

2017 Strategic Plan

Planning Process

In 2017, Foster & Adoptive Care Coalition (The Coalition) developed a 4-year strategic plan. The process had four phases:

* Diagnostic – evaluating The Coalition’s current operations and environment
* Planning – establishing a shared vision for The Coalition’s future
* Action Planning – determining the specifics of how The Coalition achieves it goals
* Commitment – committing to the plan and agreeing on a process for keeping score

Collaborative Strategies, Inc. facilitated the planning process. A committee consisting of board members and staff reviewed diagnostic findings and created the overarching planning deliverables – goals and strategic priorities. Then the team divided into small groups to work on project plans for the five priorities. Additional board and staff members joined the action planning teams to promote an inclusive process and engage appropriate subject matter experts.

Strategic Planning Team

# The strategic planning committee consisted of the following members:

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| * Bob Ahern * Debbie Genung * Denise Kelley * Jim Martin * Shannon Nichols * Mike Normile * John Phillips | * Jackie Olinger Rochelle * Melanie Scheetz * Chris Schoemehl * Nickie Steinhoff * Rossi Summers * Shelley Thomas-Benke * Cari Wegge * Diane Williams |

Diagnostic

Collaborative Strategies facilitated an extensive diagnostic process that grounded the strategic plan in the reality of The Coalition’s current situation. Quantitative analysis covered the organization’s recent programmatic trends, key performance measures, and historical financial and philanthropic results, among other items. The process also included findings from recent board and staff surveys. Assessment findings are documented in the planning committee’s meeting materials and notes.

Planning Deliverables

# Vision for 2021

To create focus for our planning efforts, the team developed a picture of success in 2021. The description and targets listed below create the focus and foundation for the strategic plan.

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| Outcomes | **Recruiting**   * We continue to **set the standard in speed and effectiveness of recruiting**.   **Support**   * Our new tracking system enables us to validate our hypotheses that:   + Families in our training and support programs **retain their foster/adoptive status longer (or more consistently)** than national benchmarks.   + Our families enjoy **greater well-being**.   + Our youth have **more placement stability** than state benchmarks. |
| Programs & Services | * We have scalable, high quality systems for **connecting our foster-adoptive families to the right supports** they need to thrive.   + Our enhanced CRM provides accurate information on families’ interactions with the Coalition.   + A standardized, centralized intake process enables us to develop a holistic picture of families strengths and challenges. * New services and capabilities enable the Coalition to **more deeply and thoughtfully support families**.   + We offer therapeutic foster care in partnership with Cornerstones of Care.   + Transcultural training prepares families to care for children of different cultures.   + We have achieved meaningful certifications in trauma-informed care and supporting LGBTQ youth.   + Either on our own or through partners, we connect our youth to mentor or coaching resources. * We have the people and processes to promote successful **replication of our programs** with interested parties. |
| Capacity | * Our structures, systems and space are conducive to effective communication. The structure is also conducive to high quality supervision. * Phone support does not distract from office work. * We have sufficient access to IT and HR expertise. * ReFresh meets its financial and mission goals (which we are all clear on). * The board shares a common expectation of its role in fundraising. Board giving has helped fuel the agency’s expansion. * Board skills are well-aligned with the needs of the Coalition. * The Junior Board has had consistent leadership and a cohesive culture. * We are more effective at converting volunteers into donors. |
| Financial | * Annual unrestricted fundraising **averages 10%-15% increase** **per year** 2018-2021. * Operating reserves are 30% of the 2021 budget. * Our planned giving program has officially launched and has $300k+ in commitments. |

Strategic Priorities

To achieve the 2021 vision and goals, The Coalition is adopting a short list of priorities. “Priorities” implies focus – so there can only be a handful. The planning team identified five critical priorities as well as activities carried forward from the previous strategic plan.

1. Enhance our systems and structure to provide more integrated and coordinated supports to families across program areas.
2. Deepen our service offerings to fill critical unmet needs for foster-adoptive families. (examples include therapeutic foster homes, trauma-informed care, LGBTQ certification, transcultural training, and more)
3. Develop the HR, IT and financial management systems to support a $5M organization and beyond.
4. Continue aggressive growth (10%-15% per annum) of our unrestricted funding (powered especially by corporate and individual giving initiatives) in order to fund our capacity building and grow our reserves.
5. Build a replication team and strategy to sustainably onboard and support partners without adversely impacting the St. Louis service team.

Continue our efforts from the last strategic plan with….

* + Board diversity and development *(lead: Nominating Committee)*
  + Awareness-building and marketing *(lead: Kyle)*

# Timeline

Below is a high level view of the timeline and accountability for key actions in each strategic priority that will be completed in the **short term**. Green depicts the estimated due dates.



The team has also planned key activities for future years. Below is the summary view of each of the **long term** activities.



