



IMPACT Community Action

Request for Proposals (RFP)

Strategic Planning Consultant

LOCATION:
711 Southwood Ave
Columbus, Ohio 43207

PROPOSALS SHOULD BE EMAILED TO:

Beth Urban
Chief Operating Officer
IMPACT Community Action
Email: burban@impactca.org

DUE DATE: January 6, 2023 at 12pm EST

A. AGENCY BACKGROUND

IMPACT Community Action is on the front lines fighting the war on poverty in Columbus and Franklin County. Our mission is to fight poverty by providing hope-inspiring help and real opportunities for self-sufficiency. The concept of Community Action has been part of the American social fabric for over forty years. The Community Action movement dates back to 1964 when the Economic Opportunity Act was passed indicating the beginning of President Lyndon B. Johnson's *War on Poverty*.

The United States has 1,100 Community Action Agencies that provide services to 96% of the nation's counties. Ohio is home to 48 Community Action Agencies that provide services to all 88 counties, including Franklin County. IMPACT is part of a state and national network committed to:

- Empowering low-income individuals and families in their effort to become self-sufficient.
- Advocating for a poverty-free community.
- Stimulating expansion of economic opportunity for low-income people and the community through economic development, programs and services.

IMPACT Community Action is a private non-profit human services agency that has a forty-year history of providing a wide range of diverse and comprehensive services that address the needs of low-income residents. The mission of IMPACT is to reduce poverty by providing hope-inspiring help and real opportunities for self-sufficiency.

B. STATEMENT OF NEED

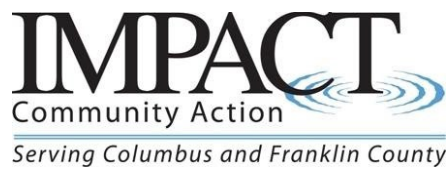
In 2019, IMPACT Community Action served approximately 23,000 families per year across all of our programs with a budget of \$10 million. Beginning in 2020, we have experienced substantial growth in our programs due to COVID 19 funding we have received from the City, County and State. In 2022, We will serve approximately 45,000 families with a budget of \$75 million. In addition, we have added several new programs and initiatives. IMPACT Community Action seeks strategic planning facilitation that will drive a forward focused vision for our organization from 2022 until 2025. The plan will be utilized to

1. Define and clarify Vision, Mission, and Values of the organization
2. Set the direction and establish priorities for the organization
3. To align all departments in the organization
4. Establish 3year goals, objectives and key performance indicators (KPIs) for the organization
5. Guide the organization through a changing environment
6. Define IMPACT's competitive advantages and align programs with those strengths

C. PROJECT OVERVIEW

IMPACT Community Action has allocated up to \$25,000 for a strategic planning retreat and seeks a consultant who will complete the following tasks according to the schedule of events detailed below:

1. Review previous strategic planning materials to inform and frame the survey and strategic planning retreat (included as appendix A)
2. Work with IMPACT Staff to create and deploy survey for board and staff
3. Meet with IMPACT staff to plan agenda and activities for Strategic Planning Retreat
4. Provide analysis of staff and board surveys
5. Facilitate strategic planning retreat
6. Prepare draft strategic plan
7. Meet with staff to review draft plan and seek feedback for final plan
8. Create final strategic plan
9. Work with staff to operationalize strategic plan and create KPIs



D. SUBMISSION GUIDELINES

All proposals must be submitted by 12:00 p.m. EST Friday, January 6, 2023, on the due date and must include the specified services and support identified in the RFP Guidelines.

SUBMIT COMPLETE PROPOSAL, ANY ATTACHMENTS VIA EMAIL ONLY TO:

Beth Urban
 COO
 IMPACT Community Action
 Email: burban@impactca.org

Due Date

All submissions must be received by the due date below.
 Friday, January 6, 2023 by **12pm EST**

Any proposal received after the required time and date specified for receipt shall be considered late and non-responsive. Any late proposals will not be evaluated for award.

Schedule of Events:

Monday, December 12, 2023	RFP Released on IMPACT’s Website: www.impactca.org . Email Notification, and Social Media (Facebook, Twitter, Instagram).
Tuesday,, December 20, 2022 3-4pm EST	Zoom Information Meeting https://us02web.zoom.us/j/81687556929 Meeting ID: 816 8755 6929
Thursday, December 29, 2022	General Questions Due Via Email.
Tuesday ,January 3, 2023	Email sent to all parties with answers to questions submitted
Friday, January 6, 2023 12pm EST	RFP responses due
Monday, January 9, 2023	Strategic Planning RFP review group convened and provider selected
Tuesday, January 10, 2023	Selected provider notified
Wednesday, January 11, 2023	Contract signed
Friday, January 13, 2023	Work commences on project First meeting with IMPACT staff to design survey for Board and Staff
Wednesday, January 18, 2023	Meeting with staff to finalize and deploy survey
Tuesday, January 24, 2023	Board and Staff survey closes
Wednesday, January 25, 2023	Meet with staff to review survey results and plan agenda for strategic planning retreat
Friday, January 27, 2023	Board and Staff survey analysis report finalized
Monday, January 30, 2023	IMPACT staff send out Strategic Plan retreat Packet

