Growing and Responding to Change
LUTHERAN SERVICES FLORIDA
STRATEGIC PLAN
2014-2017

Lutheran Services Florida's three-year Strategic Plan for 2014-2017 was developed over a twelve-month period as the result of a collaborative effort involving board members, management, staff, agency partners, funders, regulators, clergy and consumers. The plan includes:

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This plan was developed during a time of significant change within the organization, the sponsoring church bodies, and state and federal government. Significant growth and opportunities for continued growth have necessitated a comprehensive review of organizational structures, management systems and personnel needs. The velocity of change has caused strain on the administrative infrastructure.
EXECUTIVE SUMMARY

By Samuel M. Sipes, LCSW, BCD
President and Chief Executive Officer

Lutheran Services Florida’s three-year Strategic Plan for 2014-2017 was developed during a time of significant change within the organization, the sponsoring church bodies and government. While the velocity of change presents some challenges, LSF is in a strong position to thrive in the future. Future success will depend on LSF's ability to become an organization that is pragmatic, nimble, flexible, scalable, affordable, accountable and visible.

LSF is an organization that is guided by big ideas and these guiding principles create an imperative to serve that compels LSF to build on organizational strengths, overcome weaknesses and create effective programs in response to human suffering and need. The mission, values, vision and ends policies guide the work of LSF. These guiding principles also shape the advocacy and promotion efforts of the organization, which focus on the needs of the vulnerable, overcoming barriers to service and positioning LSF to effectively respond to opportunities.

The LSF business model responds to a rapidly changing service landscape with an aggressive growth strategy. That growth is predicated on methodical pursuit of entrepreneurial opportunities and the maintenance of a new program “pipeline.” LSF provides value by developing and competently deploying efficient organizational structures; effective operating policies and procedures; accountable management systems and processes; and expertise in the form of personnel, strategic alliances or purchased services.

GOALS

■ LSF’s guiding principles are reflected in, and relevant to, the work of the organization.
■ LSF will aggressively pursue viable and sustainable growth opportunities by identifying resources, expanding existing programs and developing new ones in response to changing needs and the availability of resources.
■ LSF’s expertise, organizational capacity and/or strategic partnerships will be responsive to current and future needs for service.
■ LSF’s reputation for transformational outcomes is consistent with its guiding principles and the organization effectively uses that public image to advocate, influence, attract supporters and pursue opportunities.
■ LSF is financially strong, accountable, responsible, efficient, and has the resources necessary to effectively fulfill its purpose.

LSF operates in a “business” marketplace, where the “buyer” is often government, and a “philanthropic” marketplace, where the goal is to attract “believers.” In order to succeed, LSF must first build strength by developing relevant value configurations to address societal need. Then the organization must effectively execute value propositions to demonstrate results. Finally, LSF must build brand through public relations, promotion and advancement. Good stewardship requires LSF to quantify the end result of its work and determine whether that result justifies the level of effort and expenditure of the organization’s resources.
1982-2012: Thirty Years of Service

When the Vietnam War ended, thousands of refugees sought safety in the United States and their needs were tremendous. Lutheran churches responded quickly, providing them with immediate aid in the form of food, clothing and temporary homes. Lutheran churches also sponsored employment programs to help refugees find jobs so they could truly begin building new lives in America. When thousands of Cubans came to the United States during the Mariel Boatlift, Lutheran churches responded once again, helping refugees with resettlement needs and employment assistance.

Lutheran Services Florida was established to take over responsibility for running refugee programs started by churches. Since 1982 LSF has responded to the growing need for social services with new programs, including runaway youth shelters, Head Start, child welfare services, guardianship, disaster response, and homeless services.

Today LSF has service locations in Belle Glade, Clearwater, Crestview, Fort Myers, Fort Walton Beach, Jacksonville (serving all of Northeast and North Central Florida), Largo, Lauderdale Lakes, Miami, Milton, New Port Richey, Oakland Park, Orlando, Pensacola, Pinellas Park, Port Charlotte, Sarasota, St. Petersburg, Tampa and Tarpon Springs. A number of additional locations are planned in the near future.

Recent Accomplishments

Since its founding, LSF has had a significant impact. After 32 years of providing quality health and human services, LSF has developed a strong reputation resulting in opportunities to grow and expand services.

