



2022 Strategic Plan

Lead. Unite. Thrive.

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Message from the Chairman



Leadership Fairfax Colleagues:

In the trajectory of every great organization, there are times when leadership must take a moment to ensure its focus, its energies, and its resources are being deployed most effectively and in the best interests of its mission and its key stakeholders. For Leadership Fairfax, this year was one of those times. We embarked on a multiple-month journey to examine the needs of our changing community, engage internal and external allies to solicit their views and input, and held truly substantive discussions on what more we could be doing, in addition to our already great work, to have the greatest positive impact possible.

This plan is the product of an incredible amount of hard work and dedication. Huge thanks to Catherine Nelson for the countless hours spent this as she shepherded this process and to Karen Cleveland for her ongoing invaluable leadership. Many thanks also to everyone who provided comments, insight, and advice. None of this would have been possible without the genuine and sincere devotion shone by so many.

In closing, it was my honor to serve as Chairman of this wonderful organization and get the ball rolling on this effort. But this re-imagining of the future of Leadership Fairfax is the result of the people who are the heartbeat of our organization—our staff, our board of directors, our volunteers, our alums, our many partners, and most importantly the people of Fairfax who are our guiding light and North star. May we all continue to Lead, Unite, and Thrive.

Danny Vargas
Chairman of the Board, Leadership Fairfax

Message from the Executive Director



Dear LFI Alums and Stakeholders,

It is with great pride we present this Strategic Plan to guide Leadership Fairfax through FY'25.

Leadership Fairfax 2.0, as we are referring to the organization, is not a departure from our 35 year mission but rather an enhancement reflecting the changing landscape of Fairfax County and the needs in our community. Leadership Fairfax Alums have, and continue to be, the stewards of our community, leaders within their own organizations, and thought leaders in our ever important nonprofits.

With over 2000 alums, it is time to broaden our reach and proactively engage in new and expanded training and services. Leadership Fairfax belongs to our alums and partners and we are here to act as agents to assist in the direction deemed necessary to build and sustain a thriving community.

Thank you for giving me the opportunity to serve as the CEO of Leadership Fairfax.

Karen K. Cleveland
Executive Director, Leadership Fairfax

Leadership Fairfax Vision, Mission, Values



Vision

A thriving and inclusive community inspired by courage and compassion.

Mission

To develop, connect and inspire leaders of diverse backgrounds and experiences to engage in building a better community.

Core Values

- ✓ Exercise community-focused stewardship
- ✓ Lead with integrity and accountability
- ✓ Embrace respect, inclusion, equity and diversity
- ✓ Take action for positive change
- ✓ Collaborate for impact

Lead. Unite. Thrive.

Our Strategic and Operating Priorities

Optimize Board, Leadership, and Staffing Model

Implement “right-sized” people model to meet organizational needs.

Ensure Financial Health

Build a sound financial foundation for the future.

Evolve Programs and Service Offerings

Deliver quality core programs, while considering expansion to meet existing and emerging community needs.

Expand Market Awareness

Increase awareness and visibility in the communities we serve.

Look Ahead

Empower for ambassadorship, action and advocacy.



Priority: Optimize Board, Leadership, and Staffing

Implement “right-sized” people model to meet organizational needs

Strategies & Actions:

- Implement optimized staffing model aligned to mission, vision, priorities and emerging programs
 - Assess current staffing and leadership needs, including organizational alignment, roles, responsibilities, competencies, and diversity
 - Design target organization and conduct baseline competency assessment of key staff against this model
 - Identify staff, leadership and competency gaps
 - Assess staff compensation model
 - Review, refine and document all operations (R&R, policies, practices and procedures) with a focus on efficacy and repeatability
- Manage organizational talent
 - Identify, acquire, develop, retain staff
 - Recruit staff to fill vacancies
 - Plan for succession for key positions including Executive Director
 - Engage with, assess, develop and retain staff
- Build and maintain best-in-class Board of Directors
 - Evaluate board and committee engagement, composition, diversity, and competencies
 - Refine expectations for board and committees

