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# **Executive Summary**

Over the last 80 years, Goodwill Industries of North Florida (Goodwill) has been a leader in workforce development.

Recently, Goodwill expanded its offering to the community by providing a wide array of training, educational opportunities, career advancement and wrap-around support in addition to it's tradition of workforce services. Strategic planning has always played an important role in the organization's success. The last strategic plan covered the years 2018 through 2020. This plan will cover the years 2021 through 2026. The plan objective was to take a comprehensive look at what we do, who we serve, our current and future needs, with whom we compete and provide a thoughtful reflection of WHY we do what we do.

Goodwill hired outside consultant Steve Kuras of Strategy for Good, to help the organization broaden its approach and challenge the organizational norms. Steve Kuras is a seasoned professional with over 34 years experience of working with IBM; in IT and other client-facing roles in finance, industrial and distribution industries. Kuras brings ten years experience of working with nonprofit organizations to develop strategic planning.

Kuras guided the Goodwill leadership team through strategic plan benchmarking, an examination of the community needs/perceptions and current/future economic statistics, all of which were utilized to develop the organizational goals approved by the Board of Directors. This exploration led to an introspective debate culminating in a new vision, mission statement and guiding principles.

Functional committees were established to develop and align specific strategies and tactics with each organizational goal. There were a total of four strategic plan committees led by a member of the Executive Committee of the Board of Directors. The committees were as follows:

- 1. Operations Committee
- 2. Administrative / Support Committee
- 3. New Ventures Committee
- 4. Mission Services Committee

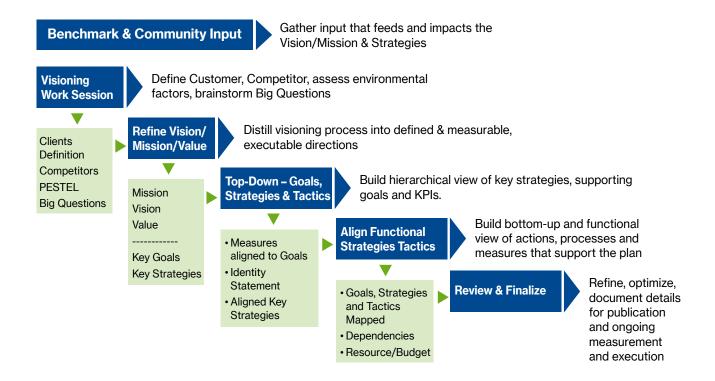
Each committee deliberated with members of the Goodwill leadership team resulting in a total of 22 strategies defining what needs to be executed to achieve the organizational goals. The committees then created 98 tactics that outlined how to accomplish each strategy. These strategies and tactics were compressed into seven key strategic projects that define the organization's roadmap for continued success. All strategies and tactics were mapped according to the organizational goals, which were reviewed to determine ownership and cross functional participation as illustrated in the execution matrix.

An organizational scorecard will be developed to establish accountability. The organizational scorecard will be reviewed annually with the budgeting process and periodically compared to the strategic plan.



# Strategic Plan Approach

The strategic plan approach we implemented ensures that we very clearly, consistently, and collaboratively align all we do to remain highly focused on the very top goals of our organization. We planned for a 5-year horizon to ensure that we addressed short-term and long-term needs and impacts.



The planning process took place from January to March 2021 in remote, hybrid, and occasional face-to-face meetings and workshops. Online surveys, interviews, and research, including critical benchmarking with other Goodwills, our business partners, and input from economists at the Florida Chamber of Commerce were insightful. The comprehensive view and departure from iterating from the previous plan allowed broad thinking and required more collaboration among the staff, leadership team, and the board.

We believe the result is a robust plan but not without flaws. Assumptions change and unexpected opportunities and hurdles will be encountered which obligates us to continually revisit this plan and process regularly. We will develop an organizational scorecard to track and report our progress as we navigate through the unexpected.





A community where every person finds meaningful employment and enjoys life-long opportunities.

# MISSION

Goodwill Industries of North
Florida is a local, not-for-profit
organization that removes barriers
to employment through
training, education and
career opportunities
for the communities
we serve.

# **GUIDING PRINCIPLES**

We passionately serve our valued CUSTOMERS!

We act with INTEGRITY!

are an INCLUSIVE organization that cares for others with COMPASSION and RESPECT!

We



# **Identity Statement**

The Identity Statement is a method to clearly and succinctly capture the essence of who Goodwill Industries of North Florida is, what we do, and how we accomplish our goals. It is derived directly from our Vision and our Mission.



Goodwill Industries of North Florida is a local, not-for-profit that removes barriers to employment through training, education and career opportunities for the communities we serve.

