STRATEGIC PLAN

2019-2024

BOARD OF DIRECTORS APPROVAL
September 25, 2019
Introduction

Community Health Awareness Council (CHAC) provides mental health services to children, families, and other individuals of Mountain View, Los Altos, Los Altos Hills, Sunnyvale and surrounding communities. For more than 40 years, the organization has provided an array of counseling services in schools and community settings. With an operating budget of approximately $3 million, CHAC is anchored by a highly engaged Board of Directors, a talented staff that includes a number of long-time members, long standing partnerships with area schools, strong community programs including our clinic, and a highly respected training program. CHAC is an effective nonprofit organization providing critical services to its community.

It is against this background that CHAC entered a 10-month extensive strategic planning process. We framed this planning process with four critical questions:

1. Who is CHAC and what is the change we seek in the community?
2. Who are CHAC’s primary clients? Should they look different going forward?
3. What are the next 1-3 big landmarks CHAC needs to realize in carrying out our mission and achieving our vision?
4. What is a sustainable business model in an ever-evolving external landscape?

Using those questions to guide our planning efforts, we looked critically at our internal situation and our external environment. We engaged constituents and stakeholders in conversation, designed to uncover current understanding of CHAC, perceptions of our strengths and weaknesses, and how we can best serve our community going forward. We analyzed data from internal and external sources, resulting in a deeper understanding of our work, business model, and the landscape for CHAC and mental health services in northern Santa Clara County.

There have been many positive outcomes from this process. We have revised our mission statement to bring greater clarity and focus to our work and created a shared vision for our community’s mental health and well-being. We have developed an explicit set of values and beliefs that undergird our work. We are able to articulate who we serve and with whom we work to best serve our clients, recognizing that we are engaged in a set of dynamic relationships with a wide variety of constituencies. Each constituency brings something unique to our work and requires somewhat different services and programs.

We made many important discoveries during our planning process. We know we must be diligent in creating and sustaining a continuum of services that address prevention and intervention for mental health issues. We recognize an opportunity to leverage the work we do with schools and in community settings, building complementary programs and services that address the most critical mental health needs we see. We must ensure we have adequate leadership and infrastructure to deliver the highest quality services thoughtfully and intentionally. There are opportunities to form deeper partnerships with other community-based organizations and government agencies, to best meet community needs while strengthening our business model.

This plan has enjoyed an extraordinary level of cooperation and we thank all who have participated, including schools, government partners, donors, community leaders, staff, and Board. This broad cooperation ensures that the plan is “owned” by everyone, and all are responsible for executing it. We are confident that it will guide CHAC well as we take on new challenges and meet the needs of our community.

Marsha Deslauriers
Executive Director

Sandy Bergen
Chair, Strategic Planning Committee
# CHAC Identity Statement

**Our Vision**
Our community embraces mental health and wellness as integral to a healthy fulfilled life. People know where and how to access appropriate help because they understand the importance of seeking mental health services when needed. There is universal access to a continuum of mental health services that includes prevention and intervention. The result is an increasingly healthy, resilient, and understanding community.

**Our Mission**
To improve lives and strengthen communities through access to comprehensive and culturally responsive mental health services in northern Santa Clara County.

**Our Values**
- **Commitment to Excellence** – We offer a standard of excellence and care in every facet of our organization.
- **Ethical** – We maintain the highest level of integrity and ethical conduct in our work and personal interactions.
- **Responsive** – We are responsive to the needs of our community, clients, staff, board, donors, and partners.
- **Respectful** – We treat everyone with dignity and empathy.
- **Inclusive** - We value and honor the diversity and experiences of the individuals and communities we serve.

**Who We Are**
CHAC is a nonprofit mental health agency founded in 1973 by school districts and city governments as a Joint Powers Authority that recognized the need for and value of community-based mental health services. CHAC is anchored by a professional staff and a large complement of Marriage Family Therapy (MFT) Trainees, Associates and Doctoral-level Clinical Psychology Interns and Practicum students, who together provide an array of mental health services in a diversity of settings.

**Whom We Serve**
CHAC serves all people, with a priority on children, youth and their families in the school districts and cities of Mountain View, Los Altos, Los Altos Hills, Sunnyvale, and surrounding communities.

**How We Work**
CHAC is a trauma-informed agency that collaborates with schools, city, county and other health services agencies to meet the mental health needs of its community.

