- Continuously refresh the board with new and existing members to create a diverse group that represents communities served by Horizons Atlanta
  - Accountability measures
    - Assign board committees to strategies and tasks by January 2023
    - Board committees to update strategic plan deadlines in accountability sections as needed by January 2023
    - Determine goals and criteria for refreshing board diversity by September 2023

Strategy 3.2. Clearly define roles, responsibilities, and delegation of authority across site and regional levels.

- Conduct organization-wide audit that includes organizational structure and operating model at the regional and site level + operating tasks assumed by regional team and site directors
- Build and implement a strategic growth plan specific to human capital needs, which directly considers Horizon's Atlanta's aspirations in all strategic plan pillars
- Address the relationship to Horizons National with regard to regional and site responsibilities
  - Accountability measures
    - Structure and schedule audit components by June 2023
    - Set up a growth plan for staffing by December 2023

Strategy 3.3. Ensure organizational effectiveness through robust feedback loops, opportunities for professional growth / development, and culture building activities.

- Formalize basic human resource functions at the regional and site levels.
  - Accountability measures
    - Establish a 360-review process and regular performance reviews (formalize by August 2023; ongoing)
    - Update job descriptions and formal KPIs per role by May 2023

Strategy 3.4. Establish appropriate and sustainable structure, resourcing, and operational practices for individual sites.

- Develop and implement a set of operating principles and priorities for regional, region-wide, and Horizons Atlanta leadership at site-specific levels of the organization
  - Accountability measures
    - Create these common principles and practices by October 2023
    - Implement across sites and assess results quarterly (ongoing)

## Strategic Priority 4: Growth

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This priority explores strategic, intentional, and sustainable opportunities for Horizons Atlanta to grow the reach of its comprehensive programs within and beyond metro Atlanta. This may include the creation of new sites, increase in seat capacity, and broader community awareness.

Goal 4: Pursue sustainable internal and external growth opportunities.

Strategy 4.1. Develop a targeted growth strategy identifying new site locations, with a focus on high-need communities.

- Develop and implement principles and key metrics to identify high-need communities
- Collaborate with sites or non-traditional host partners in high need areas for opportunities for expansion
  - Accountability measures
    - Create a system of metrics for identifying high-need communities by April 2023; implement by October 2023
    - Assemble a team to create plans for site collaboration and other partnerships by March 2023; revise, approve, and/or begin implementing plans by June 2023

Strategy 4.2. Increase seat capacity and enrollment among existing sites through deepened relationships with neighboring schools and parent communities.

- Continue developing and pursuing strategies to expand seat count in existing sites (e.g., parallel cohorts, “bubble grade” cohorts, increased class size)
- Explore additional programming for Grades 9 - 12 Horizons scholars
- Enhance site level advisory boards to facilitate initiatives that will ensure strong relationship building with the feeder schools in each community served
- Incorporate detailed site level recruitment plan as part of annual planning and retention – provide structures of support for struggling sites
  - Accountability measures
    - Develop a multi-tiered plan of different ways to expand seat count based on unique site capacities by April 2023

- Identify synergies and additional resource needs for grades 9-12 expansion; determine feasibility of region-wide launch by May 2023
- Create metrics and goals for site level advisory boards to assess community relationships by October 2023
- Identify sites struggling with retention and refresh annual plans to improve this by November 2023

Strategy 4.3. Expand community awareness of Horizons Atlanta through increased marketing efforts.

- Develop and maintain a regional communications plan with planned and measurable outcomes that includes social media and site-level activities
- Establish consistent messaging and brand narratives to be utilized at all levels of the organization including regional sites + host institutions
- Collaborate with site staff and host institutions to ensure alignment of regional marketing plan with site-level efforts
  - Accountability measures
    - Create communications plan and metrics for measuring success by March 2023
    - Meet with necessary site staff, regional team members, and host institutions to align on marketing and messaging by May 2023

## Appendix A. Strategic Planning Committee

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- Kevin Glass, Board of Directors
- Lisa Aman, Board of Directors
- Alexis Hambrick, Board of Directors
- Dr. Paul Alberto, Board of Directors
- John Brock, Board of Directors
- Mike Anderson, Board of Directors
- Sarah Anderson, Board of Directors
- Scott Bernstein, Board of Directors
- James Calleroz White, Board of Directors
- Lee Conner, Board of Directors
- Stacy Cullinan, Board of Directors
- Dave Fedewa, Board of Directors
- Jeff Fendler, Board of Directors
- Marc Fordham, Board of Directors
- Christina Graham, Board of Directors
- Aron Levine, Board of Directors
- Dr. Victoria Seals, Board of Directors
- David P. Stockert, Board of Directors
- Al Trujillo, Board of Directors
- J. Fidel Turner, Board of Directors
- Steven Turner, Board of Directors
- Alex Wan, Executive Director
- Amy Johns, Director of Development
- LaVasia Bullard, Regional Program Manager
- Laura McHargue, Assistant Director of Development
- Kennedy Kirtland, AmeriCorps VISTA