Pine Lake Fund Strategic Plan

2024-2027

Table of Contents

Letter from Executive Director and/or Board of Directors President 2

Executive Summary 3

Introduction 4

- Purpose 4
- Process 4
- Key Stakeholders 5

Mission Statement, Vision Statement, Diversity Statement & Core Values 6

- Mission Statement 6
- Vision Statement 6
- Diversity Statement 6
- Core Values 6

History of Pine Lake Fund and Current Context 7

- History 7
- About Our Organization 7
- Document Review 8
- Environmental Scan 11
- Insights from the Document Review and Environmental Scan 13
- Strategic Planning Survey Results 15

Mandates 17

Strategic Priorities 18

- Strategic Priority 1 – Broadened Services 18
- Strategic Priority 2 – Financial Stability 18
- Strategic Priority 3 – Inclusive and Expanded Stakeholder Engagement 18
- Strategic Priority 4 – Innovation and Adaptability 18

Goals, Objectives, and Key Performance Metric 19

Business Model 22

Action Plans 22

Monitoring and Evaluating Plan 32

Appendices 33

Letter from Executive Director and Chair of the Board of Directors

Dear Interested Parties,

The Pine Lake Fund Board of Directors and team members are excited to share the strategic plan for the years 2024-27. The plan positions diversity, equity, inclusion, and accessibility at the forefront of our work in collaborating with individuals with disabilities to overcome barriers to increase access to, and success in, postsecondary educational experiences and employment. Our team is thankful to Liggins Abrams Consulting whose guidance kept our objectives and action plans aligned with our commitment to DEIA as the lens through which our overarching priority areas were considered. We valued the reminders of Pine Lake Fund's long-standing strengths, which can be harnessed throughout the implementation of the plan.

We value the contribution of each individual who participated in the development of this comprehensive plan including the collective wisdom of the Pine Lake Fund Board of Directors and team members, as well as the numerous stakeholders who participated in the successful preparation of a document that will be a map over the next three years.

The Pine Lake Fund Board of Directors and team members are enthusiastically dedicated to partnerships with individuals with disabilities to enhance postsecondary education and employment outcomes. To achieve the desired outcomes, we are focusing on the strategic priority areas of innovation and adaptability; Inclusive and Expanded Stakeholder Engagement; Broadened Services; and Financial Stability.

As a non-profit 501(C)3 organization with over forty years of experience filling gaps in service areas for individuals with disabilities, and with multiple board members, an executive director, and team members who themselves identify with disabilities, the team is uniquely qualified for success in implementing this plan. As you read our plan, if you find you have an interest in becoming a part of our endeavors, we welcome your support. Please contact us.

Sincerely,

Marilyn Potgiesser, Board Chair and

Dr. Tiffany "AhNee" White, Executive Director

Executive Summary

The Pine Lake Fund Board of Directors and executive director intentionally sought a consulting firm that specialized in strategic planning through an inclusion lens for nonprofit organizations whose leadership held diverse identities. Team members from Liggins Abrams Consulting (LAC) met with the Pine Lake Fund Strategic Planning Committee, the executive director, key stakeholders, and the full board of directors. LAC team members reviewed Pine Lake Fund historical and current documents. They developed and administered a survey to a range of Pine Lake Fund stakeholders. Through each phase of the process, LAC team members asked probing questions to assure the Pine Lake Fund team stayed focused on identified priorities through a lens of inclusion.

Pine Lake Fund team members developed the strategic priority areas: Broadened Services, Financial Stability, Inclusive and Expanded Stakeholder Engagement, and Innovation and Adaptability. The team developed objectives (three or four for each strategic priority area), leading and lagging indicators, resources required, and action plans for a three-year plan.

Priority Area 1: Broadened Services: Objective 1: Identify and fill additional service gaps; Objective 2: Establish partnerships with community organizations; Objective 3: Evaluate and improve the effectiveness of service offerings; Objective 4: Extend service offerings to cater to more diverse needs within the community.

Priority Area 2: Financial Stability: Objective 1: Diversify revenue streams; Objective 2: Develop and implement a robust fundraising strategy; Objective 3: Expand the financial relationship with our partners to ensure mutually beneficial outcomes.

Priority Area 3: Inclusive and Expanded Stakeholder Engagement: Objective 1: Implement equity-focused policies; Objective 2: Improve communication with stakeholders; Objective 3: Raise PLF's visibility statewide.

Priority Area 4: Innovation and Adaptability: Objective 1: Invest in technology to streamline operations; Objective 2: Continually re-evaluate PLF's operational strategies; Objective 3: Conduct regular community needs assessments to stay responsive to changing needs.

To assure that Pine Lake Fund continues proceeding through the identified action plans and achieving the objectives under the strategic priority areas, each action item has a year (one through three) and a quarter (one through four) identifying when the action item will be performed. These action items will be reviewed with the full board every other board meeting. The board meetings are held every other month, so a report on the strategic plan progress will be reviewed three times a year.

Introduction

Purpose

Strategic planning is a systematic process to build stakeholder commitment to priorities essential to the organization's mission and response to the organizational environment. Strategic planning guides the allocation of time and resources to achieve organizational priorities. In addition, strategic planning sheds light on the organization's current state, where it wants to be, and how to get there. Over the next three months, Pine Lake Fund (PLF) will work collaboratively with Liggins Abrams Consulting (LAC) to develop a strategic plan for the organization. The strategic plan will…

- Help address long-term opportunities and challenges facing PLF
- Align the organizational direction across all stakeholder groups to position PLF to thrive
- Provide a governance roadmap for the Board of Directors and the Executive Director's management decisions
- Provide a tool to be utilized in fundraising.
- Equips PLF with an actionable vision.

