



STRATEGIC BUSINESS PLAN

EXECUTIVE SUMMARY

June 2014

Background

Green Opportunities is a 501(c)(3) nonprofit organization based in Asheville, North Carolina. GO's programs address chronic poverty, joblessness and lack of opportunity in underserved, low-wealth neighborhoods throughout Buncombe County and public housing developments in the City of Asheville. Through these programs, GO prepares people for meaningful jobs that support families and improve community and environmental health.

GO recently celebrated its fifth anniversary. In those five years, amidst rapid growth and expansion, the organization established a solid organizational foundation for accomplishing our work. However, unsurprisingly, this rate of growth resulted in a lack of clear direction and focus, and caused several other "growing pains" related to internal capacity. To address these challenges, the organization initiated a long-term strategic business plan in November of 2012.

Business Planning Goals and Process

The goals of the business planning process were to develop an actionable, one to three year plan that will enhance GO's organizational capacity by providing: a shared vision for where Green Opportunities is headed; a clear path for how we get there; a tool for prioritizing projects, evaluating future opportunities, measuring organizational impact and making improvements, and a tool for building support from community members, partners and investors.

In late 2012, GO formed a business planning "Working Group," comprised of a diverse group of stakeholders representing a wide range of perspectives and affiliations. This group adopted a framework for planning based on the book *Business Planning for Enduring Social Impact* and quickly moved to The Working Group conduct a Need and Opportunity Analysis, examining internal and external factors. They later sought and secured funds to pay for a consultant team to guide them through plan completion in early 2014¹.

Summary of Needs and Opportunities

The need for Green Opportunities in Asheville, North Carolina is significant. Despite Asheville's reputation as a leader in sustainability and consistent economic development progress, there are isolated neighborhoods within the city that are disconnected from the "green" economic opportunities and environmental sustainability projects that are prominent elsewhere. These low-wealth, predominantly African American neighborhoods are instead characterized by chronic joblessness, lack of opportunity and loss of hope. Residents of these neighborhoods face extreme employment barriers, including poverty, criminal backgrounds, lack of stable housing, inadequate childcare and lack of education.

The tremendous economic growth in and around these neighborhoods translates into substantial opportunity for low-income residents to participate in the local green economy. The jobs exist and the community members want to access them. GO's central challenge lies in linking these two together

¹ Steve Kallan and Desiree Adaway of Kallan Strategic Partners were selected as the consultants through a competitive RFP process.

through community engagement, technical and life skills training, job placement, job creation and ongoing supportive services.

A Source of Hope

It was apparent in speaking with current and past GO members, that GO is viewed as a "source of support and hope" for the "people who need it most." Members expressed feeling supported and nurtured by a caring and capable GO staff. Several members acknowledged the role that GO plays in helping "people who come from a hard place" to help themselves. They see GO as opening doors of opportunity as a way of offering people "a second chance" and getting people "off the streets."

Organizational Needs

GO's Need and Opportunity Analysis surfaced several opportunities for improvement, including the need for enhanced financial management, staff and board role clarity, collaboration across programs, management accountability and skill development. The following key themes emerged from this analysis:

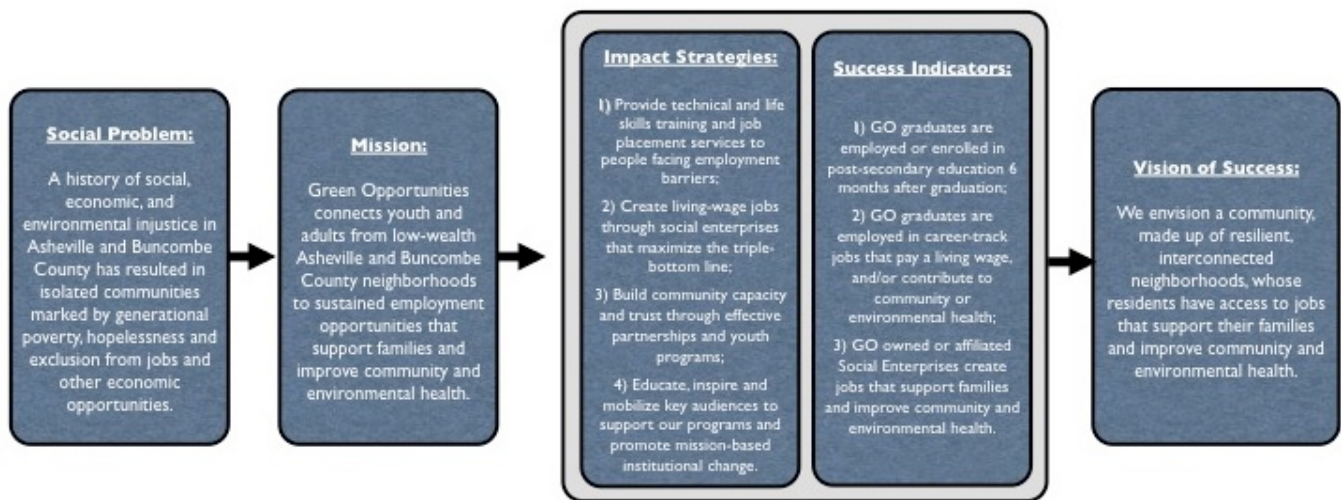
- **Organizational Purpose, Priorities and Focus** – After five years of growth and expansion, GO needed to clarify its mission, vision and programmatic focus. This means streamlining programs and bolstering support for those programs that have the biggest mission impact.
- **Message, Communications and Outreach** – The community we serve is unclear about what we do and what we are trying to accomplish. Meanwhile, many people in the greater community outside of our target areas, including employers and decision-makers, are still unfamiliar with our work. GO needs to clarify its message and improve the ways in which we communicate it, both inside and outside of our target areas.
- **Job Readiness** – GO graduates are often not well prepared with the soft and hard skills they need to stay employed. The focus of our training programs needs to be more explicitly about job readiness, and we need better filters to screen out individuals who are less likely to be successful in the programs we offer.
- **Accountability** – Lack of clarity about staff roles and who is accountable for specific program outcomes has hampered the organization's ability to achieve its full potential. Furthermore, GO's unconventional co-leadership structure has made decision-making processes unclear and inefficient. Additional professional skills development for GO staff and board continues to be a priority.

Summary of GO's Social Impact Model

Green Opportunities' Social Impact Model (depicted below) is the framework for understanding and articulating what the organization does, how it does it, and for what ultimate purpose. It includes our definition of the social we are trying to address, our vision for success and our new mission statement. It also includes the social impact strategies we will use to achieve our mission and the indicators we plan to use to measure our progress.

Timeline and Goals

The work necessary to achieve the purpose articulated in the Social Impact Model will be divided into two primary phases. Phase One covers the 18-month period from January 2014 through June of 2015. The focus during Phase One is on the improvement, establishment and growth of existing GO programs. Phase Two covers the period of time between July 2015 and January 2018. It will include long-term goals related program diversification and/or expansion. This business plan details only the



goals and activities during Phase One. Subsequent work with GO's board and staff, planned for summer of 2014, will be necessary to develop and prioritize Phase Two goals.

GO's planning process resulted in the following Phase One Goals:

1. Train and graduate 90 students in life and technical skills, and support them on a pathway toward self-sufficiency, employment, and/or continuing education.
2. Support seven (7) self-sustaining social enterprises that create permanent, living-wage jobs and provide GO graduates with the opportunity to apply their skillsets in a professional work environment.
3. Launch a pilot youth program that enhances community support networks and trust, improves conditions in families and communities, and puts 30 low-income youth on a pathway toward high school graduation, college and/or entrepreneurial careers.
4. Increase the leadership capacity of GO's board and staff in order to effectively execute the GO Business Plan and shift more of the Co-Executive Directors' focus toward external leadership functions.
5. Enhance administrative, financial, human resources and risk management systems in order to create a safe, sustainable and effective work environment at the WC Reid Center by June 2015.
6. Raise the funds needed to support GO programs and creates an operating reserve of \$50,000 by June 30, 2015.

Capacity Building

The primary persons responsible for accomplishing the strategy goals set forth in this business plan will be members of GO's staff and Board of Directors. Board committees, with clear purposes, will carry out governance functions and report regularly to the board as a whole. Staff teams, organized according to the above social impact strategies above, will carry out management functions, and a new "Management Team" will take the lead in monitoring the progress of this plan and making key decisions

along the way. Initially, the Co-Executive Directors will be responsible for regular communication with the board about Business Plan progress, including significant adjustments during implementation.

Additional staff and board roles will need to be filled in order to effectively execute the work of Phase One, including board members from our target communities, those who can “open doors”, and others with specific areas of expertise. Among staff, we anticipate needing to add or expand positions in Training/Placement and Finance/Administration. We will also move forward with leadership succession planning during Phase One, with the goal of shifting to a single executive directorship model by January of 2015.

