San Ysidro Community & Economic Development Corporation

2-Year Roadmap

From July 1, 2026, to June 30, 2028

Board Approved: [Insert Date]

Mission: To build a more resilient & prosperous community by creating access to new economic opportunities, supporting local businesses, and fostering partnerships that promote sustainable development for the binational community of San Ysidro, its residents, and visitors.

Long-Term Goal: By 2032, 50% of businesses in the SYCEDC area are locally owned small businesses, including retail, restaurants, or other gathering establishments.

Two-Year Goal: To become an independent and sustainable organization.

OVERVIEW

From April through July 2026, the San Ysidro Community Economic & Development Corporation (SYCEDC) participated in a strategic planning process facilitated by Patricia Sinay from Community Investment Strategies and supported by Civic Community Partners. The process included interviews, a day-long Board retreat, and follow-up meetings. The following report is the result of the conversations, research, and decisions made during this engaging process.

Though the entire Board will work toward the goals, the Executive Committee will lead the Organizational Development and Fundraising Priorities, while the Beautification Committee will lead the Community & Safety and Member Engagement Priorities.

Partnerships and advocacy — with government entities, funders, corporate sponsors, and community organizations — are how SYCEDC will get this work done across all four priorities, rather than as a separate effort of its own. Because multiple committees and the Board will be reaching out to many of the same entities, SYCEDC will need to coordinate internally to ensure that efforts represent the entire organization and its members' priorities, are well-timed, and are not duplicated.

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HOW TO USE THIS DOCUMENT

Dashboard: This section summarizes what success (accomplishments and outcomes) can look like at each checkpoint (90 days, 6, 12, and 18 months) for each priority area, measured against the 2-Year Goal.

Workplan: These sections are the specific steps (activities and tactics) for each strategy that produce the Dashboard outcomes above. The sections are organized into two-time bands: 30/60/90-Day Tactics and 6-Month/1-Year/18-Month Tactics. When a date is provided, the task should be completed by that date.

Quarters are abbreviated as Q; for instance, the first quarter would be Q1.

Each of the four priority areas is **color-coded** consistently throughout this document:

- Priority 1: Organizational Development
- Priority 2: Fundraising
- Priority 3: Community & Safety
- Priority 4: Member Engagement

DASHBOARD

ACCOMPLISHMENTS & OUTCOMES BY CHECKPOINT

PRIORITY 1: Organizational Development — *Staff • Board • Systems & Infrastructure*

2-YEAR GOAL (by 6/30/28)	90-DAY TARGET (9/30/26)	6-MONTH TARGET (12/31/26)	12-MONTH TARGET (6/30/27)	18-MONTH TARGET (12/31/27)
Become an independent & well-functioning organization.	✓ Create financial infrastructure ✓ Finalize 501(c)(3) ✓ Hire an event contractor ✓ Strengthen communication & engagement with members	✓ Hire interim ED (contractor) ✓ November SYBID Election	✓ Hire an ED (staff) (5/27) ✓ Successfully transition from Civic Community Partners to an independent & sustainable organization	✓ Create a governance structure that prepares the organization for BID & MAD contracts ✓ Be in good standing and in compliance with BID agreement & all other contracts

PRIORITY 2: Fundraising

2-YEAR GOAL (by 6/30/28)	90-DAY TARGET (9/30/26)	6-MONTH TARGET (12/31/26)	12-MONTH TARGET (6/30/27)	18-MONTH TARGET (12/31/27)
1. ***In year 1, secure a BID Contract, and in year 2, secure at least $150K.*** 2. ***Raise at least $215K of non-City contracts in year 1 and $270K in year 2.***	✓ Complete BID Checklist ✓ Secure at least $35K in non-City contracts (Board-led)	✓ Begin negotiations with the City for the 2028 BID ✓ Secure at least $100K (non-City contracts, cumulative)	✓ Secure FY2028 BID contract (est. $150K) ✓ Secure at least $215K in non-City contracts (cumulative)	✓ Continue to manage BID FY2029 contract ✓ Begin process to secure: MAD FY2029, City CDBG FY2029 ✓ Secure $100K in non-City contracts

PRIORITY 3: Community & Safety — *Beautification & Safety Initiatives • Community Celebrations*

