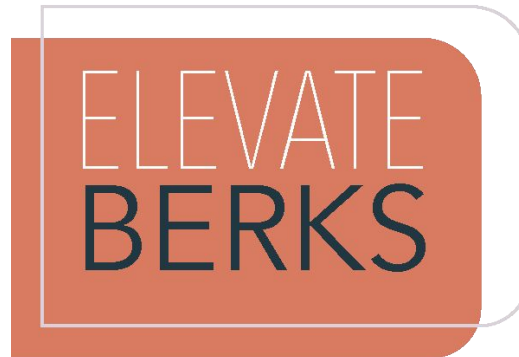


2023-2025
Strategic Plan

Prepared by:



Elevate Berks 2023-2025
Strategic Plan Prepared for:



Prepared by:



November 2022

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Introduction.

Elevate Berks has a mission to support and provide access to resources for entrepreneurs and startup businesses for a thriving and inclusive business community in Berks County, Pennsylvania. Elevate Berks vision is to be the convener of emerging entrepreneurs and small business owners and to provide pathways to success for a more equitable and vibrant economy. Elevate Berks is an initiative made possible through the collaboration of over a dozen business support organizations (BSOs) who are brought together by the common values of advocacy, collaboration, transparency, innovation, opportunity, and nurturing for Berks County's startup business community.

The idea for Elevate Berks started in 2021, when a group of a dozen business support organizations joined forces to think about how they could more strategically collaborate with each other to increase the success of local startups. This strategic plan is the culmination of that desire paired with findings from the *Startup*

Ecosystem in Berks County, an ecosystem mapping report prepared by Allium Development Group in July of 2022. While the ecosystem map identified programming gaps and opportunities, this strategic plan focuses on launching Elevate Berks as a new collaborative initiative, improving access and quality of local startup business programming, increasing access to capital for startups, advocating to reduce barriers to startups, and increasing capital options for local startups.

The 2023-2025 Strategic Plan outlines ways that Elevate Berks will meet its vision and mission over the next three years. The desired outcome is for Elevate Berks to serve as a hub of local resources that entrepreneurs can easily access; and, to serve as a platform for business support organizations to strategically collaborate to grow the Berks County entrepreneurial ecosystem. Elevate Berks will specifically serve Berks County and support entrepreneurs between idea stage and two years in business. The ultimate goal is to benefit and grow the local economy.

This strategic plan provides guidance on how to read and understand the terms used within it, a list of roles, acknowledgements of the individuals and organizations who made the creation of the plan possible, a detail of the strategic plan's

research methods, a goals and activities plan snapshot, and a timeline for plan milestones. This strategic plan is the culmination of a year of planning, meeting, collaborating, and dreaming for the future of Berks County's startup ecosystem

How to Read the Plan.

This strategic plan uses specific terms and techniques to identify who does what, when, and how. Elevate Berks 2023-2025 Strategic Plan utilizes the following terms:

VISION STATEMENT

A description of the ideal future state of the organization. It articulates what the organization is trying to accomplish.

MISSION STATEMENT

A description of why the organization exists and why it does what it does.

VALUES

Specific terms or words that are easy to absorb and memorize and reflect the guiding principles for the work.

GOALS

A desired outcome that is made possible by a set of activities with milestones.

ACTIVITIES

Specific outcomes that support a goal.

MILESTONES

Active steps necessary to accomplishing an activity.

ROLE

A committee or vendor that is primarily accomplishing or driving a specific milestone.

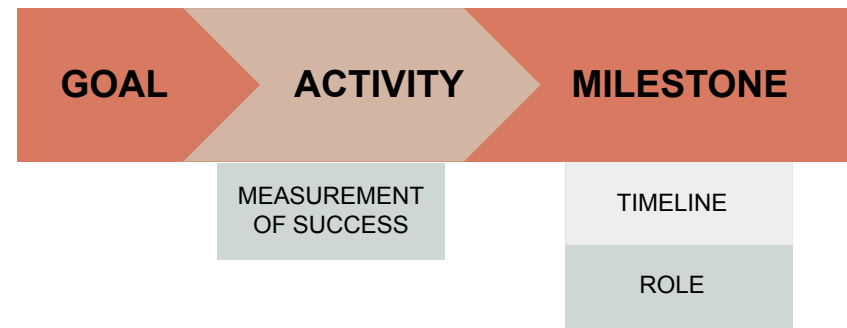
TIMELINE

Quarters and years when specific milestones should be accomplished.

MEASUREMENT OF SUCCESS

A predetermined result that indicates that an activity has been accomplished.

FLOW OF TERMS FROM GOAL TO MILESTONE



Strategic Plan Roles.

The following committees and vendor roles have been identified as part of this strategic plan. The committees do not specify organizations or individuals, but rather allow partner organizations to self-select where they would like to participate. Participation should be on the organizational level. Whenever an organization's staff member exits a committee or participation in the initiative, every effort should be made by Elevate Berks and by the partner organization to engage a new staff member and retain the partner organization's position within the initiative.

"Participation at the organization level is the key to longevity and success for the formalized startup ecosystem."

– Startup Ecosystem in Berks County

The Steering Committee should be made up of specific "key collaborators" who were identified in *Startup Ecosystem in Berks County* and include: The Greater Reading Chamber Alliance,

Berks Latino Chamber, Launchbox, the O'Pake Institute, SCORE – Berks and Schuylkill Counties, and Community First Fund.

"These organizations' participation and buy-in when formalizing the ecosystem will anchor efforts, create stability to the process, and have a strong ripple effect when bringing in new partners and aligning common goals."