The following are just a few of LSF’s recent accomplishments:

- Awarded school charter by Palm Beach County School Board (2010)
- Awarded Early Head Start Contract in Hillsborough County (2010)
- Recognized for meritorious service for assistance provided to Haitian earthquake evacuees (2010)
- Reaccredited by the Council on Accreditation (2010)
- Awarded child welfare case management contract for Pinellas County (2011)
- Awarded contract to provide substance abuse and mental health services in 23 Northeastern and North Central Florida counties (2012)
- Awarded Head Start and Early Head Start contract in Pinellas County (2013)

Organizational Context

In 2009, Lutheran Services Florida published a 5-year strategic plan focused on growth. That plan included a bold and unifying goal:

**LSF will double the number of people whose lives are significantly impacted reaching 65,000 people and providing $100 million in services annually by 2019.**

This goal was achieved far ahead of schedule. In 2009, LSF had an annual budget of nearly $33 million and served approximately 30,000 clients per year. In 2013, the organization served over 120,000 clients with a budget of nearly $150 million. This recent phenomenal growth was the organizational context for LSF’s new strategic plan.
LSF programs provide critical services to vulnerable populations. In many cases, these services are offered to people in times of crisis. In all cases, the services LSF provides are designed to help people transform their lives for the better. The following is a brief description of some of LSF’s programs and services.

**Family and Individual Services**

LSF provides a broad range of services to families and individuals in need.

- **Teen Court** – This program offers an opportunity for first-time youth offenders between the ages of 10 and 17 to appear before a jury of their peers for sentencing and sanctions.
- **Child Welfare Case Management** – These services include in-home protective supervision, relative/non-relative placement and supervision, and foster care.
- **Adoption Assistance** – This program recruits permanent homes for children who are unable to safely return to their biological parents and for whom the courts have terminated parental rights.
- **Emergency Shelters** – Programs include short-term, residential shelters for runaways and troubled youth (ages 10-17), and individual and family counseling.
- **Family Centered Services** – This program provides individual and family counseling to help families resolve conflict.
- **Guardianship** – LSF is appointed guardian by the court to serve and protect adults who have some physical or mental handicap.
- **Ryan White HIV/AIDS Services** – This program seeks to prevent the hospitalization of people living with HIV/AIDS by eliminating barriers to health care services and improving the quality, availability and organization of health care and support services.
- **Refugee Resettlement** – This program helps refugees resettle in Florida communities and become self-sufficient so they can care for their families on their own.
- **Immigration Assistance** – Counselors and accredited immigration specialists help immigrants navigate the complex documentation process and also help those who want to become U.S. citizens.
- **Employment Services** – This program provides employment counseling, placement and support services to refugees and homeless individuals.
- **Services to the Homeless** – Programs provide safe, clean, temporary and permanent housing for homeless families with young children.
- **Disaster Response** – LSF provides a variety of services to help victims of disaster, including hardship grants, case management, counseling, spiritual care, rebuilding assistance and volunteer coordination.
Substance Abuse and Mental Health

LSF assists individuals with substance abuse and mental health treatment needs by providing and coordinating services.

- **Substance Abuse and Mental Health**
  - **Managing Entity** – This program manages a network of providers to ensure needed behavioral health services are available through a comprehensive, integrated, community-based system of care.
  - **Substance Abuse Counseling** – This program provides research-based substance abuse prevention and treatment services.
  - **Sexual Abuse Treatment** – This program provides counseling and supportive therapy to children who are victims of sexual abuse in conjunction with child welfare officials and law enforcement.

Child Development and Education

LSF attempts to break the cycle of poverty by giving children the opportunity to overcome disadvantages by promoting school readiness and academic achievement.

- **Child Care Food Program** – This program ensures that children under 13 years of age in day care receive healthy, well-balanced food every day.
- **Head Start and Early Head Start** – The goal of this program is to improve the quality of life for at-risk pre-school children by providing a comprehensive array of services aimed at improving school readiness and academic achievement.

