CAST: Strategic Growth Business Plan
Pitch Deck
Preface: Project Context

→ In August 2014, CAST began a strategic business planning process to determine its vision for impact and strategic direction. This work was led by a Working Group of Board and staff leaders, and engaged Blue Garnet to support the following initial steps in the planning process:
  – **Step 1**: Conduct an organizational discovery of where CAST is today, and define CAST’s ultimate impact and implications moving forward
  – **Step 2**: Develop a strategic growth plan, including financial strategy via a pro forma model, and package work into a pitch deck

→ Through this process, CAST made several key breakthroughs:
  – Shifting to a multi-year planning focus
  – Further clarifying the integration of direct service and systems change work
  – Defining client profiles of survivors served by CAST, and the resources needed to meet their unique needs
  – Working Group consensus to recommend Scenario 2 (“Moderate” growth), with Board approval of recommended scenario

→ The following document is a packaged pitch deck of work-to-date, articulating CAST’s agreed-upon vision and direction in a summarized form for sharing with partners and funders. To maximize the pitch deck’s value and utility, content should be developed for placeholder slides, and the appropriate mix of slides should be tailored for specific audiences
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- The Need

- CAST’s Unique Value Proposition & Impact to Date

- Vision for Impact

- Strategy and Business Model

- Initial Roadmap and Dashboard

- The Ask

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Slavery exists today, with victims lured by false promises of a better life

Lorena, from the Philippines
- Went abroad to give her children a better life
- Held for 4 years in Saudi Arabia, escaped, and trafficked again for 4 more years in the United States
- Worked 18-22 hours per day as a housekeeper, nanny, and elder caregiver with no pay

Brittany, from the United States
- Forced into prostitution by a man so violent that, at one time, he strangled her until she became unconscious

Tzighe, from Eritrea
- Recruited to America to earn money to send her daughter to college
- Held for 3 years, working 18 hours per day as a housekeeper, cook, and gardener with no pay
Combatting this issue, the anti-slavery movement has come of age -- yet the need abounds

- Human trafficking and modern-day slavery are transnational problems rooted in complex systems\(^1\)
  - Fully sizing its scale is difficult; but we know California is a major US hub for trafficking\(^2\)

- Anti-slavery movement is “coming of age,” with momentum building, fueled by greater awareness

- Yet, human trafficking is fastest growing criminal enterprise in 21\(^{st}\) century.\(^3\) It is rapidly expanding, while government resourcing still lags

- Growing numbers of organizations are joining the movement, with increasing focus on “solutions”
  - New emerging models are innovative, collaborative, and entrepreneurial
  - Further, traditional social service agencies increasingly playing a role in supporting survivors

\(^{1}\) UNODC Global Report on Trafficking in Persons, 2012
\(^{3}\) California Department of Justice, http://oag.ca.gov/human-trafficking
As a leader in the movement, CAST both impacts survivors’ lives & creates broader system change

CAST’s unique model weaves together direct service & systems change

Direct services support and improve lives of freed survivors …
- In 2014, CAST directly supported 354 survivors on their journey towards become thriving individuals
- 174 survivors were “thriving” within the year, while others continue to work towards this

...and key learnings inform public policy to create systems change
- CAST drives and co-sponsors legislation at state and federal levels, resulting in major wins such as SB 477
- CAST also ensures survivors’ voices help inform policymakers, with 166 members part of its Survivor Leadership Programs

Recent Successful Legislation Efforts:
- SB 1193: California Transparency in Supply Chains Act
- SB 657: Human Trafficking Public Posting Requirements
- SB 477: Foreign Labor Contractors Registration
- Trafficking Victims Protection Reauthorization Act
Angela epitomizes how CAST integrates direct services with systems change

Angela was trafficked to the US from the Philippines at 28 years old

- Held for over 2, surviving off table scraps and working 19 hours per day for no pay
- CAST assisted Angela with social and legal services

She joined the National Survivor Network to advocate for others tricked by labor recruiters

- Testified before the California State legislature to advocate for SB477: Foreign Labor Contractors Registration
- Passed by Governor Jerry Brown in September 2014, preventing the abuse she endured from happening to others
CAST’s successful efforts are regularly recognized by its partners and supporters

“CAST sets itself apart by their proven reliability, professionalism and compassion”
- L.A. County Sheriff Jim McDonnell

“My wife and I have been long-time personal supporters of CAST. I’m proud to work with them to stop human trafficking.”
- Los Angeles Mayor Eric Garcetti

“The UN Trust Fund supports valuable non-governmental organizations such as CAST.”
- UN Secretary General Ban Ki-moon

“No one reaches out to survivors with greater passion and greater personal commitment than CAST does”
- U.S. Secretary of State John Kerry
CAST has a bold vision for impact

CAST’s Impact Statement

By 2025, CAST will create a bridge between practice and policy, meaning survivors are empowered and resilient, and working with practitioners to inform a survivor-centered policy agenda.