Friday, February 3, 2023 9am – 3pm EST	Strategic Planning retreat for Board and Senior Staff
Tuesday, February 21, 2023	Meeting with IMPACT staff and draft Strategic Plan completed
Wednesday, February 22, 2023	Draft plan sent to Board and Staff for feedback
Monday, February 27, 2023	Board and Staff responses due
Friday, March 10, 2023	Meeting with staff to review final plan and provide implementation and KPI strategies

E. GUIDELINES FOR PROPOSAL PREPARATION AND SUBMISSION

Successful proposals will demonstrate their approach to the work outlined in the schedule of events listed above. Each submission must include all requested information

1. RFP Cover Page
2. Brief description and history of the company and the company’s area of expertise
3. Describe in detail the company’s experience and knowledge and familiarity with non-profit, government funding and reporting, and Community Action Agencies
4. A brief description of past projects, dates of projects and the number of people on an average project team
5. Standard approach to Strategic Planning for non-profit organizations
6. Provide 2 samples of past strategic plans created for similar projects
7. Provide documentation of how strategic plans were operationalized and KPIs tracked
8. Statement of Work based on schedule of events

F. REFERENCES AND HISTORY

In addition to the above forms, Vendor must include three references, from similar projects from current or past clients, including a description of the product and services provided and the timeframe in which the project was completed. Additional materials such as brochures, pamphlets, or other items may be included.

G. CRITERIA FACTORS FOR AWARD

Any award to be made according to this RFP will be based upon the RFP response, with appropriate consideration given to operational, technical cost, and management requirements. Evaluation of Proposals will be based upon Vendor’s responsiveness to the RFP, ability of the Vendor to meet the needs of IMPACT Community Action and the total price.

The following elements are the primary considerations in evaluating all submitted proposals and in the selection of a Vendor:

1. Completion of all required responses.
2. The extent to which Vendor’s proposed solution fulfills IMPACT Community Action’s stated needs as set out in this RFP.
3. An assessment of the Vendor’s ability to deliver the services in accordance with the specifications set out in this RFP.
4. The Vendor’s record of past performance in delivering such services.
5. Availability of sufficient high-quality Vendor personnel with the required skills and experience.
6. The overall cost of the Vendor's proposal.

IMPACT Community Action reserves the right to:

1. Reject any or all offers and discontinue this RFP process without obligation or liability to any potential Vendor.

2. Accept other than the lowest priced offer.
3. Award a contract on the basis of initial offers received, without discussions or requests for best and final offers.
4. Award more than one contract.
5. Cancel initial term of the contract if the Vendor does not meet the requirements and expectations or deliver quality and timely services satisfactorily.

IMPACT Community Action may, at our discretion and without explanation to the prospective Vendors, at any time choose to discontinue this RFP without obligation to such potential Vendors.

H. VENDOR REQUIREMENTS

The selected Vendor must hold a license in good standing to do business in the State of Ohio, must honor IMPACT Community Action's tax-exempt status, must not be listed on a debarment list in any state, and be an equal opportunity employer.

I. TERMS AND CONDITIONS

Available funding streams will determine funding for agreed upon contract. If the contract funding is no longer available, then the contract will be considered null and void as of the date funds are no longer available.

By reference, the RFP and awarded Vendor Proposal will be made an integral part of the final contractual agreement.

J. FINANCIAL CONSIDERATION AND PRICING

Vendor understands that all billing to IMPACT will be based on a tax exempt status. IMPACT will provide tax exempt form.

The final agreed upon pricing will include all cost outlined necessary to meet project goals. It is the Vendor's responsibility to identify and include a description and cost of any critical elements absent from this RFP that would be required to complete the project and meet IMPACT's needs successfully. We understand that this type of project may have unforeseen costs. We encourage each Vendor to either attend the scheduled Information Session or request additional information for a more accurate Proposal.

K. INSTRUCTIONS ON PROPOSAL SUBMISSION

1. Friday, January 6, 2023 at 12pm EST Closing Submission Date

2. Conditions of Proposal

All costs incurred in the preparation of a proposal responding to this Request for Proposals will be the responsibility of the Vendor and will not be reimbursed by IMPACT.

3. Instructions to Prospective Vendors

Please submit Proposals via email only to Beth Urban burban@impactca.org

Late Proposals will not be considered.

4. Right to Reject

IMPACT reserves the right to reject all Proposals received in response to this Request for Proposals.

5. Small, Minority, and Female-Owned Businesses

IMPACT will make an effort to utilize small, minority-owned, and or female-owned businesses.

A business qualifies as a small business firm if it meets the definition of "small business" as established by the Small Business Administration (13 CFR 21.201), by having average annual receipts for the last three fiscal years of less than six million dollars.

L. NOTIFICATION OF AWARD

It is expected that a decision selecting the successful vendor will be made within two to three business days of the closing date of the receipt of proposals.

M. SUBMISSION & REVIEW PROCESS

1. Submission of Proposals

All Submissions shall include copies of the Proposal and a reference list of three companies with similar services expected by IMPACT.

2. Non-responsive Proposals

Proposals may be judged non-responsive and removed from further consideration if any of the following occur:

- a. The proposal is not received timely in accordance with the terms of the RFP.
- b. The proposal does not follow the submittal format.
- c. The proposal is not adequate to form a judgment by the reviewers.

3. Review Process

IMPACT reserves the right to make an award without further discussion of the proposals submitted.

N. CONTRACT EXTENSIONS

IMPACT reserves the right to extend the life of contract terms. Formal contract extension terms shall be discussed once the contract has been awarded and if the contract shows an extension need.