2-YEAR GOAL (by 6/30/28)	90-DAY TARGET (9/30/26)	6-MONTH TARGET (12/31/26)	12-MONTH TARGET (6/30/27)	18-MONTH TARGET (12/31/27)
Create a safe and well-kept business district of which businesses, property owners, and community members are proud.	Launch Beautification Committee	✓ Host the first-ever annual event that raises net $15K to $30K ✓ Launch Community WIFI Program	✓ Q1: Engage Urban Land Institute in an Updated SY TAP ✓ Q4: Transition Beautification Committee to MAD Committee	Host 2nd annual event: raises net $30K to $50K

PRIORITY 4: Member Engagement — *Events • Programs*

2-YEAR GOAL (by 6/30/28)	90-DAY TARGET (9/30/26)	6-MONTH TARGET (12/31/26)	12-MONTH TARGET (6/30/27)	18-MONTH TARGET (12/31/27)
Build stronger working relationships among members & other SY businesses.	✓ Aug 27: Co-host Q1 Member Mixer with Hispanic Chamber ✓ Sept 8: Host Candidate District 8 Forum with the League of Women Voters (LWV)	✓ By end of December: Host 1st annual community event	✓ Host Q3 Member Mixer ✓ Facilitate one Business Capacity Training per semester	✓ Host Q1 & Q2 Member Mixer ✓ Facilitate at least 2 Business Capacity Trainings per semester ✓ Become top of mind with all government entities when it comes to San Ysidro (following advocacy procedures)

WORKPLAN

Activities & Tactics by Strategy

PRIORITY 1: Organizational Development — *Staff • Board • Systems & Infrastructure*

2-YEAR GOAL: *Become an independent & well-functioning organization.*

STRATEGY	30-Day Tactics (July 2026)	60-Day Tactics (August 2026)	90-Day Tactics (September 2026)
Hire Contractors & Staff	✓ Contract with Event Planner ✓ Create $50K RFP with a goal of hosting a successful event that is well attended & nets at least $15K to $30K	✓ Contract with Event Planner ✓ Aug: Candidate screening & selection	Oversee & support the event planner
Engaged Board	Board meetings	Call for Board Nominations	Ballot Mailed
Maintain High Fiscal Standards	✓ Approve FY 2027 Budget ✓ Confirm insurance ✓ Create needed policies & procedures ✓ MOU with Civic Communities	✓ Implement accounting software ✓ Contract w/ accountant	✓ 501(c)(3) approved ✓ Create FY 2028 budget & narrative ✓ Open a bank account
Secure Office Space	—	Find storage for SYCEDC	—
Implement the Needed Policies & Procedures	Policies & Procedures to be created for: ✓ Events ✓ Corporate Sponsorships ✓ Website ✓ Contractors/consultants ✓ Code of Ethics (Values)	✓ Website ✓ Use of Logo	✓ Create a procedure for managing potential partners for fundraising, sponsorship, and programming ✓ Create advocacy policy and procedures that include managing relationships with government entities[1]

[1] Advocacy defined as representing San Ysidro's business community's interests to government agencies and elected officials. Although the entity that manages Priority 4 will be the lead, efforts and agenda will need to coordinate with all committees and the Board to ensure SYCEDC advocacy efforts are effective.

STRATEGY	6-Month Tactics (December 2026)	1-Year Tactics (June 2027)	18-Month Tactics (December 2027)
Hire Contractors & Staff	✓ Oversee and support the event planner **Hire Interim ED (contractor):** ✓ Confirm budget ✓ Draft RFP with clear goals for the position ✓ Share RFP with community by end of December	✓ In January: Hire Interim ED (contractor) By May: Hire ED: ✓ Job description ✓ Compensation plan ✓ Search plan & budget ✓ Secure funding for compensation and search ✓ Recruit a diverse candidate pool ✓ Candidate screening & selection ✓ Request 90-day plan (after first 30 days) ✓ Onboarding w/ED — draft work plan through the end of the fiscal year	✓ Support & oversee ED ✓ Begin next 3-year strategic plan
Engaged Board	✓ November: Elect & Orient the Board ✓ Select officers ✓ Board meetings ✓ Committee meetings	✓ Implement the appropriate governance structure (Board, working groups, & committees) ✓ Assess and meet training needs	✓ November 2027: Elect & Orient the Board ✓ Call for nominations ✓ Send out ballots ✓ Board meetings ✓ Assess & meet training needs
Maintain High Fiscal Standards	✓ Fiscal Review ✓ Begin to draft FY 2028 Budget	✓ Fiscal Review ✓ Approve FY 2028 Budget by May 1	✓ Fiscal Review ✓ W/ staff begin to draft FY 2029 Budget
Secure Office Space	Need space for administration of event	May: Need office space for ED	—
Implement the Needed Policies & Procedures	TBD	TBD	TBD