As a result, this leads to systemic changes to models, attitudes, actions and resources to end modern slavery.

(1) Survivor-centered approach: CAST listens to and empowers survivors to meet their individual needs and build resilience (through direct service and systems change)
CAST’s sharpened business model will allow it to achieve this vision for impact

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<th>Who we serve</th>
<th>How we serve them</th>
<th>How we invest sustainably</th>
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<td><em>Practice</em> focused on survivors “ready” to engage and benefit from CAST’s services,¹ primarily:</td>
<td>→ Direct services in emergency response, legal services, and case management</td>
<td>→ Multi-year financial model assessed different scenarios &amp; implications</td>
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<td>→ Foreign-national adults</td>
<td>→ Referrals to network of trusted partners</td>
<td>→ Investments identified for each key ingredient, phased over time³</td>
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<td>→ Domestic children and transitional-age youth²</td>
<td>→ Survivor leadership development (globally)</td>
<td>→ In total, key investments of $11.4M over the next 5 years</td>
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(1) CAST will serve domestic adults that are “ready” to engage with CAST’s service team
(2) Legal Services will continue to serve domestic children; however, because domestic children have access to available resources & services, Social Services will not serve domestic children
(3) In consistently prioritizing direct services, CAST has traditionally underinvested in other areas such as broader systems change and org. infrastructure; this next phase of strategic growth focuses more on these other key areas

Voices of Survivors
http://youtu.be/nQ_OSMepgeI

CAST-Pitch Deck as of 21Apr15
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Impact Formula guides decisions on type of growth CAST is pursuing

CAST’s Planned Investments

- Directly serve “ready” survivors, refer out others
- Maintain # of survivors served (with some growth)
- Build greater capacity to learn from survivors
- Develop better networks for quality referrals
- Develop more effective service models through research, piloting, evaluation
- Promote/teach effective models so other providers can better serve survivors
- Strengthen & expand survivor leadership network
- Go deeper in policy work
- Org. capacity in resource development, learning, communications/marketing, HR, data systems, admin.

CAST typically prioritizes investments in direct services, while maintaining relatively “efficient” systems change work. Moving forward, CAST may require strategic investments in systems change and infrastructure.
Achieving vision requires 4 ingredients for success with specific investments (I of II)

A. Learn continuously from survivors to adapt and reinvent evidence-based service models to meet their emerging needs
   - Continuously refine and innovate service models to serve survivors
   - Develop innovation lab to research, develop and pilot effective models (incl. for transitional-age-youth)
   - Develop partner network to increase quality of referrals

B. Develop survivor leaders who provide expertise to the anti-slavery movement
   - Global expansion of survivor network, incl. investments in its staffing, development, and programs

“[Quote]

-The more I learned about advocacy and about how important it is for survivors to be activists, the more I got involved. CAST taught me how to be an advocate and a leader.”

-Ima Matul

Source: Portraits of Resilience

CAST-Pitch Deck as of 21 Apr 15

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Achieving vision requires 4 ingredients for success with specific investments (II of II)

Evolve strategic networks to support survivors and meaningful policy change
- Expand policy presence in DC and Sacramento
- Develop & implement training curriculum and tracking systems for partners

Invest in organizational capacity to innovate new and effective models and policies
- Invest in key positions & systems, incl. development, human resources, admin, and data/information and learning
Our multi-year financial strategy outlines projections and requirements for our plan

Financial projections over next 5 years (FY16-FY20)

- Revenue
- Expenses
- Net Income

Investments will create a stronger CAST that further integrates policy & practice to not only serve survivors better, but also create broader systems change.

Projected revenue sources over next 5 years (FY16-FY20)

Revenue projections build on CAST’s proven track record of efficiently raising funds with lean staffing.

Now ready to invest in creating a stronger development team, to enable greater revenue growth.
CAST’s performance dashboard ensures we stay on track toward achieving vision for impact

CAST Working Impact Formula

\[ i = a + b + c + d \]

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Learn continuously from survivors to adapt and reinvent evidence-based service models to meet their emerging needs.

Develop survivor leaders who provide expertise to anti-slavery movement.

Evolve strategic networks to support survivors and meaningful policy change.

Invest in organizational capacity to innovate new and effective models and policies.

Source: Developed during Steps 1 and 2 of CAST Strategic Business Plan, September 2014 – March 2015