

**Georgia Watch
Strategic Plan 2018-2020
ADOPTED 1-11-18**

STRATEGIC PLAN 2018-2020

VISION

Equity and justice for all Georgia consumers.

MISSION

To champion Georgia's consumers through education and advocacy.

Goals

1. Promote healthcare access, financial protection, civil justice, and energy equity.
2. Effectively communicate Georgia Watch's agenda and accomplishments.
 3. Raise at least \$605,000 per year by FY2020.
 4. Assure continuity of statewide leadership.

We Accomplish our Goals by Focusing on Four Priorities:

*Civil Justice
Energy Equity
Financial Protection
Healthcare Access*

Tactical Plan 2018-2020

Goal 1: Promote healthcare access, financial protection, civil justice, and energy equity.

Metrics:

- *Decrease the percentage of income the poorest Georgians--i.e. those living below 50% of the federal poverty level--spend on utility bills.¹*
- *Increase Georgia's position in state health rankings.²*
- *Decrease the number of Georgians who experience financial distress in a given year.³*
- *Increase the financial security of Georgians.⁴*
- *Increase the number of Georgians who are aware of the arbitration clause in agreements.⁵*
- *Decrease the number of Georgians who forgo healthcare due to costs.⁶*
- *Decrease the number of Georgians with medical debt.⁷*
- *Decrease the racial wealth gap in Georgia.⁸*
- *Eliminate policies in Georgia that maintain systemic racism.*

Strategies:

- A. Provide access to the financial mainstream.
 - a. Reduce use of alternative financial services through consumer education.
 - b. Advocate for policies that reduce the prevalence of predatory lending and eliminate racial disparities in auto insurance pricing and mortgage lending.
 - c. Establish and lead a statewide financial protection advocacy coalition to address legislative and regulatory matters.

¹ According to InsideEnergy.org (a Corporation for Public Broadcasting-funded project), Georgians living below 50% of FPL spend on average at least 27.8% of their income on utility with those in the northern half of the state spending at least 30% on average.

² For 2017, Georgia ranks #41 (out of 50) in the Scorecard on State Health System Performance from The Commonwealth Fund.

³ As measured by the Atlanta Regional Commission (ARC) and other available regional planning commissions' consumer survey data. According to ARC's 2016 Metro Atlanta Speaks survey, only about half of metro Atlanta residents could pay an unexpected \$400 expense with what is in their bank account. Establish baseline by 12/31/18 by adding questions to consumer surveys. Also, as measured by the Prosperity Now Scorecard for Georgia. According to the July 2017 Scorecard, 43.9% of Georgia households live in liquid asset poverty, meaning they do not have 3 months of expenses saved. Georgia's bankruptcy rate is 4.6 per 1,000 people, ranking our state 49 out of 51, nearly the worst bankruptcy rate in the nation.

⁴ As measured by the Prosperity Now Scorecard for Georgia. According to the 2017 Scorecard, more than 60% of Georgia credit users do not have prime credit, meaning a credit score of 680 or above. 11.9% of Georgia households are unbanked and 24.6% are underbanked. 62.5% of Georgia households have savings accounts.

⁵ As measured by consumer survey data.

⁶ As measured by the Prosperity Now Scorecard for Georgia. According to the 2017 Scorecard, 15.6% of Georgians forgo a doctor visit due to cost. 14.4% of white Georgians went without a doctor's visit compared to 19.1% of black and 25.3% of Hispanic Georgians.

⁷ As measured by the Urban Institute. According to a 2017 Urban Institute study, nearly 30% of adults in Georgia ages 18-64 report past due medical debt (<https://www.theatlantic.com/health/archive/2017/03/the-geography-of-medical-debt/518316/>).

⁸ As measured by Prosperity Now Scorecard for Georgia. According to Prosperity Now, the liquid asset poverty rate for whites, households of color, and blacks is 33.3%, 54.6%, and 56.9%, respectively. The net worth of white households (\$100,470) is 600% higher than the net worth of black households (\$14,350). The housing cost burden: the percentage of homeowners with mortgages spending over 30% of their income on ownership costs is 25.9% for white HHs, 33% for black HHs, and 31.8% for Hispanic HHs. Homeownership rates for white households is 1.6 times higher than for households of color. For renters, 43.1% of white HHs spend more than 30% of their income on housing costs, compared to 53.5% of black HHs, and 52.4% of HHs of color.

- d. Close the racial wealth gap by supporting Black-owned businesses to improve individual, enterprise, and community outcomes.
- B. Increase equitable access to high quality, affordable healthcare.
- a. Promote health literacy and serve as a resource for the uninsured and underinsured.
 - b. Advocate for policies that increase insurance coverage, reduce costs, improve transparency, and advance quality in healthcare.
 - c. Reduce health disparities tied to race by advocating for Medicaid expansion, furthering hospital investment in community benefits, and promoting the use of community health workers to provide culturally fluent care.
- C. Reduce the energy burden for Georgia's consumers.
- a. Educate consumers on how to save money on their power bills.
 - b. Advocate for investments in energy efficiency programs, and making those programs available to low income residents.
 - c. Continue to advocate protections for residential ratepayers from higher Plant Vogtle costs.
- D. Protect consumers' right to seek redress in a civil court of law.
- a. Educate consumers about arbitration agreements and language in contracts that can impede their access to civil justice.
 - b. Advocate for policies that enable consumers to have their day in court and obtain appropriate damages when they are harmed.

Goal 2: Effectively communicate Georgia Watch's agenda and accomplishments.

Metrics:

- *Increase media placements⁹*
- *Increase social media shares¹⁰*
- *Increase engagement through our direct e-mail.¹¹*
- *Increase website visitors.¹²*
- *Increase media impressions for issues report card¹³*
- *Increase number of active volunteers¹⁴*

Strategies:

⁹ In FY2017, Georgia Watch had 84 media placements.

¹⁰ In FY2017, Georgia Watch had ____ social media shares, as measured by re-postings of Georgia Watch posts across social media platforms.

¹¹ In FY2017, there were 2,249 people receiving Georgia Watch's newsletter and action alerts. The average open rate was 28.7% and average click rate was 13.74%.

¹² In FY2017, 22,389 unique IP addresses visited the Georgia Watch website.

¹³ Establish a baseline by June 30, 2020, and then measure impact each year thereafter.

¹⁴ In FY2017, Georgia Watch had 30 volunteers, including board, advisory council, and advocates.

- A. Reach specific target audiences with effective messages that inspire action.¹⁵
 - a. By July 31, 2018, revamp the website to include key messages, calls to action, and highlights of Georgia Watch’s work and successes.
 - b. By February 15, 2018, create an infographic that showcases Georgia Watch’s priorities, data points, and accomplishments. Update at least annually.
 - c. Continue to activate social media engagement by promoting shares by followers on Instagram, Facebook and Twitter. Utilize Facebook paid boosts to reach additional (potential) supporters.

- B. Launch a consumer issues report card that gauges progress on the four priority areas of Georgia Watch.
 - a. Release report card no later than June 30th of each year, beginning in 2019.

- C. Maintain a toll-free consumer hotline to answer consumer questions, capture consumer stories, and provide direction.

- D. Keep website Resources page updated and continually promote our resources through social media and general media placements.

- E. Develop a volunteer structure to support the work of the organization.
 - a. By October 1, 2018, identify all work to be done by volunteers and create position descriptions for the volunteer work.
 - b. By November 15, 2018, create an infographic to promote volunteer opportunities (to include volunteer positions and the difference that volunteers will make.) Put infographic on website with link to register to volunteer; promote on social media (Facebook, Twitter, Instagram) with link to register to volunteer. Utilize a year-end “give and volunteer” campaign theme to encourage Georgians to sign up to volunteer and make a difference in the volunteer roles available at Georgia Watch. Repeat the social media campaign at least annually.
 - c. Send an annual thank-you gift to volunteers.

Goal 3: Raise at least \$605,000 per year by FY2020.¹⁶

Metrics:

- *Increase unrestricted revenue by 10% per year.*¹⁷
- *Increase the number of new donors by at least 5% per year.*¹⁸

¹⁵ Consumers are the beneficiaries of Georgia Watch’s work but are not the target audience of the organization. Target audiences include policy makers, community leaders, and funders/donors.

¹⁶ FY2017 revenue will be \$510,000. 6% growth per year = \$540,000 for 2018; \$572,400 for 2019; \$606,744 for 2020.

¹⁷ In FY2017, unrestricted revenue is 60% of revenue (\$315,000), with 40% of revenue as restricted. An increase of 10% per year, based on FY2017 revenue, would be \$31,000.

¹⁸ In FY2017, there are 80 donors to Georgia Watch.

