I. Introduction
Since January 2016, FCA has been engaged in a strategic planning process designed to build on the organization’s rich history, while at the same time re-positioning it to thrive in an environment driven by cost containment, consolidation and an emphasis on data-driven outcomes.

The process included multiple interviews with internal and external stakeholders including: clients; staff; volunteers; board members; and community partners. Demographic data, program evaluations, financial reports and consultations with statewide/national trade organizations helped shape this document as well.

Like most nonprofit organizations, FCA has suffered the vagaries of the economy and changes in government funding for health and human services. Rate cuts, flat funding, delayed government contracting/payments and a changing regulatory environment have contributed to the agency’s fiscal challenges in recent years, though a turnaround is underway and we’ve seen financial results improve over the course of the last two years. To promote that stability, management has made a series of staff changes, re-organized program teams and eliminated/modified underperforming programs. Management has also worked hand-in-hand with the board to pursue new opportunities and diversify agency revenues.

Both the charitable sector and the models for delivering and financing services – most notably, behavioral health services – are in state of transition. Some organizations will suffer, while others will thrive. FCA is determined to be among the latter.
# II. Strengths, Weakness, Opportunities and Threats – SWOT Analysis Highlights

<table>
<thead>
<tr>
<th>Strengths</th>
<th>Weaknesses</th>
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<tbody>
<tr>
<td>FCA's history and legacy.</td>
<td>We remain too reliant on government funding.</td>
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<td>Excellent reputation in community, with government, other agencies, etc.</td>
<td>Not enough funds to support competitive salaries and employee benefit packages.</td>
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<td>Strong fiscal management, executive leadership and board.</td>
<td>Cash flow issues negatively impact credit rating and morale.</td>
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<td>Size/capacity sufficient to succeed in the changing environment.</td>
<td>Limited participation from diverse communities, community stakeholders.</td>
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<td>Array of services that span multiple generations - can make things more complicated, it also offers a level of protection that single cause/single population organizations lack.</td>
<td>We can't dream big if we only look towards “covering the costs” and surviving for today.</td>
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<td>Entrepreneurial/Aggressive/Focused on outcomes.</td>
<td>Dated IT infrastructure.</td>
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<td>Tie-up with LICADD provides a blueprint for other deals.</td>
<td>Lack of capital budget – admin offices look unprofessional, vans are unsafe.</td>
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<td>Many programs run structural deficits and fundraising can be unpredictable.</td>
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<td>Opportunities</td>
<td>Threats</td>
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<tr>
<td>Geographic expansion into Suffolk and underserved areas of Nassau.</td>
<td>Destabilization of professional workforce due to low wages, push to use part-time hourly staff to reduce costs.</td>
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<td>Mergers/affiliations with other nonprofits.</td>
<td>Competition – nonprofits and proprietary companies who claim to do it faster and cheaper.</td>
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<td>Demographic trends – especially related to aging – are favorable.</td>
<td>Behavioral health care/payment system reforms – lots of unknowns.</td>
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<td>New structures and staff to better move on grant opportunities.</td>
<td>Uncertain political environment.</td>
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<td>Untapped partnerships with hospitals, health care providers.</td>
<td>Government often undervalues/underfunds our work.</td>
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<td>We don’t yet market any of our services directly to consumers.</td>
<td>Mission drift – we don’t want to simply chase dollars as we pursue growth.</td>
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<tr>
<td>Lots of untapped fundraising potential.</td>
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III. Overall Strategic Direction

This strategic plan is an overarching management plan for FCA - a roadmap for success in 2020. It’s not designed to be a “to-do list,” but instead creates a lens for assessing new opportunities, directing resources and reviewing agency performance in a way that goes beyond financial reports and program service units. We’ve identified the following three broad imperatives, from which all goals, objectives and strategies flow:

Imperative #1

Tell FCA’s story in a different way to a broader audience to convey impact and mobilize support.

Imperative #2

Enhance our infrastructure to build fiscal stability, IT capacity, talent and leadership for 2020 and beyond.

Imperative #3

Build new partnerships in order to achieve our goals and fulfill our mission.

The strategic planning team repeatedly emphasized the need to ensure the continued success of existing programs, all of which require significant vigilance if we are to remain successful. This plan was designed with those responsibilities in mind and with some flexibility should unforeseen circumstances arise, which necessitate our undivided attention.

IV. Goals and Objectives

Goal #1: Lead with vision

FCA should be seen as an organization that is bold, disruptive and a key player in provision of health and human services on Long Island. We embrace new ideas, even if mired in complexity or ambiguity and when confronted by challenges, we listen carefully, think critically and act decisively.

