



Restoring dignity and hope  
by providing identification

April 7, 2023

To Whom It May Concern:

IDignity's five-year strategic plan was approved in March 2020 just prior to the onset of the COVID-19 pandemic. While IDignity was able to accomplish many of the goals set forth in the plan, we are in the process of updating the attached strategic plan document to reflect necessary changes caused by the worldwide pandemic.

Sincerely,

A handwritten signature in blue ink that reads "Michael C. Dippy".

Michael Dippy  
Executive Director  
IDignity, Inc.



## 2020-25 Strategic Plan

### Mission

IDignity's mission is to restore dignity and hope by assisting individuals in establishing legal proof of their identity.

### Vision

IDignity's vision is to ensure that all citizens and legal residents of the United States will have access to their essential identification documents, while protecting the integrity of identification. The resulting benefits are both tangible and intangible. Not only do they empower individuals, they also cultivate a more inclusive, productive and secure society.

### Values

**Dignity** – Respecting the inherent value of each individual and affirming the importance of being able to prove one's own identity.

**Empowerment** – Assisting individuals in obtaining the identification documents needed to fully participate in society.

**Stewardship** – Cultivating the investments entrusted in us by utilizing our resources wisely and transparently.

**Compassion** – Providing service and expertise to our clients with sensitivity, empathy and perseverance, regardless of the complexity of their case.

**Excellence** – Adhering to the highest standards with integrity, professionalism and ethics worthy of the trust placed upon us.

**Justice** – Leveraging our relationships, experience and expertise to advocate for fair access to legal identification.

## Strategic Plan Goals

- 1. Ensure consistent high-quality client care.**
- 2. Sustain IDignity's immediate financial health.**
- 3. Safeguard longer-term fiscal stability and organizational capacity.**
- 4. Plan for replication of the IDignity model in other cities.**
- 5. Harness technology to expand capacity and client care.**
- 6. Lead discussion on the role of access to identifications in solving social issues.**

## Background

IDignity assists the poor and disadvantaged in navigating the inherently complex process of obtaining legal identification documents. These documents are often required to access education, employment, housing, proper healthcare, banking, benefits and numerous other opportunities. IDignity achieves its mission through collaboration with government agencies, churches, businesses and other partners in our community.

Since May 2008, IDignity Orlando has hosted monthly Identification Clinics where governmental partners, attorneys and 135 volunteers serve more than 200 people in need. At these events, IDignity assists clients in obtaining their birth certificates from any state, social security cards, Florida IDs or driver's licenses. IDignity also assists clients in obtaining background documents needed to prove their identity and amending their existing identification documents. Additional client services, including extensive case management and document distribution, are provided at the IDignity office and during weekly Client Care Days.

The success of the IDignity model at addressing this entrenched social issue led to requests for assistance from other communities nationwide. In order to better serve a wider community, IDignity launched its first replication in 2009. IDignity affiliates are currently operating in Osceola, Seminole and Volusia counties. These independently, self-sustaining locations hold quarterly Identification Clinics. IDignity provides each affiliate location with ongoing guidance and oversight to ensure consistency with organizational values and standards of excellence.

To date, IDignity Orlando has served over 22,000 individuals and thousands more at its affiliate locations with compassion, respect and care. On average, IDignity is able to assist a client in obtaining all of their various forms of identification documents at a cost of \$300 and six volunteer hours. Providing these services at no cost to our clients requires significant fundraising, including the cultivation and stewardship of individual donors, churches and corporate sponsors, and the application for and management of government, foundation, community and corporate grants.

IDignity is led by the founding executive director, Michael Dippy, and implemented by a highly effective staff, engaged board of directors and significant volunteer participation.

**Goal 1:**

**Ensure consistent high-quality client care.**

***Measurable objectives***

- Re-evaluate volunteer training and engagement plans in 2020.
- Create a volunteer succession plan in 2020 to identify and train the next generation of volunteers.
- Establish standards for all locations, through annual certification to ensure adherence to the standards of the FL Bar and IDignity.