**We provide direct services and referrals**

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**Our Strategic Priorities: 2019-2024**
- Provide consistently excellent and predictable service and experiences for every school we serve.
- Elevate programmatic excellence and organizational reputation for family services, addiction & dependencies services, Latinx services, and LGTBQ+ services.
- Build the leadership/management structure, capacity, and infrastructure that supports client and community impact.
- Increase agency capacity to deliver impact by building a more sustainable business model with a greater diversity of revenue streams.
STRATEGIC PRIORITIES: 2019-20 to 2023-24

Based on conditions found in our internal and external environment, CHAC has four strategic priorities to guide the organization in the next five years. These priorities build on our organization’s considerable strengths and accomplishments, while addressing challenges. The four priorities are:

**Strategic Priority #1:**
Provide consistently excellent and predictable services and experiences for every school we serve.

**Strategic Priority #2:**
Elevate programmatic excellence and organizational reputation for family services, addiction & dependencies services, Latinx services, and LGBTQ+ services.

**Strategic Priority #3:**
Build the leadership/management structure, capacity, and infrastructure that supports client and community impact.

**Strategic Priority #4:**
Increase CHAC’s capacity to deliver impact by building a more sustainable business model with a greater diversity of revenue streams.

The strategic plan describes the rationale, strategy, goals, success metrics, and key actions for each of the strategic priorities. We have developed a set of metrics that can be measured over time to ensure that our strategies have the desired results for our clients and our community. Goals and success metrics in the plan are intended to be achieved over the five-year period.

To ensure implementation of this plan and to make any necessary midcourse corrections required in the ever-changing external environment, CHAC’s staff and board will annually revisit the internal and external environment, the plan’s goals and objectives, and outcomes of the strategies.

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Strategic Priority #1: Provide consistently excellent and predictable service and experiences for every school we serve.

**Rationale and Strategy:** CHAC occupies a strong position as the provider of mental health services with its current partner schools and school districts. Current services address three tiers of need in schools: tier one reaches all students, focusing on social and emotional learning (SEL); tier two is for moderate risk/at risk students, providing 1:1 counseling; and tier three is for students who require a higher level of intervention and an integrated approach with physicians, a hospital, and/or more intensive intervention. CHAC school services are provided by people working towards various mental health degrees and licenses under the supervision of CHAC licensed clinicians. This long-standing service delivery model often means yearly rotation of personnel at the school sites, sometimes creating challenges in continuity of services, service delivery, and communication.

Although schools report seeing an uptick in the number of students needing services, additional financial resources to support growth in client services and caseloads may not be fully available to meet the need. Schools have begun to ask CHAC to serve more students for shorter periods of time, in order to support as many students as possible. CHAC must balance this demand with what is clinically appropriate for students, which can be longer interventions. There is increased competition from other
nonprofits and government agencies providing mental health services, some of which come with funding that require schools to pay less for services.

Given the current environment, CHAC needs to ensure consistently excellent and predictable services and experiences for each of its school and school district partners. To address this priority, key actions will include:
1. Conducting a needs assessment exercise at least every three years with each school district and creating a consortium of school-CHAC personnel to assess needs.
2. Developing clinical staff expertise in school-based mental health services.
3. Developing service delivery model to meet the needs of school districts as an integrated part of their mental health and wellness services to students and staff, providing a balance of evidenced-based prevention and intervention methodologies as indicated by the needs assessment.
4. Leveraging CHAC’s in-house services for those students who may need longer term and/or more intense care.
5. Building a system where there is an ongoing consistent point of contact for every school, year over year, staffed by a permanent CHAC position who: ensures continuity of care and service; monitors and responds to evolving school needs and concerns; and serves as a conduit to in-house programs and management staff.
6. Identifying best-practices for school-based models of mental health service and adopting them into the program.
7. Developing a rigorous vetting process for adding new programs and services outside of core school services to ensure continuity and sustainability.

Five-Year Goal
CHAC is the provider of choice for schools and school districts in its service area, playing an integrated, impactful and highly valued role in meeting the mental health needs of schools and school systems.
Success metrics to be achieved by June 30, 2024:
1. 100% of school districts are satisfied or very satisfied with communication and responsiveness.
2. 75% or greater of schools engaged with CHAC are satisfied or very satisfied with communication and responsiveness.
3. 100% of schools/school districts renew CHAC contracts annually based on prior year contract level of service or greater (absent external financial factors beyond CHAC’s control).
4. 50% of students referred to CHAC and receiving therapeutic services (individual or group) demonstrate improvement in their mental health, well-being and/or school engagement.
5. 50% of teachers report satisfaction with the impact of CHAC’s work with students in their classrooms.

Strategic Priority #2: Elevate programmatic excellence and organizational reputation for family services, addiction & dependencies services, Latinx services, and LGBTQ+ services.

