
VBSR STRATEGIC PLAN 2008 -2011

APPROVED BY THE VBSR BOARD, 4/28/08

INTRODUCTION: WHY PLAN AND WHY NOW?

VBSR is a dynamic, growing organization. When we began in 1990, our message that businesses can do well by doing good was fresh and different. Many businesses appreciated our commitment to these principles even when they disagreed with us.

In 2008, our nearly 600 members include many of Vermont's leading businesses, acknowledged and awarded for growing high-quality jobs, creating exceptional workplaces, and maintaining a healthy environment.

As we come into our organizational adulthood, we bring a youthful spirit of imagining and living the possibilities. With this strategic plan, we envision together how business growth and the common good can be linked to create lasting economic, social, and environmental prosperity. By strengthening our strategies, living the business life according to our principles, building a sustainable organization we lead the way for more businesses to do the same.

Please join us in shaping the voice and the future of business in Vermont.

- *Julie Lineberger, LineSync Architecture, VBSR Board Chair*

PLAN SUMMARY

Between January and April 2008, VBSR engaged in a strategic planning process to identify 3-year goals and priorities so the membership, staff, and Board of Directors can work together to sharpen the impact of the organization.

The process was led by a strategic planning advisory group consisting of staff, members and the Board. 250 VBSR members and a number of external stakeholders provided input, sharing a wide range of ideas. The advisory group then synthesized and developed these into a set of common goals and priorities.

The four broad goals are:

- I. VBSR is an authority on how businesses can build social and environmental capital along with economic prosperity both in Vermont and nationally.

- II. VBSR is a vibrant learning community that develops and promotes innovative and transformative socially responsible business practices.
- III. VBSR is an effective leader of change for public policies that support sustainable values and meet the organization's strategic priorities.
- IV. VBSR develops and maintains a robust and effective organization.

The priority strategies proposed for action in 2008 and 2009 are to:

- Build the business case that demonstrates the economic advantages of socially responsible businesses, plus other benefits.
- Develop a plan to help members adopt and integrate socially responsible business practices.
- Expand and improve education and networking events.
- Identify and fulfill unmet leadership needs in policy areas that represent the highest and best use of VBSR's collective knowledge and voice (e.g. carbon tax policy).
- Develop a three-year business plan to achieve these priorities and create an adequate, sustainable level of funding.

The plan also provides a tool to annually review VBSR's goals, priorities, and progress.

The four broad goals are indicated by Roman numerals and are in shaded banners. Project strategies are indicated by Arabic numbers, and those in **bold** type are proposed as priorities for 2008-2009.

THE PLANNING PROCESS

Strategic Planning Advisory Group members included:

Jan Blittersdorf, NRG Systems, Inc. and VBSR Board (Hinesburg)
Andrea Cohen, VBSR Policy Coordinator (Montpelier)
Arne Hammarlund, Chittenden Bank (Brattleboro)
Melinda Moulton, Main Street Landing and VBSR Board (Burlington)
Jacob Park, Green Mountain College (Poultney)
Will Patten, VBSR Executive Director (Burlington)
Beth Sachs, VEIC and VBSR Board (Burlington)
George Schenk, American Flatbread and VBSR Board (Waitsfield)
Liz Schlegel, Found Line, Inc. (Burlington)

The planning group and board were assisted by consultants Stephanie Lahar and Andy Robinson. The group reviewed previous planning work done over the last several years and solicited input from members and stakeholders from around the state. 250 VBSR members provided input via

an electronic survey, and the consultants conducted telephone interviews with 18 colleagues and opinion leaders (a few of these were members, most were not). The Board and staff met for a day-long retreat to review the ideas collected from members and stakeholders, and to discuss planning goals. The planning group then synthesized this work and developed a three-year plan. This was brought to the Board of Directors for approval in April 2008.

MISSION

VBSR'S MISSION IS TO ADVANCE A BUSINESS ETHIC THAT VALUES MULTIPLE BOTTOM LINES – ECONOMIC, SOCIAL AND ENVIRONMENTAL.

We do this by:

EDUCATION

Empowering our members to solve environmental, social and economic problems. We provide concrete resources and information to help improve our members' business practices.

PUBLIC INFLUENCE

Initiating tangible change in public policy that combats exploitation and promotes sustainability. We work to capture the inherent power of business to represent socially responsible ideals to legislative bodies, news media, and the general public.

WORKPLACE QUALITY

Enabling every worker to live and work with respect and dignity by creating work environments and economic climates that provide fair income in safe work settings, and allow each employee to contribute to a high quality product or service.

GOALS, STRATEGIES AND ACTION STEPS

GOAL I. VBSR IS AN AUTHORITY ON HOW BUSINESSES CAN BUILD SOCIAL AND ENVIRONMENTAL CAPITAL ALONG WITH ECONOMIC PROSPERITY BOTH IN VERMONT AND NATIONALLY.