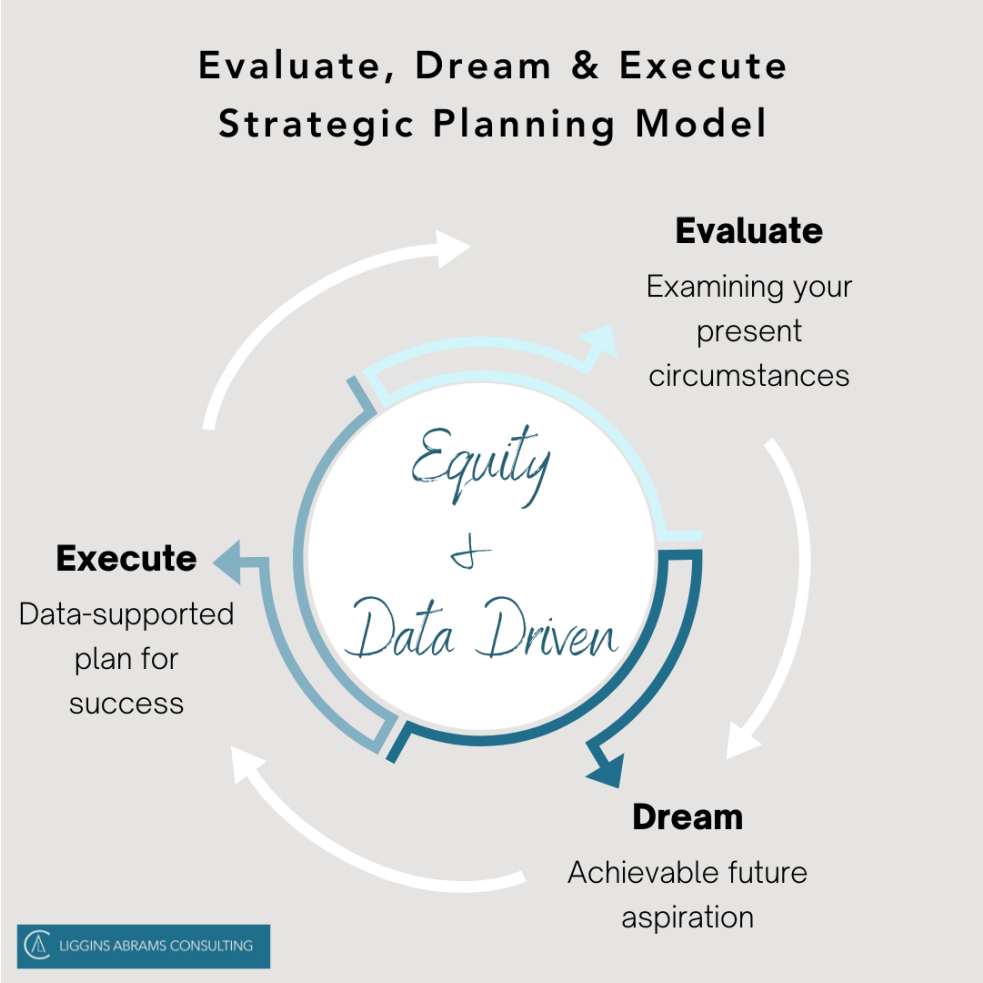
Process

The strategic planning project launched in March 2023 and concluded in May 2023. The process was facilitated by Monica Liggins-Abrams and Adriana Cardoso Reyes of Liggins Abrams Consulting and included the following phases and activities:

Stage I: Pre-work	Three preliminary sessions were held with PLF Strategic Planning Committee
	Provided advisement on meeting with MCTI and MRS
	Developed project timeline incorporating a framework for planning best suited for PLF
	Conducted Document Review
	Conducted of an environmental scan
	Surveyed internal and external stakeholders
Stage II: Facilitation of sessions with the working group	Developed planning session agendas, activities, and guiding questions
	Facilitated five strategic planning sessions, including an extended in-person session.
	Data was analyzed In between sessions and used to modify the sessions to adapt to PLF's needs and themes emerging during the sessions.
	Provide advisement on best practices related to strategic planning
	Summarized meeting notes
Stage III: Strategic plan development from provided outline/template	Created a Strategic Plan Outline
	Completed Strategic Plan Survey Analysis Report
	Completed Organizational Analysis Report

All of the activities to date help craft a historical picture of Pine Lake Fund and possibilities for the future.

During the strategic planning process a theoretical model was used as a guide for the work. This model, Evaluate, Dream & Execute was developed by Liggins Abrams Consulting and intentionally focuses equity and data at the center of the work.



Key Stakeholders

Developing the strategic plan included the contribution of multiple stakeholders. We value the contribution of each person who gave of their time to prepare the plan for our direction.

Strategic Planning Core Group Committee Members include: Cecily Dykema Cagle, Dennis Hart, Dr. Kevin Hollenbeck, Paul Mulka, Marilyn Potgiesser, and Dr. Tiffany “AhNee” White.

Participating Board Members include: LaJoyce Brooks, Cecily Dykema Cagle, Dennis Hart, Dr. Kevin Hollenbeck, Sarah Klerk, Marilyn Potgiesser, Bonnie Sawusch, and Scott Schrum.

Participating Team Members include: Art Allwardt, CJ Barratt, Norm Grosse, and Dr. Tiffany “AhNee” White.

Internal key stakeholders include: Employees, volunteers, and members of the board of directors.

External key stakeholders include: Pine Lake Fund customers / clients, Michigan Career and Technical Institute team members, Michigan Rehabilitation Services team members, State of Michigan Business Network Division (OT MAC Grant) team members, Bureau for Services for Blind Persons team members, Pivotal St. Joseph County team members, Michigan State University STRIDE program team members, Western Michigan University Autism Services Center team members, Western Michigan University Disability Services for Students team members.

Mission Statement, Vision Statement, Diversity Statement & Core Values

Mission Statement

Deeply rooted by values of diversity, equity, inclusion, and accessibility, Pine Lake Fund's mission is to collaborate with individuals with disabilities to overcome barriers to increase access to, and success in, postsecondary educational experiences and employment.

Vision Statement

We aspire to a future where individuals with disabilities in Michigan succeed in postsecondary educational experiences and employment that lead to fulfilling their goals.

Diversity Statement

We take the broadest possible view of diversity.

> Pine Lake Fund strives for inclusivity in all areas of our board and committee membership, employees and all applicants for employment, volunteers and partnerships. This includes prohibiting discrimination and celebrating diverse identities, including but not limited to, disability status, age, geography, national origin, ancestry, race, ethnicity, religion, sex including pregnancy or parenting, family and marital status, sexual orientation and identity, gender expression, military status, political affiliation, and genetic information.

We value the visible and invisible qualities that make you who you are.

> Every person brings a unique perspective and experience to advance our mission and progress our vision of a future where individuals with disabilities succeed in postsecondary educational experiences and employment that lead to fulfilling their goals.

We believe that all stakeholders should have equitable access to competitive employment through career path education or training.

We strive to include diversity, equity, and inclusion practices at the center of our daily work.

We commit to using these practices for our business and our communities.