O. ADDITIONS OF SERVICES

IMPACT reserves the right to add services to the Statement of Need as it deems necessary.

IMPACT DISCLAIMERS AND GENERAL PROVISIONS

Formal notification to award a contract and the actual execution of a contract are subject to the following: receipt of funds granted under the Funder's plan; results of negotiations between selected Vendor and IMPACT staff; and continued availability of grant funds.

Vendor selected for funding must also ensure compliance with the following, as applicable:

IMPACT may require selected Vendor to attend oral interviews, participate in Negotiations and rewrite their statements of work as agreed upon during negotiations.

Additional funds received by IMPACT might be contracted by expanding existing programs or by consideration of proposals not initially funded under this RFP if such proposals were rated in the competitive range. These decisions shall be at the discretion of IMPACT.

IMPACT may decide not to fund part or all of a Proposal even though it is found to be in the competitive range if, in the opinion of IMPACT, the services are not needed, or the cost is higher than IMPACT finds reasonable in relation to the overall funds available.

IMPACT may choose not to award a contract to the Vendor with the lowest cost when taking into account other factors in balancing services to customers.

IMPACT is required to abide by all applicable legislation and regulations. Therefore, IMPACT reserves the right to modify or alter the requirements and standards set forth in this RFP based on program requirements mandated by state and federal agencies.

The vendor will be expected to adhere to IMPACT procedures to verify data and submit invoices to IMPACT.

Reductions in the funding level of any contract resulting from this solicitation process may be considered during the contract period when a Vendor fails to meet the conditions of service specified in the contract or when funding from federal or state governments is reduced.

The contract award will not be final until IMPACT, and the Vendor have executed a mutually-satisfactory contractual agreement. IMPACT reserves the right to make an award without further discussion of the proposal submitted. No services may be delivered prior to the final IMPACT Executive Committee approval of the award and execution of the contractual agreement between the successful Vendor and IMPACT.

IMPACT reserves the right to cancel an award immediately if new state or federal regulations or policy makes it necessary to change the contract purpose or content substantially, or to prohibit such services governed by this RFP and resultant contract.

IMPACT reserves the right to determine both the number and the funding levels of contracts finally awarded. Such determinations will depend upon overall funds and availability and other factors arising during the proposal review process.

The Proposals warrant that the cost proposed for services in response to the RFP is not more than those that would be charged to any other entity for the same service performed by the Vendor.

IMPACT reserves the right to reject any or all proposals received and to negotiate with all Vendor on modifications to proposals.

Appendix A

Strategic Plan Framework

**We cannot program our way out of poverty.
Poverty was created by acts of men.**



Priority Focus Areas (4Ps); Goals; Objectives



Partnerships

Goal: The fight against poverty is strengthened by our partnerships and collaborative efforts.

Objective:

1) By December 31, 2024, we will build and strengthen our collective IMPACT through *strategic* partnerships focused on Housing, Employment, and Energy Efficiency.



Pathways to Prosperity

Goal: Create opportunities for low-income people to prosper.

Objective:

1) Lessen economic burden for xx of families per year.

Action Steps:

*Rent, Utilities, Car Repair



Policy & Advocacy

Goal: Courageously influence legislation and policies that promote equity and justice.

Objective:

1) DEI – work to correct broken system in order to eliminate disparate outcomes based on identity.

Action Steps:

*Equity Index and DEI Statement



Positioning & Branding

Goal 1: To serve as the central force in the fight against poverty.

Objective 1:

*Thought Leadership

Action Steps:

* Needs Assessment, White Papers

Objective 2:

Strong Infrastructure

Action Steps:

*Op Ex Plan, Risk Mitigation, Development, Communications & Succession

Priority Focus Areas (4Ps); Goals; Objectives; Action steps cont.



Partnerships

Action Steps:

- * Identify service gaps via the community needs assessment.
- * Determine partnership priorities by category Strategic growth, Program (MOU), Referral.
- * Solidify partner agreement process for formal & informal
- * Create partner evaluation matrix
- * Create dashboard and/or scorecard.



Pathways to Prosperity

- 2) Increase access to relevant training for credentials that meet local demand with employer commitments to hire for xx of people per year.

Action Steps:

- * Employer partners, credentialing programs, Accreditation, Pre-apprenticeship.

- 3) Provide supportive services to xx of people per year.



Policy & Advocacy

Objectives cont:

- 2) Influence Legislation

Action Steps:

- * Economic Inequality, Affordable Housing, Climate Justice, Human rights – women, race, re-entry.



Positioning & Branding

Objective 3:

By 12/31/24, IMPACT will evaluate Brand recognition and strength in the community.

Action Steps:

- * Establish committee to evaluate all brand materials, media, standards.

Priority Focus Areas (4Ps); Goals; Objectives cont.



Partnerships



Pathways to Prosperity

Action Steps:

*Life coaching, inter & intra agency referrals, whole family support, Re-entry, mobility mentoring

Objectives cont.:

4) Provide opportunities for wealth building for xx number of people per year.

Action Steps:

*Education, IDA's, Side Hustle.



Policy & Advocacy



Positioning & Branding

Goal 2:

Franklin County's leader at the intersection of poverty, equity and climate justice.

Objective:

Reduce Climate Injustice by providing access to equitable opportunities to reduce energy burden for XX # of people or communities.

