

THRIVING LOCALLY

LIBA'S STRATEGIC PLAN (2017-2021)

INFORMING CONSUMERS

- Conduct Awareness Survey
- Target Neighborhoods & Institutions
- Launch "Buy Local Besties"
- Engage Youth & Young Adults



EDUCATING & ENGAGING MEMBERS

- Turn Members into Advocates
- Retain & Grow Membership
- Reflect Ethnic & Geographic Diversity of City
- Create a Member Summit



ADVOCATING FOR MEMBER BUSINESSES

- Be a Recognized Resource to Media
- Build Connections
- Pursue Equitable & Fair Share of Government Resources



BUILDING CAPACITY & INFRASTRUCTURE

- Increase Annual Budget by 50%
- Create a 501(c)3
- Expand Office Space
- Create Standard Policies

**LOUISVILLE
INDEPENDENT
BUSINESS
ALLIANCE** 



THRIVING LOCALLY

LIBA's Strategic Plan (2017-2021)

Approved by a majority vote of the board of directors on 6/14/17.

Our Vision

Louisville is an authentic, unique, thriving community where everyone considers buying local first.

Our Mission

To preserve the unique community character of the Metro Louisville area by promoting locally-owned, independent businesses and to educate citizens on the value of purchasing locally.

LIBA's Strategic Focus

- LIBA will be the premier advocate for locally-owned, independent businesses and educating citizens on the value of purchasing locally
- LIBA will have a community and nationally recognized brand, and be known as a leader in the movement of independently owned and operated businesses.
- LIBA will be a respected resource for benchmarking, advocating and commenting on the local business environment.
- LIBA will be recognized as the largest local business membership organization in Metro Louisville reflecting the community.

LIBA's Focus Areas

- Informing Consumers about the Buy Local Message
- Educating & Engaging Members
- Advocating for our Members
- Building Capacity & Infrastructure

LIBA's Values

1. Impacting Our Community
2. Collaboration & Connection
3. Empowerment
4. "Weird Individualism" (Independence)
5. Growth & Success
6. Culture & Traditions
7. Loyalty
8. Integrity & Authenticity

Why Local?

The fundamental tenet of the organization is that purchasing goods and services from locally-owned businesses is better for the community as a whole. When consumers spend their money locally, far more money is kept in the local economy, less tax money is spent on infrastructure, the built environment of the city is more likely to be preserved as are traditional neighborhoods, and more and better jobs will be retained and created. Less tangible but equally important benefits are strengthening residents' sense of community and preserving the city's unique culture.

History & Background

The Louisville Independent Business Alliance (LIBA) is a non-profit 501(c) 6 organization with over 900 members (as of June 2017) in over 70 zip codes across the area. Its purpose is to help locally-owned businesses in the Louisville area survive and thrive by educating citizens about the economic benefits and value of shopping locally.

LIBA was founded in 2004 by John Timmons when he commissioned the first "Keep Louisville Weird" billboard and organized a small group of 14 entrepreneurs. LIBA was officially founded in 2005 when it became an AMIBA affiliate.

In the early days, LIBA was an all-volunteer organization until it hired its first paid staff in 2007. In 2008, LIBA hired its current executive director (ED) and now has three part-time staffers who report to the ED. The ED is the public face of the organization and manages the budget, the staff, the office, and interaction with the board. The ED reports to the board and is evaluated each year by a board committee with input from the full board. Part-time staff focuses on administrative duties, events, internal communications, neighborhood initiatives and social media.

LIBA is governed by an 11-member board. The organization's annual budget is \$300,000 (as of June 2017). LIBA leased its first official office space in 2013 and is located at 1974-A Douglass Blvd #101, Louisville, KY 40205.

Context for the Strategic Plan

The LIBA board has engaged in a number of retreats, strategic planning, and brainstorming sessions in the past several years. These sessions have been valuable in articulating our mission, setting priorities, identifying organizational strengths, and celebrating accomplishments.

For many years, we have focused considerable energy on expanding membership. This is a good thing as it brought us not only revenue, but hundreds of potential ambassadors. However, increasing membership is not the organization's real goal. It is a vehicle to reach our ultimate goal of changing consumer behavior and converting purchases from chains and online businesses to locally-owned, independent businesses. We believe this in turn will bring more revenue and success to our members, which is our true purpose.

We have done an excellent job building our capacity as an organization; we are stable, financially healthy, and have strong brand recognition. It is now time to leverage that capacity and turn our focus to achieving our long-term goal of ensuring a healthy, thriving, vibrant independent business community in Louisville.

Integrating LIBA's goals as an organization and the goals of its individual members can be a way to set priorities. Since an organization exists not simply to sustain itself but for some higher purpose or goal, this plan will serve as a means to measure each of LIBA's stated goals and any new goals we develop against the benefit to our members. We will ask how each activity and initiative we undertake helps to strengthen member businesses.