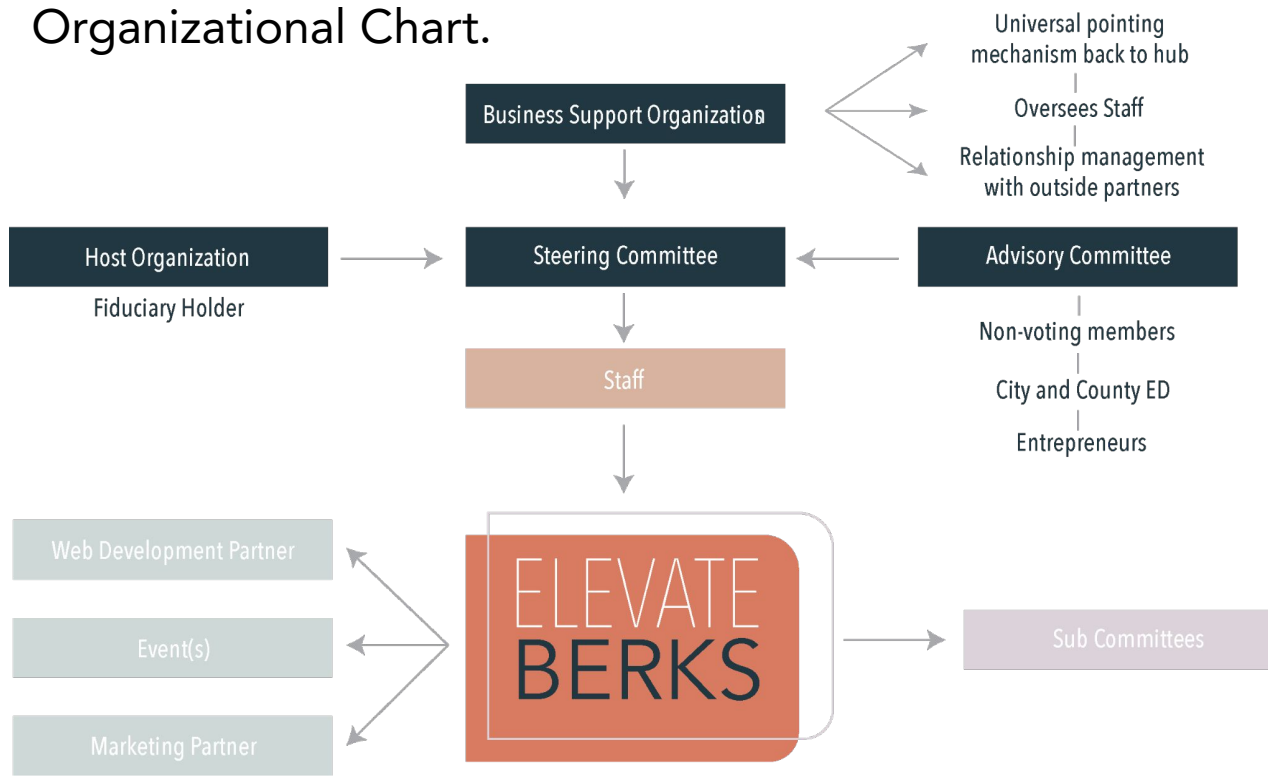
– Startup Ecosystem in Berks County

The Steering Committee will be governed by Robert's Rules, hire and fire vendors and staff, engage in relationship management with outside partners, be a universal pointing mechanism back to the initiative, and provide fiduciary oversight and fundraising. They will have an (non-voting) Advisory Committee made up of city and county economic development representatives as well as local entrepreneurs. Additional organizations and partners will be engaged in the initiative through participation on sub-committees and in events (see Organizational Chart, page 5).

The success of this initiative is premised on the creation of a *coordinator* staff position. While the specific tasks of the *coordinator* are not outlined in this plan, this person will serve the vital role of ensuring the continued success of the initiative by scheduling committee meetings, managing the strategic plan timeline and milestone achievements, acting as a point of

contact for the steering committee and partners, and being a central hub to all necessary activities. The coordinator position will ensure the continuation of the initiative beyond this initial startup mode and beyond any single individual's involvement. This should not be a shared position with any of the partner organizations staff and should be filled by an individual who has excellent attention to detail as well as interpersonal skills. For a comprehensive list of activities and milestones assigned to each committee and or vendor, see *Elevate Berks Strategic Plan Timeline by Role*.

Organizational Chart.



Roles.

The following roles have been identified in this plan. This key identifies each role and its associated color *in the strategic plan*. In the plan, committees and vendors responsible for accomplishing Milestones are marked with their color on the Timeline.

- Steering Committee
- Sub-Committees*
- Capital Committee
- Advocacy Committee
- Events Committee
- Measurement & Tracking Committee
- Programming Committee
- Vendors*
- Marketing Partner
- Web Development Partner

Acknowledgements.

This strategic plan was made possible by the collaboration and input from the following individuals and organizations:

Nancy Keeler, Principal, Allium Development Group LLC, organized and executed data collection, analysis, and report writing.

Rachel Luehm, researcher and graphic designer, independent contractor, provided graphic design services.

David Myers, Berks Alliance, and Aaron Gantz, Greater Reading Chamber Alliance, acted as primary liaisons to the partner organizations and provided real time feedback and guidance.

Organizations who participated in the strategic planning process include: Alvernia University–the O'Pake Institute, Albright Science Research Institute, Ben Franklin Technology Partners, Berks Alliance, Berks Latino Chamber of Commerce, Berks LaunchBox, Community First Fund, Entrepreneurs Connections, Greater Reading Chamber Alliance, Kutztown University Small Business Development Center, Lehigh Valley Angel Investors, SCORE –

Berks and Schuylkill Counties, Small Business Resource Association, and Tec Centro/Berks Latino Workforce Development Corporation.

Special thanks to the Greater Reading Chamber Alliance, Weidenhammer, and Berks LaunchBox for hosting meetings.

Special thanks to the Wyomissing Foundation for providing funding for this strategic plan.

Organizations who participated in this strategic plan's creation:



Methodology.