We advance our Mission to	remove barriers to employment
[IMPACT] and seek to	improve career opportunities for all
[CUSTOMERS] by serving	our Community, including Goodwill shoppers, job seekers, our business partners, donors and our employees and our environment
[GEOGRAPHIC AREA] in	the fourteen counties of Northeast Florida
[PROGRAMS/SERVICES] through	training, education, placement services and career opportunities
[HOW] by making	strategic investments, mutually beneficial partnerships and thoughtful programs
[WHY] We emphasize our competitive advantage of	significant presence, being financially sound, our name recognition, partnerships, great leadership and track record
[FUNDING and are sustained by SOURCES]	retail and contract revenues, major gifts, grants and bequests in support of our mission.



# **Organizational Goals**

The organizational goals are the top goals for Goodwill. These four goals set the core objectives that align and drive all investments and initiatives during the strategic planning period.



**GROWTH** 

Increase total operational revenue from \$40m to \$60m annually, an increase of 50% by December 31, 2026.



### **NET OPERATING INCOME**

Effectively manage costs and increase productivity in order to achieve a minimum annual NOI of 3% through December 31, 2026.



### **INCREASE MISSION REACH**

Increase our mission reach expanding from 30,000 people served in our fourteen-county territory to 50,000, an increase of 67% by December 31, 2026.



### **INCREASE MISSION IMPACT**

Expand our educational mission services by increasing the number of people served threefold from 500 to 1,500 by December 31, 2026.



# **Operations Committee**

### GOAL #1

▶ Increase total operational revenue from \$40m to \$60m annually, an increase of 50% by December 31, 2026.

**Strategy:** Increase retail store revenue by \$10m over the next 5 years, from \$27m to \$37m.

### **Tactics:**

- Increase retail store locations footprint by adding and relocating stores
- Strategically add traditional and non-traditional donation centers
- Increase pound store revenues by increasing square footage and process improvements
- Improve employee training in areas of opportunity to maximize revenues
- Link marketing efforts to local events like football games and concerts
- Consider and evaluate expanding the retail footprint in counties that we do not yet have a presence
- Increase donor marketing

**Strategy:** Expand LCI revenues from \$1.9m to \$3.5m.

### **Tactics:**

- Acquisitions to compliment revenues
- Explore adding a mulch business and other vertical integrations
- Expand the labor pool through new transportation sources or other means
- Improve brand marketing and create a targeted customer list
- Pursue new customers and government contracts

**Strategy:** Increase aftermarket pound store revenue by \$1.5m over the next 5 years, from \$500k to \$2m.

- Increase the selling square footage from 3,500 to 10,000 square feet
- Relocate the administrative support services to another building
- Leverage technology to create a more effective check out process



### **Operations Committee** (continued)

### GOAL #2

Effectively manage costs and increase productivity in order to achieve a minimum annual NOI of 3% through December 31, 2026.

**Strategy:** Improve logistics in order to become more efficient in supporting the donated goods business.

#### **Tactics:**

- Expand warehouse square footage and add new docks
- Redesign warehouse and modernize equipment

**Strategy:** Improve overall efficiency of operations to reduce costs and increase productivity.

### **Tactics:**

- Improve material handling and processing at store locations
- Implement a new point of sale system with the ability to scan merchandise
- Utilize Auto-Cad or similar software to optimize square footage of selling space in retail store locations
- Implement improved strategic training to maximize sales per square foot
- Align warehouse production with pound store staging area to create an effective / efficient flow of product based on the "River"

### GOAL #3

Increase our mission reach expanding from 30,000 people served in our fourteen county territory to 50,000, an increase of 67% by December 31, 2026.

**Strategy:** Advance our mission exposure through new store locations.

#### Tactic:

 Launch new stores where appropriate across our 14 counties to extend our mission impact through increased employment opportunities



# **Administrative / Support Committee**

### GOAL #1

▶ Increase total operational revenue from \$40m to \$60m annually, an increase of 50% by December 31, 2026.

**Strategy:** Cross promote Goodwill business lines utilizing a multi-channel approach to create synergy.

### Tactics:

- Cross promote other business lines in Donated Goods via kiosks
- Use Smart TVs to promote our Mission
- Cross promote other business lines through the Mayor's Youth at Work Program (MYAWP)
- Cross promote other business lines via digital platforms i.e., website and social media

### **GOAL #2**

► Effectively manage costs and increase productivity in order to achieve a minimum annual NOI of 3% through December 31, 2026.

**Strategy:** Leverage technology to improve customer / donor engagement, increase operational efficiencies and streamline support functions.

