



VIRTUAL LEARNING SERIES:

AFTER THE PIVOT

STRATEGIC PLANNING TOOLS

DEC. 15, 2020 @ 11 A.M.

PRESENTERS:

- SANDLIN NEELY, BCBSLA SENIOR CORPORATE STRATEGY CONSULTANT
- DUSTIN LAFONT, FOUNDER AND EXECUTIVE DIRECTOR OF FRONT YARD BIKES
- BEN MAHONEY, BCBSLA FOUNDATION COMMUNICATIONS & SPECIAL PROJECTS MANAGER

Find new paths,
get back on track

AGENDA

- Overview
- Virtual, Skilled Volunteering with Taproot
 - **BEN MAHONEY**, BCBSLA Foundation
Communications & Special Projects Manager
- Strategic Planning Collaboration + Toolkit
 - **SANDLIN NEELY**, BCBSLA Senior Corporate Strategy Consultant
 - **DUSTIN LAFONT**, Founder & Executive Director
Front Yard Bikes
- Q & A
- Closing

Please post your questions in the Chat



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COMMUNITY PARTNERSHIPS

COMMUNITY RELATIONS+BLUE CROSS FOUNDATION

TAPROOT PLUS PARTNERSHIP

Nonprofits need professional support



On average, nonprofits survive on 8.7 percent overhead...*

Compared to the 20% average spent by for-profit companies to build a strong infrastructure.

*Source: *Nonprofit Starvation Cycle*, SSIR; 2015 Nonprofit Finance Fund, Standard & Poor

What is pro bono service?

Pro bono publico adverb, Latin 1. for the public good

Pro bono is the donation of professional services (i.e., technology, human resources, marketing, strategy, legal) benefitting organizations working to improve society.

Blue Corps

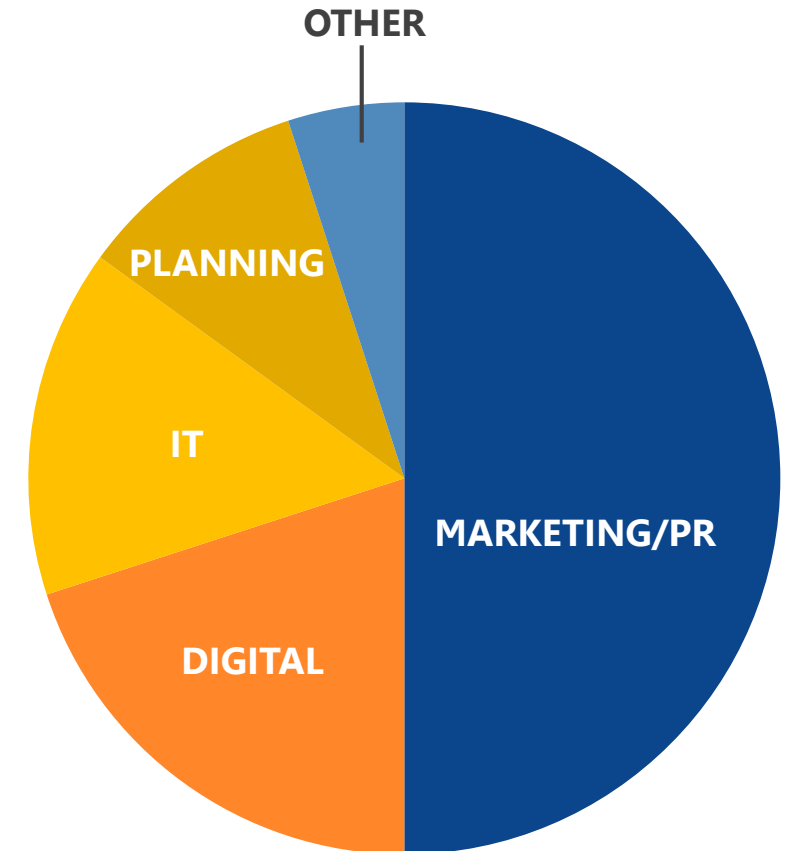
In 2017, we launched Blue Corps, which paired Blue Cross employees with valuable business skills to nonprofits who needed support in:

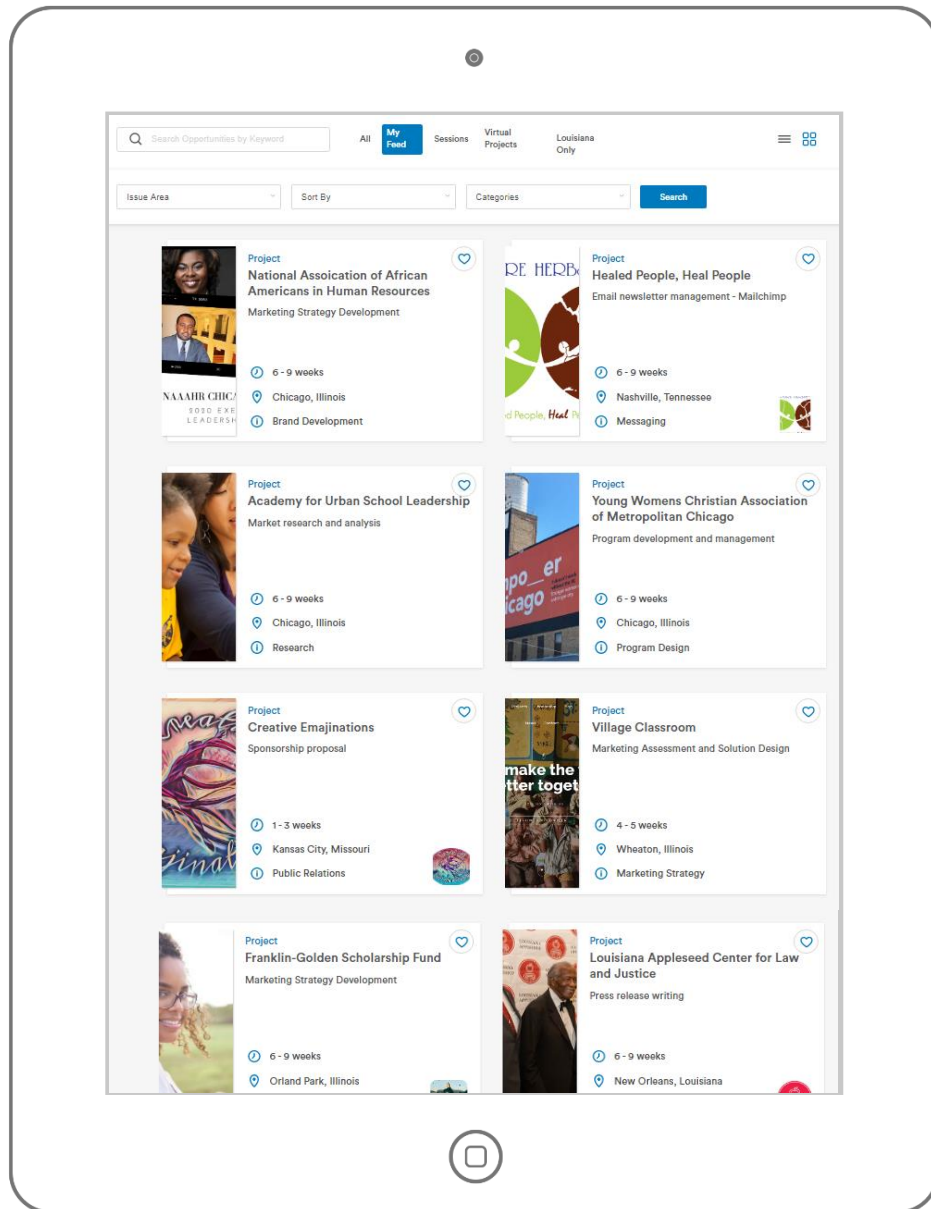
- Marketing/PR
- Digital Strategy
- IT/Technology
- Business planning
- HR support
- Translation Services



29 projects
completed since 2017

\$300,000+
in valuated services





Taproot Plus

Connecting Nonprofit Needs with Skilled Volunteers

- Louisiana nonprofits submit proposals for skilled assistance in finance, board development, marketing, IT, HR and more
- Volunteers can browse opportunities and apply to provide those consulting services pro bono
- Available at no-cost online at Louisiana.taprootplus.org
- Goal: 10 Engagements completed by Jan 2021; 25 completed by July 2021

Louisiana.taprootplus.org

WELCOME

Connect your skills with causes you care about in Louisiana.