PRIORITY 2: Fundraising

2-YEAR GOAL: *In year 1, secure 2028 BID Contract, and in year 2, secure at least $150K in City contracts.*

STRATEGY	30-Day Tactics (July 2026)	60-Day Tactics (August 2026)	90-Day Tactics (September 2026)
BID	Work towards BID Checklist	Accounting software	Prepare from BID Checklist: ✓ Nonprofit Status (copy of IRS Determination Letter) ✓ Articles of Incorporation ✓ Printout of Current Status from Secretary of State website ✓ Printout of Nonprofit status from Department of Justice website ✓ Printout of Entity Status Letter from Franchise Tax Board website ✓ Federal IRS Form 990 (most recently submitted) ✓ W-9 Form and EFT Form
MAD	—	—	—
CDBG	—	—	—

STRATEGY	6-Month Tactics (December 2026)	1-Year Tactics (June 2027)	18-Month Tactics (December 2027)
BID	<u>BID checklist to be submitted to the City in January 2027:</u> ✓ FY2028 draft BID Budget Worksheet ✓ FY2028 draft detailed (QuickBooks) budget ✓ FY2028 draft annual budget narrative ✓ FY2028 BID performance measures ✓ FY2028 current contact information ✓ Authorized signature form ✓ Personnel schedule ✓ Certificate of insurance	Secure 2028 BID Contract	Begin conversation with City regarding 2029 BID Contract
MAD	Continue to learn about MAD formation	Transition Beautification Committee to MAD Formation Committee	Begin conversations with City staff for a MAD in 2029 (following advocacy procedures)
CDBG	Continue to learn about CDBG funding	—	Begin conversation with City Council staff for CDBG funding (following advocacy procedures)

2-YEAR GOAL: *Raise at least $215K of non-City contracts in year 1 and $270K in year 2.*

STRATEGY	30-Day Tactics (July 2026)	60-Day Tactics (August 2026)	90-Day Tactics (September 2026)
Associate Membership (Unrestricted) **Year 1:** Anchor: 10 × $1,000 Small Bus: 10 × $250 <u>Neighbors: 30 × $125</u> Total = $16,250 **Year 2:** • Renewal membership rate of 60%[2] • Plus 50 new members	Recruit at least 10 Associate Members	Recruit at least 20 Associate Members (cumulative)	Recruit at least 30 Associate Members (cumulative)
Corporate & Event Sponsorships (Restricted & Unrestricted) • Year 1: at least $90K • Year 2: at least $100K	✓ Create a prospect list with at least 30 potential corporate sponsors for event & other naming opportunities ✓ Create 2027 sponsorship package with entire Board that includes naming opportunities, including Annual event, Quarterly Member gatherings, beautification opportunities, trainings	✓ Prospect List: add an additional 10 ✓ Raise at least $5K in event sponsorships (cumulative)	✓ Prospect List: add an additional 10 ✓ Raise at least $15K in event sponsorships (cumulative)
Foundation Grants[3] (Restricted) • Year 1: $110K • Year 2: $150K	✓ Create a prospect list with at least 10 potential funders ✓ Create a proposal template for at least 2 identified efforts	✓ Continue to grow prospect list ✓ Submit at least 3 proposals totaling at least $100K	✓ Submit at least 6 proposals totaling at least $200K (cumulative) ✓ Raise at least $10K

[2] For a new organization, ASAE reports that a good first-year membership renewal rate is between 50% and 70%

[3] According to Grants Plus, an average grant proposal success rate for a new nonprofit is between 10% and 30%.

