



2023–2025 Strategic Roadmap

Driving Equity through Transformative Partnership
January 27, 2023



Lift Orlando 2023–2025 Strategic Roadmap

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Executive Summary

Over the past decade, Lift Orlando has served as a champion and leading voice for the communities of West Lakes in Orlando, Florida.

In 2018, the Board of Directors embarked on the development and implementation of the 2020-2030 Strategic Plan. This plan established an essential foundation for Lift Orlando in terms of a strategic direction. As Lift completes the third year of the initial plan, the organization can proudly claim significant progress in fostering resident-level successes, building a culture of collective impact, and earning the trust and support from a growing number of business leaders and strategic investors.

Key insights have surfaced from the organization's assessment of first three years of the 2020-2030 Strategic Plan. By most measures, Lift's performance against their top five strategic goals for 2020, 2021, and 2022 was strong; however, changing societal dynamics and new investment has led leadership to reassess its current strategies and realign its strategic direction for relevance and impact. For these reasons, Lift has engaged consultants to support the development of the *2023-2025 Strategic Roadmap* to build on early progress points and bring focus and structure to the foundational work that must be done for intended long-term impacts to be fully realized.

Strategic Roadmap Architecture

(Vision to Tactical Implementation)



Programmatically, Lift Orlando operates as a "Community Quarterback," working with residents and coordinating the efforts of multiple partners to drive desired impacts across the following operating pillars:



- Mixed Income Housing** – Lift develops high quality, mixed income housing that's affordable and attracts families back into the neighborhood;
- Cradle-to-Career Education** – Lift partners with local schools to deliver a high-performing, cradle-to-career education pipeline that begins with early childhood all the way through to promising careers;
- Long-Term Economic Viability** – Lift stimulates long-term economic viability through employment, entrepreneurship, and economic development that increases household income;
- Community Health and Wellness** – Lift improves health and wellness by collaborating to provide high-quality facilities, programs, and services that enhances quality of life and well-being.

Strategic Priorities

This plan emphasizes six strategic priorities for the 2023-2025 Strategic Roadmap:

- 1**
Strengthen Resident Voice
- 2**
Strengthen Quarterback Capabilities
- 3**
Prepare Pathways for Scale and Replication
- 4**
Advance Cradle to Career Continuum
- 5**
Accelerate Housing and Economic Growth
- 6**
Stimulate Improved Health and Wellness

This strategic direction of this roadmap will be continually evaluated, assessed, and subjected to metrics, and it will serve as documentation for annual milestones that chronicle our progress and success.

Plan Preparations

Through a robust, inclusive, and fulsome strategic planning process, senior leadership, staff, and the board of directors came together to assess Lift's current situation, reflect, discuss, and shape a path for the future of Lift Orlando.

The process to design Lift's 2023-2025 Strategic Roadmap began with senior leadership's proactive assessment of Lift's "current state," factoring the major investment recently received from Blue Meridian Partners and focusing on four main areas intended to support Lift's work and impacts in the communities of West Lakes in Orlando, Florida:

1. enhancing cradle-to-career (C2C) continuum,
2. advancing pathways to scale,
3. strengthening resident voice, and
4. deepening policy and systems change

The planning process was further supported by 18 interviews with key stakeholders, including members of the board of directors, and two full-day planning sessions, one with Lift's entire staff and the other for the recently expanded senior leadership team to determine trends, issues, and the strategic priorities.

Impact Framework

To better drive strategic priorities and contribute to meaningful outcomes, this future-smart, community-focused strategic roadmap will be guided by the impact framework of *Build*, *Align*, and *Amplify*:

1. **BUILD a Foundation for Success & Scalability:** We must be nimble and collaborative while leading transformative community development work, and we must be disciplined in our work so that we remain focused on that which has the most impact.
2. **ALIGN to Strategic & Organizational Priorities:** We must continue to think about what is and should be the value our work – ensuring that it is aligned with both organizational priorities and opportunities for community impact.
3. **AMPLIFY for Impact, Awareness & Reputation:** We must amplify our efforts by optimizing our limited resources, engaging our community partners, and expanding awareness of Lift’s impacts.

