

Lutheran Child & Family Services Strategic Plan

September 30, 2018

**Approved:
Executive Committee
of the Board of Trustees
March 1, 2019**

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Strategic Opportunities

A) Strategic Opportunity: Improve the Financial Health of LCFS

Goal: Over a three year period, complete the LCFS Turnaround Plan, establish an effective budgeting process, increase fundraising and grow revenue.

Objective 1: By the end of the three year planning period, increase grants to a level equal to the 5 year average of the annual fundraising budget or approximately \$1.5-2.0 million per year.

Action Step 1: On-Board Grant Writer and Develop Grant Opportunity Matrix

- Responsibility: Michelle Yates and Marilyn Rodgers
- Start Date: 10/15/18
- Completion Date: 12/31/18
- Resources: HR, Funding/Budget Approval (If Needed)
- Progress: Implementation Plan to be developed

Action Step 2: Develop Grant Strategy: Targets, Benchmarks, Communication Plans - - Develop New Grant Opportunities: Federal Grants, Corporate Grants, Substantial Philanthropic

Foundation Grants (ex: Chicago Community Trust, MacArthur Foundation, etc.); Shift Focus on Types of Grants and Culture

- Responsibility: Michelle Yates and Marilyn Rodgers
- Start Date: 10/15/18
- Completion Date: 12/31/18
- Resources: HR Support (Sourcing, Recruiting, etc.)
- Progress: Implementation Plan to be developed

Action Step 3: Develop Internal Support Structure (Including Leadership/Organizational Roles):

- Responsibility: Darin Holt, Brent Diers, Marilyn Rogers
- Start Date: 10/15/18
- Completion Date: 3/31/19
- Resources: HR Support
- Progress: Implementation Plan to be developed

Strategic Opportunity: Improve Financial Health of LCFS

Goal: Over a three year period, complete the LCFS Turnaround Plan, establish an effective budgeting process, increase fundraising and grow revenue

Objective 2: By the end of the three year planning period, increase revenue by 20% (with at least 4% available to address organizational needs; Revenue must improve overall financial health of LCFS organization.

Action Step 1: Restart dialog with LSSI

- Responsibility: Mike Bertrand and Jill Chapman
- Start Date: 10/1/18
- Completion Date: 10/15/18
- Resources: TBD
- Progress: Implementation Plan TBD

Action Step 2: Rerun Numbers Associated with LSSI-LCFS Joint Venture Revenue and Profit Opportunity

- Responsibility: Mike Bertrand
- Start Date: 10/1/18
- Completion Date: 11/15/18
- Resources: Finance, IT, Program Staff (to provide up to date census/revenues)
- Progress: Implementation Plan TBD

Action Step 3: Develop LCFS-LSSI Joint Venture Proposal

- Responsibility: Mike Bertrand and Jill Chapman
- Start Date: 11/15/18
- Completion Date: 5/1/19
- Resources: LCFS Board Executive Committee
- Progress: Implementation Plan TBD

Action Step 4: Maximize Medicaid Opportunities

- Responsibility: Mike Bertrand and Brent Diers
- Start Date: 9/18/18
- Completion Date: 4/1/19
- Resources: TBD
- Progress: TBD

Action Step 5: Expansion of Existing Services

- Responsibility: Mike Beverly and Leadership Team
- Start Date: 11/1/18
- Completion Date: 7/1/19
- Resources: TBD
- Progress: TBD

Strategic Opportunity: Improve Financial Health of LCFS

Goal: Over a three year period, complete LCFS Turnaround Plan, establish an effective budgeting process, increase fundraising and grow revenue

Objective 3: Review Cost/Benefit of Other Alliances and Develop Plans and Goals

Action Step 1: Develop Cultivation Plans and Goals for Potential Alliances With Academia and For-Profit Companies and Organizations

- Responsibility: Mike Bertrand and Marilyn Rogers
- Start Date: 10/15/18
- Completion Date: 12/31/18
- Resources: TBD
- Progress: Implementation Plan to be developed

Strategic Opportunity: Improve Financial Health of LCFS

Goal: Over a three year period, complete LCFS Turnaround Plan, establish an effective budgeting process, increase fundraising and grow revenue.

Objective 4: Develop Board Member “Give & Get “ Policy

Action Step 1: Develop Board “ Give & Get “ Policy

- Responsibility: Mike Bertrand and Jill Chapman
- Start Date: 11/1/18
- Completion Date: 2/28/19
- Resources: Select Board Members
- Progress: Pending Board Approval

B) Strategic Opportunity : Improve LCFS Technology Infrastructure

Goal: Research, Design and Implement a “State of the Art “ IT Infrastructure Strategy/Plan

Objective 1: Establish Centralized Datasource and Integrated Desktop System Enabling LCFS Employees/Staff to Access Data and Communicate/Work Across Departments

Action Step 1: Identify Data Sources for Centralized Access Across all LCFS Desktops