Measures we'll track:

- ❖ References in the media, national web links, and online
- ❖ Invitations/requests to speak at state and national events or contribute written materials

STRATEGIES AND ACTION STEPS:

- 1. Build the business case that demonstrates the economic advantages of socially responsible businesses, plus other benefits.**

- A. Produce a professionally researched and written report/white paper that articulates a new, ground-breaking business model that adds to discussions of corporate social responsibility and its benefits, and includes
 - data from Vermont, national, and international sources;
 - practical business knowledge and applications; and
 - stories that illustrate unique vision and leadership.
- 2. Tell the story through communications, events, and the media.
 - A. Develop compelling themes as a focus for communications, education events, and outreach.
 - B. Identify opportunities to spread VBSR’s message; lead conversations on socially responsible practices, ideas and results in Vermont and nationally (e.g. journal and newspaper columns, etc.).
- 3. Develop a leadership role on sustainable economic development in Vermont.
 - A. Identify influential statewide conversations and initiatives (new and ongoing) and strengthen the impact of VBSR’s participation in these initiatives.
 - B. Identify and cultivate partnerships and collaborations with state and national organizations with complementary missions.

GOAL II. VBSR IS A VIBRANT LEARNING COMMUNITY THAT DEVELOPS AND PROMOTES INNOVATIVE AND TRANSFORMATIVE SOCIALLY RESPONSIBLE BUSINESS PRACTICES.

Measures we’ll track:

- ❖ Membership numbers and profile of membership types
- ❖ Membership satisfaction and value of membership as measured by surveys
- ❖ Attendance at conferences and events

STRATEGIES AND ACTION STEPS:

- 1. Develop a plan to help members adopt and integrate socially responsible business practices.**
- 2. Expand and improve education and networking events.**
 - A. Develop conferences as “must-attend” events by booking high-profile speakers and enhancing education, networking and/or business opportunities.
- 3. Develop enhanced tools and options for member information and networking.
 - A. Expand functionality, use, and resources on the website.
 - daily tips, discussions, etc.
 - develop content / web access services
 - B. Develop and provide tools to facilitate cooperative business strategies, e.g.
 - business exchanges and bartering
 - cooperative purchasing and procurement

- resources for local sourcing of goods and services
- strategies to obtain and leverage capital
- common consulting resources

GOAL III. VBSR IS AN EFFECTIVE LEADER OF CHANGE FOR PUBLIC POLICIES THAT SUPPORT SUSTAINABLE VALUES AND MEET THE ORGANIZATION’S STRATEGIC PRIORITIES

Measures we’ll track:

- ❖ Incorporation of VBSR-sponsored provisions and deletions of VBSR-opposed provisions in new Vermont legislation, rules, and policies
- ❖ VBSR membership on Commissions and Legislative Study groups

STRATEGIES AND ACTION STEPS:

- 1. Identify and fulfill unmet leadership needs in policy areas that represent the highest and best use of VBSR’s collective knowledge and voice (e.g. carbon tax policy).**
 - A. Implement well-chosen, collaboratively sponsored educational forums with other business and interest groups.
2. Track existing policy issues that have social responsibility implications and articulate an appropriate business position for each.
 - A. Develop and implement a policy tracking system.
3. Empower members to be more active in the legislature.
 - A. Develop communications and feedback tools to create policy priorities responsive to the needs of VBSR’s members.
4. Continue to build relationships with legislators, policymakers, and organizations with complementary missions.

GOAL IV. VBSR DEVELOPS AND MAINTAINS A ROBUST AND EFFECTIVE ORGANIZATION CAPABLE OF ACHIEVING OUR STRATEGIC GOALS.

Measures we’ll track:

- ❖ Revenue and other financial indicators
- ❖ Employee retention rates
- ❖ Recruitment of new Board members and leadership and Board turnover

STRATEGIES AND ACTION STEPS:

1. **Develop a three-year business plan to achieve these priorities and create an adequate and sustainable level of funding.**
 - A. Assess organizational structure and staffing.
 - B. Develop staffing and cost projections.
 - C. Develop options to increase and/or diversify revenue sources and develop a revenue strategy.
 - D. Create a three-year budget.
 - E. Implement activities to generate new revenue.
2. Refine the membership model; clarify criteria for membership.
3. Build the capacity and engagement of the Board of Directors.
 - A. Redefine the role of committees.
 - B. Increase administrative support for committees.
 - C. Develop a board succession plan for identifying new board members and officers and encouraging appropriate turnover on the board.
4. Create and maintain a supportive and just work environment and strengthen staff capacity.
 1. Develop a comprehensive set of policies and procedures.
 2. Do a salary comparison study to assess compensation.

USING THE PLAN

This strategic plan provides a map to enable the Board, staff, and members to focus their resources on accomplishing specific goals. For this to happen effectively, detailed business and action plans must be developed based on these goals.

This plan can be considered the first round of an ongoing conversation that will be revisited annually. The goals outlined above are broad enough to be used for the next three years, but strategies and action items will be revised more often as the environment evolves and changes, and the organization adapts accordingly.

VBSR would like to extend thanks those who provided funding for the 2008 Strategic Plan.

Seventh Generation
NRG Systems, Inc.
Ben and Jerry's Homemade, Inc.
Green Mountain Coffee Roasters
Goddard College
Main Street Landing
LineSync Architecture
Andy Robinson
Stephanie Lahar and Associates, LLC