- Implement Point of Sale (POS) upgrades
- Research the use of barcoding in stores
- Consider and evaluate self-checkout lanes
- Leverage salesforce across the organization
- Evaluate Enterprise Resource Planning (ERP) system to streamline financial reporting, and integrate with our HRIS system for better data sharing
- Develop a Learning Management System (LMS) to manage and optimize educational investments
- Improve LCI quotation and billing system



### Administrative / Support Committee (continued)

**Strategy:** Optimize processes and data management to effectively and efficiently house data for reporting and analysis.

### Tactics:

- Evaluate, build and manage a centralized data repository
- Create and implement a process improvement program with data mapping and analysis
- Optimize Board of Directors communications utilizing applications and/or dashboards
- Develop key performance indicators (KPIs) and tracking mechanism for key strategic plan initiatives via an organizational scorecard
- Create and leverage departmental dashboards

**Strategy:** Reduce administrative expenses.

### Tactics:

- Decrease liability claims through education (smart applications, smart TV videos, etc.) and driver incentives
- Reduce vehicle maintenance and repair expenses through insourcing
- Reduce HVAC maintenance and repair expenses through insourcing
- Leverage more internships

**Strategy:** Reduce organizational turnover by 20% from 100% to 80% keeping in mind we reward those individuals improving their skill set to find advanced employment elsewhere.

- Implement training and development programs for internal staff
- Implement an overall talent management program
- Utilize Financial Coaches to assist and educate internal staff
- Utilize shared learning techniques to foster ongoing development
- Implement an organizational employee recognition program
- Revise and implement a new compensation structure
- Develop and implement a mentorship program for key staff
- Develop and implement a new-manager soft-skills training program



### Administrative / Support Committee (continued)

### GOAL #3

▶ Increase our mission reach expanding from 30,000 people served in our fourteen county territory to 50,000, an increase of 67% by December 31, 2026.

**Strategy:** Share the mission message with passion both internally & externally.

### **Tactics:**

- Create, publish and distribute a more in-depth annual (impact) report
- Install Smart TVs in our retail stores
- Share strategic plan and impact report with our business partners and community stakeholders
- Publish 990 tax returns and consolidated audited financial statements to our website
- Leverage multiple platforms to inform the community of the impact of our mission
- Create an awareness campaign for high schools to include promotion for TSIC and A-STEP in all counties
- Leverage bi-lingual approaches
- Develop and implement co-marketing with business partners

### GOAL #4

Expand our educational mission services by increasing the number of people served threefold from 500 to 1,500 by December 31, 2026.

Strategy: Deploy our mission programs to internal staff.

- Implement targeted communications to staff
- Conduct internal job fairs for staff
- Offer training for advancement across business lines and promote career ladders
- Utilize Financial Coaches to educate internal staff



## **New Ventures Committee**

### **GOAL #1:**

▶ Increase total operational revenue from \$40m to \$60m annually, an increase of 50% by December 31, 2026.

**Strategy:** Evaluate and invest in new opportunities that support Goodwill's efforts to increase revenues from \$40m to \$60m annually by December 31, 2026.

### **Tactics:**

- Consider mergers & acquisitions
- Evaluate business incubators, CDL, HVAC, auto repair, CAT-5 and others to meet the educational and training needs of the communities we serve
- Evaluate and invest in revenue generating education programs
- Expand existing business lines

### **GOAL #2:**

► Effectively manage costs and increase productivity in order to achieve a minimum annual NOI of 3% through December 31, 2026.

**Strategy:** Optimize capital investments to expand and maximize retail operations and mission services in our 14 county territory.

- Increase store ownership allowing for optimal operational layout and reduced future carrying costs
- Purchase land and hold for future opportunities
- Leverage cash and debt for best cost of capital
- Evaluate opportunities utilizing the GROW Methodology, Porter's 5 Forces and other analytic processes
- Develop a core competency inventory to use as a frame-work to evaluate acquiring other Goodwill's or local nonprofits that are struggling



## **Mission Services Committee**

### GOAL #1

Increase total operational revenue from \$40m to \$60m annually, an increase of 50% by December 31, 2026.

**Strategy:** Expand and fully develop the Goodwill Resource Development Department in order to increase revenues to reach four and one-half million (\$4.5m) through grants, corporate partnerships, private donors and planned giving efforts by December 31st, 2026.

### **Tactics:**

- Fully staff Resource Development Department and vet potential new hires via contract work, to increase grants, donor relations, major gifts and planned giving
- Develop gift policy and criteria for applying for new grants
- Apply for new grants, create new corporate partnerships, and become prospects for new major gifts
- Collaborate with other nonprofits to increase partnership opportunities
- Build out administrative costs within the grant budget

**Strategy:** Expand Goodwill Temps revenues to reach five million by engaging new corporate opportunities and increase capacity with current partners by December 31st, 2026.