- **Excel Charter Schools** – LSF charter schools combine parental involvement, highly qualified teachers, and cutting edge technology with an effective and innovative curriculum that promotes achievement, creative problem solving, positive character values and good citizenship.
FORCES OF CHANGE & STRATEGIC THEMES

The U.S. economy is sluggishly recovering from the deepest recession since the Great Depression. Historically, economic crisis increases the velocity of change in the health and human service sector. This recession has had the effect of speeding up the adoption of innovations and cost-saving alternatives. Research shows that economic turbulence often brings lasting restructuring of this sector in the form of regulatory relief, new financing models and new service delivery models. What is done in the interim for cost-cutting reasons usually becomes the “standard.” During such challenging times, there are great opportunities for organizations that can accurately identify forces of change, see beyond organizational survival and prepare for future service delivery models. Below are three forces that drive much of the change at LSF.

**Force One: All programs have a shelf life.**
Changing technology, standards of care, funder expectations and public policy will determine the future viability of programs and services. Traditional service approaches and programs may not be viable due to evolving needs of consumers, public policy and funder expectations. LSF’s future success will be largely dependent on its ability to scale up and scale down infrastructure (and costs) in response to new opportunities and program shelf life.

**Force Two: There is a trend towards outsourcing of public sector care and management functions.**
Outsourcing raises expectations requiring innovation and efficiencies. Outsourcing and new innovations will produce competition between organizations. The competitive edge will go to the organization that is most responsive to evolving expectations. LSF’s future success will be largely dependent on its ability to be nimble in responding to competitive opportunities.

**Force Three: Changing stakeholder value perspectives are shaping service delivery models.**
Service delivery models are changing in response to the “push” of payers to integrate services and to move financial risk to other stakeholders; and the “pull” of consumer need and preference. The values of different stakeholders involved in the human services field are all joining together to shape the market in different ways. Organizations will be required to adjust value propositions in response to this push and pull in the market. LSF’s future success will be largely dependent on its ability to be flexible in response to new opportunities and changing market expectations.

**Strategic Themes**

During times of economic uncertainty, the successful organization simultaneously assures survival by managing cash, aggressively seeks opportunities in the chaos, and prepares for a new market paradigm. Looking ahead while others struggle to deal with current economic challenges will give LSF a competitive advantage in the post-recession marketplace.

- LSF must be **pragmatic** in its approach to solving problems.
- LSF must be **nimble** in developing value configurations in response to opportunities and rapidly changing markets.
- LSF must be **flexible** in how it creates and delivers value.
- LSF must be **scalable** to efficiently respond to new opportunities and changing markets.
- LSF must be **affordable** to compete in the marketplace.
- LSF must be **accountable** and produce evidence of the organization’s effectiveness.
- LSF must be **visible** to enhance the organization’s reputation, promote good will in the market and attract supporters.

LSF is in a strong position to thrive in the future. However, future success will depend on LSF’s ability to operationalize these strategic themes and become an organization that is pragmatic, nimble, flexible, scalable, affordable, accountable and visible.
The LSF business model aligns with the organization’s purpose and answers the following questions:

- **Why** does the organization exist?
- **What** does the organization do?
- **How** does the organization do what it does?
- **Who** is the beneficiary of the organization’s work?
- **How much** and is it worth the effort?

At LSF the “*why*” question is answered by **guiding principles**. The “*what*” question is answered by LSF’s programs and services, or **value configuration**. The “*how*” question is answered by organizational structure, management systems and personnel or **value proposition**. The “*who*” question is answered by the **market** (i.e. beneficiary, payor, public, stakeholder, etc.). The “*how much*” question is answered by the **bottom line** metrics and cost-to-benefit analysis.

The LSF business model reflects management’s hypothesis about what communities need, what our mission calls us to do, and how LSF can organize to best meet those needs and get paid for doing so. Design logic identifies the strategic importance of creating new organizational structures, or changing existing structures to pursue new opportunities.

This business model describes how LSF creates, delivers and captures value. The implementation of this business model into organizational structures and systems is how strategies are operationalized. In other words, the business model is like a blueprint for strategies to be implemented through organizational structures, processes and systems.
Guiding Principles

LSF's guiding principles are fundamental precepts that guide the organization in all circumstances, irrespective of changes in goals, strategies, type of work or top management. As community needs and consumer preferences change, LSF may change what it does. But whatever LSF does, the organization must remain true to its reason for existence: its guiding principles. The following mission, values, vision and ends polices guide the work of LSF.

LSF's mission is timeless and the following mission statement describes the purpose of the organization.

