TSN Strategic Plan – FY23 Pillars

- Refresh Mission + Vision, Lead with Values
- Deepen Program Impact
- Build A Fundraising Base
- Organization Development: Adding Value for Future Positioning
Refreshed Mission + Vision, Leading with Values
VISION

We envision a world where all people with mental health conditions can live, work, and thrive in every workplace and community without experiencing stigma and prejudice.
MISSION

To build relationships and community that eliminate mental health stigma and prejudice. We do this by empowering our global network of Stability Leaders to share their lived experiences through advocacy storytelling in workplaces and communities.
WHAT IS “ADVOCACY STORYTELLING”? 

Advocacy storytelling uses stories from our lived experiences to change minds for good. We don’t just want to tell the best story. We want our stories to call audiences to action, to reduce stigma, and to advocate for our vision of a better world. Our advocacy storytelling approach was developed in partnership with Living Proof Advocacy.
These values clarify our core beliefs, support our vision, and shape our culture.
Anti-racist Learning + Practice

We value anti-racist learning and practices because we learn from the Lived Experiences of Black, Indigenous and People of Color and improve our practices based on reflection, intention, and accountability. Colonization, racism, and oppressive systems have impacted BIPOC communities’ mental health throughout history and today.
Lived Experience

We value the Lived Experiences of our Stability Leaders because our voices are essential in conversations around mental health.
Equitable Access

We value using our resources equitably because everyone should be able to use storytelling to advocate for access to the support they need to thrive.
Community

We value community because when we build relationships and collaborate, we create a thriving, inspirational mental health movement. We are stronger when we advocate together.
Vulnerable Leadership

We value leadership based on vulnerability because it is a source of strength. We see the humanity in each other and lead with compassion and kindness.
Impact

We value meaningful and transformational impact because we are accountable and transparent to the people and communities we serve.
Program: Deepening Partnerships, Training, and Engagement
Program Pillar – FY23 Priorities

Deepen our strengths; quality over quantity; let go of what doesn’t work

- Improve training
- More speaking activities
- Building Connection
- Core, repeat Partners
- Sourcing value-aligned partners
- Build LinkedIn community
Stability Leader Feedback

- From surveys and community conversations, Stability Leaders shared TWO programmatic priorities:
  
  - Sharing stories through public speaking
  
  - Connecting with fellow Stability Leaders
Priorities – Improve Training

• Improve training top to bottom
  • 3 new Speaker Coaches (*no longer Mentors*)
  • Updated Speakers Manual – strength-based language
  • Updated Speaker Workshop guidelines
  • Restructured Fundamentals of Advocacy Storytelling training
  • Speaker Affirmation Process – new pilot in 2023
  • FY23 Goals:
    • Train and deploy 3 new speaker coaches
    • Test (Q1 – Q3) and finalize (Q4) Speaker Affirmation Program
    • Deliver at least 4 workshops using updated trainings
    • Decide whether to license training (with LPA) in FY24
Priorities – Improve Training

TSN Training Roadmap
Priorities – Speaking Activities

• More speaking activity for Stability Leaders
  • Open Mind, Open Mics
  • Quarterly Stability Leader-led events (*showcases, workshops, networking, wellness*)
  • Story videos
  • Coaching sessions – develop speaking
  • FY23 Goals:
    • 15% increase in overall speaking, not limited to engagements
    • 8 or more coaching sessions
    • 1 or more specialized trainings
    • 1 or more Open Mind, Open Mics
    • 4 or more Stability Leader-designed events or story videos
Priorities – Build Connections

• Building real connections (quality > quantity)
  • Let go of what isn’t working (*Quarterly calls, Regional/Support groups, blog team*)
  • Connections through training
  • Specialized trainings (*sourcing gigs, media, podcasts, panel, Q&A, workplace share*)
  • In-person/hybrid conference
  • Intentional, interactive virtual events sustain connections
  • Open blog submissions
  • FY23 goals:
    • In-person/hybrid conference + at least 1 added virtual event
    • Survey results: Stability Leaders feel increased community
Priorities – Core, Repeat Partners

• Focus on repeat speaking engagements – identify core partners
  • Can we engage managers at companies with using storytelling? Ex: USI
  • Build trust – identify alignment
  • FY23 Goals:
    • Identify 2-3 core, repeating partners
      • Research market demand for deeper workplace storytelling program model
      • Analysis of potential FY24 pilot of revenue-generating services model at 1 core partner, with initial cost structure (pending staff capacity and identified demand)
Priorities – Source Values-Aligned Partners