Rationale and Strategy: While best known for our school-based programs, CHAC has long provided multi-lingual, multi-cultural counseling on a sliding payment scale for children, teens, adults, couples and families at our clinic in Mountain View. We work in concert with other mental health professionals and organizations to meet the needs of clients through a robust referral system. In recent years, the number of clients served in the in-house clinic is down but service hours are relatively flat, reflecting

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1 School-based mental health services are those that are delivered on-site at schools (versus in other community, clinic, or hospital settings). At CHAC, we focus on the needs of the entire school community, including all students, their families, and school staff. We seek to integrate our services with school systems using a collaborative, interdisciplinary approach.
anecdotal information that the intensity of cases has increased significantly and more time per client is required. We most frequently serve clients with complex family issues and/or addiction.

CHAC has identified two specific populations facing significant adversity in the current sociopolitical climate who require focused services over the next several years: Latinx (both documented and undocumented) and LGBTQ+ youth. The number of people with mental health needs, and the intensity of distress, in these populations is growing. We have experience working with both populations but must build our capacity to better serve their unique needs and circumstances.

CHAC seeks to provide both prevention and intervention services for schools and the community but given financial constraints in recent years, the majority of our work has been focused on intervention. During our data gathering process, nearly all our constituents identified a need for parenting classes, workshops and groups that equip parents and caregivers to understand and deal with the often challenging circumstances of raising children today in Silicon Valley.

To make best use of our resources, deliver the highest level of community impact, and increase the community’s understanding of our services, we will focus our time and attention on the following community mental health needs over the next five years: family services, addiction & dependencies services, Latinx services, and LGBTQ+ services. Key actions include:

1. Highlighting and enhancing services and programs designed to strengthen Latinx community members’ mental health and well-being.
2. Expanding the Well-Within program with services that address dependencies and addictions for youth and transition-age youth.
3. Identifying emerging dependencies (e.g., technology, etc.), building our competencies and capacity to address them.
4. Launching an initiative to name, define scope and publicize CHAC’s work in addressing complex family system issues.
5. Launching a program to serve LGBTQ+ youth and their families.
6. Reviewing programs and identifying opportunities to add prevention components to our various programs; implementing as appropriate and viable.
7. Developing and formalizing a continuum of prevention and intervention services for families, including parenting coaching and classes to address complex family systems and early childhood and family services (First 5).
8. Establishing and enhancing specialized clinical training programs to support new programs and initiatives.

**Five-Year Goal**
Improved mental health and well-being of community members with complex family issues, addiction, minority and acculturation stress, LGBTQ and parenting related-issues.

*Success metrics to be achieved by June 30, 2024:*

1. Double the number of clients (vs 2019 volume) with dependencies and addictions in CHAC treatment programs.
2. Increasing number (year-over-year) of clients with dependencies and addictions who report sustained recovery.
3. 50 clients (at a minimum) are served by CHAC’s quality LGBTQ+ program.
4. 50 families (at a minimum) presenting with complex family issues are served by CHAC

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2 Well Within is a 12-week, group based outpatient program for teens 15-19 affected by substance use/abuse and for their families.
5. **Sustainable dual language parenting classes and parent coaching offered and actively used by community members.**

6. **50% of parents participating in parenting classes and coaching report increased confidence and ability to successfully parent.**

7. **Measurement for minority/acculturation stress is adopted and 50% of clients express improvement.**

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**Strategic Priority #3: Build the leadership/management structure, capacity, and infrastructure that supports client and community impact.**

**Rationale and Strategy:** Beginning in 2016, CHAC embarked on a three-year process to strengthen and improve its infrastructure, systems, processes, and facilities. Significant investment has been made into such things as building improvements (i.e., new roof, flooring, space configuration, etc.) and converting to electronic medical records. Almost all of the planned improvements have been made, resulting in improved client care and impact, a more pleasant work environment, and increased best practices in administration operation. There remain a few key improvements, which are part of this strategic plan.

The next phase of organizational development needs to focus on building CHAC’s leadership and management structures and capacity. For example, there is no one person responsible for overseeing all programs, looking holistically at strategy, coherence, and capacity. For many years, CHAC has relied on clinical supervisors to play a variety of roles – managers, clinical program strategists, community advocates and ambassadors, etc. in addition to supervising interns and in some cases, seeing individual clients. Staff does not always have clarity around the chain of command and decision-making and often feel overwhelmed. There are critical gaps in several support areas including HR, fundraising, and quality assurance; at present time, these functions are carried out by the Executive Director, Chief Financial Officer, and Executive Assistant with some outside contractors. Given CHAC’s size and scope, there is risk that critical strategic and operational issues might go unaddressed with the current structure.