### **Tactics:**

- Expand & increase range of external partners
- Create stronger partnerships with county chambers of commerce

### GOAL #3

Increase our mission reach expanding from 30,000 people served in our fourteen county territories to 50,000, an increase of 67% by December 31, 2026.

**Strategy:** Increase corporate partnerships.

- Grow corporate partnerships through existing grants and programs (A-STEP, MYAWP & TSIC); approach corporate partners who focus on pathways out of poverty – i.e., Ring Power & Jaguars
- Leverage relationships with county chambers and economic development agencies
- Participate in job fairs to connect with industry needs



### Mission Services Committee (continued)

**Strategy:** Target mission expansion in a greater number of the counties Goodwill serves

### **Tactics:**

- Evaluate specific needs of each county
- Develop partnerships with key social serving agencies and corporate partners
- Deliver mission services in community based spaces; libraries, in-kind office space, etc.
- Grow scholarship programs (i.e., Get There Faster) in additional counties and work with child serving agencies and school boards to increase the number of students served
- Expand stores and donation centers to un-serviced counties
- Explore hybrid subscription to virtual learning programs

### ► GOAL #4

Expand our educational mission services by increasing the number of people served threefold from 500 to 1,500 by December 31, 2026.

**Strategy:** Develop new and expand existing mission programs

### **Tactics:**

- Expand existing partnerships and programs into new counties (i.e., A-STEP, Get There Faster and TSIC)
- Offer HVAC, vehicle repair and CDL certifications through community partnerships

**Strategy:** Enhance relationships with county school boards to deepen the connection in each submarket

#### Tactics:

- Promote A-STEP / TSIC in additional counties where Goodwill footprint is present
- Expand Bag-it-Up to targeted counties
- Utilize 25th anniversary for Bag-it-Up drives
- Expand and promote TSIC in Putnam county

**Strategy:** Evaluate the implementation of an Excel Center in Duval County

- Leverage relationship with Goodwill Educational Initiatives (GEI) and Goodwill Indianapolis
- Create partnerships for student recruitment
- Collaborate with college partners to transition students into post-secondary programs. (include dual enrollment opportunities)
- Collaborate with basic adult education partners (Adult Literacy Coalition)





# **Strategy Map**

The strategy map illustrates a hierarchical view of how and where we intend to make significant investments. The map is aligned to the key organizational goals and not according to function, department or committee. It ensures that the focus is on our goals and that everything we do supports achieving them while encouraging interdepartmental collaboration.

The four Goals are identified in the top dark blue boxes and of course align with our Mission. There are several Strategies (in green) that combine to achieve each goal and a number of Tactics or initiatives (in light blue) that are necessary to carry out each associated Strategy.



# **Maximize Income**

**Tactics** Link marketing evenue by adding and

fforts to local events. relocating stores i.e. football games, concerts, Monster Add traditional Jam etc. and non-traditional

Consider expanding retail footprint in counties that we are not in currently Increase donor marketing

**Tactics** 

Implement point of

sale (POS) upgrades

Research the use of

barcoding in stores

Consider

self-checkout lanes

Leverage salesforce

across the organization

mprove LCI quotation

and billing system

**Evaluate Enterprise** 

Resource Planning

(ERP) system for

financial reporting,

and integrate with our

HRIS system for better

data sharing

anagement System

(LMS) to manage and

optimize educational investments

improvements Improve employee training in areas of opportunity to

donation centers

**Increase Pound Store** 

revenues by increasin

square footage and

through process

maximize revenues

**Tactics** 

Store ownership

Purchase land

Leverage cash and

debt for best cost of

**Evaluate opportunitie** 

utilizing the GROW

and Porter's 5 Forces

ethodology and other

analytic processes

Develop a core

Strategy: Expand LCI revenues

**Tactics** 

Acquisition to Staff Resource mplement revenues **Development Dept.**/ major gifts & donor Add mulch business relations positions

integrations Expand labor pool through new transportation or

or other vertical

Improve brand narketing and target customer list

other means

Pursue new customers including governmen contracts

**Tactics** 

Evaluate, build and

manage a centralized

data repository

Create and implemen

a process improvemen

program with data

napping and analysis

Optimize Board

of Directors

communications

utilizing applications

and/or dashboards

Develop key

(KPIs) and tracking

mechanism for key

rategic plan initiative

via an organizational

scorecard Create and leverage

departmental

dashboards

formance indicator

ew ventures and ne **Tactics** 

> Evaluate business ncubators, CDL, HVAC, auto and equip repair, CAT-5 cabling and other

