

# Lakeshore Foundation

## 2021-26 Strategic Plan Summary



Lakeshore Foundation is boldly moving forward, challenging ourselves and others to embrace and collaboratively build a new future. Rooted in our vision and mission, our work is guided by a comprehensive five-year strategic plan which calls for Lakeshore to offer more services, equip others, and partner with the disability community to achieve lasting change.

### Lakeshore's Vision and Mission

**Vision:** A world in which every person has the opportunity to achieve a healthy, active independent life.

**Mission:** To encourage and provide opportunities for people with disability to live a healthy lifestyle through activity, research, advocacy and health promotion.

### Lakeshore's Strategic Impact Goals

**Goal One:** Directly championing optimal health for people with disabilities.

**Goal Two:** Equipping others to advocate with people with disabilities to improve optimal health and societal inclusion.

**Organizational Goal:** Provide Lakeshore Foundation the opportunity and capacity to be successful through alignment of the strategic plan with organizational structure, governance, resources & people.

These goals will equip Lakeshore to:

1. Build a culture that nurtures and integrates innovation, evaluation and research.
2. Align our infrastructure and resources to support our strategic plan.
3. Clearly establish a design for developing and connecting our activities to create a unified pathway toward achieving our mission and vision.
4. Develop a consistent core identity and purpose that all staff are equipped and supported in achieving, including core competencies related to disability, inclusion and equity.
5. Design and implement programs, products and services that are data-driven, continually evaluated and in partnership with others in the disability community.
6. Identify and develop partnerships and collaborations that strengthen our services and address gaps in services at Lakeshore and in society.
7. Advocate for inclusion in all areas/sectors by developing and disseminating inclusion strategies, resources and tools.
8. Engage board members, volunteers and members.
9. Increase revenues through grants, major and planned gifts and diverse earned revenue opportunities.
10. Align branding and refined, unified messaging to support the strategic plan, including fundraising, advocacy, research and programming.
11. Enhance the awareness and influence of Lakeshore with key audiences.
12. Build and support a culture of inclusion, mutual respect and appreciation.



## Strategic Impact Goal 1

## Directly championing optimal health for people with disabilities.

**1. Ensure that Lakeshore programs and services continually meet the needs of the disability community including our members.**

Implement consistent, ongoing internal and external evaluation which supports and guides program assessment and development and engages members and the disability community. Build a culture of innovation, equipping and supporting staff to identify best practices and incorporate new ideas.

**2. Align our organization internally with the strategic plan.**

Establish consistent, organization-wide guiding principles and success indicators for all programs and activities. Develop and educate all staff on core competencies related to disability, diversity, equity, inclusion and other essential topics. Modify the organizational structure to support collaboration and the alignment of work and outcomes.

**3. Establish and deliver evidenced-based and data driven services.**

Develop and integrate formal, ongoing evaluation and research into activities, services and programs of the organization, using the information to drive alignment and expected outcomes. Use the Theory of Change to connect our activities and establish a clear, unified pathway toward our mission and vision. Support all staff in delivering evidence-based, high-quality services.

**4. Identify and strengthen partnerships to help us meet the needs of Birmingham's disability community.**

Develop criteria for partnerships, including those which meet service gaps or add value to members/participants. Increase and formalize Lakeshore's ability to refer individuals to and educate individuals about external agencies. Educate staff and members/participants on external resources.



## Strategic Impact Goal 2

# Equipping others to advocate with people with disabilities to maximize health and societal inclusion.

### 1. Develop and implement Lakeshore's person-centric approach in everything we do.

Identify and develop a decision-making framework to prioritize opportunities. Embed human-centered design thinking in the construction of innovative, evidence-based solutions. Protect and preserve Lakeshore's intellectual property. Ensure resources required are anticipated and built.

### 2. Develop a wellness observation system identifying gaps in services that will transform the disability community into active members in maximizing health, function and social participation.

Assess the gaps in models, tools and resources aimed at increasing optimal health and inclusion. Determine how others are meeting the needs of the disability community. Use data to define problems we want to solve.

### 3. Use data to develop and pilot innovative on-site and online wellness programs using relevant technology to reach a broader segment of the disability community.

Develop prototypes to identify possible solutions, and use data to iterate solutions as necessary. Advocate for inclusion across sectors (education, health, fitness facilities, advocacy, private partnerships, etc.) and programs by developing and disseminating inclusion strategies, resources and tools.

### 4. Monitor sector-wide trends to understand the changing needs of the disability population, evaluate Lakeshore's impact and support continuous improvement.

Develop and implement periodic evaluation of Lakeshore's strategies. Identify the desired outputs and outcomes of programs/services. Incentivize staff to be innovative and seek best practices. Build an infrastructure to continually gather data that informs program development, improvements and innovation.



## Organizational Goal

**To provide Lakeshore Foundation the opportunity and capacity to be successful through alignment of the strategic plan with organizational structure, governance, resources, and our people.**

**1. Governance: Develop and strengthen Lakeshore's Board of Directors to serve as engaged organizational supporters and ambassadors to advance the organization's strategic impact.**

Engage the Board's Planning Committee to oversee the strategic plan implementation. Establish a formal onboarding process. Offer continuing education opportunities on disability related issues and Lakeshore's work. Increase Board engagement by 20%.

**2. Fundraising and Revenue Generation: Generate more revenue by increasing and stewarding diverse contributed revenue streams and developing earned income opportunities to support growth and impact.**

Develop processes and infrastructure to support major and planned gift fundraising. Implement research-based, donor-centered fundraising processes. Strengthen our capacity to support programing and evidence-based processes through grants. Develop and implement diverse earned revenue opportunities.

**3. Marketing and Communications: Enhance Lakeshore's internal and external marketing and communications to build its local, regional, and nationally visibility as a thought leader and innovator, and effectively reaching all stakeholders to achieve its strategic impact goals.**

Develop strategic, measurable communication plans to support the strategic plan and internal communications. Establish Lakeshore as a thought leader for key messages that enhance our influence. Align brand identity with the strategic plan. Support the development of brand ambassadors.

**4. Human Resources: Personally and professionally support Lakeshore's staff to 1.) successfully implement Lakeshore's strategic impact goals and 2.) equip individual employees to best meet participant's needs.**

Assess current staffing to determine organizational needs and optimal staffing to achieve the strategic impact goals. Determine, communicate and educate employees on Lakeshore's values, common core competencies, achieving workforce alignment. Build and expect a culture of inclusion, trust, mutual respect and appreciation.

**5. Technology: Enhance technology efficiency and effectiveness by ensuring Lakeshore has the appropriate technology, training and security to fulfill its strategic impact goals.**

Conduct a technology audit and build Lakeshore's technology capacity to support strategic goals. Develop training programs to support the technology needs of the organization. Ensure all network security policies and regulations are met.