Guiding Principles

Fundamentally, Lift Orlando is a place-based community development organization that leverages resources for a measurable social impact to foster community pride and self-reliance. As a key distinctive, Lift Orlando leads a growing movement of business leaders committed to fostering economic prosperity for urban communities across the Central Florida region.

The following guiding principles convey Lift’s operating beliefs and intentions and underpin all efforts associated with the execution of the 2023-2025 Strategic Roadmap. Throughout the early planning stages for this roadmap a set of values shared by the leadership team emerged. These values were later honed to illustrate how we “Walk the Talk” and help to set our priorities as a catalyst for change.

Guiding Principles

Our Vision

Neighborhoods where children grow up with hope and return with joy.

Our Mission

Strengthening neighborhoods so people can thrive.

Our Values

- **SEEK EQUITY** - We stand for the dignity of every individual and work towards fair and equal access to opportunities;
- **TAKE RESPONSIBILITY** - We choose to act with a sense of ownership and urgency for results, regardless of who gets the credit;
- **PUT PEOPLE FIRST** - We start with who we serve at the center and make decisions by leading with empathy and understanding;
- **DO WITH NOT FOR** - We build partnerships and win-win collaborations instead of undermining another's strengths through one-way service;
- **THINK BIG, START SMALL** - We embrace change with bold, transformational ideas and simple, actionable steps taken consistently over time;
- **SLOW DOWN TO GO FAST** - We balance a bias for action with the humility to listen and learn before we lean in and build momentum;

Our Model

Asset-Based Community

Development — We invest in the people who call the neighborhood home.

Placed-Based Philanthropy

We invest in the places where people live, learn, work, and grow.

Collective Impact

We invest in select partnerships that help the community prosper.

Situational Analysis

Environmental Scan

For this analysis, the planning team focused on the partnership landscape and the internal capability/capacity (fit-for-purpose) factors to determine the degree of influence on Lift's programmatic aims. Collectively, the team took stock of the operating impacts over the past years and then aimed their sights on emerging trends and issues. Based on the provided feedback it is evident Lift is in the pole position of a transformational moment.

Partnership & Investment Trends and Issues

- New investments and commitments to address deeply entrenched racial and economic inequities are announced by organizations across the nation almost every day.
- We are now in an age of accountability, where business leaders are being asked to deliver on their solidarity statements and ensure equitable outcomes in all of their business activities, from everyday business decisions to their philanthropy.
- Adopting new policies and practices that advance racial equity—defined as just and fair inclusion into a society in which all can participate, prosper, and reach their full potential—is now a business imperative.
- Pressure testing initiatives with key stakeholders to gain feedback and insights is the most powerful way to inform community development goals and drive collective impact.
- Amplify your impact by fostering trust and collaboration with equity advocates and community leaders with lived experience.
- Thoughtfully and transparently engage in reckoning and repair work across all domains of Lift's operating model.

Capacity Building/Scaling Factors

- Fundraising has been successful at the macro level. A strategy is needed to solidify funding streams at the micro level.
- Develop new real estate development strategy and masterplan for future housing and economic development opportunities.
- Strengthen capabilities in data management to support program effectiveness, scalability, and replication of Lift's model to other regions as requested.
- Balancing \$100 million transactions while still being present for neighborhood engagement.
- Ensuring community partners share collective goals and accountability while being careful not to claim the partner's story for Lift's benefit.
- Leadership is focused on bringing definition to its partnerships and collaborations.
- A higher trust level is evolving with residents and other community stakeholders based on the conscious effort to have the work of Lift informed and led by community stakeholders.