# Key Investments

In recognition that the strategic priorities require funding, the team forecasted key investments over the next four years. Activity owners are responsible for quantifying any investments that remain “TBD”.



# Action Plans

Each strategic priority has a detailed project plan outlining the required tasks, timelines, and responsible parties. (See subsequent pages.) The plans also identify activities that will require financial investment.

The Coalition’s leadership will review progress against the action plans on a quarterly basis. Updates and changes to the plan are to be expected – the important point is that the plan is actually used as a roadmap by the organization.

Service Coordination Action Plan (Lead: Denise)

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| **STRATEGIC PRIORITY**  **Enhance our systems and structure to provide more integrated and coordinated supports to families across program areas.** |

| ACTIVITIES – NEXT 12 MONTHS | BY WHEN | WHO |
| --- | --- | --- |
| 1. Finish developing and/or selecting of our intake assessment tool, and integrate into Salesforce infrastructure\*. | January 2018  \*TBD on Salesforce timeline | Nickie  Barbara |
| 1. Create a new uniform model of supervision that includes guidelines on cross-program communications, referrals and professional development. | January 2018 (launch)  Modifications on-going | Denise K, Nickie, Rossi |
| 1. Enhance supervisor training:    1. How to uncover a child’s or family’s root challenges (not just the challenge they present with)    2. How to explain to families the full breadth of supports the Coalition can offer    3. The minimum data that must be entered into the new Salesforce system to keep all our teams well-informed | January 2018  January 2018  TBD on Salesforce timeline | Denise K, Nickie  Barbara |
| 1. Create a new standard for the circumstances that necessitate convening a case conference of relevant program teams to discuss a family’s best interests. | February 2018 | Denise K, Nickie |
| 1. Train the ‘right’ staff on how to complete our new intake process and form (should be the supervisor and at least 1 person from each program area). | March 2018 | Denise K, Nickie |
| 1. Clarify the role description and responsibilities of the new intake/’concierge’ role. This role will be split as follows:    1. ER clients: ER specialist (through finalization)    2. General intake: Cisely    3. 30 Days to Family: Cisely | April 2018 | Nickie |
| 1. Create process maps for when and how the [concierge] engages. Consider the many different ways that families contact the Coalition and the best ways for us to respond in these scenarios. | May 2018 | Barbara, Denise K, Nickie |
| 1. Create a “map” of the data we’ll have in our initial implementation of Salesforce and where staff should go to find other important client data. | December 2018 | Barbara |

*See action plan #3 for activities related to the Coalition’s new CRM system.*

| KEY ACTIVITIES – YEARS 2-5 | YEAR |
| --- | --- |
| 1. Evaluate the new intake and [concierge] processes and fine tune. | 2019 |
| 1. Based on our initial success with Salesforce, evaluate opportunities to move more databases out of Excel and into Salesforce. | 2019 |

| EXPECTED INVESTMENT (big ticket items/staff additions) | | | | |
| --- | --- | --- | --- | --- |
| **Description** | **2018** | **2019** | **2020** | **2021** |
| Second intake resource |  |  | TBD | TBD |

| MEASURABLE TARGETS AND/OR GOALS: |
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| * Families in our training and support programs retain their foster/adoptive status longer (or more consistently) than national benchmarks. * Our families enjoy greater well-being. * Our youth have more placement stability than state benchmarks. |

Service Enhancements Action Plan (Lead: Nickie)

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| **STRATEGIC PRIORITY**  **Deepen our service offerings to fill critical unmet needs for foster-adoptive families. (examples include trauma-informed care, LGBTQ certification, transcultural training, and more).** |

| ACTIVITIES – NEXT 12 MONTHS | BY WHEN | WHO |
| --- | --- | --- |
| 1. Infuse transcultural training into the Jones program. Open this up as an in-service for our existing foster parents. | April 2018 | Katie |
| 1. Identify the LGBTQ certification we will pursue. (HRC or otherwise) | June 2018 | Anne |
| 1. Do a staff version of Katie’s transcultural training for our staff and our partners’ staff. | September 2018 | Katie |
| 1. Have our music therapist partner go through DDP and TAC trainings. | December 2018 | Nickie |
| Trauma Informed | | |
| 1. Assess where we are on the trauma-informed continuum (“aware”, “sensitive”, “informed”). How well do we assess secondary trauma? | March 2018 | Nickie |
| 1. Conduct secondary trauma training and start DDP. | March 2018 | Nickie |
| 1. Make the trauma-informed tools used by Family Works available to all other Coalition programs. | June 2018 | Nickie |
| 1. Appoint an internal champion to keep this live & present. | June 2018 | Nickie |