**Tactics** 

**Evaluate and Invest** in revenue generating education programs

Consider mergers and other non-profits, acquisitions ncrease partnership opportunities Expand existing

Goal 2

**Optimize Efficiency** 

**Tactics** 

**Expand warehouse** 

square footage and

add new docks

Redesign warehouse

and modernize

equipment

contracts to vet potential new hires costs into grant

**Tactics** 

**Decrease liability** 

claims through

education (smart

applications, smart

Vs, videos, etc.) and

driver incentives

Reduce vehicle

maintenance and

repair expenses

through insourcing

Reduce HVAC

maintenance and

repair expenses

through insourcing

Leverage more

Apply for new grants,

gifts, planned giving

and RFPs

Collaborate with

Utilize external

Strategy: Cross

**Tactics** 

**Cross promote other** business lines in Donated Goods via kiosks

> romote our mission Cross promote other

Use smart TVs to

usiness lines through the Mayor's Youth at Nork Program (MYAWP)

Cross promote other business lines via digital platforms i.e. ebsite & social media

Strategy: nprove operation efficiency

**Tactics** 

Improve material

handling and

processing at stores

Implement new point

of sale (POS) system

with scan capability

Use AutoCad or other

system to optimize

square footage in stores

Implement strategic

training to maximize

sales floor square

footage

Align warehouse

production with pound

store staging

Strategy: Expand Goodwill Temps revenues

**Tactics** Expand/increase

external partners

Strategy: Reduce organizational turnover by 20%

**Tactics** 

mplement training and

evelopment programs

for internal staff

Implement an overal

talent management

program

Utilize Financial

Coaches to assist and

educate internal staff

Utilize shared learning

techniques to foster

ongoing development

organizational employee

recognition program

Revise and implement

new compensation

structure

Develop and

implement a

entorship progran

velop and implement

a new-manager soft-

skills training program

for key staff

Create stronger partnerships with ounty Chambers of Commerce

Strategy: crease after-mark ınd store revenu **Tactics** 

Increase selling

square footage

Relocate administrative support service Leverage technology

Goal 4

#### gencies and corporate **Expand stores and** partners who focus on pathways out of donation centers to sponsorships un-serviced counties overty i.e. Ringpowe & Jaguars Explore hybrid/ ervices in community Leverage relationship spaces i.e. libraries subscription to virtual with county chambers learning programs and economic evelopment agencies Engage in job fairs connected with industry need

Evaluate specific

needs of each county

**Develop partnerships** 

with key social serving

Strategy:

into 14 counties

**Tactics** 

**Grow scholarship** 

programs (i.e. Get

There Faster) into

additional counties

# **Mission Impact**

Goal 3

**Mission Reach** 

Strategy: Increase Corp

**Partnerships** 

**Tactics** 

**Grow partnerships** 

through existing

grants/programs

i.e. MYAWP. TSIC.

pproach corporate

Stores

**Tactics** 

Strategy: Share the Missio

**Tactics** 

Create an awareness

campaign for high

omotion for TSIC and

A-STEP in all counties

Leverage bi-lingual

Develop and implemen

co-marketing with

business partners

Leverage multiple

platforms to

communicate mission

impact

schools to include

Create, publish

and distribute a

nore in-depth annual

(impact) report

Install smart TVs in

our retail stores

Share strategic plan

and impact report with

our business partners

and community

stakeholders

Publish 990

tax returns and

consolidated audited

inancial statements to

our website

Launch new stores where appropriate across 14 counties to extend mission impact

**Tactics** 

**Expand existing** partnerships and programs into new counties

Offer HVAC. vehicle repair and **CDL** certifications through community partnerships **Expand and promote** 

ounty school board

**Tactics** 

Promote A-STEP all

**Expand Bag-It-Up to** targeted counties

**Jtilize 25th anniversary** for Bag-It-Up drives

**TSIC in Putnam County** 

with Goodwill ducational Initiatives

Indianapolis

(GEI) and Goodwill

Create partnerships for student recruitment

Collaborate with college partners to transition students to post-secondary education and dua