Allium Development Group LLC prepared this strategic plan in October of 2022. In October of 2021, a group of twelve Berks County business support organizations, led by the Berks Alliance and Greater Reading Chamber Alliance, engaged Allium to map the local startup ecosystem (report findings are available in *Startup Ecosystem in Berks County*) and to write a strategic plan for how local business support organizations may better engage, support, and optimize successful outcomes for Berks County startups between idea and two years of age. The specific anticipated outcomes from this strategic plan include: creating a new multi-organizational initiative that will be a hub of information about local resources as well as a platform for participating organizations to identify and fill gaps in business resources for local entrepreneurs.

Allium used recommendations derived from surveys, interviews, and best practices from the *Startup Ecosystem in Berks County* and identified by the partnering organizations to determine focus

areas for the strategic plan. The focus areas for the strategic planning process included: organizational structure, programming, and access to capital. Workshops on these three focus areas were conducted and led to specific recommendations for how the new entity could best support Berks County's startup ecosystem.

The focus area *organizational structure* discussed the ideal structure for a new entity as well as governance, staffing, and flow of activities within the new entity. This work group included: Michelle Conway, Alvernia University; Ellen Albright, Albright College; Kimberly Valuntas, Ben Franklin Technology Partners; Isamac Torres-Figeroa, KU SBDC and Berks Latino Chamber; Angel Figueroa, Berks Latino Chamber; Chuck Holder, Entrepreneurs Connection; Donald Schalk, Alvernia University; and, David Myers, Berks Alliance.

The focus area *programming* identified the fundamental features necessary for a hub of resources and for cross organizational collaboration on programming. This work group included: Michelle Conway, Alvernia University; Ellen Albright, Albright College; Kimberly Valuntas, Ben Franklin Technology Partners; Isamac Torres-Figeroa, KU SBDC and Berks Latino Chamber; Angel Figueroa, Berks Latino Chamber; Donald Schalk, Alvernia University; Aaron Gantz, Greater Reading Chamber Alliance; and, David Myers, Berks Alliance.



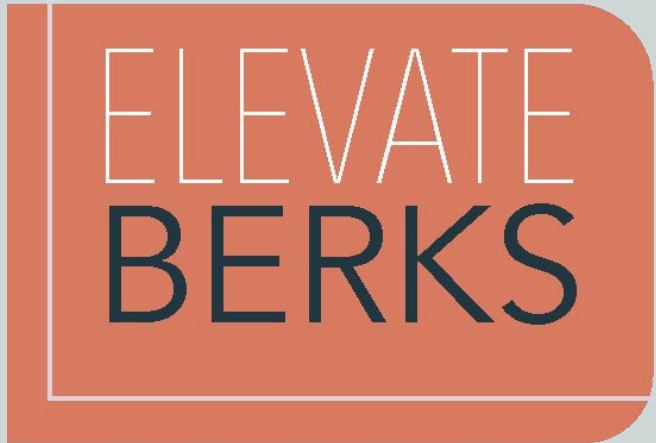
Onboarding.

SCORE Berks-Schuylkill and Community First Fund were not initially involved in the mapping and strategic planning process. The two organizations were identified as valuable partners and, in July 2022, they were onboarded to the project. Both organizations participated in the strategic plan's open invitation work sessions.

The focus area *access to capital* discussed barriers to capital and how a collaborative approach could address and reduce these barriers. This work group included: Lisa Weaver, Berks LaunchBox, Kimberly Valuntas, Ben Franklin Technology Partners; Isamac Torres-Figeroa, KU SBDC and Berks Latino Chamber; Michael Caron, Lehigh Valley Angel Investors; Aaron Gantz, Greater Reading Chamber Alliance; and, David Myers, Berks Alliance.

Recommendations from the work groups were used during two open invitation strategic plan writing work sessions, which resulted in the mission, vision, values, goals, activities, and milestones detailed in this plan.

A draft strategic plan was presented and distributed to all participating organizations in October of 2022 for review and feedback. Feedback and final adjustments were incorporated into the strategic plan under the guidance of the Berks Alliance and Greater Reading Chamber Alliance.