Action Steps:

*HWAP, Solar, Community Advocates, EV Transport

Priority Focus Areas (4Ps); Goals; Objectives cont.



Partnerships



Pathways to Prosperity

Objectives cont.:

5) Provide access to stable housing for xx # of people per year.

Action Steps:

*Navigation, Education, IDA's, Short Term assistance



Policy & Advocacy



Positioning & Branding



Strategic Initiatives focused on Collective IMPACT

1. Housing Stabilization Coalition – Lead agency
2. Workforce Advisory Council – IMPACT Co-Chair with Cols Works
3. Green Jobs/Energy Efficiency (City of Columbus, AEP, Smart Columbus, IGS, Homeport and the net zero neighborhood)

Program Partners for Pathways to Prosperity:

1. CDL Roads 2 Work – Capital Transportation, Franklin County, City of Cols.
2. Healthcare – LaRoc, Primary One, Ohio Health, others
3. Construction Trades – AEP women in line,
4. Info Tech – Pyramid
5. Comp Case Mgmt. – Sojourn (City, Bailey, 10 TV)

Strategic Partnerships to cultivate and strengthen:

(Banks, Law Firms, BX, Connect Housing, WODA, Color Coded Labs, Google, Intel, New Americans who have migrated to Central Ohio)

OP Ex – Master List of Partnerships (MOU's) Prioritize.



Pathways to Prosperity

1. Roads 2 Work – CDL Training
2. Build Up – Construction/Skilled Trades (Women in line)
3. Medical Assistant – Healthcare credential
4. Info Technology – A++ Comp TIA
5. Side Hustle & Boss Up – Entrepreneurship
6. Asset Building – Individual Development Accounts for post secondary education, entrepreneurship and home ownership.
7. Comprehensive Case Management to remove employment barriers.

Strategy & Measurements Report Out



- IMPACT is a member of the Affordable Housing Alliance of Central Ohio who is leading the advocacy efforts for affordable housing.
- Ohio Urban Resources System – Bo Chilton, Chair
 - OURS adopted 4 issues for our advocacy efforts - Affordable Housing, Economic Security, Universal Childcare, Voting Rights
- Ohio Community Development Corporation Association Board and Chair of Policy Committee.
 - Ohio Housing Trust Fund expansion – [HB 237](#)
 - Main St. Job Recovery Program (RFP, ARPA)
 - Payday lending reform working
 - CRA Reform
- National **C**ommunity **R**einvestment Coalition (Bank CRA and CBA)
- IMPACT Grey Card – Survey to assess political candidates' positions on our advocacy issues (Has not been released and has not been approved by the board, we will need to revisit if this is something we want to move forward)

Strategy & Measurements Report Out cont.



- Social Justice Rallies and articles and Op Eds
- Voices for Change
- Speak Up and Speak Out
- Social Media Engagement increased by 214%
- Energy Advocates
- Climate Action Plan

Next Steps: Host community conversations focused on needs assessment in this COVID environment, Develop a comprehensive Advocacy plan and conduct workshops on speaking to legislators (Customers, Board, Staff, Volunteers, Partners and advocates)



Positioning & Branding Lead Agency

1. Awards and Recognitions
 - Columbus Foundation Award
 - Spirit of Homeport Award
 - Social Justice Award from TML
 - C-Suite most admired Exec. Award
 - Housing Stabilization Coalition
 - Guide Star Platinum Transparency Recognition
2. Workforce Advisory Committee
3. Housing Stabilization Coalition (Go-To Agency)
4. Green Jobs/Energy Efficiency (Go To Agency)
5. Otto Beatty Closet (Go To Agency)
6. News and Press Coverage (CNN, ABC News & World Report, Associated Press NY Times, Press Conference with Mayor, Council Members, Radio, Billboards, Social Media, etc.)



Positioning & Branding Lead Agency

1. Develop a comprehensive agency Development Plan that includes the Capital Campaign
2. Develop/Update a comprehensive Communications Plan complete with Brand Standards, Press protocols, crisis communication protocols, etc.



Strategic Plan Framework Using One Goal with Four Strategic Priority Outcomes.

Mission Statement
To fight poverty by providing hope inspiring help and real opportunities to self sufficiency
Vision Statement
To Be Developed:
We envision a community that creates opportunities for all people to prosper
Values
<p>We are Making IMPACT <i>(It's Bigger than Me, I am all in, I lead by example)</i></p> <p>We treat everyone with dignity and respect <i>(I believe everyone has value, I care for others and myself, I assume positive intent, I am fully present and engaged)</i></p> <p>We take pride and ownership in our work <i>(I name it, own it, and address it, I seek what I need to succeed, I revolt against compliancy)</i></p> <p>We keep it real <i>(I am open minded, I have crucial conversations, I actively listen and respond with warmth and respect)</i></p>

One Strategic Goal (See Examples)

End Poverty
 All Communities and Neighborhoods are equitable and thriving in Franklin County
 Increase prosperity for all
 All people claiming their right to a better life
 Franklin County Public Health: Will Adopt Equity as the Foundation for conducting its daily work
 NASA: To Put a Man on the Moon

Priority Focus Areas and Objectives

Partnerships	Pathways to Prosperity	Policy & Advocacy	Positioning & Branding
<ul style="list-style-type: none"> Objective #1 - By December 31, 2021, IMPACT will build strategic partnerships at least 10 that are mutually beneficial to the agency's mission, vision and values. 	<ul style="list-style-type: none"> Objective #2 - By December 31, 2021, IMPACT will develop 5 new meaningful programs and services that will help customers achieve self-sufficiency and prosperity. 	<ul style="list-style-type: none"> Objective #3 - By December 31, 2021, IMPACT will focus on 3 public policy areas that will help low to moderate income families achieve prosperity. 	<ul style="list-style-type: none"> Objective #4 - By December 31, 2021, IMPACT will raise awareness of activities within the community in order to gain support and resources for organization.

