



NORTHSPAN

**STRATEGIC PLAN**

2021 ■ ..... ■ ..... ■ 2025

# CONTENTS

- INTRODUCTION..... 3
- 2021-2025 STRATEGIC PLAN..... 4
- 2021 ACTION PLAN ..... 9
- PROCESS SUMMARY..... 9
  - JANUARY BOARD MEETING – PROCESS CONCEPT..... 9
  - BOARD MISSION, VISION, AND VALUES SURVEY..... 9
  - BOARD SWOT..... 9
  - APRIL BOARD MEETING – CONFIRMATION OF PROCESS..... 10
  - CLIENT SURVEY..... 10
  - KEY INFORMANT INTERVIEWS..... 10
  - JULY BOARD MEETING – UNDERLYING CONTRADICTIONS ..... 11
  - OCTOBER BOARD MEETING – STRATEGIC DIRECTIONS ..... 11
  - CURRENT REALITY, SUCCESS INDICATORS & ACTIONS/ACCOMPLISHMENTS ..... 11
- APPENDICES ..... 12

# INTRODUCTION

This document contains the Northspan 5-Year Strategic Plan completed and approved January 28th, 2021. It outlines the process the organization followed to establish its plan from start to finish, and includes the materials created throughout the process, including summaries of collected input and strategic sessions with the board of directors. It concludes with Northspan's newly established five-year strategic directions and incorporates the 2021 action plan, which takes the first steps toward making the 5-year plan a reality.

# 2021 – 2025 STRATEGIC PLAN

## 1. BUILDING AWARENESS THROUGH A COMPREHENSIVE MARKETING PLAN

**DEFINITION:** This strategic direction acknowledges that, while Northspan markets its services in many ways, it has no formal plan to guide its efforts. Historically, the organization has relied on its network for marketing, and has slowly built a larger social media and newsletter presence. A more comprehensive, strategic marketing effort will allow Northspan to better promote its strengths, build its reputation for its successes, and expand its client base.

### **ACTIONS:**

1. Establish baseline metrics to measure success
2. Include all websites' analytics and social media planning
3. Establish and assign out each element within living process manual
4. Activate Co-Schedule requeue with quarterly updates
5. Budget for social spend in Twin Ports
6. Send client feedback form quarterly
7. Establish process for sending a thank you when we close out projects and once a year after client feedback forms are sent
8. Establish contract for content creation assistance

### **OUTCOMES:**

1. Functioning formal process and marketing plan, with assigned staff to each action
2. We are sent/asked to reply to RFPs for projects we are aligned with
3. We are referred opportunities from past clients or sources that know us
4. More new clients and retention rate of past clients increases
5. Original content is integrated into the marketing plan

## 2. DIVERSIFYING PARTNERSHIPS FOR REVENUE STABILITY

**DEFINITION:** This strategic direction recognizes the importance of broadening Northspan's sources of revenue to avoid overreliance on certain funding sources. It builds on recent efforts to better understand the organization's budget and expand on existing or potential partnerships with many clients or similar entities. If successful, the revenue stability generated by this strategic direction will provide Northspan with reliable funding streams, more efficient use of staff time, and greater peace of mind for the staff and board.

### **ACTIONS:**

1. Review regional opportunities for leadership and collaboration opportunities annually
2. Regularly submit proactive proposals to clients with options for assistance
3. Build partnerships for follow-up work and leverage them (e.g., University of Minnesota Extension)
4. Work with partners to identify regional opportunities and inefficiencies
5. Continue to strategically use open, defined process to recruit board members
6. Define and re-affirm missions and/or guiding principles for programmatic advisory committees to frame work and fundraising responsibilities
7. Explore varying consulting rates to allow for a community programming discounted rate (e.g., for Northland Connection, NORTHFORCE, MnOppCo, and Welcoming Community)

### **OUTCOMES:**

1. Higher level of confidence in budget projections
2. Steadier revenue throughout the year
3. No guilt over taking time off or for professional development
4. Less time spent searching for funding

### 3. FOSTERING A REGIONAL CULTURE OF INCLUSIVITY

**DEFINITION:** This strategic direction recognizes the increasing diversity of northeast Minnesota and a glaring lack of healthy regional dialogue around diversity, equity, and inclusion. Northspan has already begun exploratory efforts to develop Welcoming Community programming to build intercultural skills and strengthen the region's capacity to have difficult conversations. This new programming work is part of a long-term effort to determine how we might position northeast Minnesota for success by providing programming and resources to elevate digital access equity & inclusion, creating welcoming communities, increasing cultural fluency, and retaining and attracting talent.

**ACTIONS:**

1. Develop & continue to cultivate internal welcoming culture
2. Pursue Northspan work with diverse communities to build connections
3. With foundational partners, create welcoming partnership/advisory committee to guide regional effort and measure success
4. Hold an annual Diversity, Equity & Inclusion (DEI) summit
5. Integrate/collaborate with other regional efforts

**OUTCOMES:**

1. People feel welcome and students stay after college
2. Growth of diverse representation within business community
3. Greater acknowledgment and recognition of other cultures existing
4. Greater diversity in leadership positions  
(elected officials, leadership roles)
5. Regional welcoming community work has been launched and people outside of economic development are aware

## 4. ALIGNING AND DEVELOPING SKILLS TO MAXIMIZE GROWTH

**DEFINITION:** This strategic direction focuses on internal efforts to build up Northspan staff capacity. It continues to emphasize professional development for staff, conducts a proactive assessment of organization needs and staff growth plans, and prepares for an anticipated retirement in the coming years. When fully implemented, this strategic direction will allow Northspan to make smooth transitions, allow its staff to grow into roles that fit their skills and aspirations, and move in tandem with the organization's broader strategies.

### **ACTIONS:**

1. Follow the established succession plan
2. Current Vice President remains available throughout transition period (e.g., contractual basis)
3. Clarify and understand where staff members are headed within the career pathway framework
4. Identify opportunities for internal cross-training
5. Better understand opportunities for consultant partnerships in the region
6. Regularly updated and maintain the process manual

### **OUTCOMES:**

1. Northspan proactively maintains and/or grows capacity through transition process
2. Higher level of confidence in budget projections
3. When transitions happen, revenue stabilizes quickly
4. Continue quarterly planning and implementation
5. Continue annual review process, including mid-year check-in
6. Continue to cultivate a culture of psychological safety

## 5. ESTABLISHING OUR INDUSTRY LEADER NICHE

**DEFINITION:** This strategic direction aims to build Northspan's reputation as a visionary consulting firm in its field. It builds in efforts to collect client feedback and learn from best practices of comparable organizations to refine and brand Northspan's expertise and processes. These efforts seek to create a positive feedback loop in which Northspan gains regional recognition for its wide-ranging talents and innovative efforts.

### **ACTIONS:**

1. Create a marketing effort where clients and partners tell Northspan's story
2. Seek out new projects which highlight our range of expertise and responsiveness
3. Seek out opportunities to start the conversation around regional need
4. Continue to lead and grow Non-Traditional Lender's Forums (NTLF)
5. Identify unique original content opportunities to publish at least 2 times a year
6. Determine how to define and "sell" our methods, e.g., for strategic planning
7. Proactively determine options to lead presentations or speak on panels throughout the year

### **OUTCOMES:**

1. People know why they are choosing to approach us for services
2. People come to us for things that we haven't done before because we're so adaptable and reliable
3. We are known as the resource who knows the right place to go
4. We meet the industry leadership criteria established in our planning work
5. People are excited to hear us talk and seek us out for expertise and our webinars don't feel like ads



# 2021 ACTION PLAN

In response to the 5-Year Strategic Plan staff completed the 2021 Action Plan on January 5th, 2021. The goals for the year are as follows:

1. We have integrated client methods into our marketing plan implementation.
2. We have launched our holistic value acceleration service method.
3. We have completed year two of the Vice President succession plan.
4. We have established an active Northeast Minnesota regional Welcoming Community strategy.

This document is available in the appendices titled "2021 Action Plan 01.05.21".

## PROCESS SUMMARY

### JANUARY BOARD MEETING – PROCESS CONCEPT

In late 2019 and early 2020, Northspan established a process concept for its five-year strategic plan. This process built on the June 2018 6-month plan, a 2019 one-year plan, and the creation of a new vision that all followed Northspan's leadership transition in 2018. At Northspan's January board meeting, President & CEO Elissa Hansen presented the process concept, which the board then approved. This process concept is available in the document titled "Northspan Strategic Planning Process Concept 1.13.20."

### BOARD MISSION, VISION, AND VALUES SURVEY

The first step in the five-year strategic planning process was a survey of current Northspan board members on the organization's mission, vision, and values. The survey invited respondents to share their dreams for Northspan, assess the continued relevance of the existing values, and offer feedback on the impact report used to report on staff activity to the board. A summary of the results is available in the document titled "Northspan Board Survey and SWOT Results April 2020." The results provided a vision that helped set the foundation for future sessions, affirmed four values, created a change in a fifth value, and led mild changes to the impact report.