**Goal 2:**

**Sustain IDignity's immediate financial health.**

***Measurable objectives***

- Ensure 100 percent board giving annually.
- Each year, identify and connect with 15 new potential major donors (+\$5,000).
- Increase ongoing grant award amounts by 10 percent between 2020 and 2023.
- Grow annual campaign to cover nine months of operating budget by end of 2024.
- Identify and define donor retention rate by end of 2020.
- Increase donor retention from current percent to the sector averages of 45 percent of donors and 49 percent of dollars by end of 2022.
- Increase ongoing monthly/yearly pledged individual donors by 30 each year.
- Secure contributions from 50 new donors each year.
- Empower staff through training, annual planning/goal setting, and yearly performance evaluations beginning in 2020.
- Annual review of expenses for appropriate cost-saving stewardship.

**Goal 3:**

**Safeguard longer-term fiscal stability and organizational capacity.**

***Measurable objectives***

- Identify \$5.5 million in likely funding commitments to support IDignity’s Capital Campaign by end of 2021.
- Establish plan for endowment gifts, investment portfolio management and diverse revenue sources, and develop a formal financial strategy by end of 2021.
- Finalize research on earned income strategies and develop timeline for implementation by end of 2022.
- Create a planned giving strategy led by an advisory council of financial planners and estate attorneys by end of 2020.
- Purchase the IDignity property by end of 2020.
- Construct and occupy IDignity’s new operational headquarters by end of 2023.
- Refine the existing affiliate model by end of 2022.

**Goal 4:**

**Plan for replication of the IDignity model.**

***Measurable objectives***

- Prepare systems, technology, and roles for expansion and replication into major metropolitan Florida markets by end of 2021.
- Explore expansion options and establish plan to serve small, geographically remote communities by end of 2022.
- Develop three-year marketing strategy to cultivate support and engagement by end of 2022.
- Establish first IDignity Chapter by end of 2025.

### **Goal 5:**

#### **Harness technology to expand capacity and client care.**

##### ***Measurable objectives***

- Complete current phase of the CRM platform implementation in Orlando for clients, volunteers, donors and potential contributors by end of 2020.
- Implement CRM platform for donor, volunteer and client management to all affiliate locations by end of 2022.
- Build an online portal to streamline process to assist Florida towns not served through events by end of 2023.
- Create a marketing and engagement plan for outreach to clients by end of 2020.
- Increase community engagement (text, email, snail mail, social media, etc.) by 20% per year.

### **Goal 6:**

#### **Lead discussion on the role of access to identifications in solving social issues.**

##### ***Measurable objectives***

- Prepare a white paper on how securing identification has made a demonstrable difference in the lives of tens of thousands of Central Floridians by end of 2022.
- Present at one social justice conference annually, starting by end of 2023.
- Expansion plan and implementation of dissemination of identification information through various media sources by end of 2023.

### **Evaluation**

This plan is intended to be dynamic and serve as a living document that can be tailored to shifting conditions. Each year, the executive director will review progress on goals with the staff and present results to the board of directors in preparation for operating budget approval. In light of unexpected changes, the executive director may recommend amending the plan's goals and objectives. Tactics assigned to team members to support the goals and objectives will be used to assist in their annual performance review.

## **Addendum I:**

### **IDignity SWOT Analysis**

#### **STRENGTHS:**

- Ability to adapt to ever changing governmental requirements.
- Relationships with agencies and volunteers.
- Unique brand and mission.
- Collaboration between government agencies, faith-based groups, and non-profits.
- Ability for clients to give back by volunteering after being served.
- The support of the City (from our mayors to the chief of police,) everyone recognizes the importance of what IDignity accomplishes.
- Well-organized monthly ID Clinics.
- IDignity provides access to beneficial social and governmental services; with a high ROI.
- Resource for individuals that are not eligible for assistance from government agencies.
- Established safeguards to prevent fraud.

#### **WEAKNESSES:**

- Limited resources to leverage and implement various growth opportunities.
- Lack of specific plan to expand beyond the current region.
- Lack of control over government agency changes to their policy and procedure.
- Uncertain of ongoing governmental agency participation.
- Reliance on volunteers to provide basic services.
- Financial burden of daily operations.