Strengths, Weaknesses, Opportunities, and Threats Analysis

Lift's primary strengths include its history of housing development, its well-connected board and committed staff, its strong financial stewardship, and its educational priorities. Recognized weaknesses include the need to further develop key community partnerships, lack of alignment with resident-level priorities, a misunderstood value proposition and the bandwidth of the President and staff. Opportunities center around regional expansion of Lift's operating model, favorable funder reaction to mission-based outcomes, increased stakeholder awareness, and the repurposing of resources to scale and drive operational excellence. Perceived threats are the operational challenges associated with undisciplined execution, contraction of business support for Lift's initiatives, the slow delivery of economic development programs and impacts.

Brainstorming — SWOT

Strengths

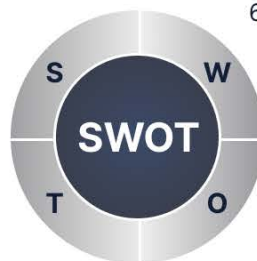
Capitalize

1. Track record of housing development
2. Business led governing board
3. Financial stability
4. Access to resources and expertise
5. Sector leadership
6. Early learning/education focus

Weaknesses

Shore Up

1. Deploying organization-wide discipline in all executions
2. Effectiveness of community partnerships
3. Management and allocation of resources
4. Organization infrastructure (operating policies & procedures)
5. Evidence of effective resident engagement
6. Talent and performance management systems



Threats

Identify

1. Single point of contact within partnering orgs
2. Underdelivering on community commitments
3. Focus on speed versus disciplined execution
4. Underperformance on investment support
5. Lack of the economic activity for small businesses
6. Poor traction on education initiatives

Opportunities

Invest

1. Leverage Lift's operating model for regional expansion
2. Operationalizing resources development
3. Develop resident engagement and incentive programs
4. Secure predictable revenue streams and investment capital
5. Refine/deploy a multi-year economic development strategy
6. Establish a multi-phased real estate development strategy

Strategic Linkage — TOWS

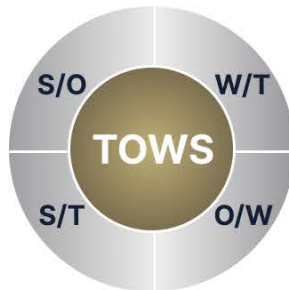
Upon completion of the SWOT analysis, the TOWS system was utilized to identify the relationships between threats, opportunities, weaknesses and strengths by linking internal and external factors to form a strategic direction. The positioning statements and the relationships for the TOWS analysis follow:

Strengths + Opportunities

- Capitalize**
- S1** Long-standing, well-regarded advocate for the communities of West Lakes
 - S2** Committed and engaged staff and board
 - S3** Comprehensive and accessible resources
 - S4** Business-led governance structure

Weaknesses + Threats

- Shore Up**
- W1** “Fit for Purpose” infrastructure
 - W2** Regional awareness about Lift’s role and impacts in meeting economic viability objectives for the region
 - W3** Established operating policies, procedures, and supporting IT systems
 - W4** Clear strategy to meet community partner acquisition and retention goals.



Strengths + Threats

- Identify**
- T1** Untimely execution of funder expectations
 - T2** Operational inefficiencies due to poor role clarification and performance accountabilities
 - T3** Delayed development of organizational capabilities
 - T4** Regional decline in business opportunities for West Lakes stakeholders

Opportunities + Weaknesses

- Invest**
- O1** Capitalize on evidence-based research to drive transformation impacts
 - O2** Cultivate key community partnerships to advance Lift’s mission and connections for residents
 - O3** Create a three-year economic development strategy
 - O4** Develop comprehensive resident engagement and incentive plan

Consolidated TOWS Position Statements

The output of the SWOT brainstorming process and the TOWS analysis are summarized in the following statements and support the development of strategic and tactical actions for this plan.

