GOODWILL OMAHA
STRATEGIC PLAN
2019-2022
GOODWILL INDUSTRIES, INC., SERVING EASTERN NEBRASKA & SOUTHWEST IOWA
VISION:
Empowering individuals to realize their maximum potential through the power of work.

MISSION:
Goodwill changes lives and strengthens communities through education, training and work.

VALUES:
Customer Focused • Integrity • Accountability
Responsible Stewardship • Respect & Dignity
EXECUTIVE SUMMARY
Since 1933, Goodwill Industries, Inc., Serving Eastern Nebraska and Southwest Iowa has trained and employed people with disabilities and other barriers to employment, many of whom may have been at a competitive disadvantage in the job market.

Most people know Goodwill as a place to donate used clothing or household items. Many people do not know that Goodwill also offers employment and training services to thousands of formerly unemployed or underemployed individuals providing them an opportunity to earn a self-sufficient living wage.

Our strategic plan for 2019 through 2022 reflects our steadfast commitment to serving those in need throughout eastern Nebraska and southwestern Iowa. This plan presents the vision, mission, mid-to-long term goals and objectives, and metrics of the agency.

The strategic plan evolved over a five month process with engagement by a professional strategic planning facilitator from Goodwill Industries International, Inc. and our local executive team and Board of Trustees. The strategic plan reflects key focus areas that will strengthen and increase Goodwill’s impact on the communities we serve.

The areas of focus that emerged from the strategic planning process are to: 1) Fully integrate mission programs throughout the agency; 2) Expand mission programs beyond its current offerings; 3) Improve customer service; 4) Offer Goodwill services throughout the territory; and 5) Communicate internally and externally in a complete and transparent manner.

As we move forward, we will remain committed to providing those in need with valuable employment services and placements that empower individuals to realize their maximum potential through work.

Dr. Michael L. McGinnis
CEO & President

Scott D. Semrad
Chairman, Board of Trustees
STRATEGIC PLANNING METHODOLOGY

The Goodwill strategic planning process was facilitated by Goodwill Industries International, Inc. (GII) during three planning retreats with Goodwill’s Board of Trustees (Board) and executive team. The agenda and support materials for the sessions were designed in collaboration with Teri Leavens, GII Strategic Planning Consultant, and Goodwill’s executive team.

Ms. Leavens’ pre-retreat work included a Strengths, Weaknesses, Opportunities, and Threats (SWOT) Analysis and a Community Needs Assessment (CNA) survey completed by Goodwill Board members, community advocates, non-profit agencies, elected officials, customers and foundations in Goodwill’s territory.

The first facilitated session took place on July 17, 2018, with Goodwill’s Board and executive team. Ms. Leavens presented the SWOT and CNA results and gave an overview of socio-economic and geographic local trends affecting our territory in the decades ahead. This session resulted in a new Goodwill vision statement and agency-level strategic goals across five key focus areas.

Ms. Leavens and Goodwill’s executive team met again on July 18, 2018, to refine the vision statement for presentation and final Board approval. A working session with the executive team generated departmental goals for each focus area.

During the final session, August 9, 2018, the executive team completed the mission advancement and retail department goals. Over the next several months, the Goodwill executive team finalized departmental goals, objectives and metrics for assessing progress.
1 • MISSION INTEGRATION

Goal: Integrate mission programs and services into all Goodwill retail store locations.

Objectives to achieve this goal:

• Create and fill transitional work positions in Goodwill retail stores with sector training graduates and Employment Solutions referrals.
• Offer employment services to all Goodwill employees.
• Provide Employment Solutions services in all Goodwill retail stores.
• Create and sustain an agency-wide culture that fully embraces and enables effective mission integration.

2 • MISSION EXPANSION

Goal: Continue to expand mission programs and services, specifically through sector training opportunities.

Objectives to achieve this goal:

• Develop and deliver sector-based training curricula in custodial, facilities maintenance, information technology, computer and electronics recycling and repair, and grounds maintenance.

3 • CUSTOMER SERVICE

Goal: Provide exceptional customer service that exceeds expectations.

Objectives to achieve this goal:

• Evaluate and enhance case management and employment support services provided to the community and program participants.
• Create a donation and retail environment that exceeds customer expectations.
• Implement a customer satisfaction program that collects customer feedback and leads to continuous improvement of customer service.

4 • GEOGRAPHIC REACH

Goal: Expand mission services and retail presence throughout Goodwill’s territory consisting of 15 Nebraska counties and 14 Iowa counties.

Objectives to achieve this goal:

• Assess area-specific community needs for mission services and donated goods resources.
• Establish an agency presence in all 25 counties within Goodwill’s territory, offering mission services and programs based on the assessed community needs.
• Evaluate targeted neighborhoods within the Omaha and Council Bluffs metropolitan areas to identify and establish potential locations where mission services and retail facilities are needed.

5 • AGENCY COMMUNICATIONS

Goal: Execute full and transparent communications.

Objectives to achieve this goal:

• Provide full and transparent communications to the Board of Trustees on governance, fiscal responsibilities, and compliance of ethical principles and practices.
• Communicate openly in a manner that keeps our employees and stakeholders informed about Goodwill initiatives, business, workplace, operations, mission performance and strategic plans.
DEPARTMENT FOCUS AREAS

1 • MISSION INTEGRATION

Agency Goal: Integrate mission programs and services into all Goodwill retail store locations.

DEPARTMENT: MISSION ADVANCEMENT

• Make employment placements in retail stores utilizing transitional positions by Q1 2019.
• Deliver Employment Solutions programming in six retail stores by Q2 2019.
• Support and sustain a culture that encourages mission integration (Ongoing).

DEPARTMENT: RETAIL

• Establish and incorporate transitional positions into retail stores by Q4 2018.
• Create workspaces for Employment Solutions staff to offer services in all retail stores by Q1 2019.
• Work collaboratively to develop and deliver sector training in all retail stores by Q4 2019.
• Support and sustain a culture that encourages mission integration (Ongoing).

DEPARTMENT: HUMAN RESOURCES

• Educate new hires on the Employee Services benefit during orientation (Ongoing).
• Educate current employees at each location on the Employee Services benefit by Q2 2019.
• Refer non-selected applicants to Employment Solutions (Ongoing).

DEPARTMENT: MARKETING

• Develop and implement in-store marketing that explains mission integration efforts to customers by Q1 2019.
• Develop and execute a digital and print marketing campaign to prospective participants by Q1 2019.

DEPARTMENT: DEVELOPMENT

• Secure $200,000 in grants from private or public foundations in support of mission integration by Q4 2019.
• Secure $25,000 in individual donations in support of mission integration by Q4 2019.

DEPARTMENT: INFORMATION TECHNOLOGY

• Provide IT support for all mission integration initiatives by Q2 2019.

DEPARTMENT: FINANCE

• Provide Finance support for all mission integration initiatives (Ongoing).

2 • MISSION EXPANSION

Agency Goal: Continue to expand mission programs and services, specifically through sector training opportunities.

DEPARTMENT: MISSION ADVANCEMENT

• Establish custodial (Q2 2019), grounds maintenance (Q2 2019), information technology (Q2 2020), computer and electronics recycling and repair (Q2 2020), and facilities maintenance (Q4 2020) sector training.

DEPARTMENT: RETAIL

• Integrate sector training programs by modifying retail store operations as needed by Q2 2019.

DEPARTMENT: HUMAN RESOURCES

• Ensure adequate staffing for mission expansion (Ongoing).

DEPARTMENT: MARKETING

• Develop and execute digital marketing strategies that educate and promote sector training programs by Q3 2019.