2023-2025
Strategic Plan

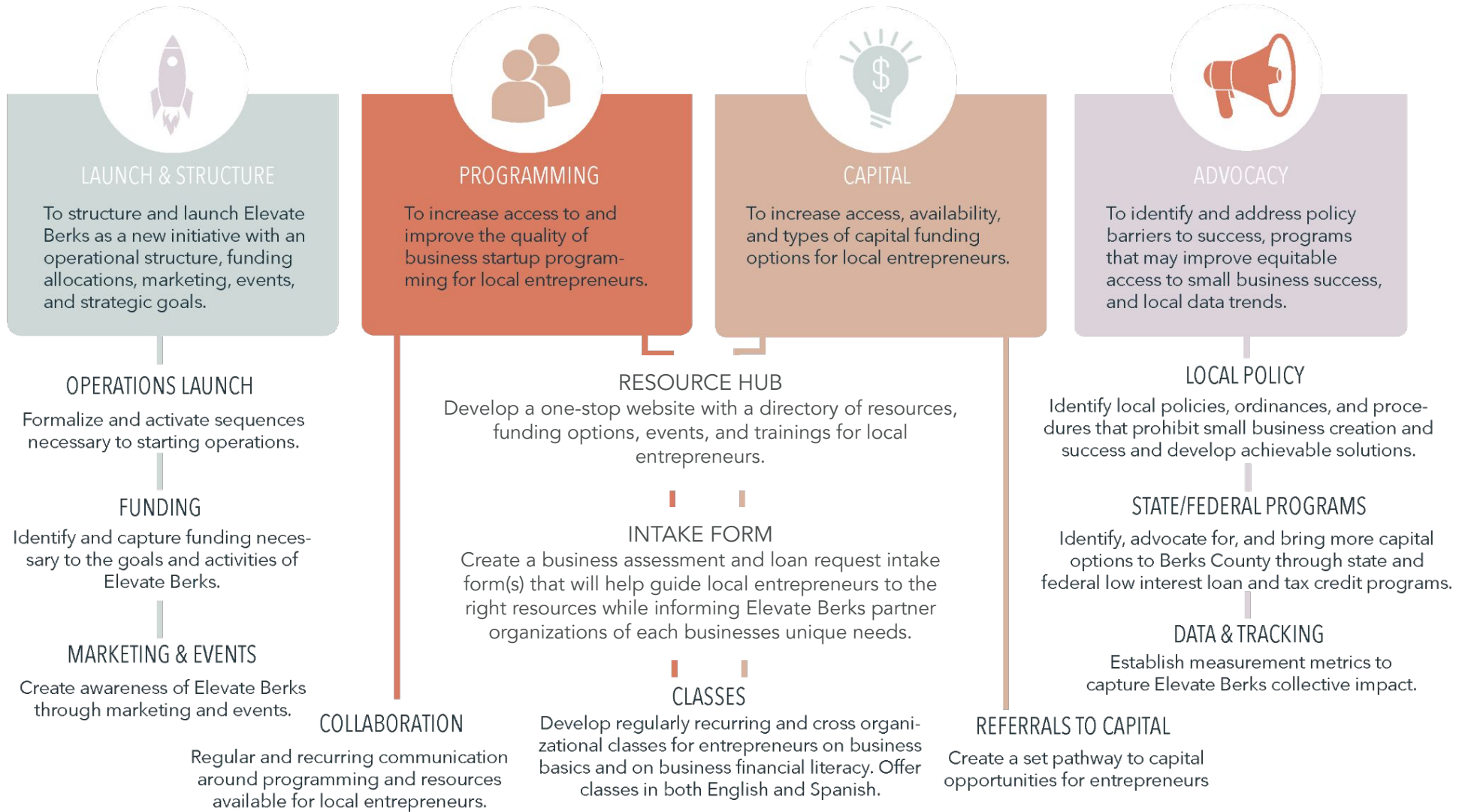


ELEVATE BERKS

MISSION Elevate Berks mission is to support and provide access to resources for entrepreneurs and startup businesses for a thriving and inclusive business community in Berks County.

VISION Elevate Berks will be the convener of emerging entrepreneurs and small business owners and will provide pathways to success for a more equitable and vibrant economy.

VALUES Advocacy, Collaboration, Transparency, Innovation, Opportunity, Nurturing





LAUNCH & STRUCTURE

Elevate Berks will be an initiative of a local host organization. The initiative will be governed by the Steering Committee and held at arm's length from its host organization both in brand and in operations. The host will act as the initiative's fiduciary holder and will have a standing seat on the Steering Committee. The host organization will have a memorandum of understanding with the Steering Committee around its specific roles and responsibilities. The Steering Committee will oversee hiring and firing of vendors and staff and, with the support of a staff coordinator, will oversee the overall implementation of this strategic plan.



PROGRAMMING

Elevate Berks will increase access to and quality of programming across partners. The creation of a hub of local resources will ensure ease of access for entrepreneurs looking to connect with local business support organizations around specific questions. The intake forms will allow BSOs to better respond to the needs of businesses and to quickly divert early idea stage businesses to classes and trainings that can provide general guidance on the startup process. Overall, the collaborative process will allow BSOs to better refer clients to each other, develop new and non-redundant programming, fill necessary programming gaps, and deepen organizational expertise.



CAPITAL

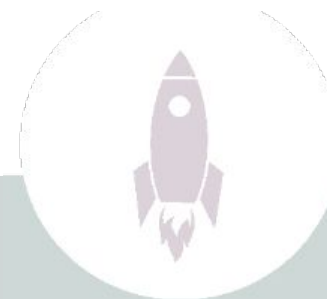
Elevate Berks will work to increase access to and availability of capital for startups. The initiative's hub of resources and cross organizational classes will help prepare and guide startups to capital options. A universal intake form will allow entrepreneurs to instantly request funding from participating financial institutions. The initiative will also develop a specific pathway for startups to access investment opportunities that might otherwise be out of reach.



ADVOCACY

Elevate Berks will work to decrease barriers and increase opportunities through specific advocacy efforts as well as collective impact data tracking. The initiative will work to decrease barriers to success for startups, specifically in the City of Reading, by partnering with the city and identifying specific policy barriers and their solutions. The initiative will advocate to bring in new state and federal funds and programs that benefit the startup ecosystem. And, the initiative will track collective impact to provide a reporting mechanism to funders and to support the Steering Committee's efforts to set and achieve goals.

GOAL: LAUNCH & STRUCTURE



To structure and launch Elevate Berks as a new initiative with an operational structure, funding allocations, marketing, events, and strategic goals.

ACTIVITIES

OPERATIONS LAUNCH
Formalize and activate sequences necessary to starting operations.

FUNDING
Identify and capture funding necessary to the goals and activities of Elevate Berks.

MARKETING & EVENTS
Create awareness of Elevate Berks through marketing and events.