### BOARD SWOT

An additional piece of the board survey was a SWOT analysis that asked respondents to submit their opinions on Northspan's strengths, weaknesses, opportunities, and threats. The document titled "Northspan Board Survey and SWOT Results April 2020" summarizes all responses and highlights the most common notes.

## APRIL BOARD MEETING - CONFIRMATION OF PROCESS

At the April Northspan board meeting, the board approved the 2020 Action Plan and reviewed the strategic planning process. The board reviewed the results of the survey and SWOT and approved the proposed change to the core value that the survey respondents had flagged for change.

## CLIENT SURVEY

Along with information from its board, Northspan sought the input of current and recent clients through an anonymous survey. The survey categorized respondents by sector and asked them to provide feedback on their impressions of Northspan as an organization and the services it provides. Respondents also rated Northspan on its cost, responsiveness, and adherence to its five stated values, and they provided feedback on existing Northspan outreach efforts such as its website and newsletter.

The feedback revealed widespread satisfaction with Northspan's effectiveness and professionalism and reasonably strong awareness of its services. Respondents generally agreed it adheres to its values and saw its future role as similar to its current one. Usage of the website and recognition of Northspan's digital marketing efforts was mixed. Several respondents also identified areas for potential future work. A complete summary is available in the document titled "Results from Client Feedback Survey and Key Informant Interviews June 2020."

## KEY INFORMANT INTERVIEWS

At the same time as it conducted the survey, Northspan also completed several key informant interviews with major clients or program funders, frequent partners, and former board members. The interviews revealed a collection of stakeholders who are working to figure out how to best use partner organizations to advance their partially overlapping but often divergent missions. Interviewees recognized the major challenges in the local and national political and cultural environment, along with the effects of economic and demographic forces that are often beyond local control. Business succession planning received frequent mentions as a necessary service, while several others latched on to Northspan's nascent concept for welcoming community work.

Together, the interviewees had a strong grasp on Northspan's historic offerings and role, though they were not equally aware of the various areas of its work, and with a handful of exceptions, interviewees did not envision a changed role for the organization. Otherwise, this cross-section of stakeholders recognized each of Northspan's three major areas of work and several of its programs. Respondents appreciated Northspan for the role it plays and remained eager to partner in the future. A complete summary is available in the document titled "Results from Client Feedback Survey and Key Informant Interviews June 2020."

## **JULY BOARD MEETING – UNDERLYING CONTRADICTIONS**

At the July Northspan board meeting, Karie Terhark of Hue.Life facilitated an underlying contradictions workshop designed to identify the issues underlying some of the challenges Northspan faces. This session identified five underlying contradictions:

- Time constraints limit ability to balance priorities
- Staff capacity limits fully engaging with clients
- Unknown funding sources challenge sustainability
- Service area limited by stakeholders' perception
- Undefined marketing strategy challenges communications

Additional information is available in the document titled "Northspan Underlying Contradictions Consensus Workshop 7.29.20."

## **OCTOBER BOARD MEETING – STRATEGIC DIRECTIONS**

At the October board meeting, the staff and board developed its strategic directions in a workshop facilitated by Karie Terhark of Hue.Life. The directions guiding the 5-year plan include:

- Building awareness through a comprehensive marketing plan
- Diversifying partnerships for revenue stability
- Fostering a regional culture of inclusivity
- Aligning and developing skills to maximize growth
- Establishing our industry leader niche

Additional details are available in the document titled "Strategic Directions 10.29.20."

## **CURRENT REALITY, SUCCESS INDICATORS & ACTIONS/ACCOMPLISHMENTS**

At a December meeting, Northspan staff worked to assess the current reality, identify success indicators, and develop actions and accomplishments for each of the five strategic directions that will move the organization from its current state toward the desired results. These actions will form the foundation for the five-year plan and inform the steps taken in each year's action plan.

The complete results from this session are available in the document titled "Current Reality, Success Indicators & Actions/Accomplishments 12.07.20."

# APPENDICES

- A. Northspan Strategic Planning Process Concept 1.13.20
- B. Northspan Board Survey and SWOT Results April 2020
- C. Client Feedback Survey
- D. Client Feedback Survey Results Summary
- E. Key Informant Summary - Final - not publicly available
- F. Results from Client Feedback Survey and Key Informant Interviews June 2020
- G. Underlying Contradictions Survey – Final
- H. Northspan Underlying Contradictions Consensus Workshop 7.29.20
- I. Strategic Directions Survey Summary 10.28.2020
- J. Strategic Directions Consensus Workshop 10.29.20
- K. Current Reality, Success Indicators & Actions/Accomplishments 12.07.20
- L. 2021 Action Plan 01.05.21

**THE NORTHSPAN GROUP, INC.**  
**STRATEGIC PLANNING PROCESS CONCEPT**  
**January 13, 2020**

**CONCEPT**

- 5-Year Strategic Plans
  - Conduct in 2020 for 2021 – 2025
  - Conduct in 2025 for 2026 – 2030
- 1-Year Action Plans
  - Present each year

**HISTORY**

- I. June 2018, 6-month plan by President & CEO
- II. December 2018, 1-year plan by President & CEO and staff
  - a. Reviewed & Approved 2019 Budget

**BOARD**

- I. January 13, 2020 Annual Meeting
  - a. Review 2019 Strategic Plan
  - b. Review & Approve 2020 Budget
- II. Q1 2020
  - a. Provide feedback on 2020 Action Plan via email
  - b. Conduct vision, mission, values survey online
  - c. Conduct board SWOT Analysis online
- III. April 16, 2020
  - a. Approve 2020 Action Plan
  - b. Review & discuss vision, mission, values survey results
  - c. Review & discuss board & staff SWOT Analysis
- IV. July 2020 Date TBD
  - a. Assess relevant underlying contradictions
  - b. Review key informant interviews & client feedback survey
  - c. Launch recruiting process for 3 new board members
- V. October 2020 Date TBD
  - a. Map out 2021-2025 strategic plan goals & timelines
  - b. Report on board member recruitment process
- VI. January 2021 Date TBD Annual Meeting
  - a. Re-elect & Elect new board members
  - b. Review & Approve 2021-2025 Strategic Plan
  - c. Review & Approve 2021 Action Plan & Budget

**TEAM**

- I. 2021 Annual 2-Day Planning
  - a. Annual 2-Day Planning, Day 1, Friday January 17<sup>th</sup> Facilitated by Entrepreneur Fund
    - i. Review Year and Completion of Goals
    - ii. Team Health
    - iii. Organizational Check-Up & SWOT Analysis, completed ahead of time online
    - iv. Vision/Traction Organizer
    - v. 3-Year Picture
    - vi. 1-Year Plan
    - vii. Quarterly Goals
    - viii. Identify, Discuss, & Solve Key Issues
  - b. Annual 2-Day Planning, Day 2, Monday January 20<sup>th</sup> Staff Action Planning
- II. Q1
  - a. Draft 2020 Action Plan
  - b. Send board vision, mission, values survey
  - c. Send board SWOT Analysis online form
- III. Q2
  - a. Conduct & compile key informant interviews & client feedback surveys
  - b. Consider underlying contradictions prior to board meeting
- IV. Q3
  - a. Consider 5-year strategic plan goals & timelines
- V. Q4
  - a. Conduct 2021 Annual 2-Day Planning
  - b. Create 2021 Action Plan w/Accountability & Budget
  - c. Finalize Draft 2021-2025 Strategic Plan

Board Survey & SWOT Results: April 2020

Mission and Vision

Survey respondents unanimously agreed Northspan’s current mission and vision are still relevant.

Dream

Board members offered a broad range of thoughts about their dreams for Northspan, both internal and external. Patterns emerged around the following topics:

- Achieve recognition as an industry leader and resource
- Build long-term relationships to elevate specific communities (tribal governments, North Shore, NW WI were listed as examples)
- Achieve long-term funding/stability to allow for growth
- Better know our strengths and capitalize on them
- Help small businesses

Are the Values Still Relevant?

**Inclusive: 10 yes, 1 maybe**

- Maybe clarify who we foster respect for? Show that we do it through intentional engagement?

**Trustworthy: 10 yes, 1 maybe**

- Drop “always” – weakens the statement

**Stewards: 10 yes, 1 maybe**

- Need long-term funding sources to allow for stability to provide this level of focus on clients

**Adaptable: 10 yes, 1 maybe**

- Watch out for candy and don’t be all things to all people

**Delightful: 6 yes, 3 maybe, 2 no**

- Possible turn-off
- Should be a given
- Too flippant in current climate?
- “Hard work is hard”
- “Rewarding” or “diligent” instead?

Aside from the suggested edits to delightful, no one thought anything was missing from the values; respondents appreciated their directness and freshness.

Current Values	Proposed Values
<b>Inclusive:</b> We foster respect through intentional engagement of stakeholders and seek common solutions to community, business, and organizational challenges.	<b>Inclusive:</b> We facilitate intentional engagement of stakeholders and seek common solutions to community, business, and organizational challenges.
<b>Trustworthy:</b> We earn the loyalty of our clients by operating ethically, reliably, confidentially and always with integrity.	<b>Trustworthy:</b> We earn the loyalty of our clients by operating ethically, reliably, confidentially, and with integrity.
<b>Stewards:</b> We carefully manage the resources entrusted to us and focus on the long-term well-being of our clients and programmatic service areas.	<b>Stewards:</b> We carefully manage the resources entrusted to us and focus on the long-term well-being of our clients and programmatic service areas.
<b>Adaptable:</b> We offer a broad range of expertise which enables us to seize new opportunities and tailor our offerings to meet our clients’ needs.	<b>Adaptable:</b> We offer a broad range of expertise which enables us to seize new opportunities and tailor our offerings to meet our clients’ needs.
<b>Delightful:</b> We provide satisfaction and joy to our clients by delivering excellent customer service and clear results.	<b>Diligent:</b> We provide satisfaction to our clients by delivering excellent customer service and clear results.

Board Survey & SWOT Results: April 2020

Impact Report

All said it is valuable and provides relevant and detailed information, though 2 of 7 respondents to this question said it was too long and hard to digest. No one thought it was missing something; if anything, it had too much information. One respondent thought it could be a quarterly report instead of a monthly report.

Valuable	Not Valuable
<ul style="list-style-type: none"> <li>Summaries helpful when bulleted/providing highlights</li> <li>Financials</li> <li>Notes/context/updates from Elissa</li> </ul>	<ul style="list-style-type: none"> <li>Long paragraphs giving updates (bulleted lists preferred)</li> <li>Bulleted lists of meetings attended without additional context on Northspan role</li> </ul>

SWOT

All responses to the SWOT portion are below. **Items in bold** received multiple mentions and appear in rank order.

Strengths	Opportunities
<ul style="list-style-type: none"> <li><b>Staff talent</b></li> <li><b>Reputation</b></li> <li><b>Willing to take on new, challenging projects and adapt</b></li> <li><b>Unique offerings</b></li> <li>Finance</li> <li>Existing relationships</li> <li>Ethical/values driven</li> <li>Strong management</li> <li>Quality of work products</li> </ul>	<ul style="list-style-type: none"> <li><b>Response to COVID-19</b></li> <li>Pivot when new opportunities arise</li> <li>Businesses/orgs that have not received services before</li> <li>Nonprofit/coalition management (e.g., GPS, ERJPB)</li> <li>Real estate events – MREJ type role for northern MN?</li> <li>Monetize research services – white papers, impact work, charge more</li> <li>Numerous facilitators nearing retirement age</li> <li>Filling in when ED/nonprofit heads retire or leave – have proposals ready to go</li> <li>Small communities that need Northspan services</li> <li>Partnerships with other programs/agencies</li> </ul>
Weaknesses	Threats
<ul style="list-style-type: none"> <li><b>Sustainable funding/need to always be drumming up new business</b></li> <li>Small staff stretched too thin</li> <li>Staff is mostly new</li> <li>Internal succession</li> <li>Staff retention given small size</li> <li>Cultural diversity</li> <li>Only option in region for some services</li> <li>Small office space (room to add more?)</li> <li>Do the people who need us know they need us, and how much those services are worth?</li> <li>Geographic growth – travel/logistics challenge</li> <li>Program ROI measurement</li> </ul>	<ul style="list-style-type: none"> <li><b>Other local organizations trying to complete (or filling roles we could fill)</b></li> <li><b>COVID-driven economic downturn</b></li> <li>Loss of funding sources</li> <li>Other organizations from outside the region</li> <li>Gaining trust in new communities/potential clients seeing value of services offered</li> <li>Misconceptions of ARDC relationship</li> <li>Reluctance to engage from NW WI</li> </ul>



## NORTHSPAN CLIENT THANK YOU & FEEDBACK SURVEY

Thank you for being a Northspan client. We love having people in our community like you and value your partnership every single day. We know the best way to improve our services is to hear from our clients. Our client feedback survey should take no more than 10 minutes, and your answers will be used to help improve our processes and your experiences. Thanks for everything you do, and we hope to work with you again.

### Overview Questions

1. What type of organization are you? (Allow them to only pick one)
  - a. Public
  - b. Private
  - c. Nonprofit
2. Which sector does your organization primarily operate in? (Allow them to only pick one)
  - a. Aviation, Aerospace & Defense
  - b. Business, Management & Operations
  - c. Civil Service
  - d. Community Services & Non-Profits
  - e. Computers & Technology
  - f. Education & Child Care
  - g. Energy, Utilities & Natural Resources
  - h. Engineering
  - i. Financial Services
  - j. Health & Wellness
  - k. Hospitality, Tourism & Customer Service
  - l. Housing, Building & Maintenance
  - m. Laborer / Technician
  - n. Licensed Skilled Trades
  - o. Manufacturing
  - p. Marketing & Communications
  - q. Professional Services
  - r. Sales, Retail & Consumer Goods
  - s. Science
3. When you think of Northspan, what words come to mind describing our services?
4. Which Northspan services are most valuable to you? (Allow them to pick more than one and explain H)
  - a. SBA services
  - b. Fund management
  - c. Valuation/succession planning
  - d. Strategic planning
  - e. Meeting facilitation
  - f. Research services
  - g. Gap capacity/organizational support
  - h. Other, please explain
5. What other services could Northspan offer that it currently does not?
6. If you could change just one thing about Northspan, what would it be?
7. How would you explain Northspan to a colleague?
8. What would you say to someone who asked about us?
9. Before choosing Northspan, what options did you consider?

**Scale Questions (1-5)**

1. How would you rate the value of our services relative to their cost? (1: not cost effective; 5: very cost effective)
2. How responsive have we been to your questions or concerns about our services? (1: not responsive; 5: very responsive)
3. Please rate Northspan's adherence to the following values: (1: does not adhere to value; 5: strongly adheres to value)
  - a. Inclusive: We facilitate intentional engagement of stakeholders and seek common solutions to community, business, and organizational challenges.
  - b. Trustworthy: We earn the loyalty of our clients by operating ethically, reliably, confidentially, and with integrity.
  - c. Stewards: We carefully manage the resources entrusted to us and focus on the long-term well-being of our clients and programmatic service areas.
  - d. Adaptable: We offer a broad range of expertise which enables us to seize new opportunities and tailor our offerings to meet our clients' needs.
  - e. Diligent: We provide satisfaction to our clients by delivering excellent customer service and clear results.
4. The project deliverables (i.e. design documents, status reports, strategic plans, system documentation, etc.) were of high quality, and met the expectations set forth in the statement of work. (1: did not meet expectations/were not of high quality; 5: met expectations/were of very high quality)
5. How satisfied are you with the way in which we engaged with your organization and its stakeholders? (1: unsatisfactory engagement; 5: excellent engagement)
6. Did your work with Northspan strengthen your capacity? (1: not at all; 5: increased capacity significantly)
7. How likely are you to recommend Northspan to a friend or colleague? (1: unlikely to recommend; 5: very likely to recommend)
8. How likely are you to contact Northspan for help with future projects? (1: very unlikely; 5: very likely)

**Website / Newsletter Questions**

1. How easy is it to navigate our website? (1-5 scale; 1: not easy; 5: very easy)
2. Were you able to find the information you were looking for on our website? Y/N
3. Do you follow us on social media? Y/N
4. If so, which platforms do you follow us on? (they have to be able to pick more than one)
  - a. LinkedIn
  - b. Facebook
  - c. Twitter
5. Are you a subscriber to our newsletter? Y/N
  - a. If yes, what information do you find useful? Check all that apply.
    - i. Northspan organizational updates
    - ii. Program updates (Northland Connection, NORTHFORCE, MNOppCo, UMFO)
    - iii. Information on services offered
    - iv. Insights into regional/industry trends
    - v. Featured partners/properties/employers/etc.
  - b. If no, but you would like to be, please leave your email here:

**Free Response** Please share any additional thoughts on any of the questions above:

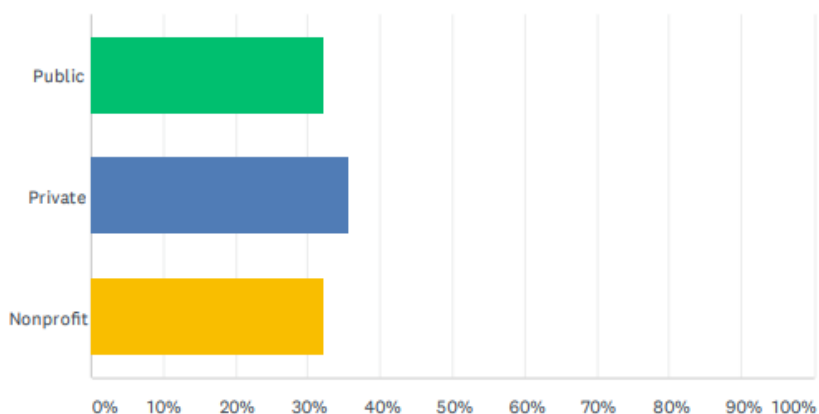
## NORTHSPAN CLIENT FEEDBACK SURVEY -- RESULTS SUMMARY

### Overview

Northspan conducted a client feedback survey in May and June 2020 to determine client satisfaction with and usage of Northspan services. We sent the survey to all current and recent Northspan clients and received 31 responses. The responses were nearly evenly split between the public, private, and nonprofit sectors, reflecting a strong cross-section of Northspan's clients. While over a third of respondents came from the community services and nonprofits sector, the remaining results included a range of respondents across ten additional sectors.

### Q1 What type of organization are you?

Answered: 31 Skipped: 0



### Free Response Questions

The next question asked respondents to identify several words that came to mind to describe Northspan. Respondents produced a variety of words, which we have grouped by topic here when possible. Many of the most frequent words were adjectives that describe how Northspan does its work and the reputation it has built, though many also called out specific services that Northspan offers, and some mentioned individual staff members.

Words	No. Mentions
Effective/relevant/competent/accurate	10
Trustworthy/professional	9
Business development services	8
Community development/gap capacity services	8
Innovative/flexible/adaptable/broad capacity	7
Collaborative	4
Future oriented/making ideas reality	4
Marketing	3
Facilitation	2
Unsure	2

When asked which Northspan services are most valuable, respondents covered a wide range of the organization's offerings. The survey offered seven existing categories of work, and responses covered Northspan's community, organizational, and business development services. Individual respondents also wrote in grant support, loan review services, management of regional websites, real estate marketing, and noted the regional benefits of all these services.

Service	No. Mentions
Research services	16
Gap capacity/organizational support	14
Strategic planning	11
Meeting facilitation	10
SBA services	9
Valuation/succession planning	6
Fund management	1

A question asking what services Northspan could offer that it currently does not generated few strong opinions. 18 of 22 respondents were unsure or did not think it should offer new things. The four unique responses included cultural training and focusing on welcoming communities, financial education for small businesses, facilitating stronger connections to Twin Cities resources for local businesses, and more marketing efforts with chambers of commerce to promote services such as succession planning.

Similarly, 9 out of 21 respondents, when asked what they would change about Northspan, had no real answer. The only responses that generated multiple mentions included increased visibility, both in the Northland and across the state, and two who worried the group was spread too thin or did not have enough of an outward presence. Individual responses included retaining institutional knowledge, lower interest rates for gap financing, larger loans for gap financing, lower hourly rates, timely maintenance of the Northland Connection real estate platform, and moving to North Branch.

When asked how they would explain Northspan to a colleague, most focused on Northspan's community development and gap capacity services, while others focused on its business development services. Others spoke more generally about its ability to offer a range of services; phrases such as "full-service" appeared several times.

Explanation of Northspan to Colleague	No. Mentions
Provide gap capacity for community/econ. dev.	9
Business development services	7
Professional/effective/talented	3
Consulting/management firm	3
Capacity-building organization	3
Unsure	2

When asked what they would say about Northspan to someone who asked about Northspan, most respondents said they would describe the organization positively. Two respondents commented on Northspan's rates, with one believing they were expensive and the other calling them reasonable.

Explanation of Northspan to Someone Asking	No. Mentions
Do good work/good at their jobs	9

Recommend exploring using them	4
Adaptable and responsive	4
Experienced and professional	3
Unsure	3
Well-run	2
Add value	2

When asked what other options they considered, the most frequent response was “none.” Other small and generally local firms also came up frequently, while a handful of respondents would have handled work in-house or looked to firms outside their immediate area. Several others used this question to stress the value of a nonprofit partner (as opposed to using a bank) for a public sector client, spoke of cost and timing, or said “all the above.”

Options Considered Other than Northspan	No. Mentions
None	8
Small (generally local) alternatives	6
Handling services internally	3
Larger/non-local firms	2

### Rating Questions

The next series of questions asked respondents to rate Northspan on a 1-5 scale. Questions asked about cost, responsiveness, and Northspan’s adherence to its five stated values. Additional questions asked about the quality of deliverables, Northspan’s engagement with the client’s organization and stakeholders, the extent to which working with Northspan strengthened the client’s capacity, and likelihood to recommend or use Northspan in the future.

These questions revealed widespread satisfaction with Northspan. Over 80% of respondents rated Northspan a 4 or a 5 on all questions but two: the rating of the ‘stewards’ value, which fell decimal places short of reaching 80%, and “did Northspan strengthen your capacity,” where just over 70% of respondents gave it a 4 or 5, with a plurality scoring it at 4. Only one other question had a number other than 5 appear as the most common response: cost effectiveness, on which 4 slightly edged out 5. The gap between 4 and 5 was also small for ‘inclusive’ and ‘diligent.’ Questions that earned overwhelming 5 scores included those on responsiveness, trustworthiness, and likelihood of recommending Northspan and using it in the future.

### Northspan Website and Newsletter

When asked about the Northspan website, 57% of respondents reported they have not visited it. Of those who had visited it, 9 of 11 gave its ease of use a 4 or a 5, with a slight plurality of 4s. All but one who visited the site reported they were able to find the information they were looking for. Two-thirds of respondents do not follow Northspan on social media; of the nine who do, seven follow it on Facebook, while five follow it on LinkedIn and four follow it on Twitter.

Roughly half of the respondents (13 of 28) said they subscribed to the Northspan newsletter, while 10 were unsure if they did. Of those who do subscribe, regional insights and programmatic updates were the most useful content.

Most Useful Information in Newsletter	No. Mentions
---------------------------------------	--------------

Insights into regional/industry trends	13
Program updates	12
Northspan organizational updates	6
Information on services offered	6
Featured partners/employers/etc.	6

### **NORTHSPAN CLIENT FEEDBACK SURVEY AND KEY INFORMANT INTERVIEWS**

*As part of its five-year strategic plan process, Northspan conducted both a client feedback survey and a series of key informant interviews over the first half of 2020. These two efforts to collect input from clients and partners give Northspan an idea of the perception of the organization among its clients and partners. In conjunction with staff and board-level assessments, they provide a picture of Northspan's strengths, challenges, and future opportunities.*

*The feedback revealed widespread satisfaction with Northspan's effectiveness and professionalism and reasonably strong awareness of its services. Respondents generally agreed it adheres to its values and saw its future role similar to its current one. Usage of the website or Northspan's digital marketing efforts was mixed. Several respondents also identified several areas for potential future work.*

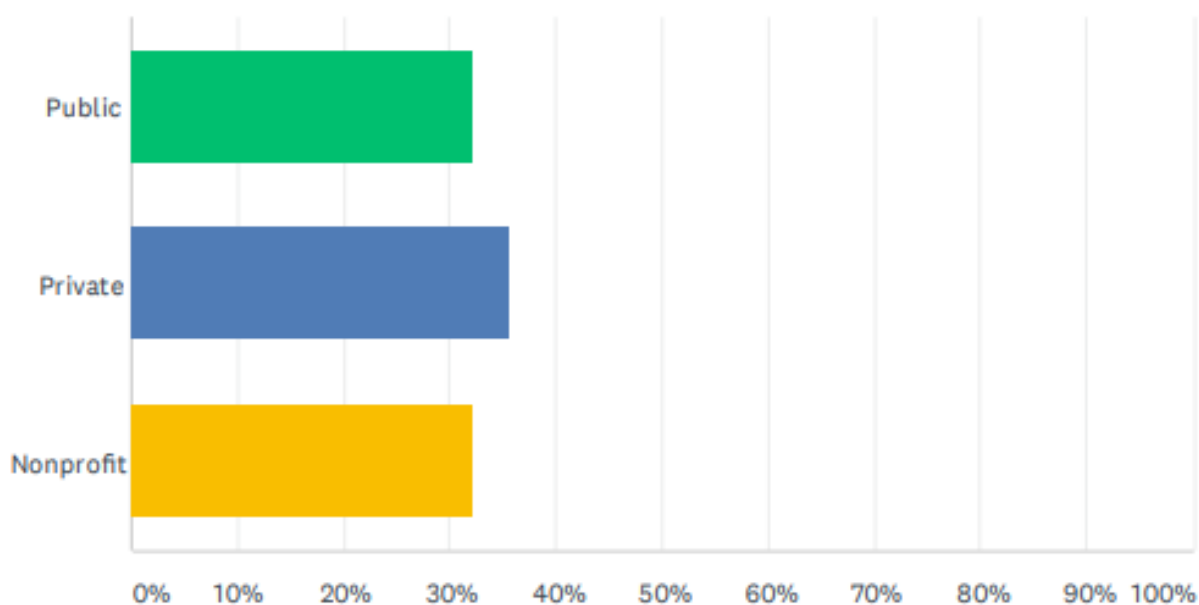
#### **CLIENT FEEDBACK SURVEY**

##### **Overview**

Northspan conducted a client feedback survey in May and June 2020 to determine client satisfaction with and usage of Northspan services. We sent the survey to all current and recent Northspan clients and received 31 responses. The responses were nearly evenly split between the public, private, and nonprofit sectors, reflecting a strong cross-section of Northspan's clients. While over a third of respondents came from the community services and nonprofits sector, the remaining results included a range of respondents across ten additional sectors.

## Q1 What type of organization are you?

Answered: 31 Skipped: 0



### Free Response Questions

The next question asked respondents to identify several words that came to mind describing Northspan. Respondents produced a variety of words, which we have grouped by topic here when possible. Many of the most frequent words were adjectives that describe how Northspan does its work and the reputation it has built, though many also called out specific services that Northspan offers, and some mentioned individual staff members.

Words	No. Mentions
Effective/relevant/competent/accurate	10
Trustworthy/professional	9
Business development services	8
Community development/gap capacity services	8
Innovative/flexible/adaptable/broad capacity	7
Collaborative	4
Future oriented/making ideas reality	4
Marketing	3
Facilitation	2
Unsure	2

When asked which Northspan services are most valuable, respondents covered a wide range of the organization's offerings. The survey offered seven existing categories of work, and responses covered Northspan's community, organizational, and business development services. Individual respondents also wrote in grant support, loan review services, management of regional websites, real estate marketing, and noted the regional benefits of all these services.

Service	No. Mentions
Research services	16
Gap capacity/organizational support	14
Strategic planning	11
Meeting facilitation	10
SBA services	9
Valuation/succession planning	6
Fund management	1

A question asking what services Northspan could offer that it currently does not generated few strong opinions. 18 of 22 respondents were unsure or did not think it should offer new things. The four unique responses included:

1. cultural training and focusing on welcoming communities,
2. financial education for small businesses,
3. facilitating stronger connections to Twin Cities resources for local businesses, and
4. more marketing efforts with chambers of commerce to promote services such as succession planning.

Similarly, 9 out of 21 respondents, when asked what they would change about Northspan, had no real answer. The only responses that generated multiple mentions included increased visibility, both in the Northland and across the state, and two who worried the group was spread too thin or did not have enough of an outward presence. Individual responses included retaining institutional knowledge, lower



interest rates for gap financing, larger loans for gap financing, lower hourly rates, timely maintenance of the Northland Connection real estate platform, and moving to North Branch.

When asked how they would explain Northspan to a colleague, most focused on Northspan's community development and gap capacity services, while others focused on its business development services. Others spoke more generally about its ability to offer a range of services; phrases such as "full-service" appeared several times.

<b>Explanation of Northspan to Colleague</b>	<b>No. Mentions</b>
Provide gap capacity for community/econ. dev.	9
Business development services	7
Professional/effective/talented	3
Consulting/management firm	3
Capacity-building organization	3
Unsure	2

When asked what they would say about Northspan to someone who asked about Northspan, most respondents said they would describe the organization positively. Two respondents commented on Northspan's rates, with one believing they were expensive and the other calling them reasonable.

<b>Explanation of Northspan to Someone Asking</b>	<b>No. Mentions</b>
Do good work/good at their jobs	9
Recommend exploring using them	4
Adaptable and responsive	4
Experienced and professional	3
Unsure	3
Well-run	2
Add value	2

When asked what other options they considered, the most frequent response was "none." Other small and generally local firms also came up frequently, while a handful of respondents would have handled work in-house or looked to firms outside their immediate area. Several others used this question to stress the value of a nonprofit partner (as opposed to using a bank) for a public sector client, spoke of cost and timing, or said "all the above."

<b>Options Considered Other than Northspan</b>	<b>No. Mentions</b>
None	8
Small (generally local) alternatives	6
Handling services internally	3
Larger/non-local firms	2

### **Rating Questions**

The next series of questions asked respondents to rate Northspan on a 1-5 scale. Questions asked about cost, responsiveness, and Northspan's adherence to its five stated values. Additional questions asked about the quality of deliverables, Northspan's engagement with the client's organization and

stakeholders, the extent to which working with Northspan strengthened the client’s capacity, and likelihood to recommend or use Northspan in the future.

These questions revealed widespread satisfaction with Northspan. Over 80% of respondents rated Northspan a 4 or a 5 on all questions but two: the rating of the ‘stewards’ value, which fell decimal places short of reaching 80%, and “did Northspan strengthen your capacity,” where just over 70% of respondents gave it a 4 or 5, with a plurality scoring it at 4. Only one other question had a number other than 5 appear as the most common response: cost effectiveness, on which 4 slightly edged out 5. The gap between 4 and 5 was also small for ‘inclusive’ and ‘diligent.’ Questions that earned overwhelming 5 scores included those on responsiveness, trustworthiness, and likelihood of recommending Northspan and using it in the future.

### **Northspan Website and Newsletter**

When asked about the Northspan website, 57% of respondents reported they have not visited it. Of those who had visited it, 9 of 11 gave its ease of use a 4 or a 5, with a slight plurality of 4s. All but one who visited the site reported they were able to find the information they were looking for. Two-thirds of respondents do not follow Northspan on social media; of the nine who do, seven follow it on Facebook, while five follow it on LinkedIn and four follow it on Twitter.

Roughly half of the respondents (13 of 28) said they subscribed to the Northspan newsletter, while 10 were unsure if they did. Of those who do subscribe, regional insights and programmatic updates were the most useful content.

<b>Most Useful Information in Newsletter</b>	<b>No. Mentions</b>
Insights into regional/industry trends	13
Program updates	12
Northspan organizational updates	6
Information on services offered	6
Featured partners/employers/etc.	6

## KEY INFORMANT INTERVIEWS

### Overview

As part of its five-year strategic plan process, Northspan reached out to 21 individuals to complete a key informant interview. The list included major clients or program funders, frequent partners, and former board members. Of these, seven responded and either talked directly to Northspan President & CEO Elissa Hansen or filled out a survey that asked similar questions. Respondents included two regional groups, two consulting firms, two community-level community and economic development professionals, and a philanthropic foundation.

The interviews revealed a collection of stakeholders who are working to figure out how to best use partner organizations to advance their partially overlapping but often divergent missions. Interviewees recognized the major challenges in the local and national political and cultural environment, along with the effects of economic and demographic forces that are often beyond local control. Business succession planning received frequent mentions as a necessary service, while several others latched on to Northspan's nascent concept for welcoming communities work.

Together, the interviewees had a strong grasp on Northspan's historic offerings and role, though they were not equally aware of the various areas of its work, and with a handful of exceptions, interviewees did not envision a changed role for the organization. Otherwise, this cross-section of stakeholders recognized each of Northspan's three major areas of work and several of its programs. Respondents appreciated Northspan for the role it plays and remained eager to partner in the future.

### Major Organizational Challenges

Interviewees noted a range of challenges that confront their organizations. Several respondents used this question about their own organizations to talk about local or regional challenges, showing how their work is often consumed by these broader issues. Respondents expressed both a desire to grow the capacity of local decision-makers (usually in government) and some leering over current decision-making, which they believe can hold the region back. Communication and messaging about offerings received several mentions, as was understanding how to work with other regional organizations to define a lane, stay in a lane, and work together with other organizations as they negotiate theirs.

Area	Mentions
Business assistance/helping customers/clients in certain areas	4
Need to improve local decision-making	3
Better communicate own offerings	2
Adapting to trends and changes	2
Staying in a lane/collaboration with other organizations	2

### Major Community/Region Challenges and Unmet Needs

Questions asking about the informants' major challenges in their communities/regions and their greatest unmet needs produced varied but often similar responses that fell into several broad categories. Foremost was a perceived lack of a coherent consensus or vision around economic development in the Northland, with several noting increasingly polarized worldviews and changing economies influencing this trend. A related concern about a need for welcoming communities that embrace and uplift their diversity was also a prevalent answer, with respondents recognizing the potential for these challenges to create divisions.

Several focused on the power of global economic (and virologic) forces beyond the Northland's ability to control and their effects on the local economy, and others noted the region's challenges with dated or changing built environment, including housing challenges, commercial real estate (particularly in light of COVID-19-driven trends), and placemaking activities that can create attractive communities. Two related areas, workforce attraction and education, emerged as areas of focus as well.

Area	Mentions
Polarized worldviews/lack of consensus around community/economic development vision	6
Need for welcoming communities	5
Major economic forces (pandemic, recession, mass layoffs)	5
Technical assistance and access to capital for businesses	5
Built environment (housing, commercial real estate changes, placemaking)	5
Workforce/population attraction and retention	4
Education (both as an asset and a potential challenge in changing economy)	3
Succession planning	3
Taxes and permitting	2

#### **Achievable Results of Focusing on Unmet Needs/Challenges**

Most respondents saw direct economic growth as the most straightforward, achievable results of tackling the challenges they identified in previous questions. Several expanded on this more general point to emphasize an expansion of opportunity, with several explicitly calling for inclusiveness and participation from many areas. Others saw economic diversification as a major goal, and some kept their responses high-level and sought more creative, broader thinking to address the challenges.

Area	Mentions
More business success and business growth	5
More participation and inclusiveness	3
Economic vibrancy and opportunity	2
Economic diversification	2
Broader and more creative solutions	2
Population growth	2

#### **Northspan's Role**

Many respondents recognized Northspan's longtime role in areas such as gap capacity and support for regional economic development, with several mentions of Northland Connection. Broad mentions of each of Northspan's three major areas of work received equal weight, while single respondents focused more on programmatic (or potential programmatic) work such as welcoming communities and NORTHFORCE.

The responses seemed to reflect Northspan's long-running efforts to position itself as a behind-the-scenes provider of creative solutions across several areas of work that support regional economic development. A handful of comments did point in new directions that Northspan has been exploring, including its potential work in welcoming communities and a broader idea of workforce development that focused on social capital.

<b>Area</b>	<b>Mentions</b>
Background research/data/support (e.g. Northland Connection)	4
Organizational development services	3
Community development services	3
Business development services	3
Welcoming communities	1
Talent cultivation/building social capital (e.g., NF)	1

### **Areas for Growth**

Business valuations and succession planning once again received considerable attention from respondents as an area for potential Northspan growth. The sense that this need remains unmet also filtered into the other response that received multiple mentions, as interviewees suggested a need for greater outreach, particularly around Northspan's business development services. None of the responses pointed to areas in which Northspan does not already operate; instead, the respondents saw opportunities to expand its capacity in nearly every area.

<b>Area</b>	<b>Mentions</b>
Valuations/succession planning	3
Outreach, especially in business development	2
Community development	1
Connecting role (organizational development)	1

**Q1** Now again consider the question “What may be blocking us or holding us back from realizing our vision?” and: Brainstorm a list on your own. Shoot for at least 8-10 ideas of what obstacles are blocking the vision. Then select your 3-5 best ideas and submit them here. (Must be 7 words or shorter.) Focus on ideas that are feasible and within the realm of staff’s ability to respond to, impact, or go around.

Answered: 13 Skipped: 0

ANSWER CHOICES	RESPONSES	
1	100.00%	13
2	100.00%	13
3	61.54%	8
4	46.15%	6
5	23.08%	3

#	1	DATE
1	Perception of being a "Duluth" organization	7/28/2020 3:35 PM
2	Limited staff capacity for engagement	7/28/2020 1:15 PM
3	Perception of only providing business development services	7/28/2020 12:20 PM
4	Racism-Inequality	7/28/2020 10:58 AM
5	Some limiting of opportunities due to current COVID impacts	7/28/2020 8:41 AM
6	Academics. Dont' get lost in text book style form of operation	7/28/2020 7:55 AM
7	competing with self - reliance on same funders multiple programs	7/27/2020 2:35 PM
8	Disjointed regional economic strategy	7/27/2020 1:24 PM
9	Dependence on clients with shrinking budgets, post-COVID	7/27/2020 11:07 AM
10	Underdeveloped skills in Welcoming Community work.	7/27/2020 10:20 AM
11	COVED-19	7/27/2020 10:02 AM
12	Limited staff to travel around the region	7/27/2020 9:32 AM
13	Lack of awareness in entire region	7/23/2020 11:00 AM

#	2	DATE
1	Limited delegation of duties (Elissa has a lot on her plate)	7/28/2020 3:35 PM
2	Perceived as background work, not a leader	7/28/2020 1:15 PM
3	Limited capacity to keep contracted consultants engaged long term	7/28/2020 12:20 PM
4	Staff abilities and reach	7/28/2020 10:58 AM
5	Must continue to build staff confidence in their skills and abilities	7/28/2020 8:41 AM
6	Quick. Process in important....Pivot is essential	7/28/2020 7:55 AM
7	broad services - tough for small team	7/27/2020 2:35 PM
8	Limited client resources due to recession	7/27/2020 1:24 PM
9	Regional dependence (growth trends are lagging in NE-MN)	7/27/2020 11:07 AM
10	Underutilized skills is community/economic development for small towns.	7/27/2020 10:20 AM
11	CURRENT STATE OF THE ECONOMY	7/27/2020 10:02 AM
12	Limited funding sources	7/27/2020 9:32 AM
13	Need unique specialization of services	7/23/2020 11:00 AM
#	3	DATE
1	Unclear definition of what "elevate" means	7/28/2020 1:15 PM
2	Fragmented consulting versus programming messaging	7/28/2020 12:20 PM
3	Regional reach of organization	7/28/2020 10:58 AM
4	Market Rate. Fee for services. Northspan brings great value	7/28/2020 7:55 AM
5	financial capacity of clients	7/27/2020 2:35 PM
6	Pull to focus on short-term crises at potential expense of longer-term progress	7/27/2020 1:24 PM
7	Consultancies benefit when all staff trained in sales/business development	7/27/2020 11:07 AM
8	Engage Wisconsin and rebuild presence	7/23/2020 11:00 AM
#	4	DATE
1	Board membership inconsistent with geographic reach	7/28/2020 1:15 PM
2	Unknown future for VP position	7/28/2020 12:20 PM
3	Secure long-term funding	7/28/2020 7:55 AM
4	capacity to take on new initiatives w/o neglecting old	7/27/2020 2:35 PM
5	Where's the better margin - Northspan initiatives or contract work with other orgs?	7/27/2020 11:07 AM
6	Have others tell our story	7/23/2020 11:00 AM
#	5	DATE
1	Tension between billable hours and nonprofit mission	7/28/2020 1:15 PM
2	Determining best role fits for new staff	7/28/2020 12:20 PM
3	Can staff/consultants be added to drive revenue, w/out increasing overhead?	7/27/2020 11:07 AM

# N O R T H S P A N

## Underlying Contradictions Consensus Workshop 7.29.20

Time constraints limit ability to balance priorities	Staff capacity limits fully engaging with clients	Unknown funding sources challenge sustainability	Service area limited by stakeholders' perception	Undefined marketing strategy challenges communications
<ul style="list-style-type: none"> <li>• Pull to focus on short term crises at potential expense of longer-term progress</li> <li>• Capacity to take on new initiatives without neglecting old</li> <li>• Fragmented consulting versus programming messaging</li> <li>• Tension between billable hours and nonprofit mission</li> <li>• Need unique specialization of services</li> <li>• Where's the better margin? Northspan initiatives or contract work with other orgs?</li> <li>• Broad range of services tough for small team</li> <li>• Quick. Process is important...Pivot is essential.</li> </ul>	<ul style="list-style-type: none"> <li>• Staff abilities and reach</li> <li>• Unknown future for VP position</li> <li>• Limited capacity for staff engagement</li> <li>• Academics. Don't get lost in textbook style form of operation.</li> <li>• Must continue to build staff confidence in their skills and abilities</li> <li>• Racism-Inequality</li> <li>• Can staff/consultants be added to drive revenue, without increasing overhead</li> <li>• Determining best role fits for new staff</li> <li>• Limited delegation of duties (Elissa has a lot on her plate)</li> <li>• Consultancies benefit when all staff trained in sales/business development</li> <li>• Underutilized skills in community development for small towns</li> <li>• Underdeveloped skills in Welcoming Community work.</li> </ul>	<ul style="list-style-type: none"> <li>• COVID-19</li> <li>• Dependence on clients with shrinking budgets post-COVID</li> <li>• Some limiting of opportunities due to current COVID impacts</li> <li>• Limited client resources due to recession</li> <li>• Secure long-term funding</li> <li>• Competing with self? Reliance on same funders for multiple programs.</li> <li>• Current state of the economy</li> <li>• Financial capacity of clients</li> <li>• Limited capacity to keep contracted consultants engaged long term</li> <li>• Limited funding sources</li> </ul>	<ul style="list-style-type: none"> <li>• Regional reach of organization</li> <li>• Perception of being a "Duluth" organization.</li> <li>• Engage Wisconsin and rebuild presence</li> <li>• Board membership inconsistent with geographic reach</li> <li>• Lack of awareness in entire region</li> <li>• Regional dependence (growth trends lagging in NE MN)</li> <li>• Limited staff to travel around the region</li> </ul>	<ul style="list-style-type: none"> <li>• Perceived as background work, not a leader</li> <li>• Have others tell our story</li> <li>• Perception of only providing business development services</li> <li>• Unclear definition of what "elevate" means</li> <li>• Market Rate. Fee for services. Northspan brings great value</li> <li>• Disjointed regional economic strategy.</li> </ul>



Q1 Now in this final stage, we want to create clearly focused yet innovative and empowering strategies that set the course for Northspan. We want to generate excitement about collaboration within Northspan and new commitment to practical possibilities. Therefore, we ask you to look back on this journey and consider Actions which will deal with the Underlying Contradictions. Actions that will put the Engage & Elevate vision in place and address key opportunities from our SWOT. The question we are answering is “What innovative substantial actions will address our underlying contradictions and move us toward our vision” Now, take time to Brainstorm a list on your own. Shoot for at least 8-10 actions. Write down at least one action per obstacle column from the Underlying Contradictions Then select your 5 best ideas and submit them here (Must be 3-7 words) Include both venturesome and conservative actions in your submissions