- A **Engage** community partners to develop and have ownership in Lift’s stakeholder engagement plan
- B **Leverage** access and expertise by delivering resources to drive resident-level impact
- C **Reposition** resources to secure and sustain resident-level voice across Lift’s program initiatives by leveraging of the role of the “Heart” as resource hub
- D **Expand** reputation management efforts to drive credibility and favorable voice in Lift Orlando by elevating awareness and stakeholder engagement through enhanced social media platforms
- E **Determine** mission critical operating needs and optimize staff’s resources to improve mission delivery by outsourcing requirements outsourcing critical activities
- F **Formalize** internal and external data management support for scaling and replication and the assessment of marketplace opportunities for replication
- G **Determine** specific programming and partnerships to drive economic growth opportunities for West Lakes aligned with the 3-year strategic roadmap
- H **Establish** performance management system, new leadership structure, job description clarifications and performance accountabilities and management systems

Strategic Priorities, Objectives, and Strategies

The strategic planning and development process—including the data and information extracted and analyzed from visioning sessions, intake data, and relevant historical documents—has produced emerging priorities for consideration to drive key goals, impacts, and outcomes for Lift Orlando.

Strategic Priority 1

Strengthen Quarterback Capabilities

OBJECTIVE Deepen Lift’s impact in West Lakes and prepare for growth through the positioning of key talent, fund development, and system improvements.

Strategy 1.1 Elevate capacity and effectiveness of staff.

- Tactic 1.1.1** Complete financial audit and develop requirements for an upgraded accounting system.
 - Tactic 1.1.2** Hire HR administrative support and secure an HR software system.
 - Tactic 1.1.3** Incrementally grow operational team to support program requirements.
 - Tactic 1.1.4** Secure a vendor to develop a performance management system.
 - Tactic 1.1.5** Grow all employees’ cultural competency and empower employees to incorporate equity-based principles into their work.
 - Tactic 1.1.6** Expand onboarding processes to ensure all employees feel welcome and have the information needed to succeed at Lift.
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Strategy 1.2 Improve operational efficiencies and supporting systems.

- Tactic 1.2.1** Establish a comprehensive professional development program that fosters foundational learning and personal exploration.
- Tactic 1.2.2** Build capacity to implement equitable and relevant resident-based programs and incentives.
- Tactic 1.2.3** Develop a donor engagement plan to increase YOY individual contribution flow.
- Tactic 1.2.4** Clarify roles at all levels of the organization and establish metrics for intended operational and financial impacts.

Tactic 1.2.5 Grow stewardship pipeline and create quarterly targets.

Tactic 1.2.6 Develop process to secure federal grants.

Strategic Priority 2

Prepare Pathways for Scale

OBJECTIVE Accelerate replication through regional partnerships, statewide funding, and a replication roadmap for each essential strategy.

Strategy 2.1 **Develop a *Replication Playbook*.**

Tactic 2.1.1 Design, document, and deploy processes that are successful proven to drive evidence-based social and economic mobility.

Tactic 2.1.2 Invest in Lift’s internal capabilities to capture knowledge and lessons learned.

Tactic 2.1.3 Engage partners to co-develop KPIs for major initiatives.

Tactic 2.1.4 Secure regional and statewide funding for replication project.

Strategy 2.2 **Build networks and partnerships to drive regional impact.**

Tactic 2.2.1 Identify and capture knowledge/lessons learned to expand the Lift’s placed-based community development model.

Tactic 2.2.2 Incentivize partners through shared priorities, leveraging incremental resources, and data-driven insights.

Tactic 2.2.3 Formalize partnerships and offerings of the Place-Based Institute.

Tactic 2.2.4 Design, develop and launch an Affordable Housing Regional Trust Fund.

Strategic Priority 3

Amplify the Resident Voice

OBJECTIVE Inspire and empower residents to be the leading voice within the West Lakes neighborhood.

Strategy 3.1 Enhance and maintain credibility with community members and key stakeholders.

Tactic 3.1.1 Launch communications plan to and drive resident demand for Heart programs.

Tactic 3.1.2 Perfect and reintroduce the Collective Impact model to engage the community.

Tactic 3.1.3 Institute processes and guidelines for funding resident-led projects.

Tactic 3.1.4 Use community assets to strengthen trust with legacy and new residents.

Tactic 3.1.5 Facilitate resident advocacy for community priorities with elected officials.

Strategic Priority 4

Build out Cradle to Career Continuum

OBJECTIVE Institutionalize K-12 education excellence.