• Begin sourcing values-aligned partners
  • Start with core partners and Stability Leader relationships/workplaces
  • “True believer” salespeople
  • Build our lecture business through word of mouth
  • Collecting testimonials
  • Lead with our new values
• FY23 Goals:
  • Update testimonials and outreach materials
  • Update post-event impact survey questions
  • Work with core partners and Stability Leaders to identify 4 potential new partners
  • Obtain at least one new FY23 partner through values alignment
Priorities – Build LinkedIn Community

• Build engagement on LinkedIn by amplifying signal
  • Small staff capacity - primary tool (*no traction on Facebook, little return on blogs*)
  • Sharing Stability Leader posts, videos + visual content
  • FY23 goal:
    • Share at least 8 Stability Leader-generated content posts
    • Share at least 4 visual stories (picture or video)
    • At least 2:1 ratio of program content posts to donation asks
Fundraising: Building a Base
Fundraising Pillar – FY23 Priorities

Professionalize; share high-quality data; grow sustaining relationships; plant seeds
Priorities – Fundraising Tools

• Updated professional fundraising tools
  • TSN has never had any high-quality marketing materials or one-pagers to share
  • Staff capacity has been limited – heavy lift to produce annual report in 2022
  • Very little in-house design or marketing capacity
  • Salesforce has been lightly-used database - learning curve for future development staff; alternatives like Little Green Light may be cost-effective
• FY23 goals:
  • Hire contract support to produce high-quality marketing materials for TSN outreach, Case for Support, one-pager
  • Hire contract support to produce 2023 annual report
  • Decide whether Salesforce is the best fundraising database option; obtain consulting or training for database transfer
Priorities – Return to In-Person Event

• Return to in-person annual event
  • Requires volunteer event chairs and additional volunteer leaders
  • Requires contractors for on-the-ground event planning and technical support
  • In-between event: *not formal hotel ballroom dinner, welcoming to community*
  • Combined with conference/workshop day and TSN board/staff retreat
  • FY23 goals:
    • Execute an in-person annual event – fundraiser plus conference
    • Obtain at least 5 substantial event sponsorships, 2 new
    • Engage donors and potential supporters in one strategic geographic area – low barrier to access for Stability Leaders
    • Connect TSN Leaders, board, and staff for relationship-building
    • Raise > $75,000 gross, with a net profit of > $25,000
Priorities – Growing sustaining relationships

• Growing sustaining grant funder relationships
  • We will have to replace at least one major expiring foundation grant
  • Strong potential relationships with a corporate foundation and family foundation in Seattle, need to diversify potential funders beyond one region
  • Building relationships and value for existing funders for multi-year investments
  • Identify resources to add staff capacity in areas like grant-writing, Comms, database
  • FY23 goals:
    • Communicate new strategic plan and mission/vision/values to all current and potential FY23 funders
    • Obtain at least one new unrestricted or capacity/staffing grant
    • Cultivate relationships with at least 5 new potential funders (1 outside Seattle), submit at least 3 new LOIs/grant applications
    • Create high-quality impact reporting template for funders
Priorities – Individual Donor Growth

• Individual donors – bigger slice of the pie
  • We’ve never replicated the momentum of individual donors in founding year (2018)
  • Individual donations dropped from 52% of fundraising pie in 2018 to 9% in 2021
  • We need to add donors (even small-dollar donors) outside of Seattle
  • Peer-to-peer campaigns have shown potential, with coordinated volunteer outreach
  • FY23 goals:
    • Increase individual donor percentage to 15% of revenue
    • Obtain at least 25 new individual donors (10 outside Seattle)
    • Raise at least $15,000 in peer-to-peer online campaigns
    • Create gift acknowledgement committee for donors over $500
    • Obtain 1-2 company match opportunities for individual employees, leveraging the 2-3 core partners identified in FY23
Priorities – Leveraging Stability Leaders

• Leveraging our best selling point – Stability Leaders
  • Stability Leaders’ storytelling is our greatest asset in demonstrating value
  • Development communications should focus on compelling personal examples
  • End of FY22 demonstrates TSN board’s potential as a fundraising board
  • FY23 goals:
    • Sharing at least 2 program highlights each quarter on social media or e-mail list, at least 1 using visual storytelling
    • At least 2:1 ratio of program content posts to donation asks
    • Increasing Stability Leader donations by 20%
    • 100% personal board giving
    • Increase in direct board fundraising by 30%
    • Mobilizing 2-3 non-board volunteer fund campaign captains
    • Identify best prospects for creating leadership society in FY24
Priorities – Planning Within Limits

• Knowing our limitations and planning within our limits
  • Without a full-time fundraiser on staff outside of the ED, we will have to wait to build areas like Major Gifts, planned giving, or meaningful grant research
  • We have no staff capacity or presence outside of Seattle, limiting reach
  • Board relationships will be critical to this stage of fundraising
  • FY23 goals:
    • Use data to identify and contact lapsed donors
    • Use data to identify recurring donors to level up in FY24
    • Create a gift acknowledgement working group
    • Develop strategy for in-person cultivation, events, and asks outside of Seattle and for donors outside the United States
Org Development Pillar – FY23 Priorities