internal staff

Collaborate with adult basic education partners (Adult **Literacy Coalition)** 

Centers **Tactics** 

**Tactics** nplement targeted

communications to staff

Strategy: Deploy ou Mission Programs to Internal Staff

Conduct internal job fairs for staff

Offer training for dvancement across business lines and romote career ladde

**Utilize Financial** Coaches to educate

enrollment





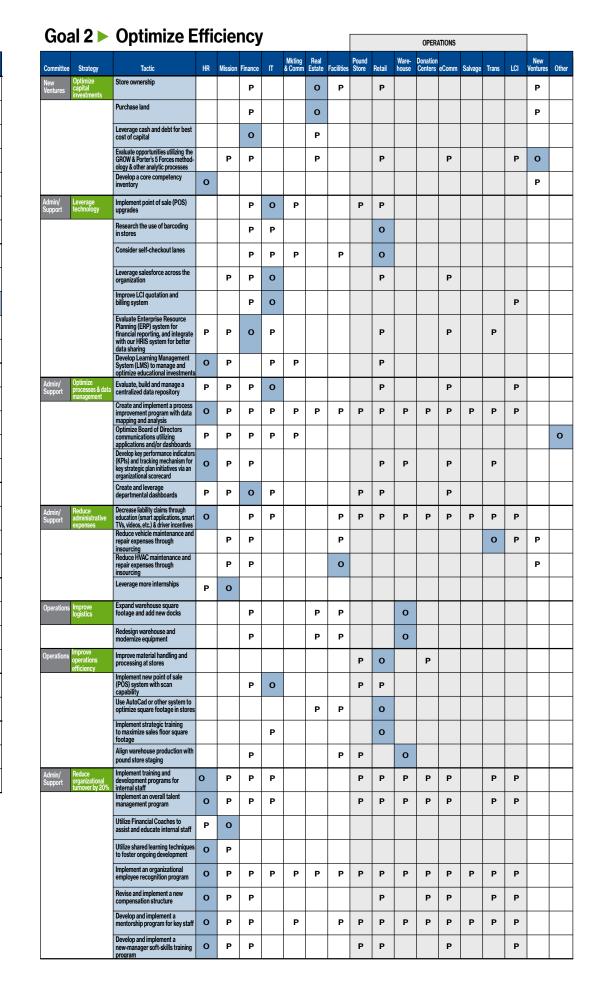
## **Execution Matrix**

The execution matrix is a restatement of the goals, strategies and tactics identified in the strategic map. The execution matrix adds ownership (O) and participation (P) to each of the strategies and tactics.

GOã	ai i 🟲	Maximize Ir	ICC	)ME	•								OPER	ATIONS					
Committee	Strategy	Tactic	HR	Mission	Finance	п	Mkting & Comm	Real Estate	Facilities	Pound Store	Retail	Ware- house	Donation Centers	eComm	Salvage	Trans	LCI	New Ventures	Othe
Operations	perations Increase store retail revenues	Increase retail stores revenue by adding and relocating stores					Р	Р	Р	Р	0	Р	Р			Р			
		Add traditional and non- traditional donation centers			Р			Р	Р		Р		o			Р			
		Increase Pound Store revenues by increasing sq. ft. and through process improvements			Р			Р	Р	0	Р	Р							
		Improve employee training in areas of opportunity to maximize revenues	Р	Р		Р					o								
		Link marketing efforts to local events, i.e. football games, concerts, Monster Jam, etc.		Р	Р		o				Р								
		Consider expanding retail footprint in counties that we are not in currently			Р	Р	Р	Р	Р		o					Р			
		Increase donor marketing				Р	o		Р		Р		Р						
Operations	Expand LCI revenues	Acquisition to complement revenues	Р		Р			Р									Р	0	
		Add mulch business or other vertical integrations			Р			Р									Р	0	
		Expand labor pool through new transportation or other means	Р	Р												Р	Р	Р	О
		Improve brand marketing and target customer list		Р			o										Р		
		Pursue new customers including government contracts		Р	Р			Р	Р								О		
Mission	Expand Resourc Development Department	Staff Resource Development Dept./ major gifts & donor relations positions	Р	o					Р										
		Apply for new grants, gifts, planned giving and RFPs	Р	o	Р														
		Collaborate with other non-profits, increase partnership opportunities	Р	o	Р		Р												
		Utilize external contracts to vet potential new hires	Р	0				Р	Р								Р	Р	
		Build in administrative costs into grant budgets		o	Р														
New Ventures	Invest in new ventures & new revenue streams	Eval business incubators, CDL, HVAC, auto and equip repair, CAT-5 cabling and other	Р	Р	Р	Р	Р	Р	Р							Р		0	
		Evaluate and invest in revenue generating education programs	Р	0	Р		Р	Р	Р									Р	
		Consider mergers and acquisitions	Р	P	Р	Р	Р	Р	Р									o	
		Expand existing business lines	Р	O/P	Р	P	Р	Р	Р		O/P			O/P			O/P	Р	
Admin/ Support	Cross promote Goodwill business lines	Cross promote other business lines in Donated Goods via kiosks				o	Р				Р			P					
		Use smart TVs to promote our mission		Р		o	Р		Р										
		Cross promote other business lines through the Mayor's Youth at Work Program (MYAWP)		o			Р												
		Cross promote other business lines via digital platforms i.e. website & social media				Р	o												
Mission	Expand Goodwill Temps revenues	Expand/increase external partners		o			Р	Р	Р								Р		
		Create stronger partnerships with county Chambers of Commerce		o			Р												
Operations	Increase after- market pound store revenue	Increase selling square footage			Р				Р	o									
		Relocate admin support services	Р	Р	Р	Р			Р									o	
		Leverage technology			Р	0			Р	Р									