Strategy 4.1 **Launch effective wrap-around services to support early learning, elementary and K-12 students.**

- Tactic 4.1.1** Develop data collection protocols with Lift’s educational partners.
 - Tactic 4.1.2** Conduct teacher training and provide resources that support in classroom instruction.
 - Tactic 4.1.3** Implement Hub & Spoke model and test with early learning network.
 - Tactic 4.1.4** Pilot scholarship participation strategy with incentives, mentors, and career exposure opportunities.
 - Tactic 4.1.5** Deploy science-based reading program designed to close the reading achievement gap.
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Strategy 4.2 **Formalize education partnerships.**

- Tactic 4.2.1** Leverage West Lakes Early Learning Center to drive philanthropy and benefit surrounding providers.
- Tactic 4.2.2** Position Legends Academy to serve as high-performing innovation hub for all schools.
- Tactic 4.2.3** Formalize long-term partnership with Orange County Public Schools for data sharing.
- Tactic 4.2.4** Partner with Children’s Home Society to offer key wrap-around services.

Strategic Priority 5

Accelerate Housing and Economic Growth

OBJECTIVE Create a master plan for the development of real estate assets.

Strategy 5.1 Establish relationships with real estate professionals to help propel Lift's mission.

- Tactic 5.1.1** Partner with residents to determine shared priorities for asset development in the community.
 - Tactic 5.1.2** Conduct teacher training and provide resources that support in classroom instruction.
 - Tactic 5.1.3** Implement Hub & Spoke model and test with early learning network.
 - Tactic 5.1.4** Build out internal resources (staff) to support housing initiatives.
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Strategy 5.2 Identify and pursue high-impact, transformational projects.

- Tactic 5.2.1** Design, develop, and launch an Affordable Housing Regional Trust Fund.
- Tactic 5.2.2** Pursue Choice Neighborhoods Grant for the redevelopment of Lake Lorna Doone, Phase 2.
- Tactic 5.2.3** Identify a large employer and site within the West Lakes footprint.
- Tactic 5.2.4** Determine a development footprint in collaboration with Florida Central Sports for property around the CW stadium.

Strategic Priority 5

Accelerate Housing and Economic Growth

OBJECTIVE Create a master plan for the development of real estate assets.

Strategy 5.1 Establish relationships with real estate professionals to help propel Lift's mission.

- Tactic 5.1.1** Partner with residents to determine shared priorities for asset development in the community.
 - Tactic 5.1.2** Conduct teacher training and provide resources that support in classroom instruction.
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Strategic Priority 6

Stimulate Health and Wellness

OBJECTIVE Activate the Heart of West Lakes Center with programming designed to address the health and economic well-being of residents.

Strategy 6.1 **Through a coalition of partners fully operationalize The Heart, and its programs.**

Tactic 6.1.1 Grow health and wellness engagement activities and assessment programs.

Tactic 6.1.2 Develop the small business resource center, business mentoring and training offerings.

Tactic 6.1.3 Develop and implement a portfolio-based approach to managing partnerships based on Lift’s collective impact model.

Tactic 6.1.4 Institute data-driven decision making.

Risk Mitigation

Based on an external (Social, Technological, Environmental, Economic, and Political) analysis and internal assessment, the following risk were identified as having a high probability of occurrence and a high potential on Lift’s ability to deliver this 2023-2025 Strategic Roadmap.