| KEY ACTIVITIES – YEARS 2-5 | YEAR |
| --- | --- |
| 1. Evaluate getting an organization-wide DDP certification (trauma informed care). Keep pushing to use trauma informed care to guide how we work – not just be a training exercise. | 2019 |
| 1. Start implementing our LGBTQ certification. Update our programs accordingly. | 2019 |
| 1. Use client inquiries to Cisely to inform future program development efforts and communications to families. | 2019 |
| 1. Update our outcomes metrics and tracking to reflect these program enhancements. | 2019 |
| 1. Add staff to STEPs. | 2019 |

| EXPECTED INVESTMENT (big ticket items/staff additions) | | | | |
| --- | --- | --- | --- | --- |
| **Description** | **2018** | **2019** | **2020** | **2021** |
| STEPs staffing | TBD | TBD | TBD | TBD |
| Trauma training | TBD | TBD | TBD | TBD |
| LGBTQ certification |  | $15,000 |  |  |

Administrative Action Plan

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| **STRATEGIC PRIORITY**  **Develop the HR, IT and financial management systems to support a $5M organization and beyond.** |

| ACTIVITIES – NEXT 12 MONTHS | BY WHEN | WHO |
| --- | --- | --- |
| HR | | |
| 1. Finish implementation of the new interviewing process (which started summer 2017). | January 2018 | Rossi |
| 1. Overhaul the onboard process, making it more robust and less dependent on the supervisor. | June 2018 | Rossi & Denise K. |
| 1. Update the employee manual. | June 2018 | Rossi |
| 1. Research and explore HRIS options, starting with Salesforce. System should integrate benefits, recruiting, training, performance evaluations, etc. | September 2018 | Rossi |
| 1. Add 1 FTE (part-time HR support/part-time admin) to:    1. (HR) assist Rossi with admin, compliance reporting, benefits administration, etc.    2. (Admin) Take the lead on answering phones and office administration | December 2018 | Rossi |
| 1. Prioritize HR skills in board recruiting. | 2018 | Nominating Committee |
| Finance | | |
| 1. Finish phase 1 of the Budget Maestro implementation. Enter the 2018 budget into the system. Begin budgeting quarterly. | Complete implementation by December 2018 | Melanie & Chris S. |
| 1. Update the finance committee’s quarterly report to include metrics from the strategic plan (such as reserve and fundraising targets). | Complete implementation by December 2018 | Chris S. |
| IT | | |
| 1. Select and implement an enterprise-wide information management system for programs, donor and volunteer mgmt., outcomes tracking, etc. (Salesforce is our leading option.)    1. Select an implementation partner.    2. Set project scope.    3. Begin customizations.    4. Begin roll out and training. | Complete Phase 1 implementation by December 2018 | Barbara and Denise P. to be project champions |

| KEY ACTIVITIES – YEARS 2-5 | YEAR |
| --- | --- |
| 1. Hire another 1 FTE support resource (.5 FTE for finance /.5 FTE for additional office administration). | 2019 |
| 1. Reengineer the performance review process to provide more professional critiques and development feedback. | March 2019 |
| 1. Conduct 360 reviews for all supervisors and above. | 2019 |
| 1. Build grant and event budgets for 2019 in Budget Maestro. | 2019 |
| 1. Research upgrading to a fiber optic internet connection. | 2019 |
| 1. Research and select a new retail management system for ReFresh. | 2019 |
| 1. Explore purchasing a new server. | 2020 |
| 1. Research and select a new phone system. | 2020 |

| EXPECTED INVESTMENT (big ticket items/staff additions) | | | | |
| --- | --- | --- | --- | --- |
| **Description** | **2018** | **2019** | **2020** | **2021** |
| Budget Maestro licensing | $9,500 | $9,500 | $9,500 | $9,500 |
| Salesforce implementation fees | $80,000\* |  |  |  |
| Salesforce licensing | $21,000 | $21,000 | $21,000 | $21,000 |
| Assistance with updating employee manual | TBD |  |  |  |
| Additional admin staffing | $50,000 | $100,000 | $100,000 | $100,000 |
| Network upgrade |  | TBD |  |  |
| Server upgrade? |  |  | TBD |  |
| Phone system upgrade? |  |  | TBD |  |
| New RMS | TBD |  |  |  |

*\*A portion of these costs will be funded in FY17.*

Fundraising Action Plan (Lead: Shannon)