## **OPPORTUNITIES:**

- Nationwide need for IDignity's services, estimated at 25 million individuals.
- Sharing strategies for navigating government regulations regarding identification.
- IDignity's system is proven replicable and scalable.
- Trend in favor of social entrepreneurship that are a disruptive innovation solution.
- Expansion to address populations such as incarcerated, hospitalized or home bound.
- Partnerships with job training agencies.
- Develop revenue stream by selling consultations, training, access to knowledge.
- Growing need for IDignity's service (tighten requirements for obtaining documents).
- Positive national media coverage.
- Client cost share for stably housed clients/ clients able to pay for documents.
- Client cost share for those from other funded organizations. (NPO, Jails, Hospitals etc.)
- This is a non-partisan issue.
- Greater capacity; greater service.
- There are many stories of success and impact on individual lives that are yet to be shared.
- Increasing security regulations, creates a greater need for access to legal identification.

## **THREATS:**

- Lack of stable location to implement IDignity events and house operations.
- Inherent security vulnerability of assisting individuals with limited and/or inaccurate identification.
- Cyber security.
- Violence at an IDignity event.
- Aging volunteer staff.
- Inaccurate perception that IDignity assists immigrants without legal status in U.S.
- Loss of key staff.
- Financial - not being able to raise enough money each year to sustain the budget.
- Losing the strong support of our volunteers each month.
- Negative or untrue information publicized about IDignity (bad press).
- Need permanent funding source to avoid exhausting volunteers in fundraising efforts.
- Potential gaps in quality of service across all IDignity locations.
- For-profit, government or other non-profit organizations competing effectively in the same space as IDignity. Especially if they focus on just the easiest of cases.
- Potential of raid by U.S. Immigration & Custom Enforcement.

## **Addendum II: Environmental Scan**

During the past 11 years, IDignity – powered by the strength of generous philanthropists, trained volunteers and a small professional team – has served over 22,000 individuals who had run out of options for obtaining essential identification.

Between 2011 and 2017, IDignity donations increased from \$374,000 to \$971,000 annually.

IDignity has gathered \$2.96 million in charitable support in the five years since 2013. It has also launched a \$5.5 million capital campaign to establish a permanent operational headquarters facility, with 25 percent of funding committed.

The 2016, hired consultant Convergent produced a feasibility study which confirmed that IDignity is well-respected among community leaders and donors. Ongoing philanthropic efforts – including Rollins, DPAC, UCF, Nemours, the Holocaust Museum, Valencia, YMCA, the Community Foundation and other charities and faith communities of various sizes – offer unrelated yet potentially some competition.

IDignity's mission and unique selling proposition do not face any head-to-head rivalry, though there can be natural overlap with homelessness and other social service causes in the perception of potential contributors.

The election effect of 2020 is expected to negatively impact philanthropy. Political divisiveness and litigation over immigration, DACA and Dreamers may require an operational response by IDignity within the bounds of established law. Post-election charitable opportunities may again spike because of attention to social justice, activism and rage philanthropy.

The longer-term impact of recent tax reform is still unclear. Short term, it includes a sharp drop in itemizers, which affects whether taxpayers can deduct charitable gifts. Strategies such as donor-advised funds and bunching of donations will require more accurate economic forecasting of nonprofits, including IDignity.

Since the Great Recession, the stock market has gained significant ground. Donor confidence and ability to fulfill pledges are obviously influenced by significant movement or corrections in the market.

The largest intergenerational transfer of wealth – estimated at some \$30 trillion of the next quarter century – will provide opportunities for multi-generational, family philanthropy. Building relationships today can help shape deferred giving for Baby Boomers and ongoing charitable gifts from their heirs.

In ratios that are consistent from year to year, 2018 US charitable donations included 77 percent from individuals (68 percent through gifts plus 9 percent through bequests). Foundations gave 18 percent, while corporations contributed 5 percent.

Giving by individuals decreased from 70 percent of overall giving in 2017 to 68 percent in 2018. This year is the first time giving by individuals has fallen below 70 percent of overall giving since at least 1954. However, donations from individuals remain the largest area of opportunity for new gifts.

Locally, public and private support of homeless individuals and attention to systemic solutions have increased over the past decade. This organization maintains strong financial support from local religious organizations and government entities.