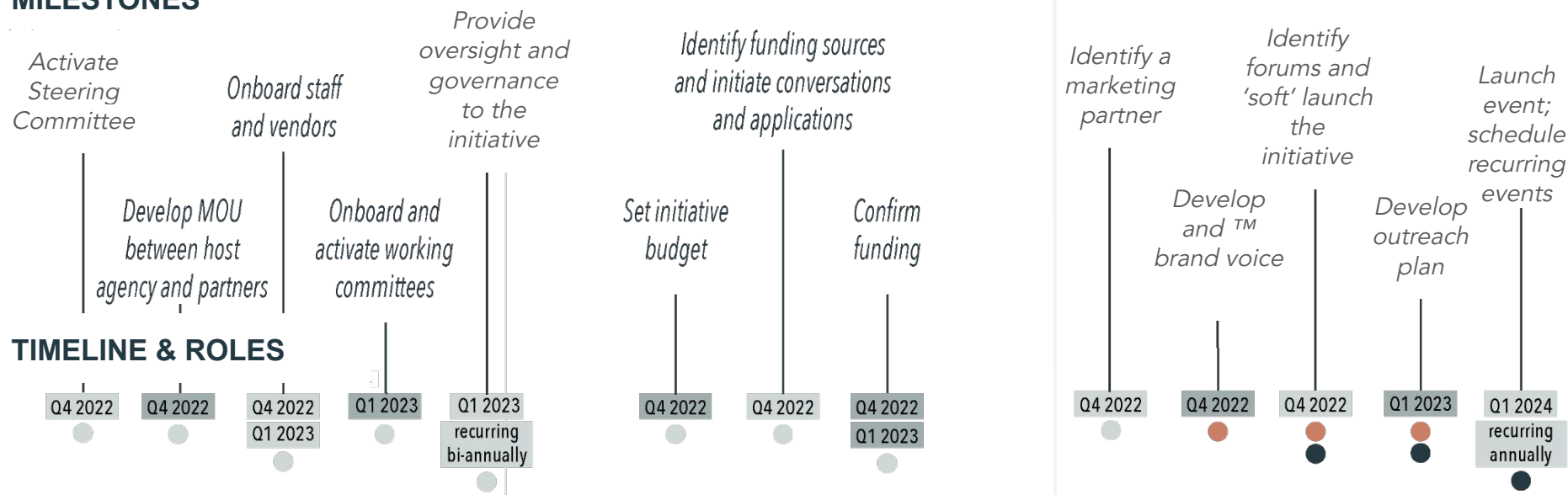
MEASUREMENTS OF SUCCESS

Creation of Committees and onboarded host, staff, and vendors.

100% funding for 3 years.

Launch of brand and first Elevate event.

MILESTONES



GOALS: CAPITAL



To increase access, availability, and types of capital funding options for local entrepreneurs.

ACTIVITIES

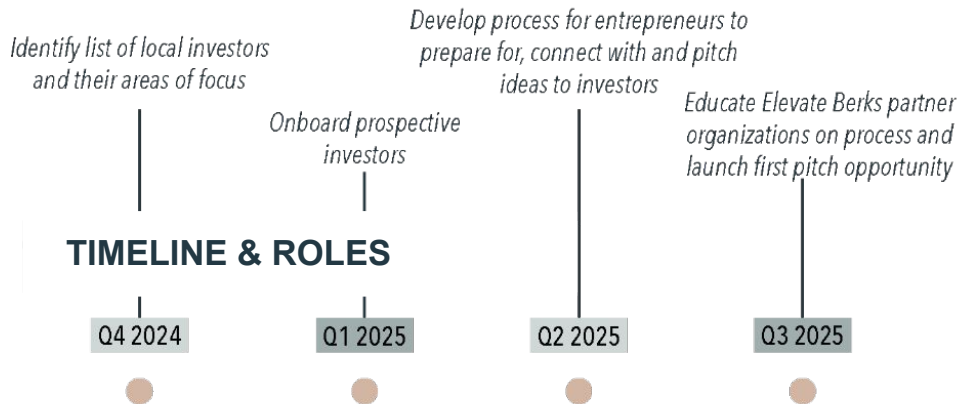
REFERRALS TO CAPITAL

Create a set pathway to capital opportunities for entrepreneurs.

MEASUREMENTS OF SUCCESS

Established process for business to seek investment dollars; funding for at least 10 businesses each year.

MILESTONES



PROGRAMMING



To increase access to and improve the quality of business startup programming for local entrepreneurs.

COLLABORATION

Regular and recurring communication around programming and resources available for local entrepreneurs.

Reduction in identified gaps in programming.

Create glossary of shared terminology for programming

Q1 2023

Annually provide in depth updates on each partners offering

Q3 2023

Recurring
Annually

COMBINED ACTIVITIES: PROGRAMMING & CAPITAL

RESOURCE HUB

Develop a one-stop website with a directory of resources, funding options, events, and trainings for local entrepreneurs.

INTAKE FORM

Create a business assessment and loan request intake form(s) that will help guide local entrepreneurs to the right resources while informing Elevate Berks partner organizations of each business's unique needs.

CLASSES

Develop regularly recurring and cross-organizational classes for entrepreneurs on business basics and on business financial literacy. Offer classes in both English and Spanish.

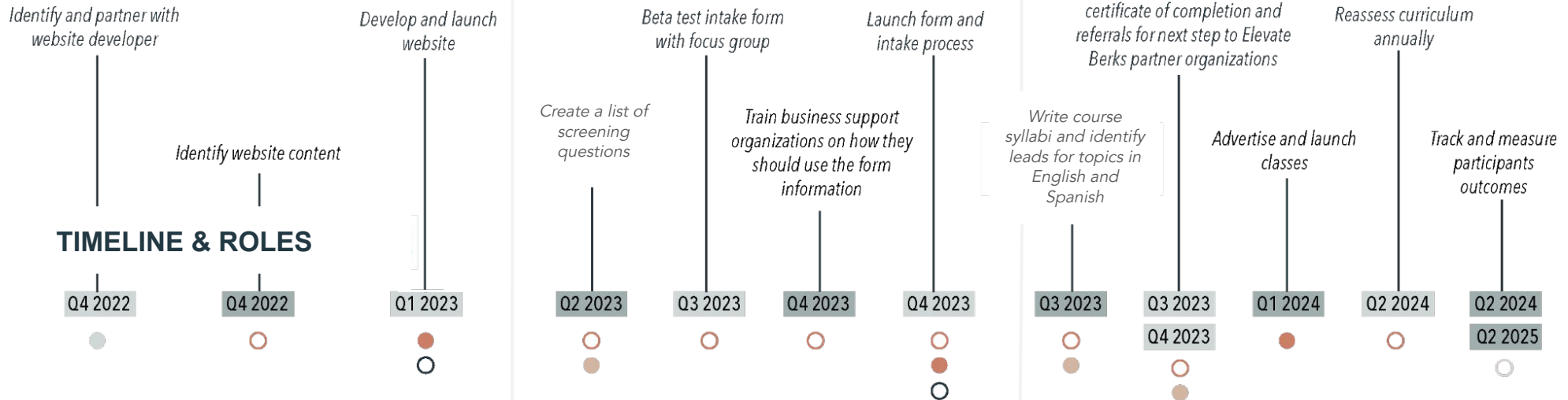
MEASUREMENTS OF SUCCESS

New website with collaborative hub of resources for local entrepreneurs.