Risk	Mitigation
<p>Funding Collapse</p> <p>The investment from the Blue Meridian Group represents a significant portion of Lift’s annual budget which could have adverse impacts when the investment period ends.</p>	<p>Continued focus on diversifying revenue streams along with a comprehensive development strategy to grow Lift’s private donors base, multi-year grants, and support from private sector partners.</p>
<p>Economic Impacts</p> <p>Predicted duration of the current recessionary climate will likely fuel a potential spike in the economically depressed households in West Lakes and the region.</p>	<p>Expansion of partnerships and key services is essential. Leveraging the role of Community Quarterback — as the convener and coordinator of resources must be a signature activity for Lift Orlando.</p>
<p>Gaining and Maintaining Trust</p> <p>Securing resident engagement is no easy task and ensuring neighborhood-wide visibility on key progress points is key to advancing each of the operating pillars and to avoid a lack resident buy-in.</p>	<p>The achievement of funder and resident expectations should be routinely communicated through a variety of channels. Joint successes will be promoted as the main evidence of impact.</p>

Conclusion

As Lift Orlando begins this work, they are operating from a platform of strength and influence. This roadmap offers insight into the current strengths and areas for improvement for Lift Orlando related to advancing economic vitality for the residents and businesses of West Lakes. The strategic priorities and accompanying objectives and strategies have been identified through a collaborative and rigorous process of data collection to include visioning, asset-mapping, stakeholder interviews, and group intake engagements as part of the planning process.

With focused implementation, Lift Orlando is well positioned to serve all stakeholders of the neighborhoods of West Lakes with relevant and sustained social economic mobility opportunities and resources.

Appendix – Sample Implementation Format for Socialization with Senior Leadership

Strategic Priorities, Objectives, and Tactics Chart

Framework	Year	Strategic Priority	Strategy	Tactics	Lead(s)	Target Date
Build	2	SP5	5.2	5.2.1 Design, develop, and launch an Affordable Housing Regional Trust Fund.	SH	8/1/2023
Build	1	SP2	2.1	2.1.1 Design, document, and deploy processes that are successful proven to drive evidence-based social and economic mobility.	MS	TBD
Build	1	SP2	2.1	2.1.4 Secure regional and statewide funding for replication project.	EM, DM	TBD
Build	1	SP1	1.1	1.1.3 Incrementally grow operational team to support program requirements.	SM	TBD
Align	1	SP1	1.1	1.1.2 Hire HR administrative support and secure an HR software system.	AE	TBD
Align	1	SP1	1.1	1.1.4 Secure a vendor to develop a performance management system.	AE, EA	TBD
Align	1	SP1	1.1	1.1.6 Expand onboarding processes to ensure all employees feel welcome and have the information needed to succeed at Lift.	AE, EA	TBD
Build	1	SP1	1.2	1.2.2 Build capacity to implement equitable and relevant resident-based programs and incentives.	EM, SM	TBD

Strategic Priorities, Objectives, and Tactics Chart, cont'd

Framework	Year	Strategic Priority	Strategy	Tactics	Lead(s)	Target Date
Align	1	SP1	1.2	1.2.4 Clarify roles at all levels of the organization and establish metrics for intended operational and financial impacts.	EM, RP, & EA	TBD
Build	1	SP1	1.2	1.2.3 Develop a donor engagement plan to increase YOY individual contribution flow.	AE, DM	TBD
Build	1	SP3	3.1	3.1.3 Institute processes and guidelines for funding resident-led projects.	EM, SM	TBD
Build	1	SP3	3.1	3.1.1 Launch communications plan to and drive resident demand for Heart programs.	RP, EM	TBD
Build	2	SP4	4.1	4.1.1 Develop data collection protocols with Lift's educational partners.	SM, Directors	TBD
Align	2	SP4	4.2	4.2.1 Leverage West Lakes Early Learning Center to drive philanthropy and benefit surrounding providers.	SM, Directors	TBD
Build	2	SP6	6.1	6.1.1 Grow health and wellness engagement activities and assessment programs.	SM, Directors	TBD
Align	2	SP6	4.2	6.1.2 Develop the small business resource center, business mentoring and training offerings.	SM, Directors	TBD
Build	1	SP1	1.1	1.1.1 Complete financial audit and develop requirements for an upgraded accounting system.	AE, KW	TBD
Build	2	SP3	3.1	3.1.5 Facilitate resident advocacy for community priorities with elected officials.	EM, Senior Team	TBD
Amplify	3	SP4	5.2	5.2.3 Identify a large employer and site within the West Lakes footprint.	SM, Directors	TBD