

VISION 2023

Pathways to Our Future
Three Year Plan
2021-2023

Review date 12/31/2021



2021-2023 Strategic Plan

Dear Team Members, Stakeholders and Friends of Goodwill

It has been an enriching exercise putting together this strategic plan of our good organization. With ongoing input from all our senior executives and many of their Team Members, we have developed a view of the organization that will, in a very positive way, provide direction for the next three years.

We have spent many hours talking about our mission, our priorities and our strategy in a way that takes into account all stakeholders. The report breaks down our strategy by “business lines,” but each of our senior executive team received input from all the others in an attempt to put together a game plan that works for the whole organization.

In this challenging and highly uncertain time, it is a bold endeavor to outline or predict any future. But it is necessary to plan and be able to adjust as we go. We have weathered a difficult 2020, we have thrived during a period of great stress to Goodwill. We are poised to enter the next three years stronger and more prepared to weather the storms that surely await us.

Jeffrey Wieser
President & C.E.O.



2021-2023 Strategic Plan

Table of Contents

MISSION STATEMENT	4
ORGANIZATIONAL VALUES	4
STRATEGIC PRIORITIES	5
PLAN ASSUMPTIONS.....	6
DONATED GOODS RETAIL	9
HUMAN SERVICES (“HS”)	11
HUMAN RESOURCES (“HR”)	14
EXTERNAL AFFAIRS (“EA”)	16
ACCOUNTING/FINANCE (“A-F”).....	19
INFORMATION TECHNOLOGY (“IT”)	21
COMPLIANCE	23
ADMINISTRATION	24



2021-2023 Strategic Plan

MISSION STATEMENT

Goodwill of Western and Northern Connecticut (“GWNC”) strengthens communities by helping people of all abilities maximize independence through meaningful employment and related support services.

ORGANIZATIONAL VALUES

We respect our Customers and Clients

All our Team Members are professionals who strive to meet the needs of those we serve.

We respect our Team Members

The diversity of our Team Members is recognized and celebrated. We strive as an organization to improve their career prospects.

We Communicate Effectively

Effective communication promotes productive dialogue. This encourages opportunities to seek new perspectives and make informed decisions.

We are Accountable

We recognize that the actions of our Team Members reflect on the organization as well as themselves.

We Collaborate

Collaboration breeds trust, and trust allows us to be creative and thoughtful.



2021-2023 Strategic Plan

STRATEGIC PRIORITIES

- **Rebuild operating profitability by assessing the viability of each current and future retail operation, and each current and future Human Services Program.**
- **Enhance Team Member training and development efforts to ensure organizational talent requirements are well met.**
- **Become an employer of choice to our Team Members and future Team Members by driving a caring, inclusive and rewarding culture.**
- **Reinforce compliance practices and procedures to ensure we maintain our obligations to all our stakeholders.**
- **Aggressively and deliberately develop our E-Commerce business.**
- **Ensure that the mission of Goodwill is understood by all stakeholders.**



2021-2023 Strategic Plan

PLAN ASSUMPTIONS

Goodwill of Western and Northern Connecticut (GWNC) is pleased to present our 2021-2023 Strategic Plan. This plan is the culmination of significant collaboration across all levels of the organization. Individuals representing each Program, Department, and level have contributed to the ideas, goals, and visions represented within this plan.

GWNC's strategic planning is a process of defining our strategy, making decisions, and allocating resources to achieve our outlined goals. We do this by assessing where we are as an organization and where we are going. Information gathered in this process will be used to communicate our priorities and goals with persons served, personnel, and other stakeholders.

Assessment Tools-

The goals found herein are based on the needs and relationships with persons served, customers, personnel, and stakeholders.

GWNC utilizes several tools to assess the needs of these groups. An annual survey is administered electronically via SurveyMonkey to persons served and stakeholders (including but not limited to guardians, conservators, employers, referral sources, and other referral agency personnel as applicable). Both Human Services and Retail personnel participated in SWOT meetings and value mapping activities to identify organizational needs. Donor feedback questionnaires are also collected. In 2020, a survey was administered to GWNC staff to assess staff opinion of diversity and inclusion. Additionally, feedback is encouraged in multiple ways including in person, suggestion boxes and through formal and a non-formal complaint process.