- Responsibility: Doug Cablk and IT Work Group
- Start Date: 11/1/18
- Completion Date: 11/15/18
- Resources: Funding
- Progress: Much of the Data has been Acquired for Centralization and Desktop Access

Action Step 2: Identify System for Accommodating All LCFS Data Sources

- Responsibility: Doug Cablk and IT Work Group

- Start Date: 11/1/18
- Completion Date: 11/30/18
- Resources: Funding; Executive Sponsor
- Progress: “ My Evolve “ System has been Identified after thorough research

Action Step 3: Develop and Present Proposal for Funding Approval

- Responsibility: Doug Cablk and IT Group
- Start Date: 12/1/18
- Completion Date: 12/15/18
- Resources: CEO & Board Alignment
- Progress: CEO and Board Approvals Pending

Action Step 4: Compile, Cleanse and Test Data Sources for Integrity and Employee Workstation/Database Access

- Responsibility: Doug Cablk and IT Work Group
- Start Date: 12/15/18
- Completion Date: 12/31/18
- Resources: CEO Alignment, Board Funding and Budget Approval
- Progress: Implementation Pending CEO / Board Funding and Approvals

Action Step 5: Ensure IT Administrative Controls, Access and Security Policies are in Place

- Responsibility: Doug Cablk and IT Group
- Start Date: 1/15/19
- Completion Date: 1/31/19
- Resources: CEO/Board and Funding Approvals
- Progress: Implementation Pending CEO/Board Approvals

Strategic Opportunity: Improve LCFS Technology Infrastructure

Goal: Research, Design and Implement “ State of the Art” IT Infrastructure Strategy/Plan

Objective 2: Develop and Implement Comprehensive IT Training Plan

Action Step 1: Assess LCFS Employee Technology Training Needs

- Responsibility : Tasha Roberson and Quality Improvement Team
- Start Date: 2/1/19
- Completion Date: 3-4 Weeks
- Resources: CEO, Board, and IT Funding Approvals
- Progress: Implementation Pending CEO/Board Approvals

Action Step 2: Identify IT Training Levels

- Responsibility: Tasha Roberson and Doug Cablk
- Start Date: 3/1/19
- Completion Date: 2-3 Weeks
- Resources: CEO, Board, and Funding Approvals
- Progress: Implementation Pending CEO/Board Approvals

Action Step 3: Develop and Implement IT Training Modules

- Responsibility: Tasha Roberson and Doug Cablk
- Start Date: 4/1/19
- Completion Date: 4-6 Weeks
- Resources: CEO, Board, and Funding Approvals
- Progress: Implementation Pending CEO/Board Approvals

Strategic Opportunity: Improve LCFS Technology Infrastructure

Goal: Research, Design and Implement “ State of the Art “ IT Infrastructure Strategy/Plan

Objective 3: Foster and Encourage Open Communication to Ensure Continuous IT Infrastructure Improvement

Action Step 1: Survey Employees and Conduct IT Communication Gap Analysis

- Responsibility: Beverly Jones
- Start Date: TBD
- Completion Date: TBD
- Resources: TBD
- Progress: N/A

Action Step 2: Analyze and Present Findings on Gap Analysis to CEO and Leadership Team

- Responsibility: Beverly Jones
- Start Date: TBD
- Completion Date: TBD
- Resources TBD
- Progress: N/A

Action Step 3: Develop and Implement Approved Corrective Action Plans from Gap Analysis

- Responsibility: Beverly Jones
- Start Date: TBD
- Completion Date: TBD
- Resources: TBD
- Progress: N/A

C) Strategic Opportunity: Improve LCFS Work Environment

Goal: Strengthen Our Ability to “Work as One Agency” Across Programs, Departments and Locations

Objective 1: Eliminate Silo Thinking Across LCFS Departments

Action Step 1: Survey LCFS Employees to Define LCFS Cultural Environment

- Responsibility: HR
- Start Date: 11/15/18
- Completion Date: 12/15/18
- Resources: HR, Leadership Team and Staff
- Progress: Pending CEO, Leadership Team and Board Approval

Action Step 2: Analyze Survey Results and Develop Recommendations

- Responsibility : HR
- Start Date: 1/15/19
- Completion Date: 2/15/19
- Resources: HR, Leadership Team and Staff
- Progress: Pending CEO, Leadership Team Approval

Action Step 3: Present Results/ Recommendations to CEO/Board

- Responsibility: HR
- Start Date: 3/1/19
- Completion Date: 3/15/19
- Resources: HR, Leadership Team and Staff
- Progress: Pending CEO, Board and Leadership Team Approval

Action Step 4: Develop and Implement Department-Wide Action Plans

- Responsibility: HR and Leadership Team
- Start Date: 4/1/19
- Completion Date: 4/30/19
- Resources: HR, Leadership Team and Staff
- Progress: Pending CEO, Leadership Team and Board Approval

Strategic Opportunity: Improve LCFS Work Environment

Goal: Develop and Implement Consistent Employee Performance Requirements for each Department Position Regardless of Race, Gender, Religion, etc.