In addition to filling these roles, current GO staff and board members will need additional coaching and training to become more effective leaders and change agents. GO will develop a “culture of professional development” that supports the professional growth of our staff and board in the same way that we support professional growth for our students.

Administration and Facilities

None of these strategic goals can be accomplished without strong administration and a safe and effective facility. This includes developing clear standard operating procedures for financial systems, office procedures and internal communications, as well as better risk management systems that support a robust Green Opportunities safety culture. GO’s administrative team will also help lead a smooth and well-publicized transition into the WC Reid Center as GO’s new base of operations.

Financial Sustainability

Green Opportunities mission and social impact strategies also cannot be carried out without a strong foundation of programmatic and general operating funding, adequate reserves and working capital, and sound financial management systems. Current projections predict the need to raise an estimated \$1,387,267 in new funding to support Phase One activities. This will come as a combination of grants, individual and business contributions, events, contracts and social enterprise revenue. Staff and board will lay a foundation during Phase One for growing the relative contribution of social enterprise revenues in order to reduce our dependency on grants. In addition, we will initiate a “Move-In” campaign to acquire an estimated additional \$241,830 in dollars or in-kind contributions to equip a thriving WC Reid Green Jobs Training Center in time for our anticipated move-in date in summer 2014.

These development efforts will be bolstered by a stronger and more clearly defined messaging strategy. Beginning with the Reid Center transition, GO staff will implement a strategic marketing plan, develop a more consistent outreach and communications toolbox, and craft targeted messages for specific audiences aimed at getting them to take action.

Ongoing professional development with GO board members and staff will be necessary in order to foster a stronger financial management culture throughout the organization. GO will need to continue its efforts to monitor cash-flow closely on a regular basis, to pursue a development strategy that emphasizes general operating funds, and to exercise caution in when entering into large grants and contracts that can impact cash-flow.

Strategic Partnerships

Collaboration is an important GO strategy driven by our Core Values. Pursuing *smart collaboration* with strategic partners —with clearly defined roles and mutual benefits—will be essential to achieving our Phase One goals.

Measuring Impact

Green Opportunities will measure its impact based on the extent to which we can facilitate sustained employment for low-income individuals in jobs that support families and improve community and environmental health. We will therefore track:

- How many people get jobs and retain them as a result of our efforts
- How many new jobs we create through GO-affiliated social enterprises
- How well the jobs our graduates get pay
- Whether or not these jobs contribute to improved community or environmental health

By the close of Phase One, we expect 60 individuals to have gotten and kept jobs or been enrolled in post-secondary education for six months, 67% of which will pay a living wage and/or contribute to improved community or environmental health. We expect to create 25 green jobs through GO-owned or affiliated social enterprises, with an emphasis on jobs that contribute to greater local food security.

Planning in Action: Action in Planning

Despite a strong emphasis on Phase One planning throughout the business planning process, GO embraced an action-oriented planning approach, implementing key business decisions in response to data gathered during the Need and Opportunity Analysis. In addition, our business plan consulting contract included coaching of key organization leaders in order to ensure that GO's board and staff could implement the work of the plan effectively.

Key business decisions that were implemented over the course of the planning process included:

- **Training Program Realignment** – GO staff realigned training and placement programs to create a single point of entry for all prospective students, along with clear, consistent expectations and standards across all programs. This included revising our intake procedures and selection criteria in order to focus our resources toward the individuals who would be most likely to succeed in our program model. We also refocused the technical training curriculum toward job sectors with greater local demand, and added *Roots of Success*, a nationally accredited training curriculum focused on sustainability and social entrepreneurship.
- **Organizational Restructuring** – GO leadership rebuilt the organizational chart to align with the Social Impact Model, with one program team assigned to each social impact strategy. In doing so, we did away with our Building Performance Team, shifting its remaining elements to either training or social enterprise. Program teams—including a leadership team comprised of the board and Co-Executive Directors—developed detailed functional models to clarify new roles, responsibilities and accountability (see appendix).
- **Social Enterprise Focus** – GO staff established clearer criteria for success in our social enterprise initiatives, embracing the criteria that all GO-owned social enterprises needed to create green jobs for graduates *and* be at least revenue neutral (if not make a profit). This decision led us to discontinuing one service and spinning another off to a GO graduate and former GO staff member.
- **Financial Management Capacity** – With the assistance of a financial consultant, GO leaders acted quickly to address pressing cash-flow challenges. These actions included reducing personnel and workers compensation costs, increasing financial management capacity for board and staff, and bolstering unrestricted revenues through GO's Annual Fund.