Critical to achieving the goals of this plan and continuing to deliver on the mission of the organization is investment in organizational capacity. Key actions include:

1. Developing a stronger organizational structure by creating a robust leadership team.
2. Developing organizational structure for program development and implementation.
3. Investing in professional development for program managers and directors.
4. Developing additional systems and processes that support effectiveness and efficiency.
   a. Optimizing technology for improved service to clients and greater organizational efficiency.
   b. Integrating necessary systems, processes and expectations into the CHAC’s training program and administration to deliver excellent services.
5. Developing the infrastructure necessary to identify, develop, monitor and report key performance and impact metrics.

**Five-Year Goal** An organizational structure and work environment that includes a strong leadership/management team and support structures that maximize operational efficiency, effectiveness and staff satisfaction.

*Success metrics to be achieved by June 30, 2024:*

1. **80% of staff agree or strongly agree that CHAC’s environment allows them to do their best work.**
2. **100% of CHAC’s major operating activities**\(^3\) **have formal policy and procedure documents created and approved.**

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\(^3\) Major operating activities include finance, administration, emergency protocols, clinic procedures, school processes.
3. Key actions in the strategic and annual plans owned by the leadership team are achieved.
4. Key Performance Indicators (KPIs)\(^4\) are developed, tracked and achieved.
5. Funding for capacity-building ($1M to $1.5M required for the first three years of the plan) is secured to enable and sustain organizational structure.
6. 100% of key leadership and management positions are filled.

| Strategic Priority #4: Increase CHAC’s capacity to deliver impact by building a more sustainable business model with a greater diversity of revenue streams. |

**Rationale and Strategy:** A critical question guiding this planning process was how to develop a more sustainable business model in an ever-evolving external environment. A model that would allow CHAC to increase and diversify its financial resources, raise its reach and community visibility, and ultimately result in greater community impact.

There are revenue sources enjoyed by other mental health agencies that are not currently part of CHAC’s revenue model. Specifically, research found that like organizations accept a form of Medical that provides a steady significant source of funding. Often, nonprofits accepting Medical and other government insurance appear to be best positioned to also receive significant county contracts for services. CHAC has generally resisted pursuing public insurance programs and some government contracts, with concern that it would inhibit the organization’s accessibility or create too great an administrative burden. However, to achieve its sustainability goals, CHAC should thoroughly investigate public insurance sources and accept one or more, if warranted.

Input from key stakeholders gathered during this planning process suggests more must be done to raise the visibility of CHAC and create greater clarity about its work and impact. Putting time and attention to CHAC’s brand and impact, together with creating a more robust fundraising program, will help to increase philanthropic investment in CHAC.

CHAC will pursue partnerships with the other nonprofits and government agencies offering complementary services to CHAC’s core programs. We believe there are organizations with core competencies and programs that can enhance and strengthen services to our clients and where our work can do the same for their clients. Over the five year period, we will seek to create formal agreements with one or more of these organizations.

To achieve a more sustainable and diversified business model, key actions include:

1. Modifying our training program business model for optimal impact, sustainability and return on investment.
2. Seeking opportunities for funding of CHAC’s training program and adjusting training based on viability of funding for training services.
3. Creating targeted opportunities for donors and funders to encourage transformational gifts to implement strategies in this plan.
4. Engaging the board and long-time supporters in fundraising.
5. Identifying and formalizing partnership arrangements with other service providers to enhance CHAC’s brand and strengthen services for our clients.
6. Identifying and enhancing CHAC’s brand image; Investing in professional services related to marketing and brand awareness.

\(^4\) KPIs include such things as cost/hr of service or x% of clients receive phone contact w/in 24 hours, etc.
7. Evaluating the opportunity for providing contracted services to hospitals, insurance companies, and Santa Clara County (i.e., Medical, Medicaid).

**Five-Year Goal** CHAC seeks, attracts and stewards partnerships and financial resources to meet its obligations, seize opportunities and increase impact.

*Success metrics to be achieved by June 30, 2024:*

1. CHAC services are fully-funded through grants, service fees, contracted revenue, JPA contributions, client fees, and service club/church support.
2. 50% increase in the number of individual donors.
3. 100% increase in overall individual contributed revenue.
4. Criteria established for evaluating feasibility and value of partnerships
5. Evaluation of new contract services to hospitals, insurance companies and Santa Clara (i.e., Medical and Medicaid)