In communities across Louisiana, nonprofit businesses are taking on big, complex challenges to save lives and improve well being for all.

However, nonprofit organizations don't always have access to the marketing, HR, technology, or planning resources they need to thrive. Too many organizations are understaffed, operating on small budgets, and facing challenges that would benefit from targeted subject matter expertise. That's where you come in.

You can put your professional skills to work by helping nonprofits complete specific, short-term projects as a virtual volunteer, or by consulting with them to help them plan around a challenge.

We're calling all Louisiana businesses and volunteers to pitch in and help the nonprofit community! It's easy to volunteer – and Taproot Plus will guide you each step of the way.

If you are signing up to volunteer on behalf of Blue Cross or another Louisiana-based company, please use your work email address to register. That way, share your impact and the value of your volunteer hours back with your employer!

[SIGN UP NOW](#)

[LEARN MORE](#)



What kind of support are you looking for?

Common pro bono projects

Projects should be created by 1 to 2 skilled volunteer(s) over the course of 6 to 9 weeks. Include specific, concrete details about what you need.

* Create a compelling pitch to attract volunteers to your project.

Why is this project a priority for you at this stage? How would this project help achieve your organization's goals or further your mission? Why is this project a good investment of the skilled volunteer's time?

What preparations have you made for the project? How do you plan to implement the project once it's complete?

Demonstrate that you have the materials, time and staff commitment to successfully complete this project with the skilled volunteer. Show them that your organization is ready to implement the work that they do.

* How long do you estimate this project will take?

What skills and expertise are most important to you?

Select Skills

Select a cover photo for your project

The most effective photos are large, landscape-orientation photos of people carrying out your organization's mission. Do not use a logo or images with a lot of text unless you absolutely have to.

Choose file No file chosen

Please indicate if the following special requirement(s) apply:

This project must be done in person.
This will significantly limit the candidate pool. Check this only if this project cannot be done remotely.

SUBMIT

SAVE AS DRAFT

Business Development

- ▶ Board reporting dashboard
- ▶ Business strategy coaching (30 hours of coaching)
- ▶ Cost-reduction analysis
- ▶ Financial auditing
- ▶ KPI Development
- ▶ Market research
- ▶ Pitch development (business proposal/grant writing)
- ▶ Project management
- ▶ QuickBooks help
- ▶ SWOT analysis/Environmental scan

Information Technology

- ▶ CRM optimization
- ▶ IT systems/network audit
- ▶ Mobile app development
- ▶ Website application development
- ▶ Website platform transfer

Marketing/Communications

- ▶ Brand strategy
- ▶ Communications plan
- ▶ Copy writing/editing
- ▶ Design (logo, brochure, annual report, one pagers, letterhead, websites)
- ▶ Digital marketing (social media strategy, Google AdWords)
- ▶ Key message development
- ▶ Media relations strategy
- ▶ Multimedia (photography, videography, presentation deck)
- ▶ Public relations plan

Human Resources

- ▶ Board development
- ▶ Board effectiveness
- ▶ Change management coaching + recommendations
- ▶ Employee handbook
- ▶ HR Systems audit + recommendations
- ▶ Performance management process

Use Cases

- CRM Planning, Solution Design
- Earned Income Planning
- Performance Evaluation System
- HR Policies
- Communications Plans
- Infographic Design
- Spanish Language Translation

Three Keys to Great Pro Bono

- The deliverable is essential. What is the widget you want to receive?
- Take the reigns on communication. Plan to touch base frequently at the beginning, at major milestones, and as you wrap up. You are the client.
- Plan for your engagement to take 50% more time than you anticipate. You are the client, but your consultant is still a volunteer.

Louisiana.taprootplus.org

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[SIGN UP NOW](#)

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THANK YOU!

SIGN UP FOR OUR MAILING LIST

WWW.BCBSLAFOUNDATION.ORG

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Non-Profit Strategic Planning

December 15, 2020

Developing a strategic plan holds many benefits



Provides direction and focus for your organization



Drives organizational alignment



Guides decisions and organizational priorities



Identifies measurable goals and helps evaluate progress



Helps clearly communicate short-term and long-term plans

Where did this idea begin?