Outcomes/Outputs:

- ✓ Right sized team
- ✓ Assessed / developed team
- ✓ Succession Plan
- ✓ Continuity of Ops Plan
- ✓ Board Assessment Tool
- ✓ Board composition plan
- ✓ Committee charters and annual operating plans

Metrics:

- ✓ All positions filled
- ✓ 100% team evaluated annually
- ✓ Retention
- ✓ Diversity
- ✓ Competency



Priority: Ensure Financial Health

Build a sound financial foundation for the future

1. Increase revenue from operations by focusing current sources of income while managing costs appropriately. Develop target growth plan for revenue for each source:
 - a. Maintain and expand current class and program offerings
 - i. Consider number of core classes and programs scheduled per year
 - ii. Review existing pricing
 - b. Consider impact and value of membership dues (# members vice increase in dues)
 - c. Evaluate and enhance corporate & organizational sponsorship/fund-raising activities and approach
 - i. Develop comprehensive list of existing and potential new organizations
 - ii. Build a comprehensive corporate & organizational development plan
 - iii. Leverage alumnae for reach into their organizations and networks
 - iv. Leverage board for reach into their organizations and networks (consider “Give and Get”)
 - d. Increase general donation income
 - e. Increase income from existing events (e.g., NVLA, BoS, Commencement, Board & Brew)
 - i. Evaluate pricing, timing, methodology, sponsorship
2. Diversify sources of income. Develop target growth plan for revenue for each source
 - a. Expand services and programs (e.g., consulting, partnerships)
 - b. Derive revenue from new events (e.g., Government Day for non-members)
3. Increase board reserves to align with Board’s reserve and investment policy
4. Build financial, grant and fund-raising/development competency within organization

Outcomes/Outputs:

- ✓ Increased revenue from operations
- ✓ Diversified revenue sources
- ✓ Comprehensive growth & development plan
- ✓ Robust corporate sponsor list
- ✓ Healthy retained earnings & cash reserves
- ✓ Commonsense investment policy & plan
- ✓ Enhanced staff competency

Metrics:

- ✓ Revenue meets growth targets
- ✓ Net income meets growth targets
- ✓ Target growth in cash reserves
- ✓ Target \$’s from donors/sponsors met



Priority: Evaluate and Evolve Programs & Service Offerings

Deliver quality programs and services to meet existing and emerging community needs



Strategies & Actions:

- Ensure quality delivery of programs and services
 - Define quality for program and service delivery
 - Develop and implement means to assess quality expanding on currently existing evaluation methods – Conduct yearly evaluation
- Understand evolving community needs
 - Define community in terms of existing and emerging client base, geographies
 - Identify external trends and opportunities for LF to engage in Community Initiatives
- Evolve programs and services
 - Assess existing programs and services, geographies (zip codes), client base in alignment with mission, vision and community needs
 - Identify gaps and redefine/modify and augment services to address needs where it makes sense (financially and to address major gaps)
 - Monitor “after action” results from new service offerings
 - Embrace diversity and equity across dimensions of all programs and services

Outcomes/Outputs:

- ✓ Increased # students
- ✓ New organizations represented
- ✓ Quality > = target score
- ✓ Revised / expanded “menu” of relevant programs & services
- ✓ Contributions to Community Initiatives

Metrics:

- ✓ Number of Students
- ✓ Quality Score
- ✓ Organizations represented
- ✓ Diversity of Students across various measurable indicators including but not limited to geography, supervisory district, ethnicity, gender identity, age, ability, etc.
- ✓ Time to promotion for graduates
- ✓ Number of recommendations



Marketing &
Outreach

Priority: Expand Market Awareness

Increase awareness and visibility in the communities we serve.