Answered: 13 Skipped: 0

ANSWER CHOICES	RESPONSES	
1	100.00%	13
2	100.00%	13
3	100.00%	13
4	92.31%	12
5	76.92%	10

#	1	DATE
1	COVID. Don't chase. Many experts in that field	10/28/2020 3:03 PM
2	Build focus around communities we don't serve.	10/27/2020 10:08 AM
3	Find new "anchor" partner for sustainability.	10/27/2020 9:00 AM
4	Become a leader in post-pandemic planning	10/27/2020 7:25 AM
5	Flexibility Being a agent for Change	10/26/2020 2:32 PM
6	Work with partners and create cultural training	10/26/2020 1:08 PM
7	Focus on work that provides sustaining levels of revenue	10/23/2020 11:27 AM
8	development of marketing strategy	10/23/2020 11:01 AM
9	Determine specialized unique services	10/22/2020 9:09 AM
10	Be transparent with clients on "hours allocated" to a project	10/20/2020 2:40 PM
11	Offer limited, specialized services focused on expertise	10/19/2020 3:38 PM
12	Have each staff member develop one way to market their key job responsibility	10/19/2020 10:12 AM
13	Establish role of potential new position(s)	10/16/2020 4:31 PM
#	2	DATE
1	Hire Talent - balance in-house development	10/28/2020 3:03 PM
2	Build retention of existing communities.	10/27/2020 10:08 AM
3	Only focus in Minnesota.	10/27/2020 9:00 AM
4	Lead a high visibility project on the Iron Range	10/27/2020 7:25 AM
5	Tapping the Resources of partnering organizations (Labor Saver??)	10/26/2020 2:32 PM
6	Continue connecting welcoming work to workforce needs	10/26/2020 1:08 PM
7	Seek work that aligns with staff capacity & grows capabilities	10/23/2020 11:27 AM
8	staff cross-training or hiring for skill/capacity gaps	10/23/2020 11:01 AM
9	Additional/Continued deep cross training	10/22/2020 9:09 AM
10	PD Opportunities that Overlap with Potential Clients	10/20/2020 2:40 PM
11	Contract with regional consultants (profit-sharing model)	10/19/2020 3:38 PM
12	Determine community and business needs due to COVID - host event, partnering with others to address	10/19/2020 10:12 AM
13	Increase reach outside NE MN	10/16/2020 4:31 PM

#	3	DATE
1	Chase long-term funding - Foundations? Banks?	10/28/2020 3:03 PM
2	Create a plan for regional reach.	10/27/2020 10:08 AM
3	Limit types of services.	10/27/2020 9:00 AM
4	Create an Iron Range contact position similar to Northforce	10/27/2020 7:25 AM
5	Marketing Be Recognized as having the capacity of Producing Community needs assessments	10/26/2020 2:32 PM
6	Grow organization and community development services	10/26/2020 1:08 PM
7	Grow skills to meet client needs and create opportunities	10/23/2020 11:27 AM
8	broaden base of program funding sources	10/23/2020 11:01 AM
9	Broaden contract area-especially in virtual world.	10/22/2020 9:09 AM
10	Create an Endowment (is that even acceptable/possible?)	10/20/2020 2:40 PM
11	Charge consultants to sub-contract	10/19/2020 3:38 PM
12	Send short "proposal" to provide ED services to many area cities that may not know about Northspan	10/19/2020 10:12 AM
13	Generate original content that conveys expertise	10/16/2020 4:31 PM
#	4	DATE
1	Chase other RLF's in regions as service provider. Wisconsin	10/28/2020 3:03 PM
2	Extremely profitable services that are underdeveloped?	10/27/2020 10:08 AM
3	Become EDA for region's small towns.	10/27/2020 9:00 AM
4	Lead in how inclusion/equity work aligns with economic development work	10/27/2020 7:25 AM
5	Educate Staff and Clients Ongoing	10/26/2020 2:32 PM
6	Create marketing plan in 2021 action plan	10/26/2020 1:08 PM
7	Build awareness outside of NE MN thru new outreach effort	10/23/2020 11:27 AM
8	Begin to build relationships/partners outside our region	10/22/2020 9:09 AM
9	Relationship Building "Meet our Staff" Section	10/20/2020 2:40 PM
10	Create branding campaign/outreach highlighting "Span/spanning"	10/19/2020 3:38 PM
11	Have introduction to Northspan Zoom or in person workshop for area communities	10/19/2020 10:12 AM
12	Implement VP transition plan	10/16/2020 4:31 PM

#	5	DATE
1	Planning for future funding sources long term.	10/27/2020 10:08 AM
2	Prioritize Racial Diversity In Next Hire	10/27/2020 9:00 AM
3	Market aggressively core strengths to a wider audience	10/27/2020 7:25 AM
4	Technology Need to Adopt Ever Changing	10/26/2020 2:32 PM
5	Close down or separate misaligned services/programs	10/26/2020 1:08 PM
6	Develop comprehensive or formal marketing plan	10/23/2020 11:27 AM
7	Present at more for Northspan, present as leaders of industry	10/22/2020 9:09 AM
8	Increase Reach on Social Media (only 260+ Followers)	10/20/2020 2:40 PM
9	Video series of testimonials	10/19/2020 3:38 PM
10	Develop longer-term plans for programs	10/16/2020 4:31 PM

# N O R T H S P A N

## Strategic Directions Consensus Workshop 10.29.20

Building awareness through a comprehensive marketing plan	Diversifying partnerships for revenue stability	Fostering a regional culture of inclusivity	Aligning and developing skills to maximize growth	Establishing our industry leader niche
<ul style="list-style-type: none"> <li>• Develop marketing strategy building awareness of Northspan in markets we have yet to serve</li> <li>• Develop comprehensive or formal marketing plan</li> <li>• Create branding campaign/outreach highlighting "Span/spanning"</li> <li>• Create a plan for regional reach (staffing, revenue)</li> </ul>	<ul style="list-style-type: none"> <li>• Find new "anchor" partners for program sustainability</li> <li>• Identify future funding sources long term</li> <li>• Build retention of existing community relationships</li> <li>• Begin to build relationships/partners outside of our region</li> <li>• Send short "proposal" to provide ED services to many area cities that may not know about Northspan</li> <li>• Create an endowment (is that possible/acceptable)</li> </ul>	<ul style="list-style-type: none"> <li>• Lead in how inclusion/equity work aligns with economic development work</li> <li>• Continue connecting welcoming work to workforce needs</li> </ul>	<ul style="list-style-type: none"> <li>• Implement VP transition plan</li> <li>• Staff cross-training or hiring for skill/capacity gaps</li> <li>• Seek work that aligns with staff capacity &amp; grows capabilities</li> <li>• Tapping the resources of partnering organizations (labor savor?)</li> </ul>	<ul style="list-style-type: none"> <li>• Determine specialized, unique services</li> <li>• Generate original content that conveys expertise</li> <li>• Offer limited, specialized services focused on expertise</li> <li>• Become a leader in post-pandemic planning</li> <li>• Present more for Northspan, present as leaders of industry</li> </ul>

## 1. BUILDING AWARENESS THROUGH A COMPREHENSIVE MARKETING PLAN

### **Current Reality:**

1. No real marketing plan, but we do market
2. Lots of ideas, currently exploring news ways to do the newsletter(s)
3. Historically mostly boots on the ground, not spending money; efforts targeted to past clients
4. Building a social and newsletter presence, client and email lists, and website case studies
5. Staff assigned and process scattered
6. We have memberships we could use more

### **Success Indicators: What will be different in 5 years if we really mobilize behind this strategic direction? List 3 to 5.**

1. Functioning formal process and marketing plan, with assigned staff to each part
2. We are sent/asked to reply to RFPs for things we are aligned to do
3. We are referred opportunities from past clients or sources that know us
4. More new clients and retention rate of past clients increases
5. Original content is integrated into the marketing plan

### **5-Year Accomplishments: What do we need to accomplish in the next 3 years at the level of program, project, or event to begin moving from the current reality to where we want to be in 5 years? List 3 to 5.**

1. Establish baseline metrics to measure success, what should these be?
  - a. All websites analytics and social media
2. Establish and assign out process for each element within live process manual
3. Active Co-Schedule requeue that is updated 4x/year
4. Budget for social spend in Twin Ports
5. Send client feedback form once a year
6. Establish process for sending thank yous when we close out projects and once/year after client feedback form sent
7. Establish contract for writing assistance success

## 2. DIVERSIFYING PARTNERSHIPS FOR REVENUE STABILITY

### **Current Reality:**

1. Getting funding for programs from same sources
2. Strong community funding partner relationships
3. We are nimble; opportunities to grow Northland Foundation & SBDC relationship
4. Have presented options for continued work based on project completion
5. Adding 5 new board members
6. Options for partnering on proposals with MBFC, IDI, APEX, HueLife, etc.