IMPACT COMMUNITY ACTION

Phase1: SWOT Analysis & Synthesis for Overarching Strategic Plan



DATE:

February 20, 2019

PRESENTED BY:



PURPOSE

OPPORTUNITY STATEMENT:

The following is an output from the Impact Community Action board meeting. This deliverable represents Phase 1 of the project and provides both the outputs from a brainstorm of a SWOT analysis and the synthesis of the identified strengths, weaknesses, opportunities and threats into key recommendations which populate and comprise part of a larger strategic roadmap to be completed in Phase 2.

The purpose of Phase 1 was to ideate and reach consensus on strategic priorities and key opportunities that will align ,expand and maximize Impact's influence while ensuring long term growth and viability. These priorities can be used to inform the development of an actionable strategic plan and/or a brand positioning.



SWOT (1/2)

STRENGTHS

- Dedicated staff
- Visionary leadership
- Passion
- Efficient processes
- Data
- Ideas
- Relatively well capitalized
- Fiscal responsibility
- Reputation
- Longevity
- Financial support
- Perceived as market leader
- Understanding of community needs
- Customer base
- Quality of service
- Wrap-around services
- Experienced staff
- Staff has prof. growth opportunities
- Community outreach
- Board support
- Public recognition
- Unique emergent programs
- Corporate sector benefits from our products

Internal Origin



External Origin

WEAKNESSES

- Dependency on govt. financing
- Not everyone sees poverty as their issue
- Lack of exposure (brand awareness)
- Accessibility to all cultures (capacity to reach/serve)
- Having only one location
- Staff skillset to meet customer/community needs
- Traditional business hours
- Lack of technology to be customer centric
- Lack of investment in entrepreneurial activities
- We don't host events consistent with mission in-house (space for youth services/events)
- Lack of appreciation of strengths
- Value proposition that is politically agnostic
- Comprehensive data system & analysis
- Staff development and training
- Competitive wages/staff retention
- Social enterprise
- Self sustainability
- Access to unrestricted funds
- Common beliefs
- Lack of succession plan

OPPORTUNITIES

- Corporate partnerships/sponsorships
- Diversity of client base and employees
- Community presence
- Leverage existing community partnerships
- Marketing strategy
- How to attract Republicans as part mission
- Improve cultural diversity (language)
- Create customer advocates
- Recruit more volunteers
- More alignment with local educational institutions for internships
- Youth services intervention/prevention
- Advocate for change in gov. policies i.e. anti-poverty work
- Grow Building Futures/VTAC (Workforce development)
- Opioid/alcohol services
- Social enterprise
- Re-brand
- Capital diversification
- Technology upgrades

THREATS

- Funds shifting (hierarchy in poverty)
- Benefits cliff for customers
- Conservatives as enemies
- Inability to fight systemic issues (poverty, racism)
- Economic downturn
- Breathing Association
- Ground level MORPC (HWAP)
- Restricted funding (current administration volatility)
- Social enterprises
- Goodwill
- Urban League
- Lack of marketing
- United Way
- Pay parity
- Gentrification - moving poverty
- Ohio Benefits Bank
- Inability to connect with generational transcendence
- Political climate – funding trends
- CPO – naming branding issue
- Data loss
- "Cause of the day"
- Conservative ideals on poverty

Helpful ← → Harmful

SWOT SUMMARY

STRENGTHS

- Staff
- Fiscally responsible/ well capitalized
- Legacy of service and attentiveness to the communities we serve
- Strong board - supports growth and investment
- Good reputation
- Understanding of the market needs
- Ability to respond with quality services

Internal
Origin



External
Origin

OPPORTUNITIES

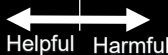
- Capitalize on diverse client base
- Expand partnership opportunities - private sector
- Grow Building Futures and VTAC - capitalize on labor market trends
- Re-brand the organization
- Find ways to appeal to those on all sides of the political spectrum
- Invest in technology infrastructure/ operational efficiencies
- Recruit more volunteers by partnering with educational institutions in Greater Columbus

WEAKNESSES

- Lack of infrastructure to serve the community in different ways
- Dependency on government and restricted financing
- Competitive wages and employee retention, lack of training and professional development opportunities
- Lack of technology infrastructure, ability to leverage data
- Lack of exposure and brand awareness in key communities

THREATS

- Not keeping up with changes in the marketplace (poverty shifts and changing needs of customers)
- Many well funded competitors with higher profiles who are innovating services (United Way)
- Political and economic climate - funding risks
- Systemic issues - race and poverty make it difficult to demonstrate progress



Helpful Harmful

KEY RECOMMENDATIONS FROM SWOT

	OPPORTUNITIES - External, Positive	THREATS - External, Negative
STRENGTHS Internal, Positive	<ul style="list-style-type: none"> • Grow Community and Corporate Partnerships – Leverage most opportunistic and emergent programs (VTAC, Building Futures, Social Enterprise, etc.) which increases revenue generation and financial support to benefit our “customers” and enable us to maintain our foundational services. • Enhance Marketing Strategy - Increase awareness and presence by leveraging our reputation as a market leader and our connections to our communities/customer base. • Strengthen policy and legislative advocacy - Develop more definitive strategy which leverages our unique programs and connections with customer base. 	<ul style="list-style-type: none"> • Showcase Impact’s emerging programs in order to better describe why we exist and what differentiates us from other NFP’s - Address social enterprise, restricted capital and opportunity to improve competitiveness by providing wrap around services. • Develop Impact’s brand positioning - Leverage our public recognition and strong fiscal position to compensate for lack of marketing. • Build data sets to connect with “generational transcendence” and understanding of current and future political climate – Leverage our longevity, customer base and unique understanding of community needs.
WEAKNESSES Internal, Negative	<ul style="list-style-type: none"> • Develop plan to garner corporate funding for staff training including cultural diversity training and staff compensation. • Decrease dependency on government funding - identify and develop self- sustaining platform which improves effectiveness of marketing efforts and increases exposure and brand awareness. • Expand accessibility to services to include all marginalized communities – expand all services and geographic reach and board and staff composition to include wider representation while improving entrepreneurial opportunities for all. 	<ul style="list-style-type: none"> • Create more diverse funding portfolio – Consisting of more unrestricted funds from corporate partners who value our services and in order to lessen our dependency on an increasingly volatile political climate. • Identify universal beliefs regarding our purpose and charter – Become a stronger, more successful organization and tell a better story. • Improve current operating limitations (i.e. hours of operation, location) – Gain competitive advantage over other NFP’s competing for same funding dollars and to reach ALL groups in poverty.