*Lutheran Services Florida serves to bring God’s healing, hope and help to people in need in the name of Jesus Christ.*

LSF's values are deeply held beliefs about how the organization will conduct its work, and those values are reflected in the following values statements:

- We believe that our success should be evaluated by our ability to serve those in need and change their lives for the better.
- We are nimble and responsive to changing community needs.
- We are flexible and pragmatic in our approach to addressing needs and solving problems.
- We are good stewards of our resources and our approach to service is scalable, efficient and effective; and we provide value.
- We recognize that no one agency or group can be fully effective when working alone; and we therefore seek partnerships with congregations, other faith-based organizations, government and community-based organizations to serve people in need.
- We are inclusive and do not discriminate in the provision of services or in hiring.

- We value our staff and strive to be an employer of choice.
- We seek staff members who are culturally competent; we intentionally seek former clients capable of joining our staff; and we encourage promotion from within.

LSF's vision about how the organization will operate now and in the future is clear and is reflected in following vision statements:

- LSF is inspired by faith and inspires others.
- LSF is a recognized national leader in the provision of human services.
- LSF is an innovator.
- LSF is competent, effective, evidence-based and data driven.
- LSF is responsive to changing community needs.
- LSF’s impact is transformational with the individuals and communities we serve.
BUSINESS MODEL (continued)

LSF’s **bold and unifying goal** stretches the organization’s sense of what it can accomplish and serves to unite the organization around a single metric that validates LSF’s success.

*LSF will be a national leader in human services; recognized for innovation and results; influential in the establishment of national standards and public policy; and enthusiastically supported by the philanthropic community. Towards that end, LSF will raise and/or generate $10 million in private support by 2019.*

LSF’s **ends policies** describe the transformational impact LSF seeks to have on the world, who will benefit from the work of the organization, and in what ways.

- **People** in need experience healing, have hope restored and are helped to realize their God-given potential in numbers sufficient to justify expenditures.
- **At-risk** families remain safely intact in sufficient numbers to justify expenditures.
- **Abused** and neglected children who have been placed in dependency have safe, appropriate homes, preferably with their families, in sufficient numbers to justify expenditures.
- **Disadvantaged** children are prepared to learn and are educated in order to overcome their economic and environmental disadvantages in sufficient numbers to justify expenditures.
- **At-risk** frail elderly and disabled adults are safe and free of exploitation in sufficient numbers to justify expenditures.
- **Refugees** and other newcomers, the unemployed, the homeless, and others who are disenfranchised and marginalized become contributing members of society in sufficient numbers to justify expenditures.
- **Victims** of disaster recover in sufficient numbers to justify expenditures.
- **Individuals** at risk of substance abuse and mental illness avoid substance abuse and manage their mental health issues in order to remain contributing members of society in sufficient numbers to justify expenditures.
- **Individuals** with addiction, or who otherwise abuse substances, recover in sufficient numbers to justify expenditures.
- **Individuals** with mental illness, or co-occurring disorders, live stable lives in the least restrictive setting possible in sufficient numbers to justify expenditures.

LSF is an organization that is guided by big ideas, and these guiding principles are grounded in Lutheran theology and traditions. Paramount is the Christian imperative to “love” and “serve” our neighbors and a Biblical understanding of God’s mercy, justice, and loving creative and redemptive activity in Jesus.

These guiding principles create an **imperative to serve** that compels LSF to build on organizational strengths, overcome weaknesses and create effective programs in response to human suffering and need.

The LSF guiding principles also shape the **advocacy** and **promotion** efforts of the organization, which focus on the needs of the vulnerable, overcoming barriers to service and positioning LSF to effectively respond to opportunities to serve. These big ideas also inform LSF on how it must organize itself and do its work in a manner that is consistent with the guiding principles.
Value Configuration

LSF creates value configurations in response to the organization’s imperative to serve by identifying programs and services that LSF is uniquely positioned to provide and by identifying a financial engine for those programs and services.

In his book *Good to Great*, Jim Collins uses the metaphor of a hedgehog’s relentlessness to describe the process of value configuration. Collins asserts that great organizations are disciplined and selective in choosing their pursuits. The LSF value configuration process borrows this “hedgehog” concept from Collins and poses the following three questions:

- What do we know how to do (or can learn how to do) better than others?
- What drives our financial engine?
- What are we called to do by our imperative to serve?