Fiscal Position and Competitive Environment-

In development of these goals, the organization has considered our competitive environment, financial opportunities, financial threats, and the capabilities of our organization. As of the development of this plan the organization is on the road to recovery from the impacts of COVID-19. As anticipated, performance has improved despite continuation of negative net months. Retail locations are open and revenue versus budget have been consistent, if not yet



2021-2023 Strategic Plan

satisfactory to management. There has been a strong performance in E-Commerce with a positive and increasing net. The organization maintains a substantial cash balance.

Social Determinants of Health-

The CDC defines social determinants of health as the conditions in which people are born, grow, live, work and age. According to the CDC “these circumstances are shaped by the distribution of money, power, and resources at global, national, and local levels.” They state, “social determinants of health are mostly responsible for health inequities – the unfair and avoidable differences in health status seen within and between countries.”

The CDC continues “Resources that enhance quality of life can have a significant influence on population health outcomes. Examples of these resources include safe and affordable housing, access to education, public safety, availability of healthy foods, local emergency/health services, and environments free of life-threatening toxins.”

Here at GWNC, we are committed to strategically addressing these determinates through our retail stores that provide much needed goods at affordable prices along with our Human Services programs that focus on employment and other supports such as housing and living skills.

Demographics and Analysis of Human Services (including Career Centers) Staff and Participants in Relation to Local Census (data from 2019)-

In a review of the demographics of GWNC’s HS personnel and participants, it was found that the HS staffing pool is reflective of the population we serve. Additionally, we have found that we serve a larger percentage of African American (35%; GWNC Team Members represent 28.4% of total staff) and Hispanic (29%. GWNC Team Members = 22.1%) individuals than the statistical state average (12% and 16.5% respectively), as evidenced by the most recent state wide census data available (2019). The gender makeup of the individuals we serve, is also reflective of the most recent census data; it is an even split of individuals served between females and males (50.1% and 49.9% respectively. GWNC Staff = 62.3% and 37.7%, respectively). Approximately 62% of the service area is represented by individuals between 18 and 65 years old. In regard to age: .4 % of participants are 12-15 years of age; 23% are 16-24 years of age; 23% are 25-34 years of age; 19% are 35-44 years of age; 17% are 45-54 years of age and 18% are 55 + years of age.



2021-2023 Strategic Plan

Other areas of consideration in development of the strategic plan include-

- The regulatory and legislative environment
- Use of technology to support efficient operations, effective service delivery, and performance improvement

Information from the analysis of performance has been utilized to identify and develop goals in the Human Services programs. Please refer to Performance Measurement Plan for further detail.

2021-2023 Strategic Plan

DONATED GOODS RETAIL

- 1. Get Back to the Black**
 - a. Achieve 2021 – 2023 Budgets
 - b. Significantly grow E-Commerce (Triple size in 3 years)
- 2. Optimize Retail footprint (close non-profitable locations)**
 - a. Work with External Affairs to grow customer base through targeted marketing and GWNC mission awareness.
 - b. Close Stamford Broad 2021 or reconfigure into a Boutique model
 - c. Sublet or exit Bloomfield lease 2021
 - d. Close Newington 2022
- 3. Increase Current Brick and Mortar strength**
 - a. Look for possible outlet or store location in northeast corner
 - b. Relocate or add additional Norwalk location 2022
 - c. Relocate Danbury 2022
 - d. 2023 Focus on affluent store location addition (New Canaan or Darien?), transportation hub or Bridgeport relocation
- 4. Increase Donations and Donor Base – Attended Donation Center (“ADC”) strength**
 - a. Work with External Affairs to grow donor base through targeted marketing and GWNC mission awareness.
 - b. Replace Stratford and Route 7 ADC’s with more affluent donor areas (New Canaan or Darien?).
- 5. Expand upon current Continuous Improvement (“CI”) strength**
 - a. Target revenue driven areas (sales floor organization - optimization)
 - b. Organize, update and add standardized work and process trainings
 - c. Add additional E-Comm trainings
- 6. Increase E-Commerce strength**
 - a. 2021 revenue to \$2.1 million
 - i. Add 10 additional Team Members (20 total Team Members)
 - ii. Min 400 listings daily (avg)
 - iii. Store specific goals