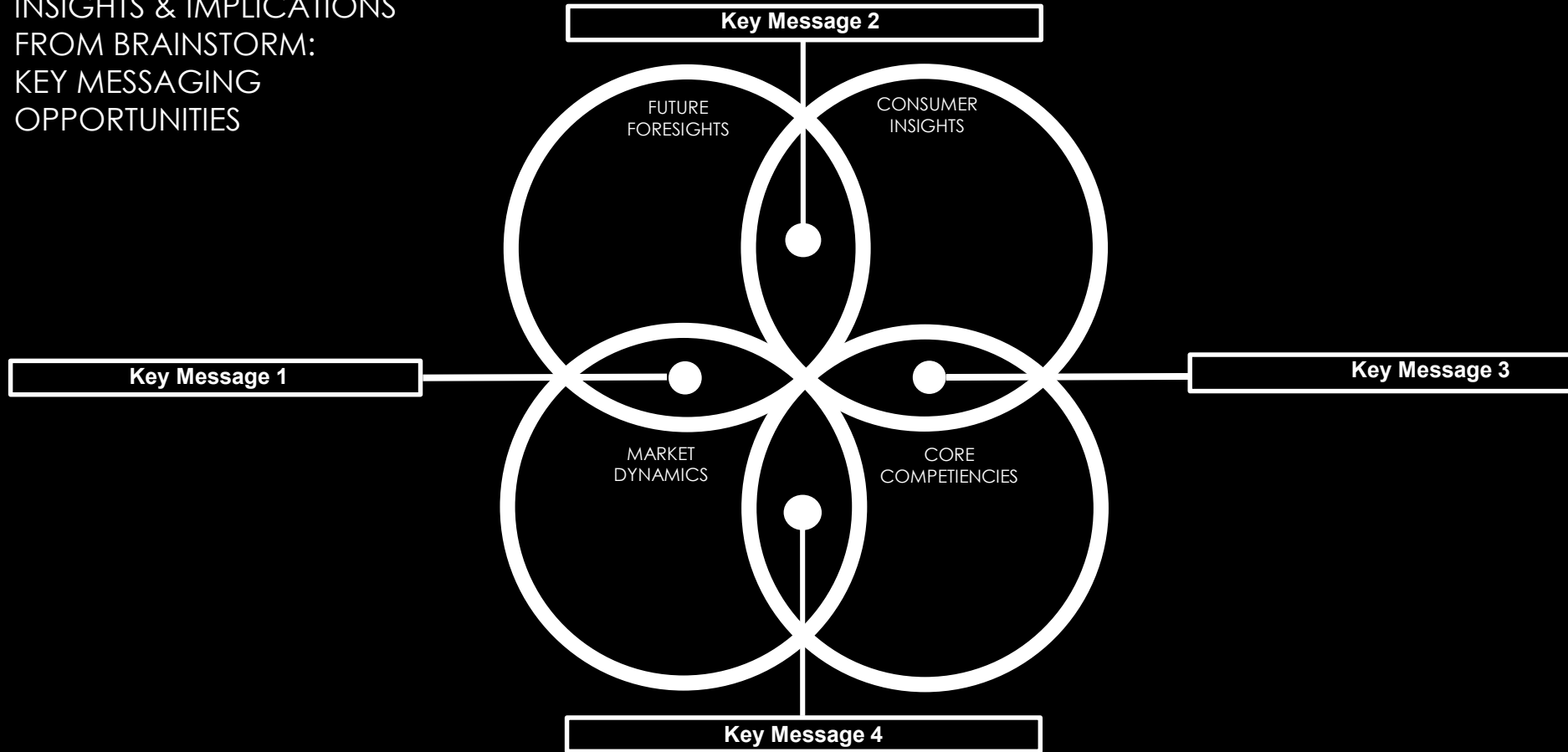
STRATEGY MAP

FROM INISIGHTS & IMPLICATIONS: Messages to emphasize	FROM SWOT: Key Recommendations	ANALOGOUS BRANDS	RESPONSIBILITY And Project type in partnership with finance				
?	<ol style="list-style-type: none"> 1. Develop Impact’s brand positioning - Leverage our public recognition and strong fiscal position to compensate for lack of marketing. 2. Enhance Marketing Strategy - Increase awareness and presence by leveraging our reputation as a market leader and our connections to our communities/customer base. 3. Identify universal beliefs regarding our purpose and charter – Become a stronger, more successful organization and tell a better story. 4. Showcase Impact’s emerging programs in order to better describe why we exist and what differentiates us from other NFP’s - Address social enterprise, restricted capital and opportunity to improve competitiveness by providing wrap around services. 		Brand/ Marketing				
	?	<ol style="list-style-type: none"> 5. Grow Community and Corporate Partnerships – Leverage most opportunistic and emergent programs (VTAC, Building Futures, Social Enterprise, etc.) which increases revenue generation and financial support to benefit our “customers” and enable us to maintain our foundational services. 6. Develop plan to garner corporate funding for staff training including cultural diversity training and staff compensation. 7. Decrease dependency on government funding - identify and develop self- sustaining platform which improves effectiveness of marketing efforts and increases exposure and brand awareness. 8. Create more diverse funding portfolio – Consisting of more unrestricted funds from corporate partners who value our services and in order to lessen our dependency on an increasingly volatile political climate. 			Partnerships & Revenue Generation		
		?		<ol style="list-style-type: none"> 9. Strengthen policy and legislative advocacy - Develop more definitive strategy which leverages our unique programs and connections with customer base 10. Expand accessibility to services to include all marginalized communities – expand services and geographic reach and board and staff composition to include wider representation while improving entrepreneurial opportunities for all. 11. Improve current operating limitations (i.e. hours of operation, location) – Gain competitive advantage over other NFP’s competing for same funding dollars and to reach ALL groups in poverty. 			Policies & Processes
				?		<ol style="list-style-type: none"> 12. Build data sets to connect with “generational transcendence” and understanding of current and future political climate – Leverage our longevity, customer base and unique understanding of community needs. 	

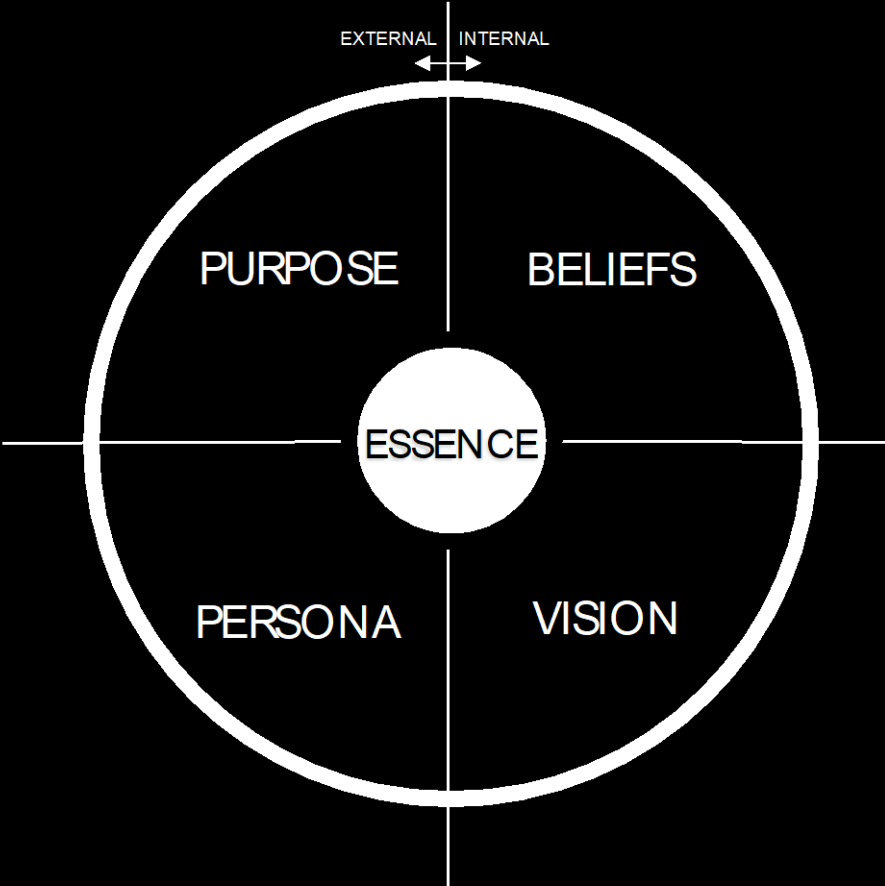
STRATEGY MAP

FROM INISIGHTS & IMPLICATIONS: Messages to emphasize	FROM SWOT: Key Recommendations	ANALOGOUS BRANDS	RESPONSIBILITY And Project type in partnership with finance
?	<ol style="list-style-type: none"> 1. Develop Impact’s brand positioning. 2. Enhance Marketing Strategy. 3. Identify universal beliefs regarding our purpose and charter. 4. Showcase Impact’s emerging programs in order to better describe why we exist and what differentiates us from other NFP’s. 		Brand/ Marketing
?	<ol style="list-style-type: none"> 5. Grow Community and Corporate Partnerships 6. Develop plan to garner corporate funding for staff training including cultural diversity training and staff compensation. 7. Decrease dependency on government funding. 8. Create more diverse funding portfolio. 		Partnerships & Revenue Generation
?	<ol style="list-style-type: none"> 9. Strengthen policy and legislative advocacy. 10. Expand accessibility to services to include all marginalized communities. 11. Improve current operating limitations (i.e. hours of operation, location). 		Policies & Processes
?	<ol style="list-style-type: none"> 12. Build data sets to connect with “generational transcendence” and understanding of current and future political climate. 		Tech/Data