Sustainable programs and services are those that fall within the convergence of the three circles. This value configuration process is applied to new opportunities and is used to determine the viability of current operations. LSF’s organizational strengths and weaknesses will determine which services LSF will be prepared to provide in the future. Following are some of LSF’s identified strengths and weaknesses:

- LSF’s size, visibility and “critical mass” put the agency in a competitive position when compared with other smaller organizations.
- LSF has the capacity to respond to new opportunities and build on its expertise in geriatric services; child and family services; employment and immigration services; substance abuse and mental health; early learning and education; disaster response; case management; network and system of care management; community organization; back office support; and capacity building.
- LSF’s growing size and vast service area place new demands on leadership to ensure that all staff is “connected” to the organization.
- To keep pace with programmatic expansion, LSF must develop the administrative and management infrastructure to support such growth.
- Some LSF programs are not consistently managed and are not held accountable to the same high standards.
BUSINESS MODEL (continued)

- Tools must be acquired and systems, processes and procedures must be developed to improve LSF’s efficiency and effectiveness.
- LSF has staff members with considerable expertise in their respective fields and staff turnover needs to be addressed.
- LSF needs to monitor salaries and benefits to ensure that they are competitive.
- LSF has expertise in employment services and support services that could be used by the broader population of unemployed and underemployed.
- Employees working with refugees tend to have “feast or famine” workloads due to the inconsistent flow of refugees.
- Maintaining disaster response readiness requires infrastructure investment in advance of funding.
- Disaster response is a very visible component of LSF’s work, which presents both opportunity and a potential risk.
- LSF has never had a successful fund-raising program; and there is a need to improve the coordination of agency public relations, church and community relations, event planning and fund-raising activities.
- There is a need to recruit new donors and to strengthen relationships with existing donors.
- Risks faced by LSF require a comprehensive risk management strategy that is fully integrated into all programs.
- More attention must be given to cross-training and developing succession plans to prepare for inevitable changes in funding, community need and public policy.

- Greater exchange of data between administrative and program areas is needed to better inform and support program management.

The LSF business model responds to a rapidly changing service landscape with an aggressive growth strategy. That growth is predicated on methodical pursuit of entrepreneurial opportunities and the maintenance of a new program “pipeline.”
Value Proposition

A *value proposition* is a promise of value to be delivered and a belief from the customer that value will be experienced. A value proposition can apply to the entire organization, or parts thereof, or customer accounts, or products or services. LSF’s business strategy leading to the creation of value propositions is shaped by the organization’s guiding principles, value configurations, and alignment with the market.

Various value propositions can be seen as a progressive hierarchy of results frontiers or a series of sequential building blocks beginning with regulatory compliance and ending with transformational results.

*Regulatory compliance* is the prerequisite for all other results and without it, LSF is out of business. The next result frontier is *quality assurance/process improvement*, whereby the organization creates a culture of quality that drives a continuous performance improvement process. Building on compliance and performance improvement, the next result frontier focuses on producing positive *client outcomes*. These outcomes are usually the immediate result of service and a causal relationship with that service can be established. The final result frontier focuses on *transformational ends*. Transformational results build on the earlier prerequisite value propositions of compliance, quality assurance/process improvement, and client outcomes. They demonstrate how the work of the organization changes the world for the better and they are best described by LSF’s “ends policies.” However, these transformational results, and a causal relationship with an LSF service or intervention, are difficult to measure.

As LSF becomes more efficient, effective and sophisticated, its business model produces more complex and comprehensive results. The *LSF Business Model Value Curve* shows the progression of the various value proposition “results frontiers.”

The value proposition is the part of the business model that describes what LSF does to produce desired organizational results. LSF aspires to be a transformational organization. However, all of the results in the value curve are important and they build upon each other to reach higher results frontiers.

These results frontiers drive the design logic of LSF’s strategy. In other words, these results frontiers, and the value propositions they reflect, drive the way LSF organizes itself, the systems it develops, the staff it hires and the strategic partnerships it pursues.