Core Values

- Flexibility and Innovation
- Sustainability
- Industry and Community Partnerships
- Disability, Equity, Accessibility, and Inclusion
- High-quality service/effective service
- Research Expansion
- Data and Evidenced-Based Driven
- Person-Centered

History of Pine Lake Fund and Current Context

History

Pine Lake Fund was established for Michigan Career and Technical Institute to receive donations on its behalf as the postsecondary trade school is funded by the State of Michigan and could not receive them. Over the years, Pine Lake Fund supported MCTI in multiple ways including hiring instructors to work with students, hiring occupational therapists as accommodation specialists, completing infrastructure studies for the MCTI-owned buildings, building a 20-unit apartment complex for MCTI-affiliates, and providing services to MCTI students. Moreover, Pine Lake Fund branched out into the surrounding counties to provide education and employment services to Michigan Rehabilitation Services customers. Additionally, Pine Lake Fund provided an infrastructure study for MCTI, and then facilitated a process to bring awareness to State legislators about MCTI and current infrastructure needs. The result was millions of dollars in additional funds to assist in the renovation and updating of MCTI facilities. The work Pine Lake Fund previously did for MCTI changed as the service gaps at MCTI dramatically reduced with the additional funds.

About Our Organization

Pine Lake Fund is a nonprofit organization that was established in 1981.

Pine Lake fund team members teach job readiness services to students with disabilities attending Michigan Career and Technical Institute. The workshop sessions are provided to groups within each vocational training program over nine one-hour sessions. The skills are also taught individually in one-on-one meetings. Some topics covered are study skills, time management, completing a job application, cover letter, and resume, practicing interviewing skills, and life skills, and social skills that are required by most employers.

These services and more are also offered to individuals with disabilities transitioning to the next phase in their lives.

The customers are:

- Referred from Michigan Rehabilitation Services under the vocational rehabilitation counselor's direction.
    - The transition out of high school can be a challenging time in the lives of most people, and even more so for people with disabilities. Offering workshop sessions can be calming as there is an understanding of what to expect as the students make their decisions. The Pine Lake Fund team does not make the decisions for the participants; but rather, asks questions, and offers options based upon the responses from the students.

For some people with disabilities, it can be useful for a job developer to meet with the individual, learn their employment goals, and determine what types of positions would work well for them. The Pine Lake Fund team members, then, seek job opportunities in partnership with the individual with disabilities for which the individual can apply. The team members may also connect with employers to share the skills and qualifications of the individual with disabilities.

Pine Lake Fund has had grant funding for over twenty years to provide occupational therapy services for students at MCTI. The team members meet with MCTI students learning their goals and needs to

seek creative accommodations that will work for the student through the duration of their education in their vocational training program, as well as in the industry, so the accommodations can be used after graduation in employment within the field.

Pine Lake Fund provides tours of Michigan Career and Technical Institute, so community leaders have information to share with their networks and with people with disabilities, as well as to promote friend raising and new donors for Pine Lake Fund.

Pine Lake Fund partners with postsecondary institution researchers to further the literature on partnering with the people from the disability community.

Document Review

A document review was conducted to provide introspection and to help identify the strengths, opportunities, aspirations, and results (SOAR) of Pine Lake Fund. The document review and analysis process focused on reviewing selected materials, such as reports, emails, or policy documents, to interpret and glean insights about Pine Lake Fund's operations, strategies, challenges, and opportunities. Table 1 below summarizes strengths and opportunities for various aspects of the organization's health: Financial, Leadership, and Operations.

Table 1: PLF Document Review Financial, Leadership, and Operational Summary

Financial

Strengths	*Opportunities*
Pine Lake Fund apartments are a significant financial asset that provides an alternative housing option to individuals associated with MCTI.	The need to grow donations, in 2021-2022, donations comprised just .002% of revenue, while contracts and fee services comprised 90%.
The Board of Directors has continuously monitored the organization's financial stability.	Elevate PLF status with MCTI (vendor relationship, key stakeholder) on par with MRS, currently, MRS provides significant financial support and influence to MCTIs strategic focus.

Leadership

Strengths	*Opportunities*
The Board of Directors has deep expertise and commitment to supporting the organization in moving forward.	

A deep commitment to supporting Michigan Career Technical Institute (MCTI) and adapting over the years to fill the service gaps for MCTI.	
PLF has filled many gaps for MCTI throughout the years, enabling MCTI to be considered a national model for the involvement of business and industry in training and placing persons with disabilities.	
	The PLF board needs to diversify geographically across Michigan and within individual identities.
	The PLF board needs to determine gaps in professional areas for representation to provide guidance on the future of PLF.

Operational

Strengths	*Opportunities*
Long-term partnership with MCTI has fostered the development and testing of new training programs and the flexibility and the mechanism to augment all facets of MCTI operations.	Need to embed data and equity in processes, policies, and daily operations.
	Developing and reviewing organizational data and documentation of policies, procedures, and evidence of decision-making (i.e., employee handbook from 1993, previous ED had documented goals, but PLF did not have a comprehensive strategic plan.)

Here are some other key findings related to the mission and previous strategic direction.

Pine Lake Fund

Current Mission:
To promote the training and placement of persons with disabilities attending the Michigan Career and Technical Institute. Advocate and provide continuous strategic program direction for MCTI.

Increase	Increase MCTI's presence throughout the state of Michigan utilizing emerging technology.
Serve	Serve the employment needs of persons with disabilities in the state of Michigan.
Support	Support the development of criteria and programs that best represent the employment needs of the employer community.
Maintain	Maintain oversight activities of trade training business advisory committees.
Pursue	Pursue greater diversity of Pine Lake Fund board membership.
Solicit	Solicit Funds

Pine Lake Fund

Previous Mission Statement (1993)*

A non-profit organization developing partnerships to serve persons with disabilities.

In association with Michigan Career and Technical Institute

**From the Staff Handbook*

From 2021-2023 MCTI Strategic Plan

"The Pine Lake Fund (PLF) was established in 1981 to promote the training and placement of persons with disabilities attending MCTI. PLF is committed to establishing partnerships in new markets and resources to promote and support the innovation and expansion of MCTI. PLF and its programs have encouraged Michigan business leaders and employer partners to become involved and invested in the training and job placement of persons with barriers to employment. It has enabled the Michigan Career and Technical Institute to be considered a national model for the involvement of business and industry in training and placing persons with disabilities. This long-term partnership has fostered the development and testing of new training programs; provided the flexibility and mechanism to augment all facets of MCTI operations; and enabled the Institute to maintain a competitive edge in Michigan's ever-changing labor market."

(PLF identified as a key stakeholder pg. 8)

Ex. Pine Lake Fund Filling the Gaps for MCTI

From 2021-2023 MCTI Strategic Plan

"Student Apartments: In 1998 the Pine Lake Fund, a non-profit 501c3 organization dedicated to promoting/supporting MCTI, built the apartment complex which consists of 10 two-bedroom and 10 three-bedroom units and a community center room currently used as a testing center. Ten of the units are designated for MSHDA eligible tenants. The goal of the Pine Lake Apartments is to provide an alternative housing option to individuals associated with MCTI. For some individuals, this is the first step into housing independence, utilizing this supportive housing opportunity to build a positive housing history. This transitional housing option can be used as a housing reference, to establish a rental payment history, apartment care and tenant responsibility record.