Objectives:

- Simplify and affirm FCA’s brand and value proposition to key stakeholders and to the public at large.

- Build and strengthen FCA’s profile as a thought leader in combating poverty, homelessness, addiction, violence, economic inequality, health care disparities and other issues that affect Long Island.
• Leverage FCA’s 130+ years worth of expertise in addressing social determinants of health to build innovative partnerships with health care providers, managed care organizations and other entities.

• Demonstrate and articulate the benefits of a strong, dynamic, accountable nonprofit sector and innovative community-based services as a critical component of Long Island’s strategic economic development and population health efforts.

• Establish FCA as an “employer of choice” for talented professionals of all ages through competitive compensation tied to performance, family-friendly workplace policies, opportunities for advancement and alignment of personal and organizational values.

• Build a “new generation” of volunteers and donors that can help support, shape and further energize FCA’s programs.

• Directly engage and mobilize clients, volunteers, community members, staff, volunteers, trustees and other stakeholders in support of FCA’s mission, programs and shared initiatives.

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**Goal #2: Govern for the future**

FCA’s voluntary board of Trustees has always been among our greatest assets and its 30 active members analyze community, service delivery and market trends to position the organization for the future and ensure mission alignment. They are guardians of the horizon, and they do this by helping FCA define and realize its future aspirations, while ensuring the inclusion of underrepresented and marginalized communities.

**Objectives:**

• Evaluate current board composition to identify gaps in time, talent or treasure.

• Recruit, engage and maintain a diverse cross-section of trustees.

• Formalize the new trustee orientation process, including a revamped handbook, program tours and mentoring.

• Ensure that trustees continue to receive timely/actionable financial reports and participate in meaningful programmatic activities that help reaffirm their commitment to FCA.

• Review existing board committee structure and membership.

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**Goal #3: Execute on mission**

We will consistently articulate a clear purpose, target audience, and intended results of our efforts, taking into account fiscal viability and community impact. We will work to ensure adequate and stable funding for mission-driven endeavors and continually examine both prospective and existing programs to assess relevancy to mission and sustainability.
Objectives:

- Continually assess and prioritize all existing programs to ensure fidelity to mission, effectiveness and sustainability.

- Assess and prioritize all potential new opportunities to ensure fidelity to mission, advancement of strategic goals and financial stability.

- Amplify FCA’s voice on behalf of consumers and in support of nonprofit excellence in our communities, in the media, among lawmakers and in other forums.

- Enhance FCA’s performance dashboard to enhance feedback loops, allow for program modifications and increase transparency.

- Review community-level data and consumer feedback to pinpoint and address service gaps.

- Immediately review existing programs that received a low priority score in the strategic planning assessment as well as programs that are chronically underfunded or face significant competition for clients.

- Investigate and implement new strategies for increasing unrestricted donations, major gifts and foundation grants to FCA and strive for increases of at least 10% annually.

Goal #4: Measure what matters

FCA will relentlessly focus on achieving outcomes tied to meaningful, measurable change in lives, systems, and communities. We will continue to infuse performance management into all levels and aspects of agency operations. Staff will relish the ability to improve their approaches and inform their decisions with internal and external data, research, and practice evidence. FCA will also remain committed to using evidence to educate funders, government agencies, and the public on the impact of our social interventions.

Objectives:

- Build on FCA’s historic investment in Step Up to Success to demonstrate impact, ensuring that data analysis and iterative action extends to all programs.

- Quantify and convey the economic benefit and social return on investment (SROI) of FCA’s programs to public and private funders and potential partners, including health care providers, health homes and managed care organizations.

- Gain a better understanding of actual unit costs in each program.

- Thoroughly assess the return on investment (ROI) associated with FCA’s fundraising strategies, including events, direct mail campaigns and online giving.
Goal #5 Partner with purpose
Rather than diluting our efforts across a diverse spectrum of programs or launching potentially duplicative initiatives, FCA will address the complexity of social problems through diverse partnerships that revolve around shared visions, values and resources. We value public/private partnerships that are atypical and embrace shared risks and responsibilities in all aspects of program implementation, operations, funding, and recognition.

Objectives:

- Continue to explore mergers, acquisitions and strategic affiliations with other nonprofit organizations with an eye towards expanding service capacity and building financial security.

- Actively seek formal partnerships with hospitals, primary health care providers, behavioral health providers, managed care organizations and other entities.

- Create, maintain and deepen partnerships with local businesses and academic institutions that can provide meaningful advancement opportunities for young people.