2021-2023 Strategic Plan

- b. Inter-store agents or interns
 - 2022 revenue to \$3.2 million
 - i. Add additional 20 Team Members (40 total Team Members)
 - ii. Min 800 listings daily
 - iii. Store specific goals
 - iv. Implement Inter-store E-Comm listings (space allowable)
- c. 2023 revenue to \$4.5 million
 - i. Add additional 10 Team Members (50 total Team Members)
 - ii. Min 1000 listings daily
 - iii. Store specific goals
 - iv. Grow Inter-store E-Comm listings (space allowable)



2021-2023 Strategic Plan

HUMAN SERVICES (“HS”)

Community Employment Services (“CES”)

- 1. Develop and grow talent and leadership within the CES department.**
 - a. Collaborate with GWNC’s recruitment initiatives to support adding talent to the department, including management positions, as well as direct service Team Members.
 - b. Advance current initiatives such as the CES Career Pathways tool, as well as trainings developed by the department to support growth for Team Members.
- 2. Develop relationships with other community organizations with the purpose of potential future collaboration. Develop Cross collaborative efforts with other organizations where CES handles the employment functions of larger initiatives.**
 - a. GWNC leadership will reach out to select community organizations to build relationships through networking and other means.
 - b. GWNC leadership will align relationships with organizations that may serve as complementary community partners.
- 3. Expand CES services beyond GWNC territory line.**
 - a. GWNC leadership will explore territory agreements with Goodwill of Southern New England to determine a feasible pathway to expanding Bureau of Rehabilitation Services’ (“BRS”) employment services into that organization’s Connecticut territories.
- 4. Identify new funding opportunities to further the CES mission of providing meaningful work opportunities to Connecticut residents while considering potential community partners within the scope of programming.**
 - a. CES leadership will explore RFP/Q opportunities as they align with the employment vision of the department.
 - b. Key partners will be considered based on leveraging their unique services to deliver greater outcomes for program participants.
 - c. Develop and grow talent and leadership within the CES department.

2021-2023 Strategic Plan

Department of Developmental Services (“DDS”)

Day Support Options (“DSO”)

Employment and Training Services (“ETS”)

- 1. Expanded day services options inclusive of DSO, ETS, possibly an afterhours service and weekend respite service (Hartford location). Services may include facility-based, community-based.**
 - a. Join DDS ETS’ collaborative efforts to grow program in both locations.
 - b. Forge relationships with high schools to directly let them know about our programs in an effort to increase referrals.
 - c. Evaluate after hour/weekend program options.
- 2. Strengthen community partnerships for participant training and other programmatic purposes.**
 - a. Develop list of current gaps in participant training and potential community partners.
 - b. Identify and develop relationships with supportive organizations to create internships.
 - c. Identify new volunteer sites.
- 3. Increase participant use of technology to enhance work skills and maintain social relationships.**
 - a. Deploy devices and identify tech-savvy staff at each location to support deployment.
 - b. Provide training to GWNC Team Members and participants.
- 4. Evaluate and update utilization of GWNC-owned facilities (e.g. room size, décor, use of technology) in all programmatic space.**
 - a. Develop space planning tool for locations with HS programs.
 - b. Identify best use of space for current and future needs.
- 5. Conduct feasibility study of providing residential services.**
 - a. Determine residential need with DDS.
 - b. Survey other residential providers re: pros and cons of providing residential supports in today’s climate.

2021-2023 Strategic Plan

- c. Identify and implement action steps needed to develop new residential program site(s).

Residential

Department of Mental Health and Addiction Services (“DMHAS”)

Department of Social Services (“DSS”)

Acquired Brain Injury (“ABI”)

Community Residence (“CR”)

DSS ABI, CR

- 1. Evaluate current portfolio of Residential programs for further growth and/or contraction, taking into account financial viability, ability to staff programs, existing space and other considerations e.g. assess and determine best use of the Wahlstrom residence by working with community and government partners, seek additional space for expansion of DMHAS-funded programs.**
 - a. Assess viability of DSS ABI program.
 - b. Optimize residential facilities at all times.
 - c. Work with DMHAS to identify candidate for additional Wellness case(s).
 - d. GWNC leadership invite State housing partners to visit residence and develop shared vision for better future use of facility, including opportunities to fund renovation.
 - e. Identify funding to add 3rd CR to portfolio.