STRATEGY	6-Month Tactics (December 2026)	1-Year Tactics (June 2027)	18-Month Tactics (December 2027)
Associate Membership (Unrestricted) **Year 1:** Anchor: 10 × $1,000 Small Bus: 10 × $250 Neighbors: 30 × $125 Total: = $16,250 **Year 2:** ● Renewal membership rate of 60% ● Plus 50 new members	Recruit at least 40 Associate Members (cumulative)	Recruit at least 50 Associate Members (cumulative)	✓ Renewal rate of 50 to 75% ✓ Recruit at least 25 (new)
Corporate & Event Sponsorships (Restricted & Unrestricted) ● Year 1: at least $90K ● Year 2: at least $100K	Raise at least $40K in event sponsorships (cumulative)	✓ Raise at least $60K in event sponsorships (cumulative) ✓ Create 2028 sponsorship package with entire Board that includes naming opportunities, including Annual event, Quarterly Member gatherings, beautification opportunities, trainings	Raise at least $50K (start at zero)
Foundation Grants (Restricted) ● *Year 1: $110K* ● *Year 2: $150K*	Raise at least $50K (cumulative)	Raise at least $75K (cumulative)	Raise at least $50K (start at zero)

PRIORITY 3: Community & Safety — *Beautification & Safety Initiatives • Community Celebrations*

2-YEAR GOAL: *Create a safe and well-kept business district of which businesses, property owners, and community members are proud.*

STRATEGY	30-Day Tactics (July 2026)	60-Day Tactics (August 2026)	90-Day Tactics (September 2026)
Beautification Committee/MAD Formation Committee	✓ Draft Committee Description ✓ Create 2027 sponsorship package with entire Board that includes naming opportunities, including Annual event, Quarterly Member gatherings, beautification opportunities, trainings	✓ Recruit Committee members (can be broader than Board) ✓ Design Community WIFI Project (start-up costs, approvals needed, maintenance cost, sustainability)	Create a plan for the rest of FY 2027 using responses from the Member Survey
Annual Community Event	✓ Identify the event, create budget, and select date ✓ Draft RFP for event planner ✓ Hire an event planner ✓ Create event portion for the sponsorship package	**Support event planner's timeline:** ✓ Secure location ✓ Secure vendors ✓ Secure entertainment ✓ Confirm date ✓ Secure sponsors	**Support event planner's timeline:** ✓ Secure vendors ✓ Secure entertainment ✓ Secure sponsors
Clean-up & Graffiti Removal (City, sponsors, funders)	Hearts & Hands ($100K contract from City)	Hearts & Hands ($100K contract from City)	Hearts & Hands ($100K contract from City)
Capital Improvement Project (City)	Open working relations with the City Planning Department & San Ysidro Planning Group	—	✓ Continue to stay engaged with Planning Group & City ✓ Share results from SYCEDC member survey with Planning Group & City & make recommendation for a CIP
Landscaping (City)[4]	TBD	TBD	TBD
Safety (City & Sponsors)[4]	TBD	TBD	TBD

[4] To be determined by the Beautification Committee Plan, which will be informed by the Member Survey.

STRATEGY	30-Day Tactics (July 2026)	60-Day Tactics (August 2026)	90-Day Tactics (September 2026)
Updated Urban Land Institute Report	Negotiate with ULI to update San Ysidro Technical Assistance Panel (TAP) report (dates, cost)	Discuss ULI report with at least 2 funders	Write at least 1 proposal to a foundation for ULI TAP report

STRATEGY	6-Month Tactics (December 2026)	1-Year Tactics (June 2027)	18-Month Tactics (December 2027)
Beautification Committee/MAD Formation Committee	✓ Committee plan will define tactics ✓ Launch Community WIFI Project	✓ Transition Beautification Committee to MAD Formation Committee ✓ Create a MAD formation plan ✓ Create 2028 sponsorship package with entire Board that includes naming opportunities, including Annual event, Quarterly Member gatherings, beautification opportunities, trainings	2028 Committee plan to create a MAD will define tactics
Annual Community Event	Implement a successful event that brings community & businesses together and raises $15K to $30K	Have budget and timeline for 2027 Annual Event	Implement a successful event that brings community & businesses together and raises $30K to $50K
Clean-up & Graffiti Removal (City, sponsors, funders)	✓ Hearts & Hands ($100K contract from City) ✓ Negotiate a new contract for 2028	Implement a new contract	Manage new contract
Capital Improvement Project	✓ Continue to stay engaged with Planning Commission & City ✓ With Planning Commission, identify a CIP	Continue to stay engaged with Planning Commission & City	Continue to stay engaged with Planning Commission & City
Landscaping (City)	TBD	TBD	TBD
Safety (City & Sponsors)	TBD	TBD	TBD
Updated Urban Land Institute Report	ULI conducts research for updated report	Complete ULI SY TAP report including recommendations or action items	Share & promote discussion of ULI SY TAP Report with community

