

The background of the lower half of the page is a photograph of a person's silhouette standing on a hill, looking out over a landscape under a deep blue twilight sky. A small crescent moon is visible in the upper left portion of the sky. The bottom of the image is framed by a white, wavy, curved border.

STRATEGIC PLAN

OCTOBER 2023



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EXECUTIVE SUMMARY

JT Mestdagh established the JT Mestdagh Foundation in 2020 to support children, families and individuals facing significant health and learning challenges. JT's desire to support children and their families with colorectal and learning challenges is a result of his own struggles with VATER syndrome, dyslexia, and short-term memory loss. JT pushed past his physical and education roadblocks to achieve what many people told him he would never do—learn to read, graduate from high school, attend college, and become a successful motivational speaker, influential podcast host, and author. This journey inspired JT to dedicate his time to helping others overcome these challenges and embrace the possibilities. This led to their mission of **“Through our faith, inspiring families with medical and educational challenges by providing access to programs and supplies.”** The Foundation's long-term vision is that **“Everyone has the opportunity to overcome obstacles that no one should face alone.”**

The pathway to fulfilling this mission and vision is embodied in the long-term goals and objectives to:

- » *Create an \$1.5M endowment by 2033*
- » *Establish the JT Mestdagh Foundation as a nationally recognized leader in supporting colorectal challenges and dyslexia*
- » *Produce a Signature Annual event that raises over \$100,000*
- » *Develop a donor network of 1500+ individuals*
- » *Impact the lives of 3500 children families through the JT Mestdagh Foundation donations*



I want to share my story so people who feel alone or discouraged might feel, well, less alone and more confident!

– JT MESTDAGH

Strategic initiatives were identified for the next 3 years that will enable the organization to begin to fulfill these long-term goals. These include fostering and building donor relationships to expand the donor network and major gifts; expanded speaking engagements; launching a signature annual event; and sharing the stories of the lives impacted by the work of the JT Mestdagh Foundation.

The JT Mestdagh Foundation has built a solid financial position through tenacious fundraising and careful management of expenses. Their current assets as of June 30, 2023 are approximately \$300,000 with minimal current liabilities. Funding for operations and capital projects is generated through individual fundraising and events. Revenue is anticipated to increase by almost 40% over the next 3 years, while expenses are managed at \$110K annually to continue to fund the asset base for donations. Expenses include annual donations of \$50,000 to support colorectal challenges and dyslexia.

	2023 BUDGETED	2024 FORECAST	2025 FORECAST	2026 FORECAST
Revenue	\$160,000	\$174,400	\$190,096	\$207,205
Expenses	\$110,000	\$110,000	\$110,000	\$110,000
Net Surplus	\$50,000	\$64,400	\$80,096	\$97,205



UNDERSTANDING OUR WHY

The strategic planning working group began this process with a discussion to understand the “why” for the JT Mestdagh Foundation. What do we do? How do we do it? Why do we do it? While most organizations understand what they do and how they do it, many do not truly understand why they do what they do. The JT Mestdagh Foundation team’s passion for the work they do and the communities they support is clear as they create opportunities for children and their families to live, learn and heal. The Foundation’s why is **“to set an example of overcoming challenges in both health and learning disabilities”**, which embodies the heart and soul of the organization.

OUR PILLARS



Pediatric Colorectal Malformations
Dyslexia and Learning Disabilities

The JT Mestdagh Foundation is focused on two primary areas to support and maximize their impact. The first is providing support for children with colorectal malformations and their families. The second is to support children and adults struggling with dyslexia and learning disabilities. These both represent areas that the founder, JT Mestdagh, personally struggled with and overcame, and represent his passion and commitment.

MISSION

Through our faith, inspiring families with medical and educational challenges by providing access to programs and supplies.

VISION

Everyone has the opportunity to overcome obstacles that no one should face alone.

CORE VALUES AND GUIDING PRINCIPLES

TELL
YOUR
STORY

PULL
OFF YOUR
LABEL

STRETCH
YOURSELF

STAY TRUE
TO YOUR FAITH

TAKE OFF
YOUR MASK

FIND
YOUR
TRIBE

LISTEN,
LEARN
AND
DON'T STOP

STRENGTHS

- » Fundraising
 - » Energy
 - » Fundraising adventure events
 - 29029' Everesting Mountain climb one time
 - Annual paddleboarding event
 - 100 mile biking event
 - » Partners
- » Donor relationships
- » JT's story
- » JT's faith
- » Partnerships with other nonprofits (healthcare and education)
- » Online fundraising

OPPORTUNITIES

- » Interesting and accessible events
 - Compelling activities and events that provide more participation
- » Expand donor network
 - Connecting with foundations
 - Generational wealth
- » Build the team
- » Strengthen the partner network
- » Need for medical supplies not going away
- » Need for literacy support not going away
- » Secure donations or sponsorships from insurance companies
- » Secure donations or sponsorships from medical supply companies
- » Expand support to additional hospitals
- » Partnerships with other nonprofits
- » Health care reform

CHALLENGES

- » Events
 - Limited participation in paddleboarding
 - Viewing of the events
 - Social Media - How to do the event and also do social media
- » Lack of brand awareness
- » Total funds raised
- » Donor presentations
- » Reaching new donors
- » Small staff
- » Small board
- » Lack of policies and procedures

THREATS

- » Economy
- » Pandemic
- » Other nonprofits in the same space competing for funding
- » Health care reform
- » Other foundations or individuals change giving focus
- » Change of donor economics



PRIMARY RESEARCH

Individual interviews were conducted with donors, recipients of donations, and the team supporting JT's work to create a better understanding of the strengths, challenges and opportunities for the JT Mestdagh Foundation. The individuals interviewed included:

Rick Lueders

Donor and Mentor

Dr. Andrea Pena Bischoff, MD,

*Children's Hospital Colorado
Recipient of Donations*

Dr. Alberto Pena

*Children's Hospital Colorado
Recipient of Donations*

Steve Tattum

*Founder of the F.A.S.T. Reading Program/
Tattum Reading
Recipient of Donations*

DT Slouffman

*Producer - Supports Social Media
Production and Speaking Engagements*

Greg Lucid

*Publicist - Supports Branding, Messaging,
Books and Speaking Engagements*

Kelly Hercher

*Philanthropy Director at Children's Hospital
Colorado Foundation
Recipient of Donations*

All of these individuals had great respect and admiration for JT's personal story and his passion and experience as a patient and a person with a learning disability. Challenges include clearly identifying and sharing the Foundation's strategic objectives, expanding the donor base, and building the organization with a small team.

Everyone felt there is a tremendous need and opportunity for this work and that JT can leverage his story and passion to raise money for the Foundation. There is

significant need for transportation, supplies and over the counter medication for colorectal patients. Additional collaboration and speaking opportunities include the Pull Through Network and supporting other hospitals with colorectal centers. JT can become an influencer and author with the Foundation as the beneficiary, as he builds out his pillars, streamlines the messaging, and builds the brand of the Foundation.

LONG TERM GOALS AND STRATEGIC INITIATIVES

The Long Term Goals provide the vision and strategic direction for the Foundation over the next 10-15 years. Strategic initiatives and measurable goals will be developed each year to move toward achieving this long term vision. Below is a summary of these long-term goals and the strategic initiatives identified to reach those goals. On-going evaluation, assessment, and review of these initiatives will enable the organization to understand their relative successes and challenges and identify when additional resources or other modifications are required.

LONG TERM GOALS (10-15 YEARS)	STRATEGIC INITIATIVES (2-5 YEARS)
<p>\$1,500,000 ENDOWMENT</p>	<ul style="list-style-type: none"> » Reach \$600K in 5 years » Secure 10 major gifts (\$10,000+) » Explore sponsorships from global companies » Current assets total approximately \$300K » Annual donor recognition event » Annual fund request » Donations associated with events
 <p>is Nationally Recognized as a Leader in Supporting Colorectal Challenges and Dyslexia</p>	<ul style="list-style-type: none"> » Create videos/content for each pillar <ul style="list-style-type: none"> • 2 videos per month » Speaking engagements <ul style="list-style-type: none"> • Consistent and growing audiences • New book launched 2024 • 12 speaking engagements per year
<p><i>Signature</i> Annual Event <i>That Raises Over</i> \$100,000</p>	<ul style="list-style-type: none"> » Identify 1 annual event to introduce in 2024 <ul style="list-style-type: none"> • Create compelling and engaging event • Net revenue \$100K by year 5
<p>Donor Network 1500+ <i>Individuals</i></p>	<ul style="list-style-type: none"> » Set up separate funds for specific pillars to support restricted funds » Building donor base through marketing/communications and events (including athletic events)
<p>Impact <i>the Lives of</i> 3500 of Children and Families <i>Through the JT Mestdagh Foundation Donations</i></p>	<ul style="list-style-type: none"> » 1000 children supported with colorectal conditions » 500 families assisted at Ronald McDonald House » 2000 students receive literary support » Create and share annual impact report beginning 2025