Strategies & Actions:

- Review and edit value proposition as needed to support the new mission and vision
- Refine LF brand and language to align to mission and vision
 - Align to mission and vision
 - Refine to encompass evolving and expanding programs and services
- Develop and Fund a marketing budget in order to support
 - Identify marketing and communication actions required to better position LFI across the county and its diverse population and communities that cannot be addressed through free platforms
 - Develop and execute an appropriate outreach strategy expanding paid market outreach
- Identify and deliver on appropriate public speaking engagements to include a discussion with the Board of Directors on honorarium requests for LF experts
 - Determine list of tabling events and outreach opportunities to multiple sectors and zip codes
- Support an alumnae engagement plan through outreach and marketing to internal customers

Outcomes/Outputs:

- ✓ Increased visibility in community
- ✓ Aligned and well understood brand
- ✓ ELI, LFI, LLP Class Applications Increase
- ✓ LF tag line

Metrics:

- ✓ Number of students
- ✓ Number of partners/sponsors
- ✓ Numbers of participants and applicants based on measurable diversity including, but not limited to: ethnicity/race, geography, sector, age, ability
- ✓ Increase in website and social media analytics



Priority: Look Ahead

Empower for ambassadorship, action and advocacy.



Strategies & Actions:

- Enable for Civic Engagement
 - Build into LF program curriculum (all levels)
 - Provide network tools and resources to support ambassadorship, action and advocacy
 - Develop public statements on sentinel events of right and wrong
 - Continue to implement and operationalize the Equity Council
- Serve as a Thought Leader
 - Develop and deliver DEI curriculum for organizations and boards
 - Expand board matching (with intentionality?)

Outcomes/Outputs:

- ✓ Enhanced curriculum + materials
- ✓ Research papers
- ✓ Enhances Serve Fairfax section of website with resources and tool kit
- ✓ DEI Curriculum established and delivered

Metrics:

- ✓ Host first DEI Training and increase numbers year over year
- ✓ Increase board matching by 10% per year
- ✓ Deliver at least 1 white paper per year

ROADMAP

Translating the Priorities into an Actionable Plan

Annual Operating Plan (2022 – 2025):

Priority: *Leadership and Staff*

Period	Planned Actions & Activities	Expected Outcomes/KPI's
Planning + FY2022	<ul style="list-style-type: none"> Assess existing staff and identify staff competencies and gaps Analyze current Leadership and staff related expenses and assess affordability vis a vis cash and budget Identify and Forecast staffing needs immediately (with in FY23) Begin development of succession plan 	<ul style="list-style-type: none"> Refine staffing model Staff reassessment
FY 2023	<ul style="list-style-type: none"> Identify action plans to optimize Leadership and Staffing to align with the Strategic Plan Update policies and operating procedures to ensure currency, completeness, and appropriate Complete succession plan Document Board evaluation process Review staffing needs in alignment with strategic priorities Identify and Forecast staffing needs for FY24 and FY25 Develop a RACI for board and organizational operations Hire FY23 staffing needs 	<ul style="list-style-type: none"> Leadership and Staff Action plan CONOP with all policies and procedures Succession Plan Board assessment tool developed Board assessment completed
FY2024	<ul style="list-style-type: none"> Professional development fund and plan Review and update Board Committee Charters and Operational Plans Board recruitment purposeful and based on Board assessment Hire FY24 staffing needs 	<ul style="list-style-type: none"> Full staff Board Cmte Charters validated
FY2025	<ul style="list-style-type: none"> Forecast people needs over 2-3 year timeline 	<ul style="list-style-type: none"> Board of Directors based on Board assessment

Annual Operating Plan (2022 – 2025)

Priority: *Ensure Financial Health*

Period	Planned Actions & Activities	Expected Outcomes/KPI's
Planning + FY2022	<ul style="list-style-type: none"> Identify strategies and operating roadmap to build financial health Analyze current financial position, including assets, liabilities, revenue, expenses, cash needs Assess/understand relationships with existing and possible sponsors, alumnae, donors Develop targeted revenue growth plan from programs, services, grants, events, membership, donations and sponsorship to build into annual budget and future year forecasted budget Review / update existing accounting policies and procedures to ensure comprehensive and appropriate Develop a commonsense investment plan Identify target growth for cash reserves target and manage in accordance with investment plan Review budget and integrate targets for revenue, cash reserve growth 	<ul style="list-style-type: none"> Plan for financial health Preliminary list of sponsors, alums, donors Targeted marginal growth in cash reserves for FY2023, 2024, 2025 Revised accounting and investment policies & procedures
FY 2023	<ul style="list-style-type: none"> Develop & execute detailed plans to support achieving targets all development activities, including: grants; approach to alumnae membership providing value for cost; event income, etc Establish/launch a Board affiliated development committee (with charter + annual operating plan). This committee is responsible for developing a comprehensive multi-year sponsorship & development (i.e. fund-raising) plan that includes a broad corporate relationship / outreach program Develop a list of target organizations to include new and non-traditional partners for future outreach Rollout revised accounting and new investment policies and procedures Identify competency/staffing needs to support development function Review various financial growth targets for FY2024 and FY2025 as well as plans 	<ul style="list-style-type: none"> Annual plan/target for \$ reserves Annual plan/target for revenue growth and diversification Development committee charter and plans Revised accounting and investment policies & procedures Refined list of corporate donors (with targeted additions)
FY2024	<ul style="list-style-type: none"> Review, refine and execute various growth and development plans Refine targets for FY2025 as well as plans Build staff competency through training and acquisition as needed 	<ul style="list-style-type: none"> Annual plan/target for \$ reserves Annual plan/target for revenue growth and diversification Growing list of corporate donors
FY2025	<ul style="list-style-type: none"> Review, refine and execute various growth and development plans Refine targets for FY2025 as well as plans Build staff competency through training and acquisition as needed 	<ul style="list-style-type: none"> Annual plan/target for \$ reserves Annual plan/target for revenue growth and diversification Growing list of corporate donors

Annual Operating Plan (2022 – 2024+): Priority: *Programs & Services*

Period	Planned Strategies & Actions	Expected Outcomes/KPI's
Planning + FY2022	<ul style="list-style-type: none"> • Define program and service quality • Develop metrics for multiple indicators • Conduct survey to develop baseline • Define community in terms of LF engagement • Conduct redevelopment of ELI from April through June and redevelopment of LFI from May through August, LLP evaluation between June through August • Identify community initiatives where LF can engage to meet the priority of community outcomes • Coordinate with YLN to incorporate equity and diversity training as a standard • Compile and design model for Real Talk Workshop • Develop list of topics for Lunch and Learns 	<ul style="list-style-type: none"> • Increase number of students by 10% • Add 3 new organizations to representation in ELI/LFI • Identify 3 organizations with initiatives where LF can engage and book discussions • 30 New Members for YLN • Model for Real Talk workshop with supporting collateral that can be supplied to alumni facilitators • Timeline established for Lunch and Learns in 2023
FY 2023	<ul style="list-style-type: none"> • Establish relationship with 3 organizations fulfilling community needs where LF can have a positive impact – Days of Service • Evaluate redesign and modifications to ELI, LFI and LLP Programs • Expand course offerings for YLN • Conduct survey based on metrics developed in planning segment • Implement lunch and learn workshops in collaboration with alumni and faculty, supported by Communications and Marketing team • Develop framework for Equity Book Club 	<ul style="list-style-type: none"> • Increase number of students by 10% over 2022 • Establish and promote Day of Service for alumni • New Members for YLN increase by 50% • 25 people attend each Lunch and Learn over 2023 – 4 Workshops • Launch Book Club by end of 2023 • Increase in sector and zip code representation
FY2024	<ul style="list-style-type: none"> • Conduct annual survey • Implement Equity Book Club • Re-evaluate programs and identify gaps and opportunities 	<ul style="list-style-type: none"> • 5 – 6 meetings with Book Club • Conduct 4 Lunch and Learns with increased attendance of 25% • Increase number of students by 20%, recommendations by 10%

Annual Operating Plan (2022 – 2025)