A universal intake form that serves a minimum of 150 entrepreneurs annually.

Class registration at 80% of capacity annually.

MILESTONES



GOALS: ADVOCACY



To identify and address policy barriers to success, programs that may improve equitable access to small business success, and local data trends.

ACTIVITIES

LOCAL POLICY

Identify local policies, ordinances, and procedures that prohibit small business creation and success and develop achievable solutions.

STATE/FEDERAL PROGRAMS

Identify, advocate for, and bring more capital options to Berks County through state and federal low interest loan and tax credit programs.

DATA & TRACKING

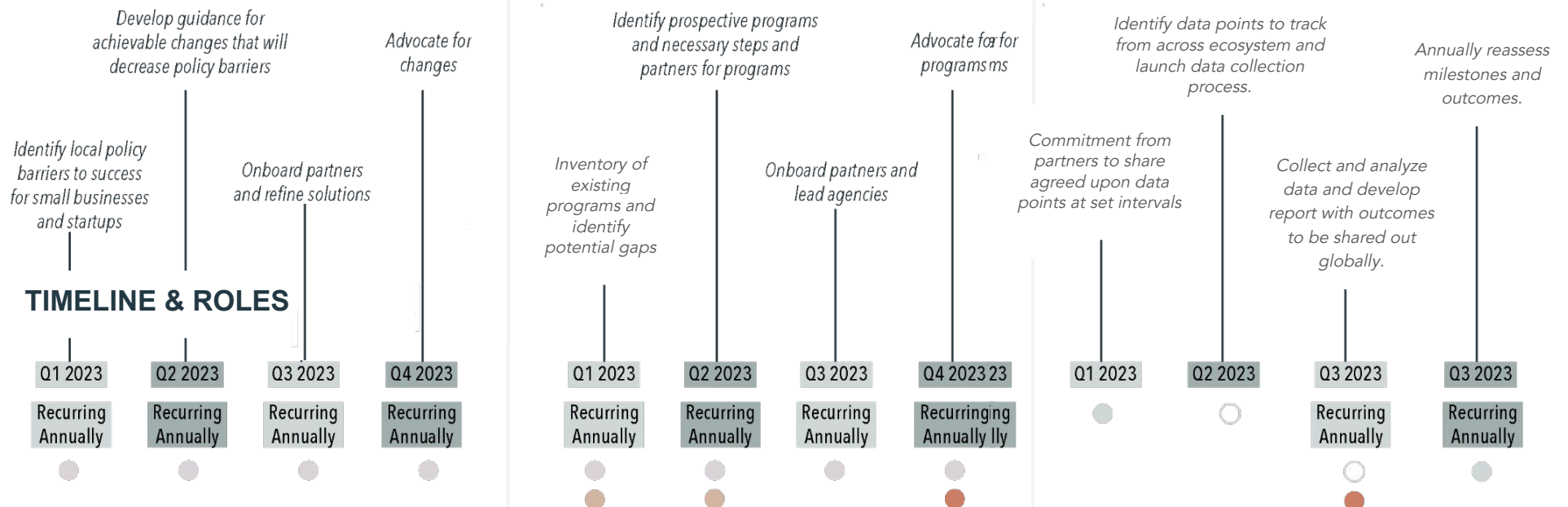
Establish measurement metrics to capture Elevate Berks collective impact.

MEASUREMENTS OF SUCCESS

Successful adoption of policy recommendations.

New capital programs successfully implemented in Berks Co. or localities.

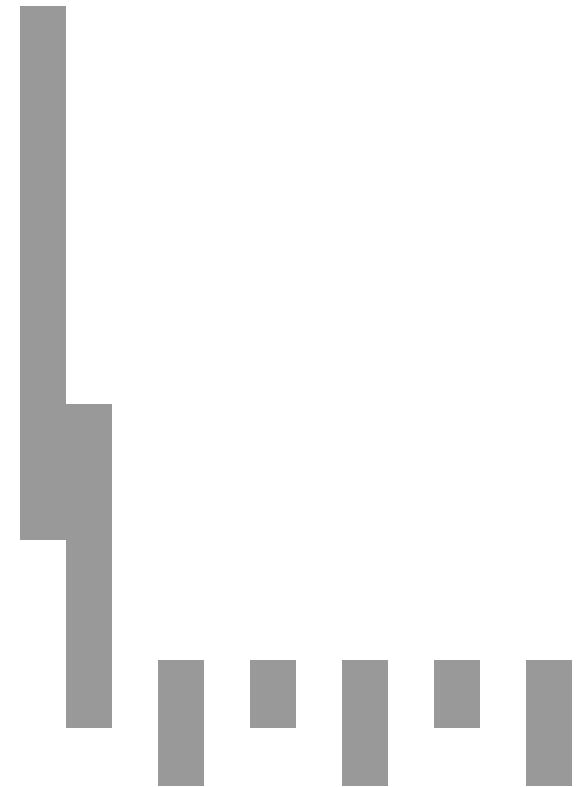
Annual report on compiled data.