The current occupancy average is 80-85%. The development of new strategies for marketing the apartments, broadening the scope of blended occupancy options and the revision of housing materials and documents have had positive results."

Pg. 11

Ex. Pine Lake Fund Filling the Gaps for MCTI

From 2021-2023 MCTI Strategic Plan

Objective: Work with the Pine Lake Fund to secure the help from a lobbying firm.

"Background: The Pine Lake Fund, a non-profit foundation supporting MCTI, contracted with C2AE in November 2017 to conduct a Facilities Design Study. The scope of the design study includes: a visual review of the existing facility to become familiar with the construction and general condition of the facility, identification of any significant changes to the facility since completion of the 2009 Facility Assessment by M.C. Smith Associates, and develop conceptual plans and cost estimates for potential improvements to MCTI. "

Pg. 18

Environmental Scan

The environmental scan helps to gain a better understanding of the external environment. Through the environmental scan, a review of 501(c)3 organizations that shared a similar mission to PLF throughout the U.S. were identified. There was a breadth of services and activities offered to individuals with disabilities through

similar organizations, such as paid internships, vocational training, pre-employment transition services, services for employers, respite, recreational therapy, day programs, and arts focused opportunities to the general community. In addition, these organizations had diverse funding sources composed of fundraising activities, private and corporate donors and contributions, foundation grants, endowments, state funds, and community partnerships.

Some key findings from the environmental scan include:

- PLF is truly a unique organization
- Non-profit organizations take several structures to support training schools or specific populations.
- Non-profits vary in structure, and different approaches could be used to fulfill PLF's current mission.
    - Definition of a Fund – "Non-profit funds benefit a predetermined non-profit and provide ongoing financial support. A non-profit can establish them to support their mission or a donor who wishes to establish a fund to provide long-term sustainable support to a non-profit."
    - Definition of an Education Foundation – "A non-profit organization (IRS designation 501(c)3) that supports a school district's mission or some associated education-related cause" Some education foundations do provide direct services to students; however, most offer student scholarships and teacher grants to support educational activities.
    - A 501c(3) non-profit can provide social services, education, and training programs to specific populations.

Here are some simple mission statements found:

- *Statewide Independent Living Council of Georgia:* Equal Participation of people with disabilities within their communities.
- *Pride Industries:* To create employment for people with disabilities.
- *Vista Life Innovations:* Providing services and resources to assist individuals with disabilities to achieve personal success.
- *The Arc of Evansville:* Our mission is to empower individuals with disabilities to build relationships, gain independence, and achieve their full potential.
- *Inspire of Central Florida:* Our mission is to provide a work environment that is safe, compassionate, and educational for adults with developmental disabilities.

Here is a sample service areas and services provided:

Here are some of the funding sources identified from organizations reviewed in the environmental scan:

- Fundraising Events and Activities
- Private and Corporate Donors and Contributions
- Foundation Grants
- Endowments
- State Funds
- Community Partnerships

Insights from the Document Review and Environmental Scan

The strategic planning process included several activities that allowed for the identification of the strengths, opportunities, aspirations, and results (SOAR) of Pine Lake Fund. The document review and environmental scan help us understand the broader context in which Pine Lake Fund exists and the organization's path to date. Table 3 below is a SOAR analysis considering the data collected from these reviews. The Result column was not included because identifying practical changes based on the data was completed at other stages of the analysis. This analysis focused on the financial, leadership and operational aspects of the organization.

Table 3: Pine Lake Fund Strengths, Opportunities and Aspirations (SOAR) Analysis Summary

Financial

Strengths	*Opportunities*	*Aspirations*
Pine Lake Fund apartments are a significant financial asset that provides an alternative housing option to individuals associated with MCTI.	Diversifying resources (growing donations, federal innovation grants, corporate donors, focusing on employer needs).	Financial stability
The Board of Directors have continuously monitored the organization's financial stability over time.	Postsecondary Education Rehabilitation Transition (PERT) program offerings	
PLF has been providing services as a source of revenue generation.		

Leadership

Strengths	*Opportunities*	*Aspirations*
Current key partners MCTI and MRS leadership support PLF.		What is the ideal relationship with MCTI?
MCTI current and past leadership are committed to strengthening the PLF and MCTI partnership.		Be an innovative arm of MCTI.
Established and connected PLF leadership and board with deep expertise and context to support the organization moving forward.		
Diversity of members		

Operational

Strengths	*Opportunities*	*Aspirations*
PLF is committed and willing to fill service gaps for MRS customers.	Envision PLF's purpose and services in a broader way to allow for more revenue streams for PLF beyond MCTI contracts, such as vocational evaluations, pre-employment transition services, short-term career and technical training, and job placement and career coaching.	Quality student support services
PLF is a unique organization.	Expanding who PLF serves and support programming	Remove systemic barriers to career training and employment for people with disabilities.
PLF is innovative.	Brand and Organizational Marketing Communication Strategy	Expand to serve individuals beyond MCTI.
PLF has the flexibility and independence to respond to changing needs of the community.	Expansion of Community partnerships and employer partnerships	The success of individuals with disabilities
Student-centered wrap-around services to support employment outcomes.	Development of program structures (planning, documentation, and evaluation of program services and development of student outcomes).	
PLF is deeply committed to supporting MCTI and has made steps to improve the services offered.	Opportunities to build relationships with industry partners.	
PLF has established resources and capacity.	Identify service gaps.	
	Influence systems to better support students.	
	Identify and Develop research opportunities.	

Strategic Planning Survey Results

This survey aimed to gather diverse perspectives and data from a wide range of stakeholders to assist Pine Lake Fund (PLF) in developing its strategic plan for the next three years. To ensure confidentiality, the survey was administered by Liggins Abrams Consulting (LAC), an independent consulting firm engaged by PLF, to facilitate strategic planning for the organization. The full survey analysis report by LAC collected valuable insights from various stakeholders and is available upon request.

Under the advisement of LAC, Pine Lake Fund leaders identified 18 external stakeholders and 12 internal stakeholders who were invited to participate in the survey. The survey was designed as a substitute for interviews and focus groups. It included a mix of Likert-scale rating questions (ranging from Strongly Disagree to Strongly Agree) and open-ended questions at the end of most sections and the end of the survey.