Put another way, LSF provides value by developing and competently deploying:

- Efficient organizational structures.
- Effective operating policies and procedures.
- Accountable management systems and processes.
- Expertise in the form of personnel, strategic alliances or purchased services.
BUSINESS MODEL (continued)

**Market**

The term “market” can be used to describe many varieties of systems, institutions, procedures, social relationships and infrastructures whereby parties engage in exchange. In a traditional market, buyers and sellers exchange money for goods and services. LSF operates in a complex marketplace where there are often many parties to a single transaction. Multiple customers sometimes have conflicting needs and desires. Services may be paid for by consumers, private donors, the government, another party, or any combination. Forces that influence the LSF marketplace include public policy, public opinion, politics, the economy, taxes, competition, litigation, press coverage, regulations, standards, and community need. Through advocacy and promotion, LSF can influence the market as well as respond to it by offering value propositions.

LSF operates in a business marketplace, where the “buyer” is often government, and a “philanthropic” marketplace, where the goal is to attract “believers.”

Collins describes the dynamics of this marketplace with the *Flywheel in the Social Services Sectors*. In order to attract believers or donors in the philanthropic marketplace, LSF must first build strength by developing relevant value configurations to address societal need. Then the organization must effectively execute value propositions to demonstrate results. Finally, LSF must build brand through public relations, promotion and advancement.

Below are some market trends that could impact LSF:

- Government budget cuts will continue to have a major impact on the funding of health and human services.
- Significant legislative and public policy changes have occurred in how health and human services are provided and funded.
- It is expected that funding will not be able to keep up with increased demand for services.
- Social service organizations are being asked to do more with less.
Many social service organizations are finding it difficult to survive. There will undoubtedly be more intensive focus on case management and the flexibility of services. There will probably be a decline in the utilization of residential and shelter care; these will be replaced with more home-based services. The remaining residential and shelter care facilities will probably become more specialized facilities, to provide care for clients with specialized needs.

Careful analysis suggests there will be opportunities for growth in the areas of mental health and substance abuse counseling; early learning and education; case management and community-based care; immigration; employment and job training; disaster preparation and response; system of care and network management; contract management and acting as a fiscal agent; management consultation and back office services; merger and acquisition; expansion into previously unserved areas; and partnership and affiliation with other denominations and communities of faith.

There will be an increasing need for senior services as baby boomers mature and the number of senior citizens retiring to Florida places the state ahead of all other states in the growth of its senior population.

Senior citizens have changing goals and expectations, and many seniors prefer to stay in their homes longer and have services brought to them, rather than to go to a long-term care setting.

The senior service industry is shifting from a “medical model” to a “hospitality model,” and the decision-makers are often the adult children of seniors.

There are growing numbers of working poor and unemployed.

Florida is a major destination for refugees, asylum seekers and immigrants to the United States.

The flow of refugees into the United States is related to changing political situations in the world and is therefore inconsistent, with more refugees at some times and fewer in others.

Cuban asylum seekers are significant consumers of government funded resettlement services and when U.S. policy toward Cuba changes, there will be a significant impact.

LSF’s successful history of disaster response has attracted positive attention and created additional opportunities to expand disaster-related activities.

Disaster services, by their very nature, operate in an unpredictable environment of highly fluctuating resources and demands.

Consumers and the public have high expectations of LSF.

During difficult economic times, many charities see a decline in giving.

The most reliable donors are those who have a personal connection to a charity; emerging donor groups are women and young executives; and time commitment often precedes financial commitment, particularly for women donors.

There is a shift from denomination-specific support to broader, more ecumenical support; and donors are less concerned with name recognition and more with accountability.

Solicitations via internet and email are increasingly effective.

There is increased regulatory scrutiny of non-profits.

The environment in which LSF operates is becoming increasingly litigious.

The market presents threats and opportunities, and sometimes the same market force can be both a threat and an opportunity. LSF’s value propositions must be responsive to, and align with, the market in order for the organization to satisfy buyers and attract believers.
Financial Stability and Return on Investment

Return on investment is usually quantified by profit, but with a not-for-profit enterprise it is more complex. Quantifying and determining the adequacy of the return on investment of a not-for-profit organization is sometimes described as “stewardship.”

This term also has a theological significance, and stewardship can be described as an ethic that embodies the responsible planning and management of resources.

There is a financial aspect of stewardship, which is primarily focused on accountability and the adequacy of revenues or resources. However, good stewardship also requires an organization to quantify the end result of its work and to determine whether that result justifies the level of effort and expenditure of the organization’s resources.