STRATEGIC PLAN TIMELINE BY ROLE

Q4 2022 Q1 2023 Q2 2023 Q3 2023 Q4 2023 Q1 2024 Q2 2024 Q3 2024 Q4 2024 Q1 2025 Q2 2025 Q3 2025 Q4 2025

GOAL	ACTIVITY	MILESTONES
STEERING COMMITTEE		
Programming Capital	Resource Hub	Identify and partner with website developer
Initiative Launch & Structure	Funding	Set initiative budget
Initiative Launch & Structure	Funding	Identify funding sources and initiate conversations and applications
Initiative Launch & Structure	Marketing & Events	Identify a marketing partner
Initiative Launch & Structure	Operations Launch	Activate steering committee
Initiative Launch & Structure	Operations Launch	Develop MOU between host agency and partners
Initiative Launch & Structure	Funding	Confirm funding
Initiative Launch & Structure	Operations Launch	Onboard staff and vendors
Initiative Launch & Structure	Operations Launch	Onboard and activate working committees
Advocacy	Data & Tracking	Commitment from partners to share agreed upon data points at set intervals.
Initiative Launch & Structure	Operations Launch	Provide oversight and governance to initiative
Advocacy	Data & Tracking	Annually reassess milestones and outcomes



STRATEGIC PLAN TIMELINE BY ROLE

Q4 2022 Q1 2023 Q2 2023 Q3 2023 Q4 2023 Q1 2024 Q2 2024 Q3 2024 Q4 2024 Q1 2025 Q2 2025 Q3 2025 Q4 2025

GOAL

ACTIVITY

MILESTONES

EVENTS COMMITTEE

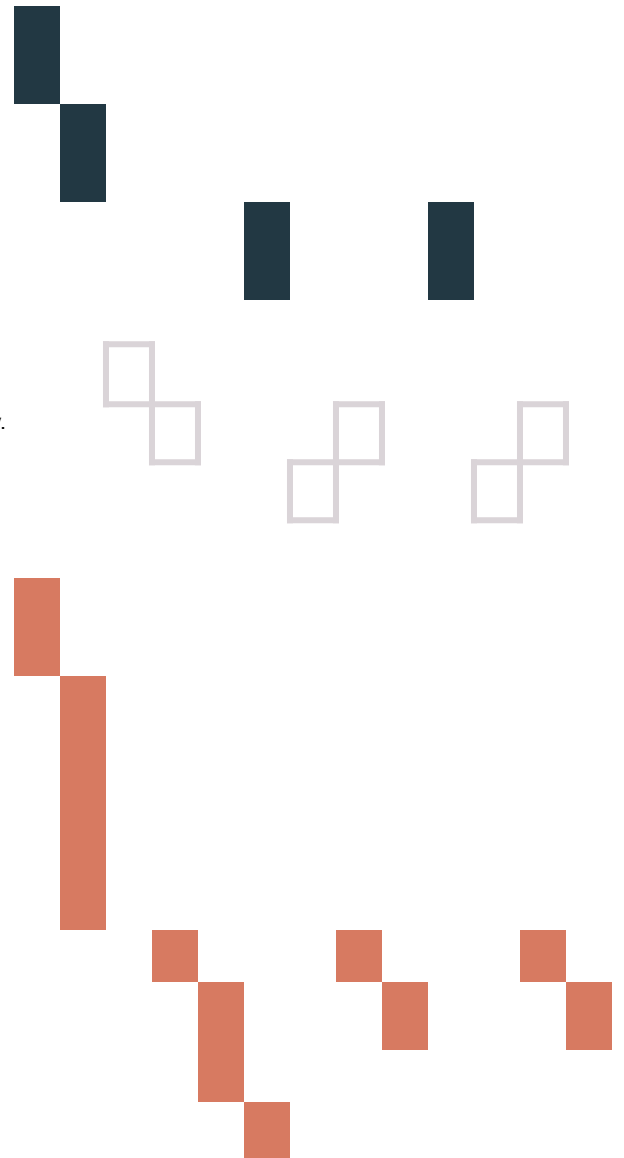
Initiative Launch & Structure	Marketing & Events	Identify forums and 'soft' launch the initiative
Initiative Launch & Structure	Marketing & Events	Develop outreach plan
Initiative Launch & Structure	Marketing & Events	Launch event; schedule recurring events

MEASUREMENT & TRACKING COMMITTEE

Advocacy	Data & Tracking	Identify data points to track from across ecosystem and launch data collection process.
Advocacy	Data & Tracking	Collect and analyze data and develop report with outcomes to be shared out globally.
Programming Capital	Classes	Track and measure participants outcomes

MARKETING PARTNER

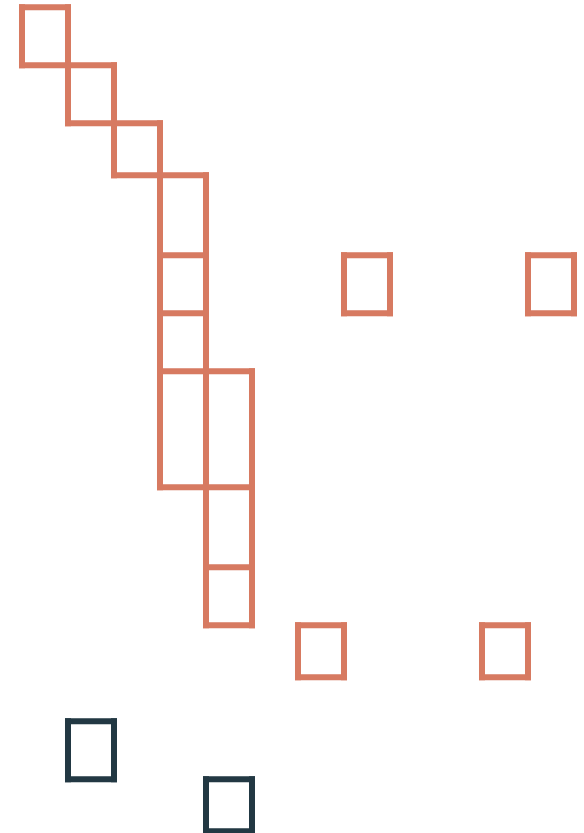
Initiative Launch & Structure	Marketing & Events	Develop and ™ brand voice
Initiative Launch & Structure	Marketing & Events	Identify forums and 'soft' launch the initiative
Initiative Launch & Structure	Marketing & Events	Develop outreach plan
Programming Capital	Resource Hub	Develop and launch website
Advocacy	Data & Tracking	Analyze data and develop report with outcomes to be shared out globally
Advocacy	State/Federal Programs	Advocate for programs
Programming Capital	Intake Form	Launch form and intake process
Programming Capital	Classes	Advertise and launch classes