The overall survey completion rate was 56.7% (17 out of 30 participants), with 75% of internal stakeholders completing the survey (9 out of 12) and 44.4% of external stakeholders completing the survey (8 out of 18). The largest groups of survey participants were the PLF Board of Directors (Internal) and Michigan Career & Technical Institute Employees, Students, and Graduates (External). The other significant stakeholders were Michigan Rehabilitation Services (MRS) employees (External) and PLF employees (Internal). This group represents diverse stakeholders who provided perspectives on the internal workings and the perceived impact of PLF. The internal stakeholders range from new to more than 15 or more years of affiliation with PLF providing fresh perspectives as well as historical perspectives of the work of Pine Lake Fund over the years. Most external stakeholders have been affiliated with PLF for five years or less. These stakeholders would be most familiar with PLF's operations from 2018-2023. The COVID-19 pandemic dramatically impacted how PLF operated and supported MCTI from 2020 and beyond.

Key themes, strengths, opportunities, and aspirations for PLF were gleaned from the survey responses.

Key Themes:

- There is a need for mission expansion to adapt to the changing landscape.
- Financial sustainability, moving beyond dependence on Michigan Rehabilitation Services fees, is crucial.
- The organization's commitment to creating an inclusive, equitable environment that addresses historical inequities was appreciated.
- There is a call for continued innovation and adaptability.

Strengths:

- Stakeholders have a solid understanding of PLF's mission supporting Michigan Career & Technical Institute (MCTI), though some internal stakeholders question its continued relevance.
- Internal stakeholders believe they are effectively engaging with key external stakeholders.
- PLF's culture values teamwork and promotes diversity, equity, and inclusion.
- Stakeholders view PLF as a performance-driven organization with a strong culture of accountability.
- There is a sense of appreciation for PLF's historical capacity for risk-taking and adaptability.
- The unique and close relationship with MCTI is a strength and foundation for potential organizational expansion.
- PLF's dedication to the success of MCTI students and all clients with disabilities they serve is seen as commendable.

Opportunities:

- Mixed sentiments persist about the effectiveness of internal communication and alignment of the mission with organizational goals.
- The depth of PLF's understanding of stakeholder needs creates an opportunity for improvement.
- Stakeholders acknowledge a lack of resources but also express optimism about the potential to access additional resources and expand services.
- Stakeholders aspire to diversify the populations PLF serves beyond MCTI students, focusing on including more students with multiple marginalized identities.

Aspirations:

- PLF should work towards enhancing its visibility and reputation statewide.
- Diversification of funding sources is a critical area for growth.
- Stakeholders advocate for improved communication with both current and potential partners.

In conclusion, this analysis provides a significant foundation for PLF's future strategic planning. Recognizing its strengths, addressing the areas of opportunity, and working towards stakeholder aspirations, PLF is poised to adapt, grow, and continue serving its diverse stakeholders with an amplified commitment to its mission. Stakeholders' insights and feedback underline the significance of PLF's distinctive relationship with MCTI and suggest a path toward sustainable growth while maintaining Pine Lake Fund's integrity and dedication to its mission.

Mandates

Key findings from the planning session prep meetings with the Strategic Planning Committee (SPC) of the PLF Board of Directors set the foundation for the strategic planning process. The organizational strengths identified highlighted the current supportive leadership of Michigan Career Technical Institute (MCTI) and Michigan Rehabilitative Services (MRS). Pine Lake Fund's role in providing services as a source of revenue generation and the steps taken toward improving services offered to MCTI were additional strengths identified.

In addition, discussions around envisioning the organization's purpose and services in a broader way to allow for more revenue streams beyond MCTI service contracts, such as vocational evaluations, pre-employment transition services, short-term career and technical training, and job placement and career coaching, were highlighted. Strategic Planning Committee Members also identified several external environmental challenges that impact the PLF, such as the MRS reimbursement fee structure, the PLF and MCTI conflict of interest as a vendor, and MCTIs improved financial positioning.

Strategic Priorities

Strategic Priority 1 – Broadened Services

PLF will focus on widening its mission to include additional service offerings and a broader demographic reach.

Strategic Priority 2 – Financial Stability

Ensuring PLF's long-term financial stability is essential for organizational sustainability and longevity. It is essential to redefine the relationship with MCTI but not be limited by that relationship to allow PLF to be sustainable in changing economic climates.

Strategic Priority 3 – Inclusive and Expanded Stakeholder Engagement

PLF will further its commitment to inclusivity and equity, focusing on comprehensive engagement with stakeholders as well as raising PLF's visibility statewide.

Strategic Priority 4 – Innovation and Adaptability

As the landscape continues to evolve, PLF needs to remain flexible and responsive, adjusting to the changing needs of the community. The commitment to ongoing innovation and adaptability should be central to PLF's strategic plan.

Goals, Objectives, and Key Performance Metric

Priority Area 1: Broadened Services

Objective 1: Identify and fill additional service gaps

- Leading Indicator: Number of new service gaps identified annually.
- Lagging Indicator:
  - Number of new services implemented in response to the identified gaps.
  - Number of recommended services implemented in response to the identified gaps.
- Resources: Requires personnel for needs assessment, funds for service implementation, and potential partner collaborations.

Objective 2: Establish partnerships with community organizations

- Leading Indicator: Number of community organizations approached for partnerships.
- Lagging Indicator:
  - Number of successful new partnerships established.
  - Number of successful partnerships maintained.
- Resources: Time and personnel dedicated to outreach, relationship building, and partnership management.

Objective 3: Evaluate and improve the effectiveness of service offerings

- Leading Indicator: Implementation of an evaluation framework to assess service effectiveness.
- Lagging Indicator: Positive changes in service effectiveness metrics post-evaluation.
- Resources: Evaluation experts, time for evaluation processes, and budget for implementing changes.

Objective 4: Extend service offerings to cater to more diverse needs within the community.

- Leading Indicator: Number of new services launched.
- Lagging Indicator: User satisfaction rate of new services.
- Resources Needed: In-depth market research, service development, and implementation team, feedback and assessment mechanism.

Priority Area 2: Financial Stability

Objective 1: Diversify revenue streams

- Leading Indicator: Number of potential new revenue sources identified.
- Leading indicator:
  - Number of potential grants researched as potential opportunities.
  - Number of grants applied for in a year.
- Lagging Indicator: Increase in total revenue and percentage of revenue from diversified sources.
- Resources: Financial consultants, investment in revenue generating activities, time for exploring and establishing new revenue streams, grant writing team.

Objective 2: Develop and implement a robust fundraising strategy

- Leading Indicator: Launch of the fundraising strategy and related initiatives
- Lagging Indicator: Increase in the number of donors and funds raised.
- Resources: Fundraising time, fundraising expertise, development and communications personnel, marketing budget, time for relationship building.

Objective 3: Expand the financial relationship with our partners to ensure mutually beneficial outcomes.