In order to provide strategic planning support to a larger number of non-profits, we developed a DIY strategy toolkit

Strategic planning support as a common request from non-profits

BCBSLA Strategy team wanted to help fulfill those requests

How do we help a broad audience consisting of several non-profits?



Strategic Planning Toolkit

How did we get to the final toolkit?

Testing the toolkit with Front Yard Bikes allowed us to create a product that any organization could use to develop a strategic plan

Selection Process

The BCBSLA Foundation provided us with several profiles from non-profits seeking strategic planning support

The Strategy team reviewed the profiles to select one to pilot the toolkit with



Collaboration

Interview	Objective	Initial call to ensure interest and understand current plans, goals, barriers, and opportunities
	Output	Determined to proceed with engagement and gained understanding of current position and plans
Half Day Planning Session	Objective	Follow the toolkit to facilitate FYB strategic planning and receive feedback on improvements
	Output	First draft of FYB's strategic plan and suggestions on updates to make to the toolkit
Follow-Up	Objective	Complete Strategic Plan with the updated format (moved from PowerPoint to Excel)
	Output	Comprehensive Strategic Plan and completed Toolkit

Successful strategic planning may require an understanding of how to navigate potential challenges that may arise

Barriers

Potential Solutions

1	Lack of clarity on why a strategic plan is valuable	<ul style="list-style-type: none">Align on why you need or how you could use a set of clearly defined organizational goals and opportunities (i.e., for fundraising / grant applications, growth potential, etc.)
2	Key stakeholders not present during strategic plan development	<ul style="list-style-type: none">Identify who is critical to the development (i.e., Founder, Leadership, Board members, etc.) and plan in advance to ensure proper attendance and participation
3	Not enough time to plan or distractions / lack of focus during the planning process	<ul style="list-style-type: none">Ensure schedule availability from critical stakeholdersBlock a few half or full days to dedicate focused time to the planning process
4	Disagreement among leadership	<ul style="list-style-type: none">Develop a comprehensive, pointed mission to drive the strategies
5	No clear definition of success	<ul style="list-style-type: none">Create or use a mission and vision to define what you are aiming to accomplish and set success measures and goals that align accordingly