P Participation

O Ownership



auc	11 5	Mission Re	au	11									OPER	ATIONS					
Committee	Strategy	Tactic	HR	Mission	Finance	IT	Mkting & Comm	Real Estate	Facilities	Pound Store	Retail	Ware- house	Donation Centers	eComm	Salvage	Trans	LCI	New Ventures	Otl
Admin/ Support	Share the mission message	Create, publish and distribute a more in-depth annual (impact) report	Р	Р	Р	Р	o	Р			Р			Р		Р	Р		
		Install smart TVs in our retail stores	Р	Р		0	Р												
		Share strategic plan and impact report with our business partners and community stakeholders	Р	Р			0												
		Publish 990 tax returns and consolidated audited financial statements to our website			0	Р	Р												
		Create an awareness campaign for high schools to include promotion for TSIC and A-STEP in all counties	Р	o			Р												
		Leverage bi-lingual approaches	o	Р															
		Develop and implement co-marketing with business partners	Р	Р	Р	Р	0				Р								
		Leverage multiple platforms to communicate mission impact		Р		Р	О												
Mission	Increase corporate partnerships	Grow partnerships through existing grants/programs i.e. MYAWP, TSIC. Approach corporate partners who focus on pathways out of poverty i.e. Ringpower & Jaguars		o	Р		Р												
		Leverage relationships with county chambers and economic development agencies	Р	О			Р												
Mission	Targeted expansion into 14 counties	Engage in job fairs connected with industry need	Р	0			Р												
		Evaluate specific needs of each county	Р	o	Р		Р	Р			Р		Р					Р	
		Develop partnerships with key social serving agencies and corporate sponsorships		o			Р												
		Deliver mission services in community spaces i.e. libraries		0			Р												
		Grow scholarship programs (i.e. Get There Faster) into additional counties		0	Р		Р												
		Expand stores and donation centers to un-serviced counties	Р		Р		Р	o	Р		Р		Р			Р		Р	
		Explore hybrid/subscription to virtual learning programs		О		Р											Р		

Goa	Goal 4 ► Mission Impact										OPERATIONS								
-	41 1	Wildelett IIII	Pu							UPERATIONS									
Committee	Strategy	Tactic	HR	Mission	Finance	П	Mkting & Comm	Real Estate	Facilities	Pound Store	Retail	Ware Houses	Donation Centers	eComm	Salvage	Trans	LCI	New Ventures	Other
Operations	New stores	Launch new stores where appropriate across 14 counties to extend mission impact	Р		Р		Р	0	Р		P		Р			P		Р	
Mission	New mission programs	Expand existing partnerships and programs into new counties		0															
		Offer HVAC, vehicle repair and CDL certifications through community partnerships		Р	Р			Р	Р							Р		o	
Mission	Enhance relation- ships with county school boards	Promote A-STEP all counties		О			Р												
	,	Expand Bag-it-Up to targeted counties					0				Р					Р			
		Utilize 25th anniversary for Bag-It-Up drives					0				Р					P			
		Expand and promote TSIC in Putnam County		o	Р		Р												
Mission	Evaluate Excel Centers	Leverage relationship with Goodwill Educational Initiatives (GEI) and Goodwill Indianapolis		o	Р		Р	Р	Р									Р	
		Create partnerships for student recruitment		o															
		Collaborate with college partners to transition students to post- secondary education and dual enrollment		o															
		Collaborate with adult basic education partners (Adult Literacy Coalition)		О															
Admin/ Support	Deploy our mission programs to internal staff	Implement targeted communications to staff	o	Р		Р	Р												
		Conduct internal job fairs for staff	О	Р		Р	Р												
		Offer training for advancement across business lines and promote career ladders	o	Р															
		Utilize Financial Coaches to educate internal staff	P	o															



# **Key Strategic Projects**

There were seven key strategic projects identified that represented our most important investments during the term of our strategic plan. These projects are cross-organizational and the outcomes are critical to achieve the organizational goals. The strategic projects were identified AFTER the strategy map was created. The seven strategic projects represent a clustering or aggregation of key strategies and tactics.