2021-2023 Strategic Plan

HUMAN RESOURCES (“HR”)

1. Enhance GWNC’s work culture to attract and retain talent.

- a. Continually evaluate and incorporate more efficient means of Team Member communication throughout the organization.
 - i. Partner with External Affairs regularly for effective channels and coordination of messaging.
 - ii. Determine a formal structure to ensure effective methods and remove duplication of efforts.
- b. Increase Team Member retention by fostering engagement at all levels of the agency. Provide offerings on a regular basis (bi-monthly) to connect Team Members to the organization (i.e. events, contests).
- c. Ensure all Team Members have a clear connection to the mission. Continuously update performance review forms to add mission-related competencies to all positions.

2. Succession Planning

- a. Execute a formal process to annually assess leadership positions across the agency and identify successors for the roles by performance, skills and abilities.
- b. Establish goals set up in collaboration with executives for evaluation and feedback of their teams.
- c. Strengthen the organization by providing career paths for advancement and business continuity, key outcomes of the succession planning exercises.

2021-2023 Strategic Plan

- 3. Enhance Team Member development and training initiatives offered throughout the agency to build a knowledgeable workforce.**
 - a. Develop and maintain training initiatives through a centralized function in Human Resources, utilizing internal and external resources to be able to offer courses on “soft skills”, leadership skills and career development.
 - a. Encourage and support broader learning and education opportunities offered by professional memberships and associations. Invest in Team Members by supporting their external connections to related mission learning, workshops and networking opportunities.
- 4. Upgrade HR systems/technology**
 - a. Explore new software systems for performance reviews that will streamline efficiency and are more user friendly.
 - b. Invest in a more enhanced recruitment tracking software to ensure hiring needs are met.



2021-2023 Strategic Plan

EXTERNAL AFFAIRS (“EA”)

RETAIL SUPPORT

- 1. Research and acquire an omnichannel Customer Relationship Management (“CRM”) platform enabling ability to deliver consistent customer support leading to increase in customer/donor satisfaction, retention and revenue.**
 - a. Streamline the # of ways outside stakeholders can connect with GWNC.
 - b. Work with IT to insure smooth implementation.
 - c. Empower EA Project Manager as the lead on customer service.
- 2. Develop cross-channel campaigns and promotions that support retail growth goals in revenue and donations. (ongoing)**
 - a. Work with GO Media to create dynamic creative and implement campaigns across media channels.
 - b. Purchase and utilize Data Candy enabling us to build robust customer and donor loyalty programs.
- 3. Partner with ShopGoodwill marketing team providing success story videos, product spotlights, etc. to increase traffic to and the sell through of GWNC auction items.**
 - a. Work with E-Commerce department to obtain information on unique finds that would be a draw for special promotions including live auctions.
 - b. Share success stories and videos quarterly with ShopGoodwill Team Members.

HUMAN RESOURCES SUPPORT

- 1. Help drive organizational culture shift that supports, develops and shows care to Team Members.**
 - a. Work with HR and Compliance Officer to develop and oversee Diversity Equity Inclusion (“DEI”) Advisory Committee.
 - b. Work with HR to develop and oversee Team Member Engagement Committee.
 - c. Implement inclusive company events and activities that build Team Member engagement.

2021-2023 Strategic Plan

2. **Provide marketing materials that position GWNC as an employer of choice to support recruitment and onboarding processes.**
 - a. Work with HR team to craft and produce materials needed for desired outcomes.

HUMAN SERVICES SUPPORT

1. **Provide support as needed for the desired client growth in HS Services.**
 - a. Work with HS leaders to provide recommendations and support as needed.

GOODWILL CAREER CENTERS (“GCC”)

1. **Identify new client database allowing for more granular reporting to guide in decision making and marketing of this service.**
 - a. Partner with IT to research database solutions that can be supported in-house.
 - b. Get feedback of GCC Team Members, ensuring platform meets needs and wants.
 - c. Research, acquire, migrate data and implement new database including career coach training.
2. **Build partnerships with social service agencies that allow GCC to provide access to wrap around services to clients experiencing common barriers (childcare, transportation) improving job placements.**
 - a. Continue to build outreach activities with support of Community Development Coach.
 - b. Develop a pitch book that strongly articulates the win-win for Goodwill and outside organization joining forces to get Connecticut residents to work.
3. **Cultivate stronger relationships with Connecticut employers that focus on serving their immediate needs, thus allowing GWNC to assure jobs are available to clients while maintaining employer interest in GWNC.**
 - a. Develop outreach calendar with a minimum of quarterly contact with the thousands of employers in our database.
4. **Utilize the appeal funds raised for the GCCs to invest in the staff development, client resources and updating of locations.**
 - a. GCC coaches take training to become certified resume writers.

2021-2023 Strategic Plan

- b. Renovate the Hartford GCC to match look and feel of all other locations also to reduce the behavior that often effects this center.
 - c. Survey clients to see what new services and/or trainings would benefit clients and draw in new activity.
- 5. Open new GCC at the Stamford Elm retail store.**
- a. Partner with IT and facilities to facilitate the build-out and equipment purchases.
 - b. Work with GCC management and HR to recruit two fulltime coaches.
 - c. EA department to handle the signage and purchase of furniture.

COMMUNICATIONS

- 1. Develop and produce campaign to communicate “Why Goodwill?”**
 - a. Campaign will drive awareness of and utilization of the GCCs while tying back to shopping and donating.
 - b. Produce :15 and :30 second spots along with corresponding collateral.
- 2. Continue to refine internal communications plan focusing on clear, transparent and consistent communications.**
 - a. Use SharePoint as the main vehicle to communicate to Team Members.
 - b. Continue producing Team Member Spotlight videos.
- 3. Pitch relevant and timely GWNC stories to the media monthly.**
 - a. Ensure Co Communications ties GWNC in with relevant news stories.
- 4. Develop in-house video making and editing capabilities.**
 - a. Purchase necessary equipment needed for quality video.
 - b. EA team receives training in video editing.
 - c. Continue to keep current outside videographer for high profile video production.



2021-2023 Strategic Plan

ACCOUNTING/FINANCE (“A-F”)

- 1. Maintain best practices in A-F department (including all related corporate services) ensuring corporate compliance and efficient, effective processes.**
 - a. Produce monthly closing by Day 10.
 - b. Comply with state and federal monthly, quarterly and annual grant/contract reporting requirements in conformity with the standards of the State Single Audit Act and GAAP.
 - c. Maintain proficiency with the financial management of Human Services Grants - schedule additional training and/or expert consultation as warranted.
 - d. Update or revise all Accounting Department SOPs annually by year end.
 - e. Strive to maintain an unqualified opinion from our external auditors in the Annual Audit Report. Work in all cases to complete the annual audit by May 31, 2021.
- 2. Further strengthen GWNCT financial position through responsible, responsive and compliant cash management analyses and practices.**
 - a. Closely manage and regularly report on Agency liquidity. React appropriately to cash balance expectations given the Agency’s current unprofitability and ongoing pandemic concerns. Examine opportunities to increase return.
- 3. Provide effective capital planning and management, including the determination of suitable Return on Investment (“ROI”) analysis for significant projects.**
- 4. Insure efficient, effective business continuity through resource assessment and improvement.**
 - a. Continue to cross-train staff for the purpose of improving back-up and enhancing the capabilities of all department Team Members.
 - b. Maintain and evaluate department software resources.

2021-2023 Strategic Plan

- i. Maintain Abila accounting software package to current version. Build user knowledge through local User Group meetings and training sessions.
 - ii. Improve automation/electronic capabilities in all applicable areas of A-F.
- 5. Support the organization's return to profitability, appropriate growth and continuous improvement.**
- a. With DGR and IT, continually review Point of Sale ("POS") retail package and recommend improvements. To the extent possible, seek an understanding of how POS would objectively improve our profitability.
 - b. Examine other process enhancements/improvements as warranted and with the necessary team collaboration (DGR, IT).
 - c. Continue to lead an effective, thorough and collaborative annual budgeting process of all company operations and capital needs. Assemble useful supplementary detail where necessary. Continue to forecast current year results and recommend appropriate remedial action to team if and when necessary.



2021-2023 Strategic Plan

INFORMATION TECHNOLOGY (“IT”)

Network Infrastructure

- 1. Evaluate and upgrade with software-defined wide area network (SD-WAN) and wireless wide area network (WWAN) as backup in 2022.**
 - a. Optimize network usage
 - b. Increase network reliability and security
 - c. Reduce costs
- 2. Improve business continuity and disaster recovery infrastructure.**
- 3. Research and implement server virtualization and cloud base backup storage.**
- 4. Reduce data center footprint in Bridgeport and Hartford Campus.**

Team Member proficiencies and efficiencies

- 1. Partner with External Affairs leadership to centralize Corporate news and announcements in SharePoint and make it accessible to all Team Members.**
- 2. Partner with Compliance leadership to educate Team Members on Health Insurance Portability and Accountability Act (“HIPAA”) requirements and eliminate data loss.**
- 3. Partner with Human Resources leadership to improve new hire, leave of absence, and termination processes.**

Businesses Support

- 1. Implement new POS system that includes advanced tools to support DGR and Marketing strategies.**
- 2. Integrate POS system with Accounting software to streamline sales validation and reporting capabilities, and with surveillance cameras.**
- 3. Partner with Human Services leadership to streamline scheduling application to improve efficiency.**
- 4. Partner with GCC leadership to buildout new GCC in Stamford Elm store and other potential locations.**
- 5. Partner with External Affairs leadership to setup a CRM platform to deliver consistent support leading to increased customer satisfaction, retention, and revenue.**
- 6. Partner with Accounting leadership to develop an accounts payable (“A/P”) workflow process to reduce paperwork and labor hours.**



2021-2023 Strategic Plan

7. Renew and standardize technology in corporate offices, retail stores and career centers.



2021-2023 Strategic Plan

COMPLIANCE

- 1. Review and amend policies and procedures for all departments to provide a framework for compliance across the entire organization.**
- 2. Develop a system that facilitates the timely resolution of stakeholder complaints and provides for the anonymous submission of complaints.**
- 3. Work with the Human Services department to create audit systems for billing and quality assessment that reduces billing issues and increases the quality of care provided to participants.**
- 4. Collaborate with all departments to create a culture where Team Members feel comfortable bringing issues to senior leadership and have confidence that their concerns will be heard, and that action will be taken to remedy any issues.**
- 5. Assist all departments in creating trainings that provide Team Members with instruction on complying with policies and laws applicable to their jobs.**



2021-2023 Strategic Plan

ADMINISTRATION

- 1. Drive efforts to improve operating profitability.**
 - a. Return GWNC to annual breakeven performance, after non-cash depreciation charges.
 - b. Fully engage DRG Management and Marketing to increase revenues at GWNC stores.
 - c. Engage all members of the Executive and Admin team to minimize expenses, while fulfilling the mission of the organization.
 - d. Ensure that GWNC meets all the standards of operating performance within the data analytics of Goodwill Industries International ("GI").
- 2. Lead Administration's corporate compliance activities.**
 - a. Ensure that all Team Members recognize the policy of zero tolerance for ethical lapses in all aspects of operating performance.
- 3. Establish customer service and Team Member best practices.**
 - a. Continue to build DGR practices so that we become a favorite place to shop, and a favorite place to work.
- 4. Use Goodwill resources to provide low-expense support to collaborative 501(c)3's in our area of operation.**
- 5. Provide salvage merchandise to non-profits for low cost outreach for local public relations and collaboration.**
- 6. Build a greater sense of engagement between the executive team and the Board of Directors.**
- 7. Confirm GWNC mission to match our historical activities and our future path, while fulfilling the perception the community has for the Goodwill brand.**
- 8. Review strategic plan annually for ongoing relevance and direction.**