- Leading Indicator: Establishment of a plan for expanding relationship which impacts financials.
- Lagging Indicator: Increased revenue opportunities resulting from the expanded relationship.
- Resources Needed: Negotiation team, financial advisors, resources for implementing changes in the relationship.

Priority Area 3: Inclusive and Expanded Stakeholder Engagement

Objective 1: Implement equity-focused policies

- Leading Indicator: Number of equity-focused policies revised or implemented.
- Lagging Indicator: Improvements in internal stakeholder satisfaction and climate survey.
- Resources: Diversity and inclusion experts, time for policy development and training, budget for implementation.

Objective 2: Improve communication with stakeholders

- Leading Indicator: Implementation of a new communication strategy.
- Lagging Indicator: Improved satisfaction rates in stakeholder communication surveys.
- Resources: Communications personnel, technology for communication channels, time for strategy development.

Objective 3: Raise PLF's visibility statewide

- Leading Indicator: Number of marketing and outreach initiatives launched.
- Lagging Indicator: Increased awareness evidenced by more partnerships and services of individuals from different counties in Michigan.
- Resources: Marketing and PR personnel, budget for marketing initiatives, time for planning and execution.

Priority Area 4: Innovation and Adaptability

Objective 1: Invest in technology to streamline operations

- Leading Indicator: Number of technology solutions identified to recommend for implementation.
- Lagging Indicator: Improvements in operational efficiency post-technology implementation.
- Resources: IT consultants, funds for technology purchase and implementation, training for staff.

Objective 2: Continually re-evaluate PLF's operational strategies

- Leading Indicator: Schedule and conduct regular strategy review meetings with Strategic Planning Committee or Board of Directors.
- Lagging Indicator: Number of strategic adjustments made and their implementation.
- Resources: Leadership time, potentially external facilitators, commitment to adapt and implement changes.

Objective 3: Conduct regular community needs assessments to stay responsive to changing needs.

- Leading Indicator: Number of community needs assessments conducted.
- Lagging Indicator: Adjustments made in service offerings and their effectiveness in meeting community needs.
- Resources Needed: Market research team, community liaison, system for integrating community needs into service offerings.

Business Model

The Pine Lake Fund business model includes revenue generation from multiple revenue streams for the benefit of individuals with disabilities including fee-for-service income, grant funding, corporate and individual donations. To generate these revenue streams, Pine Lake Fund develops and promotes services to Michigan Rehabilitation Services team members who authorize Pine Lake Fund to provide services to their customers for a fee. Pine Lake Fund applies for grants that assist in covering expenses for MRS customers as well as customers who do not have cases with MRS and need services. Pine Lake Fund hires qualified team members to deliver the services.

Pine Lake Fund owns 20 two- and three-bedroom affordable housing apartments along with 40 acres of land. The apartment complex was built with financial support from MSHDA. Pine Lake Fund has an agreement with MSHDA until 2029 that the rent for ten of the apartments will be at the MSHDA affordable housing rate.

Pine Lake Fund endeavors to increase grant, corporate, and individual funds for a diverse balance of revenue and to serve individuals with disabilities who may not have MRS cases.

Action Plans

1 – Broadened Services			
1a – Identify and fill additional service gaps		***Year***	***Quarter***
Responsibility Owner	**Action Items to Support Attainment**	**Target Start and End Dates**	
ED	Conduct Survey of MRS counselors and district managers to gain insights on needs. • Completed in Year 0.	2	2
ED	Conduct meetings with MRS counselors and district managers. • Completed in Year 0.	2	4
ED	Conduct interviews with MCTI instructors. • Completed in Year 0.	3	1
ED, Disability Partner Services Specialist	Conduct interviews with MCTI vocational rehabilitation counselors.	2	1
ED, Disability Partner Services Specialist, (Check in w/board observations)	Scan / network of what services are available in what service locations to determine needs.	2	1
Indicators for 1a	Leading: Number of new service gaps identified annually. Lagging: Number of new services implemented in response to the identified gaps.		

	Number of recommended services implemented in response to the identified gaps.		
Resources for 1a	Resources: Requires personnel for needs assessment, funds for service implementation, and potential partner collaborations.		
1b – Establish partnerships with community organizations		***Year***	***Quarter***
Responsibility Owner	**Action Items to Support Attainment**	**Target Start and End Dates**	
ED, Associate Director, Disability Partner Services Specialist	Prepare a list of the community partners with whom PLF has relationships.	1	1
ED, Employment Services Specialist	Assure current community partners on the mailing list.	1	2
ED (with guidance from the board), Associate Director	Determine ways to engage or enhance partnerships with current partners.	2	2
ED	Implement the above.	2	3
ED (with guidance from the board), Disability Partner Services Specialist, Rehabilitation Services and Innovation Specialist	Prepare a list of potential community partners with whom PLF could build relationships.	2	4
ED (with guidance from the board)	Determine ways to engage new potential community members from above.	3	1
Employment Services Specialist	Assure new community partners are on the mailing list.	1	4
ED, Employment Services Specialist	Implement engaging new community members.	2	1
Indicators for 1b	Leading Indicator: Number of community organizations approached for partnerships. Lagging Indicator: Number of successful new partnerships established. Number of successful partnerships maintained.		
Resources for 1b	Resources: Time and personnel dedicated to outreach, relationship building, and partnership management.		
1c – Evaluate and improve the effectiveness of service offerings		***Year***	***Quarter***
Responsibility Owner	**Action Items to Support Attainment**	**Target Start and End Dates**	
Rehabilitation Services and Innovation Services Specialist	Implement pre- and post-surveys for ESS participants. Review surveys for improvements. • Completed in Year 0.	1, 2, 3	1

Social Worker, Disability Partner Services Specialist	Review ESS curricula for updates / improvements.	2	1
Employment Services Specialist, Associate Director	Implement mock interview evaluations based upon a rubric. Review for improvements. • Completed in Year 0.	2	2
Social Worker, Associate Director	Review the guided conversation curricula for improvements.	2	3
Tutor	Collect data on tutoring grade level enhancements.	1, 2, 3	1, 2, 3, 4
Rehab Services & Innovation Specialist	Determine evaluation tools for external MRS customers: PreETS, Placement, Coaching, Summer Program.	2	2
Rehab & Innovation Specialist	Implement the above.	2	3
Rehabilitation Services and Innovation Specialist	Prepare a tool to learn satisfaction of customers when engaging in new service delivery.	2	4
Indicators for 1c	Leading Indicator: Implementation of an evaluation framework to assess service effectiveness. Lagging Indicator: Positive changes in service effectiveness metrics post-evaluation.		
Resources for 1c	Resources: Evaluation experts, time for evaluation processes, and budget for implementing changes.		
1d – Extend service offerings to cater to more diverse needs within the community		***Year***	***Quarter***
Responsibility Owner	**Action Items to Support Attainment**	**Target Start and End Dates**	
Rehabilitation Services and Innovation Specialist	Develop new services to fill gaps as determined by work under PA #1. • Completed in Year 0.	3	2
Associate Director	Collect demographic information of customers served. • Initiated in Year 0.	1	1
ED (with guidance from board members)	Assure new partnerships include organizations who serve racially historically underrepresented populations from PA #1.	2	1
ED, Employment Services Specialist	Develop a database of potential business partners. • Initiated in Year 0.	1	2
Indicators for 1d	Leading Indicator: Number of new services launched. Lagging Indicator: User satisfaction rate of new services.		