### **Success Indicators: What will be different in 5 years if we really mobilize behind this strategic direction? List 3 to 5.**

1. Higher level of confidence in budget projections
2. Steadier revenue throughout the year
3. No guilt over taking time off, professional development, etc.
4. Less time spent finding dollars

### **5-Year Accomplishments: What do we need to accomplish in the next 3 years at the level of program, project or event to begin moving from the current reality to where we want to be in 5 years? List 3 to 5.**

1. Review regional opportunities for leadership/collaboration annually
2. Regularly submit proactive proposals to clients with several options where we could help
3. Build partnerships for follow-up work and leverage them (e.g., Extension)
4. Work with partners to identify regional opportunities and inefficiencies
5. Continue to strategically use open, defined process to recruit board members
6. Define and re-affirm missions/guiding principles for advisory committees to guide work and fundraising
7. Explore adjusting consulting rates to allow for a community programming discounted rate (e.g., for Northland Connection, NORTHFORCE, MnOppCo, possibly Welcoming Work and Succession)

### 3. FOSTERING A REGIONAL CULTURE OF INCLUSIVITY

#### **Current Reality:**

1. Perception of region: not welcoming
2. We've done lots of prep during 2020
3. We know we don't need to lead, but there's a place for us in the partnership
4. We've begun internally developing skills
5. Have a foundational partner with this focus and other people are supportive
6. Other regions are already doing this so we're behind

#### **Success Indicators: What will be different in 5 years if we really mobilize behind this strategic direction? List 3 to 5.**

1. People do not feel like they have to leave to feel welcome - staying for/after college
2. Growth of diversity/representation within business community
3. Acknowledgment of existing other cultures
4. Greater diversity in leadership positions (elected officials, leadership roles)
5. Regional welcoming strategy implemented; people outside of ED are aware

#### **5-Year Accomplishments: What do we need to accomplish in the next 3 years at the level of program, project or event to begin moving from the current reality to where we want to be in 5 years? List 3 to 5.**

1. Develop & continue to cultivate welcoming culture internally
2. Pursue Northspan work with diverse communities to build our connections
3. With foundation, create welcoming partnership/advisory committee to guide regional effort and measure success
4. Have an annual DEI summit
5. Integrate/collaborate with other regional efforts



#### 4. ALIGNING AND DEVELOPING SKILLS TO MAXIMIZE GROWTH

##### **Current Reality:**

1. We have PDPs and a transition plan
2. We have an emergency succession plan
3. Process manual in place (with continued development) for ease of cross-training
4. We are/will be conscious of needs in hiring process
5. We have a quarterly planning process to help identify needs
6. RFP process seeks to challenge and use our talents

##### **Success Indicators: What will be different in 5 years if we really mobilize behind this strategic direction? List 3 to 5.**

1. Northspan proactively maintains and/or grows capacity through transition process
2. Higher level of confidence in budget projections
3. If/when transitions happen, revenue stabilizes quickly
4. Continued quarterly planning and implementation
5. Continued annual review process (including mid-year check-in)
6. Continue to cultivate a culture of psychological safety

##### **5-Year Accomplishments: What do we need to accomplish in the next 3 years at the level of program, project or event to begin moving from the current reality to where we want to be in 5 years? List 3 to 5.**

1. Follow the established transition plan
2. Current VP remains available throughout transition period (e.g., contractual basis)
3. Understand where individuals are headed within the framework
4. Identify opportunities for internal cross-training
5. Better understand consultants in region who could provide partnerships
6. Continue to update process manual regularly and identify things that have changed

## 5. ESTABLISHING OUR INDUSTRY LEADER NICHE

### **Current Reality:**

1. Was part of 2020 action plan - work has started
2. Defined role as a consultant and what an industry leader is (in our eyes)
3. Established process for feedback allows us to measure performance
4. RFP intake form has made us more intentional about proposals
5. Adapt quickly and respond to crises - we are the EMTs of economic & community development
6. How we work has gained regional recognition: We are timely, affordable, a resource, and developing new processes that work and editing them as necessary.
7. Know our limits and refer things to partners

### **Success Indicators: What will be different in 5 years if we really mobilize behind this strategic direction? List 3 to 5.**

1. People know what they're coming to us for (reputation, not specific tasks)
2. People come to us for things that we haven't done before because we're so adaptable and reliable
3. We are known as the resource who knows the right place to go
4. We meet the industry leadership criteria established in our planning work
5. People are excited to hear us talk and seek us out for expertise (our webinars don't feel like ads)

### **5-Year Accomplishments: What do we need to accomplish in the next 3 years at the level of program, project or event to begin moving from the current reality to where we want to be in 5 years? List 3 to 5.**

1. Marketing effort to have someone else tell Northspan's story - why do we meet the IL criteria? How do we describe Northspan's personality? (Not just what we do, but how we do it; show how we do things as a community effort)
2. Seek out new projects that show range and responsiveness, and be the first to start a conversation around needs
3. Continuing to lead and grow NTLF, and define "grow"
4. Identify unique original content opportunities to publish (2x/year)
5. Determine how to define and "sell" our processes, e.g. for strategic planning
6. Determining when/where and how many speaking at events versus getting asked to speak at events

**CORE VALUES**

**Inclusive:** We facilitate intentional engagement of stakeholders and seek common solutions to community, business, and organizational challenges.

**Trustworthy:** We earn the loyalty of our clients by operating ethically, reliably, confidentially, and with integrity.

**Stewards:** We carefully manage the resources entrusted to us and focus on the long-term well-being of our clients and programmatic service areas.

**Adaptable:** We offer a broad range of expertise which enables us to seize new opportunities and tailor our offerings to meet our clients' needs.

**Diligent:** We provide satisfaction to our clients by delivering excellent customer service and clear results.

**VISION** Engage & Elevate

**MISSION** To be expert navigators, transforming ideas into accomplishments.

**CY 2021 GOALS**

- 1 We have integrated client methods into our marketing plan implementation.
- 2 We have our launched holistic value acceleration service method.
- 3 We have completed year two of the Vice President succession plan.
- 4 We have established an active Northeast Minnesota regional Welcoming Community strategy.

**CY21 ACTION PLAN****1. We have integrated client methods into our marketing plan implementation.**

<i>Action</i>	<i>Start</i>	<i>Due</i>	<i>Responsible</i>	<i>Measures of Success</i>
1 Client feedback quarterly process in action and internal reports are part of quarterly meetings	Q1	Q4	Amanda	1 More market awareness of NS capabilities and services 2 Resulting in contracts that come to us versus us seeking 3 We have products that illustrate what we do, we use them in content and in RFPs 4 Enhances board and staff recruitment
2 Determine and enhance distribution modes: CoSchedule, social media, case studies, post card flyers, thank you cards	Q1	Q2	Karl lead	
a. Update CoSchedule content	Q1	Q2	Karl lead	
b. SEO and possibly some paid "regional" spend	Q1	Q2	Elissa lead	
3 Identify opportunities to speak and/or present at conferences etc	Q1	Q4	Team	
4 Identify methods, write them, and design them	Q2	Q3	Team	
5 Gain earned media through Research Project writeups, case study PR, etc.	Q2	Q4	Karl lead	
6 Identify and market our services to communities in our region, NE MN & NW WI	Q3	Q4	Team	

**2. We have launched our holistic value acceleration service method.**

<i>Action</i>	<i>Start</i>	<i>Due</i>	<i>Responsible</i>	<i>Measures of Success</i>
1 Identify roles and clarify method within the Northspan team	Q1	Q1	Bob lead	1 We identified and are working with a team of regional advisors 2 Someone else in the region is certified in valuation 3 Proven assessment tool in use 4 Retention of businesses & jobs (wealth)
2 Finalize assessment tool & determine launch distribution routes in coordination with marketing plan	Q1	Q2	Bob lead	
3 Explore options to offer lower cost to businesses through USDA/grant funding by monitoring timeline and applications	Q2	Q3	Bob lead	
4 Build exit planning / value acceleration cohort of consultants	Q3	Q4	Bob lead	

**3. We have completed year two of the Vice President succession plan.**

<i>Action</i>	<i>Start</i>	<i>Due</i>	<i>Responsible</i>	<i>Measures of Success</i>
1 Operations Specialist onboarded and working independently with team input	Q1	Q1	Amanda	1 Maintain level of business dev clients and abilities 2 Obtain contracts of equal amounts in different areas to fill any gaps 3 Maintain reputation and confidence in NS through transition 4 Maintain team dynamics 5 Team members' PDPs for advancement reflect opportunities or gaps identified by the transition plan
2 Identify which personal skillsets gaps exist with a current VP exit	Q1	Q1	Team	
3 Determine which practical skillsets gaps exist to be trained up or filled	Q2	Q2	Team	
4 Assess current team skills and prepare advancement professional development plans where needed	Q2	Q3	Elissa lead	
5 Connect and build relationships with regional consultants and identify where we can partner	Q1	Q4	Team	

**4. We have established an active Northeast Minnesota regional Welcoming Community strategy.**

<i>Action</i>	<i>Start</i>	<i>Due</i>	<i>Responsible</i>	<i>Measures of Success</i>
1 Staff the Advisory Committee	Q1	Q2	Team	1 Regional plan in action and funded 2 Awareness of the regional effort and people know how to get involved 3 Increase in regional wellbeing
2 Welcoming Work Advisory Committee is operating with goals	Q2	Q2	Elissa lead	
3 Offer IDI to community groups and students	Q2	Q4	Elissa	
4 Staff team continues to invest in and embrace cultural fluency	Q1	Q4	Elissa lead	
5 Continue to seek opportunities for client work with diverse groups	Q1	Q4	Team	