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| **STRATEGIC PRIORITY**  **Continue aggressive growth (10%-15% per annum) of our unrestricted funding (powered especially by corporate and individual giving initiatives) in order to fund our capacity building and grow our reserves.** |

| ACTIVITIES – NEXT 12 MONTHS | BY WHEN | WHO |
| --- | --- | --- |
| 1. Find and create new opportunities to incorporate more stories about our children in messages to donors. | December 2018 | Kyle |
| 1. Cultivate relationships with Gateway Center for Giving, St. Louis Community Foundation, and others to spur more giving from donor advised funds. | December 2018 | Debbie |
| Individual Donors | | |
| 1. Infuse the idea of monthly giving in all our stakeholder communications. | June 2018 | Shannon |
| 1. Update our approach for converting event donors (especially Old Bags, which has the lowest conversion rate). | December 2018 | Kimberly |
| Corporations & Volunteers | | |
| 1. Create a fundraising outreach to corporations who send volunteers to REFRESH. | December 2018 | Kim and Shelley |
| 1. Update our approach for converting corporate event donors. Identify our top prospects for whom we should develop customized outreach plans (could include presentations at their offices, invitations to lunches, etc.) | December 2018 | Kim |
| Board & Events | | |
| 1. Support the board in becoming even more involved in fundraising    1. Brainstorm ways to get more board involvement in Sizzle. Dedicate part of Q1 board meeting to Sizzle.    2. Create a more formal annual commitment for board members, which should increase awareness and clarity of the many ways in which board members can help the Coalition raise money.    3. Explore increasing our give or get expectation. | December 2018 | Ad Hoc board committee |

| KEY ACTIVITIES – YEARS 2-5 | YEAR |
| --- | --- |
| 1. Little Wishes    1. Build on our momentum in converting Little Wishes donors into unrestricted donors. Run analytics to find patterns among those who we convert and don’t convert in order to inform our future efforts.    2. Test whether we can convert LW donors into monthly unrestricted donors. | 2019 |
| 1. Create a plan specific to Corporate Little Wishes donors to convert to them unrestricted donors. | 2019 |
| 1. Formalize our approach for maintaining relationships with members who roll off our board. | 2019 |
| 1. Support the board in becoming even more involved in fundraising    1. Board portfolio strategy | 2019 |
| 1. Using our new capabilities in Salesforce, revamp our moves management strategies to get more donors moving up the giving pyramid. | 2019 |
| 1. Launch the Now and Forever campaign. (Launch will depend on getting our matching funder. We will target 2018, but it could be longer.) | 2020 |

| EXPECTED INVESTMENT (big ticket items/staff additions) | | | | |
| --- | --- | --- | --- | --- |
| **Description** | **2018** | **2019** | **2020** | **2021** |
| Now & Forever collateral |  | TBD | TBD | TBD |
| Donor giveaways | TBD | TBD | TBD | TBD |

| MEASURABLE TARGETS AND/OR GOALS: |
| --- |
| * Annual unrestricted fundraising averages a 10%-15% increase per year 2018-2021. * Operating reserves are 30% of the 2021 budget. * Our planned giving program has officially launched and has $300k+ in commitments. |

Replication Action Plan (Lead: Melanie)

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| **STRATEGIC PRIORITY**  **Build a replication team and strategy to sustainably onboard and support partners without adversely impacting the St. Louis service team.** |

| ACTIVITIES – NEXT 12 MONTHS | BY WHEN | WHO |
| --- | --- | --- |
| 1. Implement a new practice that the 30 Days to Family team will maintain 2 staff at all times who are willing to serve as replication trainers. (They will be ready to staff the next replication project that goes live.) | Now | Jo Z. |
| 1. Begin using the new readiness assessment to help confirm that interested replication partners really are ready. | Now | Melanie S, transitioning to Melanie M in 2018 |
| 1. Resource our replication project in Central MO:    1. First, attempt to get a trusted 1099 to staff the project.    2. If that doesn’t work, Gayle and her team will staff the project. | Now | Melanie S. |
| 1. Track replication projects separately in Budget Maestro. | March 2018 | Rossi |
| 1. Develop our “real-time technical assistance model” for how we will proactively support our partners. | April 2018 | Melanie M. |
| 1. Build program outcomes into the new Salesforce project. | May 2018 | Denise P. / Barbara |
| 1. Analyze the pricing of our past replication projects. Did we cover our costs? Our intent is to generate a small/”fair” surplus on these projects to help cover local expenses. Share findings with the board. | July 2018 | Melanie S. |
| 1. Have a lawyer assess our liability risk associated with replication and recommend an appropriate contract structure. | July 2018 | Melanie S. |
| 1. Annually communicate to the board:    1. Number of replication sites supported    2. Forecast for number of new sites coming onboard in the next 12 months    3. Number of Coalition FTEs involved in replication support | July 2018 | Melanie S. |

| EXPECTED INVESTMENT (big ticket items/staff additions) | | | | |
| --- | --- | --- | --- | --- |
| **Description** | **2018** | **2019** | **2020** | **2021** |
| No significant unfunded costs expected |  |  |  |  |

| MEASURABLE TARGETS AND/OR GOALS: |
| --- |
| * All incremental replication costs are covered by partner fees * File reviews and outcomes indicate partners are replicating our programs with fidelity * Anecdotal evidence shows that partners are embracing the values behind our programs |