Resources for 1d	Resources Needed: In-depth market research, service development, and implementation team, feedback and assessment mechanism.		
2 – Financial Stability			
2a – Diversify revenue streams		***Year***	***Quarter***
Responsibility Owner	**Action Items to Support Attainment**	**Target Start and End Dates**	
ED, Associate Director	Prepare a financial analysis of current and potential services demonstrating what services lose money and which services make money. The report will be provided to and discussed with the Finance Committee and the Executive Committee to determine the ongoing financial viability of each program.	1, 2, 3	4
Fund Development Chair	Increase the number of sponsoring organizations on the grant spreadsheet. • Initiated in Year 0.	1, 2, 3	1
ED	Include the number of grants applied for in a year in an ED board report.	1, 2, 3	1
ED	Increase the number of grants applied for within a year.	1, 2, 3	4
ED (with guidance from board members)	Develop a fundraising strategy (including board fund development committee).	2	3
ED, Marketing Volunteer	Market the DEIA trainings to business partners / sponsors.	2	1
Indicators for 2a	Leading Indicator: Number of potential new revenue sources identified. Leading indicator: Number of potential grants researched as potential opportunities. Number of grants applied for in a year. Lagging Indicator: Increase in total revenue and percentage of revenue from diversified sources.		
Resources for 2a	Resources: Financial consultants, investment in revenue generating activities, time for exploring and establishing new revenue streams, grant writing team.		
2b – Develop and implement a robust fundraising strategy		**Year**	**Quarter**
Responsibility Owner	**Action Items to Support Attainment**	**Target Start and End Dates**	
ED	Include the number of individuals and businesses on the mailing list in a board report.	1	1
Employment Services Specialist, Marketing Volunteer	Increase the number of individuals and businesses on the mailing list by 15%.	2	1
ED	Include the number of individual donors on an ED board report.	1	1

Fund Development Chair, Marketing Volunteer	Increase the number of individual donors by above by 10%.	2	1
ED	Include the dollar amount of individual donors on an ED board report.	1	1
Fund Development Chair, Marketing Volunteer	Increase the average amount of individual donation by 10%.	2	1
ED	Add a project to Catch-a-Fire for a fund development strategy volunteer.	2	3
ED	Complete a fund development strategy with the Catch-a-Fire volunteer.	2	4
Fund Development Chair, ED	Begin implementation of the fund development strategy.	3	1
ED (with guidance from board members)	Develop a database of potential business sponsors. • Initiated in Year 0.	1	2
Indicators for 2b	Leading Indicator: Launch of the fundraising strategy and related initiatives Lagging Indicator: Increase in the number of donors and funds raised.		
Resources for 2b	Resources: Fundraising time, fundraising expertise, development and communications personnel, marketing budget, time for relationship building.		
2c – Expand the financial relationship with our partners to ensure mutually beneficial outcomes		**Year**	**Quarter**
Responsibility Owner	**Action Items to Support Attainment**	**Target Start and End Dates**	
ED (with board member guidance)	Communicate with MCTI leaders to determine mutually beneficial outcomes (i.e. trainings, placement). • Initiated in Year 0.	1	3
ED	Prepare plans from the above for board consideration.	1	4
ED	Implement board-approved plans from above.	2	1
ED, Disability Partner Services Specialist	Continue to foster relationships at the MRS offices in Battle Creek, Barry, Kalamazoo, and Holland.	1	4
ED, Disability Partner Services Specialist	Build relationships with MRS offices in Grand Rapids, Benton Harbor, and Jackson.	2	1
Indicators for 2c	Leading Indicator: Establishment of a plan for expanding relationship which impacts financials.		

	Lagging Indicator: Increased revenue opportunities resulting from the expanded relationship.
Resources for 2c	Resources Needed: Negotiation team, financial advisors, resources for implementing changes in the relationship.

3 – Inclusive and Expanded Stakeholder Engagement			
3a – Implement equity-focused policies		***Year***	***Quarter***
Responsibility Owner	**Action Items to Support Attainment**	**Target Start and End Dates**	
Policy Chair	Establish policies and procedures in an equity-focused manner. • Initiated in Year 0.	1	1
Policy Chair	Review policies through an equity lens.	1	4
Board Chair	Consider implementation of a board / PLF staff DEIA committee.	1	1
DEIA Chair	Implement a diversity educational moment in each board meeting.	1	2
DEIA Chair	Prepare a DEIA organizational plan.	2	1
DEIA Chair	Implement a DEIA plan.	2	3
ED	Implement a diversity educational moment in each staff meeting.	1	1
ED, Policy Chair, Board Chair	Prepare a board and team member demographic survey. • Initiated in Year 0.	1	1
Board Chair	Implement the above diversity demographic survey for board members.	1	2
ED	Institute a DEIA requirement in performance management plans for team members.	1	3
ED	Institute an annual professional development opportunity for all team members.	3	1
ED	Implement the above diversity demographic survey for team members.	1	2
Indicators for 3a	Leading Indicator: Number of equity-focused policies revised or implemented. Lagging Indicator: Improvements in internal stakeholder satisfaction and climate survey.		
Resources for 3a	Resources: Diversity and inclusion experts, time for policy development and training, budget for implementation.		
3b – Improve communication with stakeholders		**Year**	**Quarter**
Responsibility Owner	**Action Items to Support Attainment**	**Target Start and End Dates**	
ED	Prepare seasonal newsletters consistently. • Initiated in Year 0.	1, 2, 3	1, 2, 3, 4