INSIGHTS & IMPLICATIONS
FROM BRAINSTORM:
KEY MESSAGING
OPPORTUNITIES










VENN POSITIONING MODELSM



IMPACT Community Action
Strategic Plan - Scorecard

Strategic Plan Deliverables	Benchmark/Metric	Owner	Status	Status Details
Goal 1: Inform, Engage and Inspire Community Action towards collective IMPACT.			●	On track - more momentum needed
Strategies:				
A. Position agency as a thought leader on issues of poverty.	1A1. Secure 1 media interview (print, radio, TV, Internet) once per quarter.	Community Outreach	●	Bo's AANJ feature, Leland 2 radio spots on BF, Carmen did an interview on Radion 107.5, Poverty Simulation in Westerville, JFS Press releases. Bo did press conference for VTAC funding from the City of Columbus.
	1A2. Publish 1 article/editorial in an external publication once per quarter.	Community Outreach	●	Open invite for to write articles in the Columbus African American News Journal. We did not publish any articles in 2018.
B. Empower customers to have a voice in civic matters that impact them.	1B1. By December 31, 2018 provide 40 IMPACT advocates with Civic Engagement training and have a minimum of 2 testify before a legislative body.	Community Outreach	●	87 participants and/or volunteers participated in the advocacy orientation. We did not have any testify before a legislative body but we had several who spoke at varios public functions or to our classes.
	1B2. By December 31, 2018 establish a Civic Engagement Advisory committee led by a minimum of 5 IMPACT Advocates.	Community Outreach	●	Marketing & Development department is undergoing a restructuring. We will revisit this benchmark when the restructuring is complete.
C. Advocate for public policy reform that addresses economic inequality and the growing disparity.	1C1. By the end of the 3 rd quarter of 2018, host a community conversation centered on our needs assessment, the growing economic inequality, and steps to proactively address these trends.	Community Outreach/ Executive	●	Facilitated several small group conversations and a state-wide conversation at the OURS conference.
	1C2. By the end of the 4 th quarter, publish a position paper with advocacy recommendations on public policy reform.	Community Outreach/ Executive	●	Not started and not sure this is the right metric
D. Build civic engagement capacity by establishing partnerships with allied organizations from the public, private and non-profit sectors.	1D1. By December 31, 2018 establish 5 formal (MOU) partnerships with organizations that are aligned with IMPACT's public policy agenda.	Community Outreach/ Executive	●	Not started and not sure this is the right metric
Goal 2: Diversify and grow revenue to increase financial capacity and sustainability.			●	On track - more momentum needed
Strategies:				
A. Decrease dependency on governmental funding.	2A1. Achieve a 10% increase in non-governmental funding over three year average of non-governmental funding for the prior 3 years.	Fiscal / Executive	●	We actually had a decrease of 17% due to the late rollout of trhe AEP program.
	2A2. Increase overall funding by 3% over the average of the prior 3 years.	Fiscal / Executive	●	We grew our overall funding (revenue) by 10.4%
	2A3. Net \$50,000 in unrestricted revenue from the 2018 Ripploe of Hope Gala	Development	●	Completed but did not achieve the goal. We raised \$21,758.
B. Increase unrestricted revenue via entrepreneurial efforts that provide services/products that meet community needs. (e.g.: Affordable Housing)	2B1. Achieve an operating break-even for rental property activites by June 2019.	Executive / Housing Director	●	Started but will need to rethink metric or timeline.
	2B2. Generate a profit of \$3,000 per month from a minimum of 5 units by January 2021.	Executive / Housing Director	●	Started but will need to rethink metric or timeline.

IMPACT Community Action
Strategic Plan - Scorecard

Goal 3: Provide innovative, high quality, customer driven programs and services that lead to true self-sufficiency.				On track - more momentum needed
Strategies:				
A. Provide customers with career pathways that lead to a liveable wage of \$12 per hour or more.	3A1. Increase the Building Futures & VTAC program enrollment to serve 120 program participants by 12/31/18.	Empowerment		We served 58 customers via Building Futures and 52 via VTAC. We changed training partners in our VTAC program and did not serve as many. Our new partners have greater capacity, we will serve more people.
B. Implement innovation strategies and process improvements that will increase the number of customers we serve and improve the quality of service.	3A2. The Emergency Services department will increase the number of customers served by 20% over the previous program year.	Emergency		We served 15,889 in 2017 & 16,219 in 2018. Per our grant agreement we will need to serve 21,000 in 2019.
 Achieved or exceeded the goal				
 Making progress and on track to achieve the goal				
 Started but more momentum needed				
 Not started, focused attention needed				