DEPARTMENT: DEVELOPMENT

• Secure $250,000 in grants from private or public foundations for mission expansion and sector training by Q4 2019.
• Secure $35,000 individual donations for sector training programs by Q4 2019.

DEPARTMENT: INFORMATION TECHNOLOGY

• Search for certification (Q1 2019) and provide instruction for the information technology sector training by Q2 2020.

DEPARTMENT: FINANCE

• Provide ongoing financial data and reporting that supports sector training (Ongoing).
3 • CUSTOMER SERVICE

Agency Goal: Provide exceptional customer service that exceeds expectations.

DEPARTMENT: MISSION ADVANCEMENT
• Evaluate and enhance case management and employment support services provided to the community and program participants (Ongoing).
• Implement a participant and partner satisfaction survey by Q1 2019.
• Ensure all reports are completed in accordance with compliance and regulatory requirements (Ongoing).

DEPARTMENT: RETAIL
• Enhance and personalize customer service upon entering and exiting the stores by Q4 2019.
• Open 12 donation centers across our territory to increase donor convenience and better serve our communities by Q4 2022.
• Implement a customer satisfaction program by Q1 2020.
• Enhance the online shopping experience by Q2 2019.
• Enhance the donor experience and reduce drop-off time with the use of hand-held scanners by Q4 2021.
• Implement LED lighting in all stores to improve the customer experience and enhance safety by Q4 2019.
• Implement a community donation pick-up program in designated zip codes by Q4 2018.

DEPARTMENT: HUMAN RESOURCES
• Implement a health and wellness program to encourage employee well-being by Q1 2020.
• Offer employee benefits that are affordable and competitive (Ongoing).
• Improve safety and reduce the number of incidents (Ongoing).
• Maintain a fair and equitable compensation system (Ongoing).

DEPARTMENT: MARKETING
• Create informative marketing materials for retail store entrances, sales floors and donation door areas by Q4 2018.
• Provide excellent customer service and timely responses to internal and external customers (Ongoing).

DEPARTMENT: DEVELOPMENT
• Foster relationships and educate current and new donors and stakeholders of Development efforts by Q1 2019.

DEPARTMENT: INFORMATION TECHNOLOGY
• Implement a system to better serve internal customers by Q1 2019.
• Improve the point of sale system providing customers a better experience by Q4 2019.
• Develop and deploy an application to enhance the material donor experience by Q3 2019.

DEPARTMENT: FINANCE
• Provide excellent customer service to internal and external customers (Ongoing).

4 • GEOGRAPHIC REACH

Agency Goal: Expand mission services and retail presence throughout Goodwill’s territory consisting of 15 Nebraska counties and 14 Iowa counties.

DEPARTMENT: MISSION ADVANCEMENT
• Partner with the University of Nebraska at Omaha (UNO) to complete a community needs assessment by Q2 2019.
• Develop and implement a mission services plan for selected counties based on the results of the community needs assessment by Q3 2019.

DEPARTMENT: RETAIL
• Develop and implement a retail plan for selected counties based on the results of the community needs assessment by Q3 2018.
• Pilot a mobile retail program based on community needs assessment results by Q4 2019.

DEPARTMENT: HUMAN RESOURCES
• Ensure adequate staffing for expansion (Ongoing).

DEPARTMENT: MARKETING
• Develop and implement a marketing plan for selected counties based on the results of the community needs assessment by Q1 2019.
• Develop and execute a targeted neighborhood marketing campaign to create community awareness about donation centers by Q4 2018.
4 • GEOGRAPHIC REACH (con’t)

DEPARTMENT: DEVELOPMENT
• Form partnerships in communities where Goodwill presence is not currently active by Q4 2019.

DEPARTMENT: INFORMATION TECHNOLOGY
• Provide appropriate IT infrastructure to support retail and mission expansion by Q4 2019.
• Develop and implement a mobile point of sale and donation system by Q4 2019.