While the plan contains many new ideas and initiatives, it endorses continuing many of the current LIBA events and activities, like increasing public awareness, encouraging more B to B activity, and offering business owners workshops on how to improve their operations. We will also begin to shift our focus to more political advocacy in an effort to enlist city and state government in leveling the playing field and making more resources available to locally-owned businesses.

Strategic Planning Process

This plan has been created over the past four years. Spearheaded by LIBA Board member Carol Besse, Executive Director Jennifer Rubenstein and LIBA's consultant Jennifer Blair, it included discussions at four annual board retreats (February 2013-2016) as well as a series of additional inputs from the various stakeholders and Strategic Planning Committee. In August, Carol attended an IBA conference with Jen and gathered strategic plans from other IBAs. In early October 2016, we asked each 2016 board member for his or her vision of where LIBA should be in five years and their SWOT analysis. In late October, a survey and SWOT analysis was sent to all 900+ members for their input, thoughts, ideas and feedback. In November 2016, we invited past Board members to meet with the current Board and staff in order to focus on specific areas and create the overall goals of the plan. Those committees continued to flesh out their ideas and areas over the next two months. Finally, a draft of the plan was presented to LIBA's Board and staff at the annual retreat in February 2017 and everyone had a chance to give their final input and review. All of that data has gone into the development of this plan and has led to identifying the four goals and focus areas for the organization over the next five years.

2017 LIBA Board of Directors

Summer Auerbach (Vice President)
Rainbow Blossom Natural Food Markets

Carol Besse
Carmichael's Bookstores

Jordan Clemons
Kentucky Financial Group/Langley Capital Management

Lauren Hendricks (Secretary)
a+h advertising & marketing

Lance Minnis
Commonwealth Financial Advisors

Ashley Parker (President)
Parker & Klein Real Estate

Patrick T. Schmidt
Tilford Dobbins & Schmidt PLLC

Shaun Spencer
Trimen Solutions/Trimen Career Placement Solutions

Tori Thompson
Kertis Creative

Michael Trager-Kusman
Rye/Galaxie/MPerfect

Chris Vessels (Treasurer)
Total Office Products & Service

2016-2017 Strategic Planning Committee

Carol Besse
Carmichael's Bookstores

Jennifer Blair
Excavive Coaching & Consulting

Toph Bryant
Kentucky Science Center

Ashley Parker
Parker & Klein Real Estate

Jennifer Rubenstein
LIBA Executive Director

LIBA Staff

Charles Booker, Neighborhood Initiatives
Kelly Buening, Administrative
Leslie Spanyer, Membership Engagement
Jennifer Rubenstein, Executive Director

Other Contributors (Previous Board Members)

Don Burch
Founder of Quest Outdoors

Michael Croce
Stockyards Bank

Michael Jones
Highland Cleaners

Rebecca Mercer
Bluegrass Doulas (formerly ear X-tacy manager)

LIBA Goals 2017-2021

Consumer Goal

LIBA will contribute to the success and longevity of member businesses by increasing the number of people buying goods and services from locally-owned, independent businesses. LIBA will educate the public on what a local, independent business is and what buying locally actually means.

- 1. LIBA will conduct an annual consumer survey to measure awareness in the community.*
- 2. LIBA will target individual neighborhoods, civic groups and institutions to increase awareness.*
- 3. LIBA will create an army of advocates through the "Buy Local Besties" Program.*
- 4. LIBA will target youth & young adults (pre-teen's to mid-20's).*

Membership Engagement Goal

LIBA will educate all members on the buy local message so they will become advocates for the LIBA mission. Additionally, LIBA will provide members value through education, marketing, advocacy, networking, resources and volunteer opportunities.

- 1. LIBA will ensure 50% of its members are strong advocates of the Buy Local message, affecting both retail and business purchasing decisions.*
- 2. LIBA will achieve a 90% retention rate through outreach and membership mapping.*
- 3. The membership and leadership of LIBA will reflect the diversity of the city, both in geography and ethnicity.*
- 4. LIBA will create a Membership Educational Conference/Summit.*

Advocacy Goal

LIBA will create strong relationships with local government and media in order to inform local decision-making and give voice to the locally owned independent business community, and to promote policies that support community-rooted enterprise.

- 1. LIBA will be a recognized resource to community leaders and the media for independent businesses and Louisville's unique culture.*
- 2. LIBA will build connections and advocate for legislative changes that benefit locally-owned businesses.*
- 3. LIBA will advocate for an equitable and fair allocation of governmental resources for its member businesses.*

Capacity & Infrastructure Goal

LIBA will have an engaged, high performing staff and board and will focus on developing a financial model that promotes organizational sustainability and mission impact.

- 1. LIBA will increase the annual budget by 50% by 2021.*
- 2. LIBA will create a 501(c)3 sister organization for the purpose of expanding our financial opportunities through charitable donations and grants.*
- 3. LIBA will obtain new office space to support its staff, as well as a larger conference room and ample storage space.*
- 4. LIBA will create standard policies that support organizational success.*

LIBA's makeup as of June 2017:

