

# 2024-2028 Strategic Framework

## VISION

All people possess the ability, confidence, and knowledge to build financial security, create prosperity, and grow generational wealth

## MISSION

To empower Pierce County residents to achieve economic mobility through an integrated coaching and counseling model to secure personal financial health

## Strategic Goals and Actions

### CLIENTS

Clients progress upward in their economic stability with dignity and hope

- Listen to our client's hopes & needs to guide our work
- Build systems that enable culturally relevant customized coaching
- Deepen coaching skills & referral capacity for clients experiencing economic crisis
- Develop services for people moving into greater economic stability

### STAFF & BOARD

A thriving team fosters our capacity to build long-term, culturally responsive relationships with our clients

- Invest in staff wellness, development & retention
- Develop best-in-class systems for hiring, orientation & training
- Implement our DEI plan with a shared understanding of success
- Foster a Board who advocates for client & staff success

### COMMUNITY

Mutually beneficial partnerships fuel our ability to be of service in a timely and integrated manner

- Create new & deepen existing partnerships serving a full spectrum of clients
- Expand financial partners to increase client access to financial products
- Scale Asset Building Coalition to effect systems change
- Explore other models for client engagement, including cohort-based partnerships

### SUPPORT & RESOURCES

Sound Outreach has the resources and flexibility to meet clients where they are and evolve with their needs

- Launch communications strategy for increased engagement & understanding
- Launch philanthropic strategy, with an emphasis on unrestricted operating funds
- Invest in our capacity to more deeply understand both clients & donors
- Explore Earned-Income models



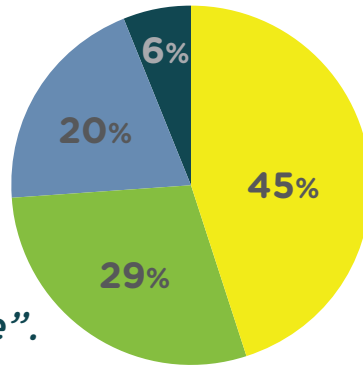
## VALUES

ECONOMIC JUSTICE • TRUST  
INNOVATION • COLLABORATION



# Who did we support in 2023

74% of the clients served by Sound Outreach have a household income below "Stable".



## Income Level

- Crisis, 45%
  - Vulnerable, 29%
  - Stable, 20%
  - Self Sufficient, Thriving, 6%
- Based on AMI levels for Pierce County.*

# 2,728

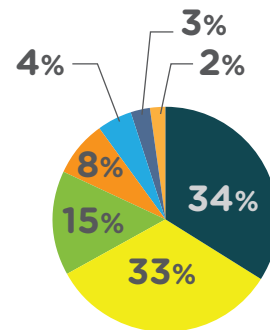
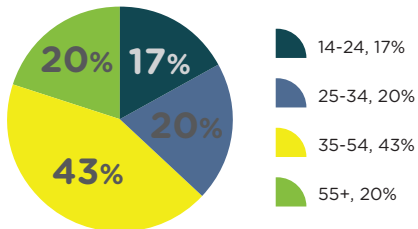
TOTAL CLIENTS SERVED

SHIBA 1,946

(Statewide Health Insurance Benefits Advisors)

Coaching Clients 782

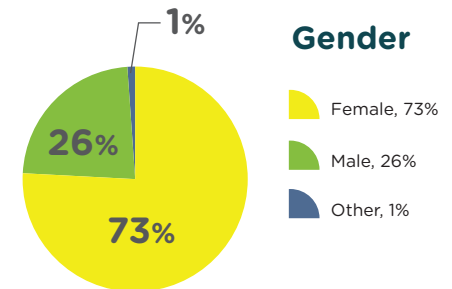
## Age



## Race

- White, 34%
- Black, 33%
- Other Unknown, 15%
- Multi-Racial, 8%
- Hawaiian, Pacific Islander, 4%
- Asian, 3%
- American Indian, Alaska Native, 2%
- Hispanic, 22% (of the above, 22% also identified their ethnicity as Hispanic)

## Gender



Pie Charts based on 472 Center for Strong Family Clients.



## NIEISHA'S STORY

Nieisha collaborated with SO to learn how to leverage money, use credit and pay off debt. After sustained effort, Nieisha began to see the results of her hard work and she increased her credit score by over 200 points!