Objective 2: Eliminate Selective Employee Performance Standards and Inconsistent Reviews

Action Step 1: Review LCFS Position Standards and Requirements for Consistency

- Responsibility: HR
- Start Date: 4/1/19
- Completion Date: 5/1/19
- Resources: HR, Leadership Team

- Progress: Pending CEO and Leadership Team Approval

Action Step 2: Update / Develop Consistent Position Standards and Review Requirements for All LCFS Jobs

- Responsibility: HR
- Start Date: 5/15/19
- Completion Date: 6/15/19
- Resources: HR, Leadership Team
- Progress: Pending CEO and Leadership Team Approval

Action Step 3: Present Revised Position and Review Requirement Standards for Approval

- Responsibility: HR
- Start Date: 6/30/19
- Completion Date: 7/15/19
- Resources: HR, Leadership Team, Board, CEO
- Progress: Pending CEO, Leadership Team and Board Approval

Action Step 4: Implement New Position Standards and Review Requirements with All LCFS Leadership and Employees

- Responsibility: HR, Leadership Team
- Start Date: 8/1/19
- Completion Date: 9/15/19
- Resources: HR, Leadership Team, Board, CEO
- Progress: Pending CEO , Leadership Team and Board Approval

Strategic Opportunity: Improve LCFS Work Environment

Goal: Assure Consistent Position Values and Salary Increase Standards for all LCFS Employees

Objective 3: Research Internal Salary Compression Issues and Develop Recommendation

Action Step 1: Review Position Values and Salary Ranges Across Organization

- Responsibility: HR
- Start Date: 10/1/19
- Completion Date: 11/1/19
- Resources: HR, Leadership Team
- Progress: Pending CEO and Leadership Team Approval

Action Step 2: Recommend Consistent Position Values and Salary Increase Guidelines/Standards Across Organization

- Responsibility: HR
- Start Date: 11/15/19
- Completion Date: 11/30/19
- Resources: HR, Leadership Team
- Progress: Pending CEO, Leadership Team and Board Approval

Action Step 3: Implement New/Revised Position Values and Salary Increase Guidelines/Standards to all LCFS Employees

- Responsibility: HR, Leadership Team
- Start Date: 12/1/19
- Completion Date: 12/31/19
- Resources: HR, Leadership Team
- Progress: Pending CEO, Leadership Team and Board Approval

Strategic Opportunity: Improve LCFS Work Environment

Goal: Integrate “ 2020 Welcoming Inclusion Diversity and Equity “ Initiative Throughout LCFS Organization (2020 WIDE)

Objective 4: Complete “2020 WIDE “ Implementation with Leadership Team and All LCFS Employees

Action Step 1: Complete Crossroads Training With Officers and Leadership Team

- Responsibility: Tasha Roberson , Leadership Team
- Start Date: 11/1/19
- Completion Date: 11/30/19
- Resources: HR, Leadership Team, Continued Funding
- Progress: Pending CEO, Leadership Team and Board Approval

Action Step 2: Achieve ACAF Seal (All Children and Families)

- Responsibility: Tasha Roberson, Leadership Team
- Start Date: 12/1/19
- Completion Date: 12/15/19
- Resources: Leadership Team, Inclusion Council, Continued Funding
- Progress: Pending CEO, Leadership Team and Board Approval

Action Step 3: Ensure LCFS Policies, Practices and Leadership Represent Employees and Population Being Served

- Responsibility: HR, Leadership Team, CEO, Board Members
- Start Date: Ongoing
- Completion Date: Ongoing
- Resources: HR, Leadership Team, CEO, Board
- Progress: Ongoing

D) Strategic Opportunity: Update LCFS Mission/Vision Statements to Support And Guide New Strategic Plan

Goal: Utilize “ Building Block “ Methodology to Revise and Update Current LCFS Mission and Vision Statements

Objective: Develop and Recommend Mission/Vision Statement Options for CEO, Board and Leadership Team Approval

Action Step 1: Present Mission Statement Options to Leadership Team and Select Board Members from August Retreat for Review and Approval:

- *Draft 1:* “ To Protect, Strengthen and Equip People in Need Through Child Welfare and Preventive Services “ (13 Words)

- *Draft 2:* “ To Nurture and Strengthen Children and Families Through Foster Care, Adoption and Preventive Services “ (14 Words)

- Responsibility: Tony Stephens and Mission/ Vision Team

- Start Date: 10/1/18

- Completion Date: 11/1/18

- Resources: Leadership Team, Board and CEO

- Progress: Meetings Held With Select Board Members to Review Draft Options

Action Step 2: Present Vision Statement Options to Leadership Team and Select Board Members for Review and Approval

- *Draft 1:* “ A World Where All of God’s Children Have the Opportunity (for/to live) Safe, Healthy, and Loving Lives “

- Responsibility: Tony Stephens

- Start Date: 10/1/18

- Completion Date: 11/1/18

- Resources: Leadership Team, Board and CEO

- Progress: Meetings Held With Select Leadership Team and Board Members to Review Draft Option(s)