- Increase board-approved reserve¹⁹ to \$500,000 by the end of FY2027.²⁰

Strategies:

- A. Increase funding from individual donors by 15% per year.
 - a. Contact existing and prospective donors via postal mail and e-mail at least quarterly, with a message about the work of Georgia Watch and current events.
 - b. By March 1, 2018, compile a list of at least 50 existing, lapsed, and potential donors to cultivate.
 - *By March 15, 2018, assign each donor/prospect to a staff person for engagement and follow up, to include phone and in-person contact.*
 - *All donors who make a gift of at least \$250 in a year will receive a thank you phone call from a board member. Staff will send the donor name & donation amount/giving history to a board member for timely thank you within 7 days of receiving the donation. Board members will take turns making calls, so that each board member receives one thank you call to make approximately every 1-2 months.*
 - c. By the end of FY2019, establish a planned giving (bequest) society for donors who have named Georgia Watch in their estate plans. These donors will receive recognition in the Georgia Watch annual report.
 - d. Send an annual thank-you gift to donors that give at least \$250 in a year.
 - e. Maintain a major donor giving society for those individuals giving at least \$1000 per year.
 - *\$1000+ donors will be invited to a special "Georgia Watch briefing" annually and invited to provide input to the Georgia Watch agenda.*
 - *Each donor giving \$1000+ will be assigned a relationship manager (staff, board or volunteer) to steward, invite to Georgia Watch events, and maintain connection between the donor and the organization.*
 - *Relationship managers will make contact with their donors quarterly: March 1, June 1, September 1, December 1. Contact may be a phone call, an informational email, an invitation to a Georgia Watch event or hearing, etc.*
- B. Increase funding from corporate and business donors by 15% per year.
 - a. By April 1, 2018, compile a list of at least 30 existing, lapsed, and potential corporate and business donors to cultivate.
 - *By April 15, 2018, assign each donor/prospect to a staff person for cultivation and follow up, to include phone and in-person contact.*
 - *All corporate/business donors who make a gift of at least \$1000 in a year will receive a thank you phone call from a board member. Staff will send the donor name & donation amount/giving history to a board member for timely*

¹⁹ Defined as unrestricted reserve funds that can be utilized with board approval.

²⁰ In FY2017, the reserve fund = \$225,000.

thank you within 7 days of receiving the donation. Board members will take turns making calls, so that each board member receives one thank you call to make approximately every 1-2 months.

- b. Include business and corporate donors in the \$1000+ major donor society as noted in #A above.
- C. Increase funding from grants by 10% per year.
 - a. By May 1, 2018, compile a list of at least 40 local, regional, and national funding sources to cultivate.
 - *Make contact with the 20 most promising sources of new or renewal funding by June 1, 2018. Where possible, schedule in-person or telephone meetings to update the foundations on Georgia Watch's work, anticipated results, and organizational needs that are a match for that particular foundation's priorities.*
- D. Maintain Cy Pres award funding and assure that lawyers are aware of Georgia Watch as an option for these awards.
 - a. *Notify Georgia's trial lawyers (by email and through in-person presentations) about Georgia Watch's willingness and ability to accept Cy Pres awards. Communicate with the trial lawyers at least twice per year.*
- E. Each year, include a \$10,000 increase in the reserve fund in the expense budget.
- F. Enable effective database management through proper software that aggregates and tracks donor giving and prospects, timely updating of information, and the ability to track volunteer involvement.

Goal 4: Assure continuity of statewide leadership.

Metrics:

- *Maintain a diverse, active board of at least 17 members with representation from throughout Georgia.*
- *Recruit and train at least 5 speaker's bureau volunteers by December 31, 2018.*

Strategies:

- A. Invest in technology that supports achievement of organizational goals.
 - a. Acquire additional databases, analytics, and communications tools.
- B. Activate the board's skills and contacts to support the organization.
 - a. Define measurable expectations of board service, including board meeting attendance, access to networks, personal giving, and committee service.
 - b. Assure diverse board representation from a variety of backgrounds, skills, race/ethnicity, gender, and geographic locations in Georgia.

- c. Establish a workable committee structure to support the strategic plan, with each committee chaired by a board member and populated by board and non-board members.
 - d. Develop the capacity of the board through education, training, and support. Enable the board to govern, provide oversight, support fundraising, and continue to be effective ambassadors for Georgia Watch.
 - e. Utilize technology for board member communications.
- C. Activate a speaker's bureau of volunteers that can carry key messages to diverse audiences throughout the state.
- a. Promote the speaker's bureau availability to civic and community groups throughout the state, with a traditional and social media launch no later than February 1, 2019.
- D. Have an active presence in all six regions of Georgia.²¹

²¹ “Active presence” is defined as at least one consumer issues forum in the region each year and at least 200 people in the Georgia Watch database from the region.