Doing what’s expected of a maturing organization entering the next life cycle stage

- Swimming with bigger fish
- Shoring up the business
- Plan for Staff Growth
- Multi-year strategic planning
- Deeply commit to racial equity
- Growing volunteer + board momentum
Priorities – Explore Merger/Acquisition

• Swimming with bigger fish: researching merger or acquisition scenarios
  • Merging with, or being acquired by, a larger or more established organization may be one scenario for viability that we need to explore at this stage of the life cycle
  • Funders and advisors have recommended pursuing this path, even identifying targets
  • Board relationships with mental health CBOs and staff experience with youth work
  • 2-3 year process: it may take all of FY24 or likely longer to negotiate and execute
  • FY23 goals:
    • Identify a list of potential merger/acquisition targets
    • Build relationships with CBOs doing related work, particularly at the level of partnerships with deeper alignment
    • Identify our primary value proposition to other CBOs – what is our expertise that can’t be replicated elsewhere?
    • Prepare an analysis of desirability and prospects at end of FY23
Priorities – Shoring up the business

• Shoring up the business fundamentals
  • As a startup CBO, TSN has yet to obtain CGL and D&O insurance, which is necessary to attract and retain future board members, directors, and to limit liability
  • TSN has also not yet had an annual financial review, hiring an independent accounting firm. This will give grantmakers and some donors more confidence.
  • Part of this annual financial review will ask for TSN’s fiscal policies and procedures.
  • TSN needs to develop specific financial policies and procedures.
  • FY23 goals:
    • Identifying resources and a plan for obtaining CGL and D&O insurance in FY23, or at latest, FY24
    • Identifying a commercial insurance broker, projected expense, and timeline for shopping our policy in 2024 (usually in late Q1)
    • Identifying resources and a plan for a financial review in 2024, including obtaining recommendations for potential auditors and creating written financial policies and procedures.
Priorities – Plan for Staff Growth

• **Staffing plan for growth and admin support**
  - TSN remains understaffed and capacity is the main limit on growth
  - All staff have admin duties that could be relieved with additional admin support
  - To prevent burnout and turnover, an additional Program Coordinator is a priority
  - TSN’s fundraising capacity requires full-time fundraising staff to support the ED
  - All staff have marketing/comms duties but staffing this function is important for a virtual org that does all its work online
  - FY23 goals:
    - Create a staffing plan with the order of priority for future hires, beginning in FY24
    - Create an admin support plan
    - Identify resources and paid or pro bono support necessary to create a first-ever marketing and communications strategy in FY24, including potentially looking at the overall TSN branding
Priorities – Multi-year Strategic Plan

• Multi-year strategic planning
  • Professional strategic planning consulting help would be a game-changer and reduce the lift on staff, especially the ED
  • Consulting support would allow deeper dive, more objectivity, better stakeholder input
  • Thinking 3-5 years ahead will help us to think beyond current scarcity
  • FY23 goals:
    • Identify resources and a timeline for a multi-year strat planning cycle in FY24
    • Identify potential strategic planning consultants and cost
    • Identify a strategic planning committee made of select staff, select board, and potentially community members with expertise
Priorities – Deep Racial Equity Work

• Deep commitment to racial equity
  • Leading in racial equity is an opportunity for TSN to stand out in the mental health CBO space – most of our peers and competitors lack real diversity or equity strategy
  • In-house expertise: ED and Program Director bring significant personal experience in racial equity work for young people; strong board experience
  • Demonstrating programmatic expertise in training and in showcasing the voices of professionals of color living with MHC could be our “secret sauce” – attracts others
  • FY23 goals:
    • Reboot Equity Committee as a working group, including Stability Leaders outside the board with relevant expertise and global perspectives
    • Assess the need for formal racial equity training and evaluation by an outside consultant
    • Establish baseline for equity in programs, most needed changes
Priorities – Board/Volunteer Momentum

• Growing volunteer and board momentum
  • Goal of having a board that does more work between meetings than waiting to do work at meetings
  • Rethinking committees as working groups: Fundraising, Equity, Donor Acknowledgement – include non-board Stability Leaders for needed expertise
  • Young Professionals or Associates Board would create an effective “bench”
  • FY23 goals:
    • Identify ongoing resources for board learning and training
    • Identify staff or board ownership of creating a Young Professionals or Associates Board in FY24, identify candidates for leadership
    • Reboot and assign ownership of working groups, pulling in non-board Stability Leaders if needed to add to stretched capacity