

Biggest Hack of all: The Altruist Impact System. Nonprofits gain >\$1M in revenue and >25% to their social impact in first year of deployment.





Must-have foundational elements for a thriving nonprofit social impact enterprise

Components

- each is technical and specific- get the details wrong and they won't work
- ✓ each element has 2 subcomponents that align teams and ensure good process



BUSINESS PLAN



REVENUE ENGINE



EXECUTION DASHBOARD



Business Plan

Components

√ "Strategic Plans" rarely work

Business Plan Framework

Needs initial alignment phase, the



Mission

We foster stability and self-sufficiency for children and their families through programs that provide food, clothing, education and emergency assistance.



Vision

All students in our city can focus on their education because their basic needs are being met.

Strategic Framework v. 1.03



Values

Inclusive of all individuals & families.
Compassionate programs delivered with respect, empathy and humility.
Accountable to each other, our donors, and those we serve.



Value Proposition & Proof Points

Our city's original human services organization with deep and established roots in the community.

Direct, wraparound services with low barriers of entry to assist children and their families.

All investments stay local and positively impact children in Bellevue.

Established relationships with the City School District create efficient and responsive solutions.



Impact & Growth Strategy

- Complement transactional services with client follow-up and support.
- Extend reach of client services with community and school outreach.
- Leverage membership circles and events to build awareness of poverty in Bellevue.
- Diversify revenue sources from dependence on events to relationship-based investments from individuals, foundations and corporations.



Year 1 Initiatives

- Invest in ongoing client follow-up and staffing to support it.
- Create a community outreach and ambassador program.
- Build an **Investments & Partnerships team** to grow community and financial support.
- Launch **org-wide data analytics** to enable continuous performance improvement.
- Develop engagement opportunities for volunteers and corporate partners.

| Metrics (leading + lagging) | | | |
|---|--|--|--|
| Financial | Stakeholder | Organizational | Impact |
| Annual growth Months of cash on hand Cost per dollar raised | Circle membership growth Corporate, foundation and individual investments Community partnership leverage to extend reach | Staff growth, retention, compensation and development Board outreach metrics Board diversification matrix | School attendance and graduation rates for underserved students Cost per client served vs. SROI Achievement gap reduction |





Business Plan

Business Plan Template

PROBLEM Define the problem you are solving (for arts/culture orgs, the joy you add) with concise

descriptive statistics. What are the challenges?

SOLUTION What does total success look like in concrete, measurable terms? Vision statement here.

VALUE PROP State why your organization is the best solution to the problem and give concrete evidence

(aka "proof points") that they work.

GOAL Your 5 to 10 year Big, Hairy, Audacious Goal that makes progress toward your ultimate

vision. "A BHAG is clear and compelling. People get it right away. Our goal is to put a man on the moon and return him safely to earth by the end of the decade. The best BHAGs require

both building for the long term AND a relentless sense of urgency." (Jim Collins)

MARKET How many people or parts of the planet will this touch? Who are the other actors in the

space? How does this effort compare?

STRATEGY How will you achieve your BHAG? What set of linked behaviors and choices will be made to

achieve the goal? (Don't get strategy wrong like most do:Your Strategic Plans Probably

Aren't Strategic or Even Plans - Many Strategies Fail Because They Aren't Actually

Strategies.)

MILESTONES Measurable progress points toward the BHAG, often in a "crawl, walk, run" progression.

Milestones are pieces of your bigger goal and show you have a pathway to get there. Like all

goals, they should be SMART: Specific, Measurable, Aspirational, Relevant, Timed

METRICS Small set of <u>robust KPIs</u> (3-5) for financial, stakeholder, program, and organizational

development. Differentiate between <u>leading and lagging indicators</u>. Lags measure desired results; leads are the measurable causes, the activity or actions, that the organization

believes will generate the lags.

MARKETING Define: 1) purpose of marketing efforts in relation to impact and growth; 2) audience

segments and size; 3) how they will be reached; and 4) how they will be engaged to take action. (Develop a subsidiary marketing plan; just use bullet points in this document.)

REVENUE Summarize best-practice strategies for maximizing contributed, earned and loaned revenue

from individuals, foundations, corporations, government agencies, and impact capital

sources.

RISK Nonprofits face financial, reputational, legal, governance, operational and other risks. How

will you identify and mitigate them? (Learn robust nonprofit governance here.)

ORG Org chart showing current/future phased staffing expansion.

FINANCIALS Rolled-up five-year financial projections. Each business plan is also accompanied by an

itemized (including salaries) financial projection on request.

TEAM Brief bios of the Board and Executive Team.

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Components

- ✓ ED/CEO leads
- ✓ Board & CEO -> framework; staff -> plan
- ✓ Bias to speedy action and experiment, NOT analysis and reflection

Success

- 1. When asked, board and staff respond with aligned answers on your KPIs
- 2. Continuously updated, rapidly at first and then less so
- 3. The Swiss Army Knife roadmap, governance tool, fundraising prospectus, messaging library, recruitment doc

Resources

1. Business planning <u>framework</u> and <u>template</u>



Affordable implementation support: Altruist Nonprofit Accelerator

altruistaccelerator.org

About ANA

- ✓ The first nonprofit accelerator for all mission types
- ✓ Self-paced, community supported, expert guidance





The complete toolkit for accelerating growth and impact

Need help?

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