- Complete the integration of LICADD’s initiatives with FCA, including the potential consolidation of events in 2017.

- Continue to explore membership in the various IPAs and other groups designed to play a role in behavioral health care financing reform.

Goal #6 Innovate through enterprise
Uncertainty often inspires creativity and as the nonprofit sector evolves, FCA is anxious to take 130+ years of proven successes directly to individuals, families and communities in need. We will encourage staff in all positions at all levels to challenge the status quo, take calculated risks and work together to build sustainable solutions.

Objectives:

- Pursue strategic public funding opportunities that will expand or maximize existing programs, while at the same time diversifying our funding base. Of particular interest are Federal, State and Pay-For-Performance initiatives.

- FCA will develop at least (2) earned income ventures that will allow us to market/deliver services to individuals, families and communities who have the ability to underwrite those efforts.

- FCA will review its use of space to maximize rental income and lessen expenses.
**Goal #7 Invest in capacity**

FCA recognizes that our fiscal health positions us for the future. We will continually improve the operating systems, business functions, technologies and talent that supports high financial/programmatic performance and sustainability. Our unrestricted revenue allows risk taking, solid overhead support, and will help us scale what works. New efficiencies will allow us to reinvest donor dollars back into laser-focused solutions to community problems.

**Objectives:**

- Build an unrestricted operating reserve fund of at least $5 million to stabilize FCA’s finances and address cash flow shortages, unexpected expenses or one-time losses.
- Maintain a physical plant on all sites that fosters professionalism and productivity among staff, volunteers and clients.
- Stabilize FCA’s technology infrastructure to accommodate new functions such as an EHR and to promote efficiency and accountability.
- Research, select and implement an Electronic Health Record (EHR) that will both foster productivity and enable intra/inter-agency information sharing.
- Research, select and implement an IT-based talent management system that streamlines human resource (HR) functions.
- Increase employee retention by at least 5% annually through the creation of enhanced compensation plans, attractive workplace policies and other mechanisms designed to attract/retain top talent.
- Review all marketing materials (online and offline) to ensure maximum impact and look for ways to double online giving between 2016 and 2017.
- Explore the feasibility of launching a capital campaign to help sustain/expand our operations and create a strategic investment pool for new initiatives.

**Goal #8 Engage all voices**

We know that placing clients, their families, staff, volunteers and other key stakeholders at the center of decision-making and goal-setting achieves the most meaningful and durable outcomes. FCA’s practices, policies, and relationships all reflect a person-centered, asset-based orientation, so that all stakeholders can provide feedback that shapes their own paths and that of the organization and broader community.

**Objectives:**

- As reimbursable services expand and we face inward to achieve stability, we must ensure that our public voice remains strong weighing in on issues that effect vulnerable populations, our communities and the non-profit sector.
• Develop a diverse Leadership Council that help guide program development, resource development and pave the way towards new partnerships.

• Revisit the structure and function of the board’s Advocacy Committee.

• Catalog all community groups, task forces and coalitions of which FCA is a part, assess our participation and make changes as necessary to ensure maximum impact.

• Actively seek more ways to involve consumers and staff in agency decision-making, especially as it relates to program planning and operations.

V. Jumpstarting our Efforts:

With the momentum associated with this effort behind us, we expect to immediately:

• Complete the agency-wide roll-out of our new talent management software (10/16).
• Continue efforts to finalize and schedule implementation of our new EHR. (11/16).
• Create a stakeholder Advisory Board for our new Recovery Center (10/16).
• Create a stakeholder Advisory Board for our new SAMHSA-funded project (10/16).
• Contract with a marketing firm to design a free-standing brochure that simplifies and affirm our brand and value proposition to key stakeholders and to the public at large (10/16).
• Recruit a 12-person diversified Leadership Council that can help guide our efforts and serve as a ‘farm team’ for the board (12/16).
• Refine our philanthropic efforts based on the re-affirmed value proposition and branding 12/16).
• Distribute a comprehensive survey to all Trustees assessing their satisfaction, interests and goals in volunteering with FCA (10/16).

During the execution of this Strategic Plan, senior staff will review progress every three months at leadership meetings and share its findings with all staff, the board of Trustees and key stakeholders. Senior staff and the Executive Team will update the plan annually to maintain infrastructure benchmarks, including financial stability.

**Strategic Planning Committee Members**

**Board:** Charles Trunz (Chair); Drew Crowley; Scott Treiber; Bernie Kennedy; Dan Griesmeyer; Dorothy Jacobs

**Staff:** Jeffrey Reynolds, Lisa Burch, Mary Ann Vassallo