All strategic projects have a project owner assigned to oversee progress and assist in the cross-functional collaboration.

STRATEGIC PROJECT	DESCRIPTION	COMMITTEE PROJECT OWNER
Expand Retail	Expand the geographic footprint, resources and optimize operations and logistics to maximize revenues/profits and associated Mission work within the store operations.	Operations
<ul><li>Resource Development Program Office</li></ul>	Create a small, highly specialized team to build and implement a strategy and process to seek and respond to opportunities that align to our Organizational Goals quickly and efficiently.	Mission
Technology Enhancements	Leverage technical solutions and enhancements in support of our Strategies to achieve our Organizational Goals.	Administration
<ul><li>Mergers &amp; Acquisitions</li></ul>	Seek, develop, and execute large and critically important initiatives that are subject to vetting and prioritization assuring alignment with our Organizational Goals.	New Ventures
Improve Communications	Improve and optimize communications across the entire organization and our community by leveraging technology, improved processes and redefined metrics.	Administration
► Reduce Turnover	Reduce the high turnover rate to maximize efficiency, consistency and employee satisfaction.	Administration
Expand A-STEP	Leverage the tremendous impact and experience to a larger community of candidates both within and to future geographic footprints.	Mission



### **Key Strategic Projects** (continued)

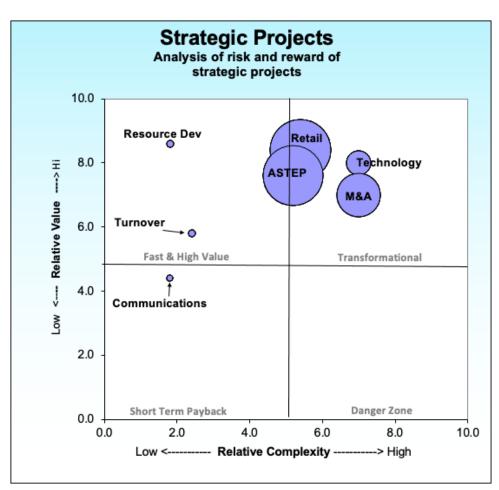
Each strategic project was assessed for the amount of financial and human capital investment over the next five years by the leadership team. Each of these projects also carries both a complexity and a value profile, ie., impact to the organization. The projects are defined and assessed by the following:

### Complexity

- · Cashflow needs
- Timeline to implement or time to start receiving value
- Amount of incremental resource required
- Financial Risk
- Flexibility to adapt and leverage

### **Value**

- Increases Income
- Increases Efficiency
- Enhances Mission Reach
- Enhances Mission Impact
- Increases Sustainability



The size of the bubbles represents the rough estimate of total cash necessary to implement and operate for 5 years



### **Conclusion**

Goodwill is committed to pursuing the organizational goals defined in the strategic plan. The leadership team is equipped to strive for completion of the 22 strategies and 98 tactics presented in this plan along with the seven key strategic projects. Departments have showcased cross-collaboration that is invaluable to the process of developing this plan and therefore the execution of said plan. Annual departmental and individual executive team leadership goals will also align with the plan to ensure continuity.

To guarantee we stay on track to meet/exceed these goals, we will implement an organizational scorecard to help monitor our progress. This scorecard will be shared periodically with the team and the board of directors. A draft sample scorecard is below.



# Strategic Plan Organizational Scorecard MONTH / YEAR

		MET	RICS		
FINANCIAL	YTD BUDGET	YTD ACTUAL	NON-FINANCIAL	YTD GOAL	YTD ACTUAL
Revenue - Organization			Total # of Job Placements		
Revenue - DGR			Total # of TSIC Participants / Graduates		
Revenue - LCI			Total # of Goodwill Employees		
Revenue - Source America			Total # of People Served		
Revenue - Mission			Mentor Match Percentage		
Store Sales per Square Foot			Total # of A-STEP Participants / Graduates		
Store Revenue per Hour			Total # of Donors		
Net Operating Income Amount - Organization					
Net Operating Income Percentage - Organization					
KEY RATIOS	GOAL	ACTUAL	KEY STRATEGIC PROJECTS	UPI	DATE
Current Ratio		≥ 1.50	Expand Retail Footprint		
Days Liquidity on Hand		> 25	Create / Expand Resource Development Office		
Management & General Expense Ratio		≤ .14	Technology Enhancements		
Debt to Equity Ratio		≤ .60	Mergers and Acquisitions		
Expense to Revenue Ratio - including Endowment		≤ .96	Reduce Turnover		
Expense to Revenue Ratio - Operating Only		≤ .96	Expand A-STEP		

Above Goal	With in Range	Below Goal
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