THE TEAM

STAFF

JT Mestdagh is the Founder and Executive Director of the JT Mestdagh Foundation. While JT is currently the only full-time employee, he is supported by several consultants and contractors that provide accounting, fundraising, and marketing/communications expertise. The organization will continue to rely on consultants and contracts to guide and support the organization and does not intend to add any additional staff over the next 3-5 years in order to best manage expenses.

BOARD OF DIRECTORS

The Board of Directors currently consists of JT Mestdagh, Kris Mestdagh, and Jim Mestdagh, Sr. The organization will add 2 Board members in 2024, for a total of 5 and another 2-4 Board members over the next 5 years. These potential Board members will provide additional expertise and diverse experiences and perspectives that support the organization's continued growth and success. By-laws will be updated to include term limits, engagement and giving criteria, and the maximum Board member size. The Board and Executive Committee will meet once each quarter and be responsible for fiscal oversight and strategic direction.

MARKETING AND COMMUNICATIONS

JT's books and speaking engagements will continue to provide opportunities to build the JT Mestdagh Foundation brand and expand the donor base. JT Mestdagh will be positioned as an author, speaker, and founder of the JT Mestdagh Foundation.

Athletic events and the new annual Signature Event also provide opportunities to build awareness and brand

identity. The website and social media platforms are the primary other vehicles for messaging and brand building and will continue to reflect the mission, vision and core values of the organization. The organization is active on Facebook, Instagram, and LinkedIn and will continue to monitor engagement on these and emerging platforms.



DEVELOPMENT

The organization has been successful since its inception in 2020 to receive over \$500,000 in donations and engages 273 unique donors. These donors have given gifts directly and/or supported the organization's special events. JT Mestdagh will continue to foster and build donor relationships and develop a planned giving program to ensure long-term financial sustainability. An annual impact report will be shared beginning in 2025 to tell the stories of the children and families touched by the organization's work.

The organization will also pursue opportunities for sponsorships with insurance companies, pharmaceuticals, and other health-care related organizations. Sponsorship packages for both the athletic events and annual signature event offer these companies the opportunity to reach new audiences and support important philanthropic work synergistic with their market space.

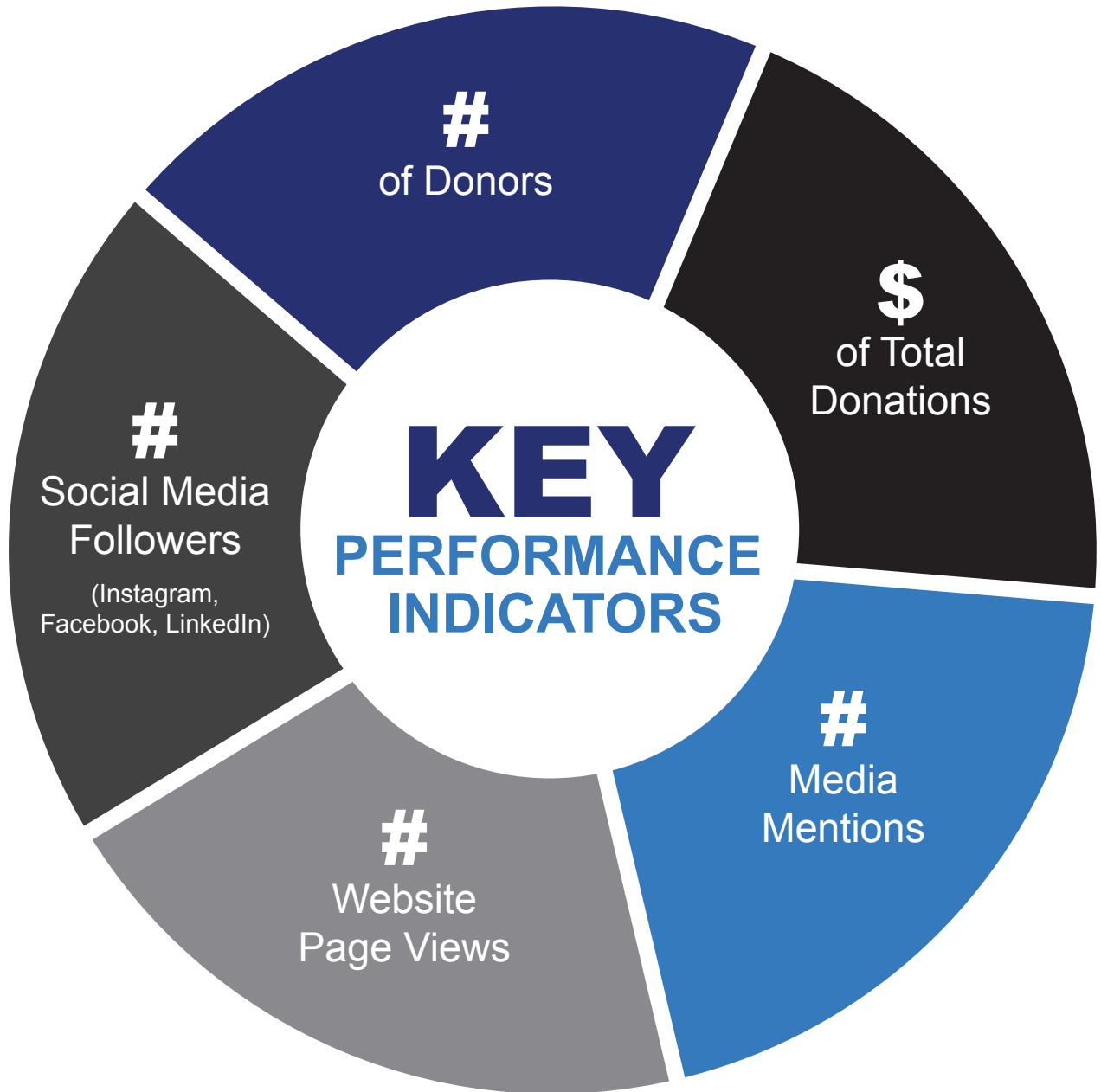
FINANCIAL PROJECTIONS

The financial projections are based on executing the strategic initiatives and reaching the goals for fundraising. Revenues are projected to increase by 9% each year through 2026 from an estimated \$160K in 2023 to \$207K in 2026 through increases in individual donations and fundraisers.

Expenses will maintain at a level of approximately \$63K, while support for the colorectal, educational, and religious initiatives remain flat. The goal of increasing the net surplus over these years is to support the long term goal of building a \$1.5M endowment. Below is a summary of the revenue and expense projections through 2026.

	2023 BUDGETED	2024 FORECAST	2025 FORECAST	2026 FORECAST
REVENUE				
Donations	\$160,000	\$174,400	\$190,096	\$207,205
Total Revenue	\$160,000	\$174,400	\$190,096	\$207,205
EXPENSE				
Admin Expenses	\$60,000	\$61,800	\$63,654	\$65,564
Education Support	\$10,000	\$10,000	\$10,000	\$10,000
Medical Support	\$35,000	\$35,000	\$35,000	\$35,000
Religious Support	\$5,000	\$5,000	\$5,000	\$5,000
Total Expenses	\$110,000	\$111,800	\$113,654	\$115,564
Net Surplus / (Deficit)	\$50,000	\$62,600	\$76,442	\$91,641





Key performance indicators (KPIs) enable the organization to understand, track and monitor performance and share with staff, Board, donors, and other community stakeholders. The KPIs are closely tied to the long-term vision and strategic initiatives and will enable the team to continually assess and analyze current successes and challenges.

IMPLEMENTATION AND COMMUNICATION PLAN

The success of the plan rests on the ability of the team to focus on the long-term vision while meeting the needs of the organization on a daily basis and continuing to partner with donors to create a financially sustainable model. Sharing this plan with key stakeholders and the community at large will be integral to fostering relationships and engaging resources to support this future vision. Specific communication plans will include sharing the plan with the donors and recipients as well as through links and postings on the website and social media platforms.