Priority: *Marketing, Branding and Outreach*

Period	Planned Strategies & Actions	Expected Outcomes/KPI's
Planning + FY2022	<ul style="list-style-type: none"> Review and Edit Value Proposition as needed to align with updated mission and vision Develop and Fund marketing budget based on identified areas for paid outreach and begin implementation of paid marketing campaigns Review and refine branding language as needed to align with updated mission, vision and strategic goals to support ALL PROGRAMS currently operating Release annual one sheet of impact and accomplishments Conduct baseline survey for understanding of new mission and vision 	<ul style="list-style-type: none"> Increased/Improved website and social media analytics Familiarity with brand among alumni, students, partners and sponsors Increased number of applicants for ELI, LFI and LLP Programs by 10% 30 New Members for the Youth Leadership Network by December 31, 2022
FY 2023	<ul style="list-style-type: none"> Fund marketing budget to increase paid outreach Identify 2 - 3 key partners with aligned missions for collaborative marketing efforts and sponsorships and reach out Establish process for request, booking and requested honorariums/fees for LF Services in speaking, facilitation, and consulting and promote online Develop plan to coordinate with Programming Team on Alumni Focused Engagement Initiatives Identify 2 opportunities for paid facilitation, consulting or speaking Develop annual list of tabling events and commit to attending eight Conduct annual survey and release annual one sheet of impact and accomplishments 	<ul style="list-style-type: none"> Increase in diversity represented in classes and programs Increase/Improve website and social media analytics Well understood brand among alumni, students, partners and sponsors Requests for services increase Sponsor Numbers Increase and 2 new sponsors Increased number of applicants for ELI, LFI and LLP Programs by 20% Youth Leadership Network members increase by 50% Attend eight new tabling events
FY2024	<ul style="list-style-type: none"> Review and approve increased marketing budget as needed Support the efforts of increased and expanding programs Create a plan and conduct dedicated outreach to market LF services in facilitation, consulting and speaking Create and fund a position for an Events Intern Coordinate with GMU's Honors College Connects on Outreach to expand LF revenue sources through consulting and facilitation Attend 15 annual tabling events Conduct annual survey and release annual one sheet of impact and accomplishments 	<ul style="list-style-type: none"> Increase in diversity represented in classes and programs Increased website and social media impressions, clicks and conversions Well understood brand - Conduct Annual Survey and compare to previous 2 years to identify areas for growth Requests for services increase Sponsor Numbers and contributions Increase Turn away 50% of applicants due to high application rates
FY2025	<ul style="list-style-type: none"> Evaluate marketing results, analytics from previous 5 years and realign marketing strategy 	<ul style="list-style-type: none"> Classes full by May 15 90% of Sponsors return from 2024

Annual Operating Plan (2022 – 2024+):

Priority: *Look Ahead*



Period	Planned Strategies & Actions	Expected Outcomes/KPI's
Planning + FY2022	Build out strategies to launch in FY'23	Detailed timeline for execution and expected outcomes and data collection
FY 2023	<ol style="list-style-type: none"> 1. Develop and deliver DEI curriculum for organizations and boards 2. Expand board matching 3. Firm up structure and operationalize the Equity Council 	<ol style="list-style-type: none"> 1. Engage at least 4 boards for Deeply Rooted training and train a minimum of 6 facilitators for this work and subsequent trainings. 2. Develop and implement ongoing mechanism for board matching and grow Board and Brew by 10% Survey and track board matching success 3. Develop and implement mechanism to work with the county on sourcing for BACs 4. Host planning session with output to include goals and strategies with benchmarks.
FY2024	<ol style="list-style-type: none"> 1. Provide network tools and resources to support ambassadorship, action and advocacy 2. Develop public statements on sentinel events of right and wrong 	<ol style="list-style-type: none"> 1. Dedicated page on website with resources and training materials 2. Produce and distribute white paper on at least one issue 3. Respond publicly, and vociferously, to community issues that meet our criteria.