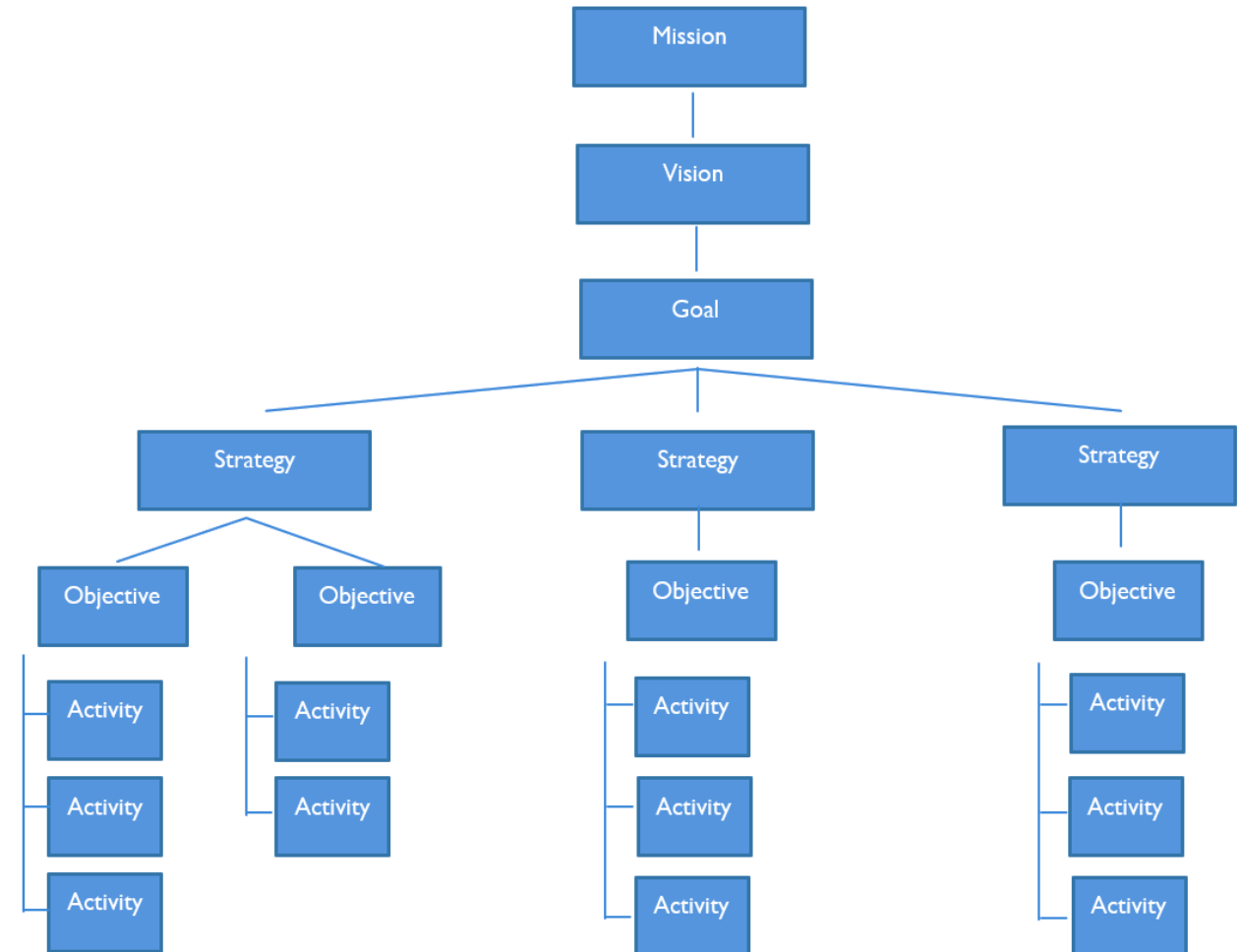
The toolkit walks you through each step of the strategic planning process to help you develop a comprehensive organizational strategy

What is included in the toolkit:

- An Excel file to easily populate
- Detailed steps and tips for completion
- Examples of what you could use for specific components of your strategy (i.e., mission, goals, strategies, etc.)

End-product from using the toolkit:

- A comprehensive understanding and documentation of organizational priorities
- A strategic plan that includes:
 - Mission and vision
 - Organizational goals
 - Strategies with strategic objectives and tactical activities to accomplish your strategies



Front Yard Bikes

We had a good narrative, solid data, and wonderful youth!

So what do we do now?

- We know we are not doing enough and we can have better outcomes but how do we get started? Where do we begin?



Strategic Plan Process to us

1. Creating a plan allows you to self-evaluate and provide direction for your Board, staff, volunteers, and donors
 - Our programs were being led by grants we received rather than the needs of our community.
2. Knowing our goals and future plans saved our energy!
 - My staff is small and needs to work with purpose. Can NOT afford burn out.
3. Many foundations, grantors, and nonprofit partners expected us to have one
 - In large proposals, we are always asked to attached a strategic plan

Notable Strategic Plan Outcome



After redefining organization goals and the needs of our youth, we:

1. Sought funding for a larger space
2. Recruited nonprofit partners that could fill our programing gaps
3. Sought out donors which helped us to collectively raise \$385,000.

We are still using our strategic plan to sustain our goals but we still make changes. It's a living document and our youth input is extremely valuable to us.

How can you get the support you need to create a strategic plan for your organization?

- Submit a request through the Taproot system
- Reach out to the BCBSLA Foundation for a copy of the Strategic Planning Toolkit
- Email the BCBSLA Strategy team for specific questions:
Strategy@bcbsla.com
- Respond to the survey we will send out following this discussion so we can gauge the number of organizations interested in additional support so we can develop solutions accordingly

Please post your questions in the Chat



As a result of what you heard during presentations today, what is one **action** you can take on Monday?

Please post your commitment in the chat



Contact Us!

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Thank You

- **Next Virtual Learning Series**
- Tuesday, January 26 @ 11AM
- **Thinking About Success Differently:** Measure of America's Human Development Index as a Tool to See Challenges & Measure Progress