STRATEGIC PLAN TIMELINE BY ROLE

Q4 2022 Q1 2023 Q2 2023 Q3 2023 Q4 2023 Q1 2024 Q2 2024 Q3 2024 Q4 2024 Q1 2025 Q2 2025 Q3 2025 Q4 2025

GOAL		ACTIVITY	MILESTONES
PROGRAMMING COMMITTEE			
Programming	Capital	Resource Hub	Identify website content
Programming		Collaboration	Create glossary of shared terminology for programming
Programming	Capital	Intake Form	Create a list of screening questions
Programming	Capital	Classes	Write course syllabi and identify leads for topics in English and Spanish
Programming		Collaboration	Annually provide in depth updates on each partners offering
Programming	Capital	Intake Form	Beta test intake form with focus group
Programming	Capital	Classes	Onboard teaching leads, develop curriculum, and create certificate of completion and referrals for next step to Elevate Berks partner organizations
Programming	Capital	Intake Form	Train business support organizations on how they should use the form information
Programming	Capital	Intake Form	Launch form and intake process
Programming	Capital	Classes	Reassess curriculum annually
WEBSITE DEVELOPMENT PARTNER			
Programming	Capital	Resource Hub	Develop and launch website
Programming	Capital	Intake Form	Launch form and intake process

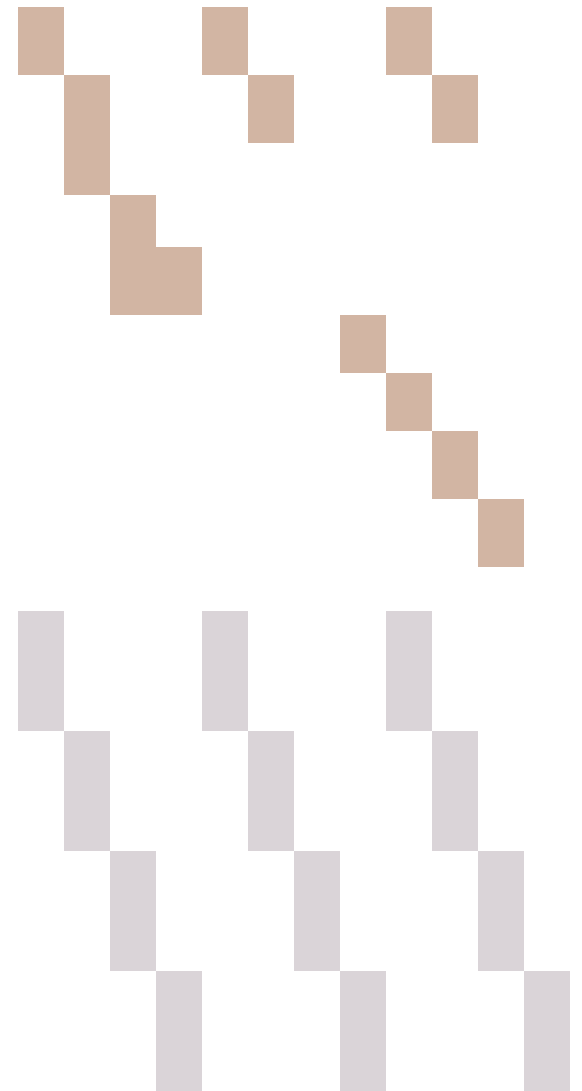


STRATEGIC PLAN TIMELINE BY ROLE

Q4 2022 Q1 2023 Q2 2023 Q3 2023 Q4 2023 Q1 2024 Q2 2024 Q3 2024 Q4 2024 Q1 2025 Q2 2025 Q3 2025 Q4 2025

GOAL	ACTIVITY	MILESTONES
CAPITAL COMMITTEE		
Advocacy	State/Federal Programs	Inventory existing programs and identify potential gaps
Advocacy	State/Federal Programs	Identify prospective programs and necessary steps and partners for programs
Programming	Capital	Intake Form
Programming	Capital	Classes
Programming	Capital	Classes
	Capital	Referrals to Capital
	Capital	Referrals to Capital
	Capital	Referrals to Capital
	Capital	Referrals to Capital

GOAL	ACTIVITY	MILESTONES
ADVOCACY COMMITTEE		
Advocacy	Local Policy	Identify local policy barriers to success for small businesses and startups.
Advocacy	State/Federal Programs	Inventory existing programs and identify potential gaps
Advocacy	Local Policy	Develop guidance for achievable changes that will decrease policy barriers.
Advocacy	State/Federal Programs	Identify prospective programs and necessary steps and partners for programs
Advocacy	Local Policy	Onboard partners and refine solutions.
Advocacy	State/Federal Programs	Onboard partners and lead agencies
Advocacy	Local Policy	Advocate for changes.
Advocacy	State/Federal Programs	Advocate for programs



ELEVATE BERKS

Prepared by:



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Allium Development Group partners with organizations, businesses, developers, and local governments to create better communities for people and for businesses. Allium's vision is to increase quality of life through place-based initiatives and place-making.