5 • AGENCY COMMUNICATIONS

Agency Goal: To execute full and transparent communications.

DEPARTMENT: MISSION ADVANCEMENT
• Communicate openly with employees, executive team, Board of Trustees and external organizations about mission advancement initiatives and operations (Ongoing).
• Promote inclusive employment within the community by sponsoring training and education opportunities (Ongoing).

DEPARTMENT: RETAIL
• Communicate openly with employees, executive team, Board of Trustees and external organizations about retail initiatives and operations (Ongoing).

DEPARTMENT: HUMAN RESOURCES
• Communicate openly with the human resources team, employees, executive team, Board of Trustees and external organizations about HR initiatives and operations (Ongoing).

DEPARTMENT: MARKETING
• Provide ongoing, open and transparent communications to the public through Goodwill’s website and social media by Q1 2019.
• Write and externally publish monthly news stories highlighting Goodwill’s positive impact (Ongoing).

DEPARTMENT: DEVELOPMENT
• Communicate openly with the employees, executive team, Board of Trustees, donors and external stakeholders about fundraising initiatives and operations (Ongoing).

DEPARTMENT: INFORMATION TECHNOLOGY
• Improve reporting capabilities to better inform and educate employees on Mission Advancement and Retail department initiatives and outcomes by Q3 2019.

DEPARTMENT: FINANCE
• Ensure tax and financial reports are completed in a timely manner (Ongoing).
• Communicate openly with employees, executive team, Board of Trustees, and external organizations about financial initiatives and operations (Ongoing).
## 2019 BUDGET

### Operations (Earned) Revenue

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
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<tbody>
<tr>
<td>Retail</td>
<td>$ 20,328,881</td>
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<tr>
<td>Ability One Contracts</td>
<td>$ 4,512,586</td>
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<tr>
<td>Commercial Services Contracts</td>
<td>$ 294,480</td>
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<tr>
<td>Mission Programs</td>
<td>$ 1,770,157</td>
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<tr>
<td>Investment Interest Income</td>
<td>$ 109,200</td>
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<tr>
<td><strong>Total Operations Revenue</strong></td>
<td><strong>$ 27,015,304</strong></td>
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### Operations Expenses

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<tr>
<th>Description</th>
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<tbody>
<tr>
<td>Salaries</td>
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<tr>
<td>Payroll Taxes</td>
<td>$ 1,170,820</td>
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<td>Employee Benefits</td>
<td>$ 2,394,945</td>
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<td>Utilities</td>
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<tr>
<td>Rent</td>
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<td>Maintenance and Repairs</td>
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<td>Vehicles</td>
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<td>IT Supplies and Maintenance</td>
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<td>Supplies</td>
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<td>Insurance</td>
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<td>Professional Services</td>
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<td>Student Stipends</td>
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<td>National Dues</td>
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<td>Interest</td>
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<td>Other</td>
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<td><strong>Total Operations Expense</strong></td>
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### Operations Net Profit (Loss)

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<tr>
<td><strong>Total Operations Net Profit (Loss)</strong></td>
<td><strong>$ 3,010,869</strong></td>
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### Additional Income and Expenses

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<th>Description</th>
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<tr>
<td><strong>2018 Restricted Income Carryover</strong></td>
<td>$ 154,202</td>
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<td><strong>2018 Restricted Expenses Carryover</strong></td>
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<td><strong>2019 Restricted Income Projection</strong></td>
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<td><strong>2019 Restricted Expenses Projection</strong></td>
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### Net Profit (Loss)

<table>
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<tr>
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<tr>
<td><strong>2018-2019 Net Restricted Income</strong></td>
<td><strong>$ 230,180</strong></td>
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<tr>
<td><strong>Investment Gain/Loss</strong></td>
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<td><strong>Depreciation</strong></td>
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<thead>
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<tbody>
<tr>
<td><strong>Net Profit (Loss)</strong></td>
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