Funding sources usually identify desired compliance, process and outcome results in a contract. However, the LSF Board of Directors is ultimately responsible for determining whether the results of LSF’s work justify the organizational investment and level of effort.

The LSF Board has identified the transformational results to be achieved by the organization through its “Ends Policies.” The return on investment of all activities of the organization should be viewed through this lens of good stewardship.
GOALS AND STRATEGIC DIRECTIONS

Goal 1: LSF’s guiding principles are reflected in, and relevant to, the work of the organization.

- **Strategic Direction:** An uncompromising yet pragmatic approach is required to operationalize ideals represented in LSF’s guiding principles.
- **2013-14 Context:** With recent growth, new ends policy metrics must be developed and a review of governing documents is necessary.
- **Objectives**
  1. Refine, track, analyze and report program metrics for Ends Policies.
  2. Review and refine governing documents, policies and procedures to ensure they are consistent with agency practice and guiding principles.

Goal 2: LSF will aggressively pursue viable and sustainable growth opportunities by identifying resources, expanding existing programs and developing new ones in response to changing needs and the availability of resources.

- **Strategic Direction:** A successful growth strategy requires LSF to be nimble, responsive and competitive.
- **2013-2014 Context:** The LSF new program pipeline includes more than $40 million in potential growth in 2014-2015.
- **Objectives**
  2. Pursue Head Start and Early Head Start opportunities in Palm Beach and Duval counties.
  3. Assess viability of additional charter schools and act accordingly.
  4. Develop and implement a business plan for market-priced immigration legal services.
  5. Identify opportunities to expand behavioral health services, and act accordingly.
  6. Develop sustainable disaster responding capacity and identify new opportunities.
  7. Identify additional growth opportunities and respond as appropriate.

Goal 3: LSF’s expertise, organizational capacity, and/or strategic partnerships will be responsive to current and future needs for service.

- **Strategic Direction:** The velocity of change and rising performance expectations require a flexible and scalable organizational response to growth and a competent execution of strategy.
- **2013-2014 Context:** LSF has experienced more than $100 million in growth in the past two years and this year’s focus is on infrastructure enhancements. LSF will likely grow to $200 million by 2017.
- **Objectives**
  2. Modify organizational structure and deploy staff in response to growth.
  3. Develop and implement employee retention strategies.
  4. Modify operating policies, procedures and practices in response to growth and new operational realities.
  5. Refine, track, analyze and report metrics (compliance, CQI/CPI, client outcomes, ends, financial) necessary for program management and strategic leadership.
  6. Acquire subject matter expertise in response to growth and new operational realities.
Goal 4: LSF’s reputation for transformational outcomes is consistent with its guiding principles and the organization effectively uses that public image to advocate, influence, attract supporters and pursue opportunities.

- **Strategic Direction:** LSF must satisfy customers and its success must be visible to pursue growth and win supporters.
- **2013-2014 Context:** Program quality has made growth possible. Previous advancement strategies have failed. LSF has a positive but low profile public image. LSF has established a “bold and unifying goal” to raise $10 million in private support.
- **Objectives**
  1. Develop a comprehensive advancement strategy to address fund-raising priorities, targets, case development and messaging, branding, events and future personnel needs.
  2. Refine, track, analyze, report and publicize metrics demonstrating transformational client results.
  3. Develop public relations strategies to raise the visibility of LSF within Florida and nationally.
  4. Develop and implement advocacy strategy for 2014 Florida Legislative session.

Goal 5: LSF is financially strong, accountable, responsible, efficient, and has the resources necessary to effectively fulfill its purpose.

- **Strategic Direction:** Good stewardship requires LSF to account for every dollar and make every dollar count.
- **2013-2014 Context:** Phenomenal growth has made previous LSF financial models obsolete (including cost allocation methods) and additional subject matter expertise is needed. Cash reserves are inadequate for an organization the size of LSF.
- **Objectives**
  1. Establish financial targets (budget, reserves, indirect costs, net assets, etc.) and strategies.
  2. Identify and implement strategies to maximize revenues.
  3. Identify and implement strategies to reduce costs and/or maximize efficiency.
  4. Identify strategies to identify, mitigate and manage financial risk.
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