ED	Establish website, maintain current information consistently. • Initiated in Year 0.	1, 2, 3	1, 2, 3, 4
ED, Social Media Volunteer	Establish social media platforms (consistently post) including LinkedIn, Facebook, and Instagram. • Initiated in Year 0.	1, 2, 3	1, 2, 3, 4
ED	Engage a social media expert on Catch-a-Fire or in the community to prepare a social media plan.	1	4
ED, Social Media Volunteer	Implement a social media plan.	2	1
Fund Development Chair, Marketing Volunteer	Increase the reach of the newsletter as indicated in PA #2b.	1	2
ED	Include in an ED board report the number of followers on each social media platform.	1	1
Fund Development Chair, Marketing Volunteer	Increase the number of followers on LinkedIn, Facebook, and Instagram by 5%.	2	1
ED	Include in a board report the data analytics from the website.	1	2
Fund Development Chair, Marketing Volunteer	Increase the traffic to the website by 5%.	2	1
ED, Admin Services Specialist	Send the seasonal newsletter to MRS counselors. • Initiated in Year 0.	1	1
Fund Development Chair, Marketing Volunteer	Prepare a marketing plan.	3	1
Indicators for 3b	Leading Indicator: Implementation of a new communication strategy. Lagging Indicator: Improved satisfaction rates in stakeholder communication surveys.		
Resources for 3b	Resources: Communications personnel, technology for communication channels, time for strategy development.		
3c – Raise PLF's visibility statewide		**Year**	**Quarter**
Responsibility Owner	**Action Items to Support Attainment**	**Target Start and End Dates**	
Admin Services Specialist	Send a seasonal newsletter to a minimum of ten legislatures.	1	1
Board Chair	Engage board of directors in sharing about PLF by providing them with marketing tools in print, email, and social media.	1	4

ED, Fund Development Chair	Engage team members in sharing about PLF by providing them with marketing tools in print, email, and social media.	1	4
Board Chair, Fund Development Chair	Engage board of directors in adding to the mailing / emailing list.	1	3
Employment Services Specialist	Engage team members in adding to the mailing / emailing list.	1	3
ED	Prepare customized flyers for MRS customers via MRS counselors. • Initiated in Year 0.	1	4
ED	Provide business cards for each PLF team member.	1	1
Board Chair	Inquire with board members regarding what materials would be most useful for them to share in their networks.	1	2
Admin Services Specialist	Determine the number of MRS counselors who currently refer to MRS.	1	2
Disability Partner Services Specialist, ED	Increase the number of MRS counselors who refer to PLF from the above by 3 counselors.	2	2
ED	Determine the number of PLF tours, PLF awareness presentations, community organization visits provided and their county of connection.	1	1
ED, Disability Partner Services Specialist	Seek to increase the number of PLF tours, PLF awareness presentations, community organization visits provided along with expanding the counties of connection into Grand Rapids, Benton Harbor, and Jackson.	2	4
Indicators for 3c	Leading Indicator: Number of marketing and outreach initiatives launched. Lagging Indicator: Increased awareness evidenced by more partnerships and services of individuals from different counties in Michigan.		
Resources for 3c	Resources: Marketing and PR personnel, budget for marketing initiatives, time for planning and execution.		
4 – Innovation and Adaptability			
4a – Invest in technology to streamline operations		***Year***	***Quarter***
Responsibility Owner	**Action Items to Support Attainment**	**Target Start and End Dates**	
ED / Associate Director	Review resources to determine implementation of a formal continuous quality improvement plan.	2	4
ED / Associate Director	Implement formal continuous quality improvement plan.	3	1, 2, 3

Associate Director	Transition from MRS electronic space to PLF electronic space (MS Office 365). Move PLF data from MRS to PLF. No longer use MRS for PLF electronic storage. • Initiated in Year 0.	1	4
Associate Director	Transition from SOM email addresses to full use of Pine Lake Fund email addresses.	1	4
Associate Director	Assess internal needs with inquires during team meetings.	1	1
Associate Director / ED	Prepare an ED board report regarding the above assessment.	1	2
ED	Implement the board-approved items.	1	4
ED	Implement QBO from Quickbooks Desktop 2014. Prepare a board report to indicate the improvements. • Initiated in Year 0.	1	2
Associate Director / ED	Implement AtlasHR from ESI. Prepare a board report to indicate improvements. • Initiated in Year 0.	1	2
Admin / ED	Record receivables in Quickbooks Online.	1	1
Indicators for 4a	Leading Indicator: Number of technology solutions identified to recommend for implementation. Lagging Indicator: Improvements in operational efficiency post-technology implementation.		
Resources for 4a	Resources: IT consultants, funds for technology purchase and implementation, training for staff.		
4b – Continually re-evaluate PLF's operational strategies		***Year***	***Quarter***
Responsibility Owner	**Action Items to Support Attainment**	**Target Start and End Dates**	
ED	Refer to and implement the monitoring and evaluation plan.	1, 2, 3	1, 2, 3, 4
Indicators for 4b	Leading Indicator: Schedule and conduct regular strategy review meetings with Strategic Planning Committee or Board of Directors. Lagging Indicator: Number of strategic adjustments made and their implementation.		
Resources for 4b	Resources: Leadership time, potentially external facilitators, commitment to adapt and implement changes.		
4c – Conduct regular community needs assessments to stay responsive to changing needs		**Year**	**Quarter**
Responsibility Owner	**Action Items to Support Attainment**	**Target Start and End Dates**	
Rehab & Innovation Specialist	Develop a questionnaire for team members to use with MRS customers external to MCTI	2	1

	to learn their level of value with the services provided and what other services they may need.		
Indicators for 4c	Leading Indicator: Number of community needs assessments conducted. Lagging Indicator: Adjustments made in service offerings and their effectiveness in meeting community needs.		
Resources for 4c	Resources Needed: Market research team, community liaison, system for integrating community needs into service offerings.		

Monitoring and Evaluating Plan

Responsibility owners will provide the executive director with a summary of their action items three weeks prior to each board meeting.

The executive director will prepare a summary for the board of directors for discussion during every other board meeting. The board of directors meets bimonthly.

The summary and discussion will have a primary focus on the upcoming quarter to determine if the team is on target for meeting the action item completion dates. If the team is not on target, a discussion will take place to determine if additional resources are needed or if the target date can be adjusted. The outcome of the discussion will be recorded in the board meeting minutes as well as in the strategic plan reporting workbook. The strategic plan reporting workbook will be saved in the Microsoft One Drive board member shared space for all board members to access.

Dates Responsibility Owner Summaries are due to ED	Board Meeting Dates
Thursday, Jan. 4, 2024	Thursday, Jan. 25, 2024
Thursday, March 7, 2024	Thursday, March 28, 2024
Thursday, May 9, 2024	Thursday, May 30, 2024
Monday, July 8, 2024	Thursday, July 25, 2024
Thursday, Sept. 5, 2024	Thursday, Sept. 26, 2024
Thursday, Oct. 31, 2024	Thursday, Nov. 21, 2024

Appendices