PRIORITY 4: Member Engagement — *Events • Programs*

2-YEAR GOAL: *Build stronger working relationships among SY's businesses and with the larger community. Year 1: Host semi-annual mixers & business capacity training. Year 2: Host quarterly mixers & business capacity training.*

STRATEGY	30-Day Tactics (July 2026)	60-Day Tactics (August 2026)	90-Day Tactics (September 2026)
Member Mixers • Year 1: Host semi-annual mixers • Year 2: Host quarterly mixers	—	Bi-Annual Mixer on Aug 27: Co-host event w/ Hispanic Chamber	—
Advocacy	<u>Sept 8: District 8 Candidate Forum w/ LWV:</u> ✓ Invite participants ✓ Confirm venue	<u>Sept 8: District 8 Candidate Forum:</u> ✓ Design candidate forum w/LWV ✓ Design and send out invitations ✓ Collect RSVPs	<u>Sept 8: District 8 Candidate Forum:</u> ✓ Collect RSVPs ✓ Design questions to ask candidates ✓ Host with LWV ✓ Send thank-you notes to candidates, partners, sponsors
Business Capacity Trainings • Year 1: Host semi-annual capacity trainings • Year 2: Host quarterly capacity trainings	—	—	—
Communication	✓ Business walk: Member survey ✓ Launch database ✓ Launch website ✓ Launch social media (share survey & ask to join mailing list) ✓ Finalize logo ✓ Collect at least 100 member surveys	✓ Business Walk 2: Member survey ✓ Close & analyze member survey	Q1 newsletter (share results of survey)

STRATEGY	6-Month Tactics (December 2026)	1-Year Tactics (June 2027)	18-Month Tactics (December 2027)
Member Mixers ● Year 1: Host semi-annual mixers ● Year 2: Host quarterly mixers		Bi-Annual Mixer: ✓ Set date ✓ Design event (speaker, vendors, etc.) ✓ Secure sponsor(s) ✓ Secure location ✓ Design and send out invites ✓ Collect RSVPs ✓ Thank sponsors	Q1 & Q2 Mixers: ✓ Set date ✓ Design event (speaker, vendors, etc.) ✓ Secure sponsor(s) ✓ Secure location ✓ Design and send out invites ✓ Collect RSVPs ✓ Thank sponsors
Advocacy	✓ Create and continually update advocacy priorities & next steps ✓ Meet at least quarterly with District 8 Councilmember ✓ Meet at least quarterly with key City agencies ✓ Congratulate the new District 8 Councilmember & request a meeting	✓ January/February: Meet with the new City Council member of District 8 and share FY2027 plan ✓ March: Meet w/ new City Councilmember and share SYCEDC's plans for FY2028, including MAD formation & CDBG funding	✓ Create and continually update advocacy priorities & next steps ✓ Meet at least quarterly with District 8 Councilmember ✓ Meet at least quarterly with key City agencies
Business Capacity Trainings ● Year 1: Host semi-annual capacity trainings ● Year 2: Host quarterly capacity trainings	—	APEX/SBDC Cohort 2 Training to address issues identified in the survey	✓ APEX/SBDC Cohort 3 Training to address issues identified in the survey ✓ Capacity Training Q1 ✓ Capacity Training Q2
Communication	✓ Update website ✓ Be current on social media ✓ Quarter 2 Newsletter	✓ Update website ✓ Be current on social media ✓ Q3 Newsletter ✓ Q4 Newsletter	✓ Update website ✓ Be current on social media ✓ Q1 Newsletter ✓ Q2 Newsletter