



**STRATEGIC PLAN SUMMARY REPORT  
2020-2023**

## I. EXECUTIVE SUMMARY

From the period November 2019 through October 2020, the leadership of Better Tomorrows engaged in a 3-Year Strategic Planning initiative. The planning was supported by a number of internal and partner resources, as well as the team of Dunleavy & Associates.

The timing of the initiative was based in large part on a recent leadership change. The organization recognized the value in, and opportunity to, bring the staff and leaders together, to chart a new course as one. Laying the foundation for a new culture and set of strategic priorities.

As the planning period encompassed the Covid-19 Pandemic outbreak, it is important to mention how the planning process was impacted.

- All stakeholder interviews were completed before the pandemic reached the United States in any measurable way. While 2 calls did take place in late March, the impact of the outbreak was not yet known. As such, the assessment findings did not include any information related to the pandemic.
- The Strategic Planning Committee (SPC) was able to meet face to face for the kick-off meeting while all subsequent gatherings were facilitated via Zoom.
- The stakeholder findings were presented to the SPC on April 30<sup>th</sup>. At this time more was understood about the outbreak impacts although the data presented did not reflect that knowledge as it was gathered earlier in the year.
- In May, when the SPC identified the strategic priorities, (2 calls were held during the month), pandemic implications were better understood but did not direct the strategic prioritization decisions.

## II. PROCESS

The strategic planning process encompassed four unique phases. These phases and corresponding tasks were as follows:

### PHASE I: STRATEGIC VISIONING

Initial meeting with Leadership to:

- Articulate desired outcomes & deliverables
- Review the planning process
- Identify intended and unintended outcomes
- Seat the full Strategic Planning Committee (SPC)
- Identify preliminary list of stakeholders for assessment interviews/focus group participation

Kick-off meeting with SPC to:

- Affirm high level planning objectives
- Review the planning process (workplan)
- Review SPC roles & responsibilities
- Review timeline(s)
- Discuss SPC culture & guiding principles
- Affirm list of stakeholders for assessments
- Review Interview Guide

## **PHASE II: ORGANIZATIONAL & ENVIRONMENTAL ASSESSMENT**

- Confirm stakeholder questions and formats (Interview Guides)
- Distribute interview request invitations
- Schedule all interview calls/outreach
- Conduct One-on-One interviews - (17 stakeholders)
- Conduct Focus Groups - (2 sessions, total of 11 participants)
- Consolidate all assessment data
- Create SWOT (strengths, weaknesses, opportunities, threats) analysis
- Prepare Assessment Findings presentation
- Present findings to include SWOT, to SPC

## **PHASE III: STRATEGIC DIRECTION & PLAN**

Working meeting(s) with SPC to:

- Discuss outstanding questions, comments, feedback from Assessment Findings
- Affirm/revise Mission & Vision language
- Determine high level strategic goals and priorities
- Identify metrics and outcomes/success statements to support the goals
- Finalize draft Strategic Plan
- Present Plan recommendations to the Board of Directors

## **PHASE IV: IMPLEMENTATION PLANNING**

- Seat the Implementation Planning team members and co-chairs
- Review the implementation planning process, to include planning templates and timelines
- Provide counsel to each planning team as they progress
- Present Plan recommendations to the Board of Directors

## **III. PARTICIPATION**

There were 4 primary groups and 1 advisory team involved in the planning process. While a few individuals sat on multiple committees, there were over 50 unique voices involved in the assessment and planning work. These teams and the respective individuals gave tirelessly to the initiative. Their commitment, passion, focus and expertise, yielded informed and collaborative discussions and outcomes. The teams were as follows:

### **STRATEGIC PLANING COMMITTEE**

#### **Board of Trustees**

- John O'Donnell, Chairman
- Marge DellaVecchia, Trustee
- Jake Jones, Trustee

#### **BT National Members**

- Annie Foster, Director of New Business Development
- Pat Schwartz, Director of Service and Program Delivery

### **BT Social Service Coordinators**

- Anni Peterson, Director of Hawaii Operations
- Evoni Story, Chester Apartments, Chester, PA - Family Site
- Matthew Korten, Hall's Corner, East Brunswick, Silver Vistas, Neptune, NJ - Senior Site
- Derrick Kirce, Janie's Garden, Sarasota, FL - Family Site
- Fred Roldan, Roosevelt Manor and Morgan Village, Camden, NJ - Family Site

### **Michaels Staff**

- Julieann Duca, Michaels Sr. Regional Property Manager (Philly area Portfolio)
- Bessie Hampton, Michaels Sr. Regional Property Manager (Florida area Portfolio)
- Ken Crawford, Michaels Development Company Executive Vice President

### **Camden Based Organization**

- Gerald Davis, Executive Director - TOUCH NJ Food Pantry

\*\* Howard Tucker, Nelson Morgan, and Sarah Rossi also on the committee as BT Leadership \*\*

The Strategic Planning Committee was responsible for determining the stakeholder cohorts, approving the stakeholder guides (questions), evaluating the assessment findings, and making the strategic priority recommendations. The team gathered in person on January the 30th, participated in numerous electronic based correspondences, and gathered again via Zoom on April 30<sup>th</sup>, May 6<sup>th</sup> and May 20<sup>th</sup>. The final Strategic Priority language was presented to the Board of Directors by the SPC in June of 2020. The recommendations were approved.

### **STAKEHOLDER INTERVIEWEES**

#### **Board Member**

- Joe Purcell - Board Treasurer and Michaels CFO/Treasurer

#### **Better Tomorrows National Staff**

- Lauralee Brown Markus - AD California - California based

#### **Better Tomorrows Field Based Staff**

- Shaquanna Frizzelle - Ocean Towers and Ocean Pointe Elderly, Jersey City, NJ - Sr. Site
- Bridgett Floyd Lee - Regional Lead Social Service Coordinator, Raleigh Annex Apartments

#### **Michaels Corporate Staff**

- Kimberlee Schreiber - President, Michaels Management Affordable
- Laura Zaner - VP Corporate Marketing Michaels
- Walt Meremianin - Director, Learning and Development
- Andrew Davenport - Vice President Development

#### **Michaels Field Based Staff**

- Vorricia Harvey - Director of Resident and Community Services (Chicago)
- Gina Young - Michaels Regional Property Manager (Texas/LA)

#### **Current External Partners/Funders**

- Philadelphia Councilman Mark Squilla
- Michael D'Italia - Rutgers Camden, Program Coordinator, Engaged Civic Learning
- Sarah Geiger - Director, Agency Relations, Philabundance
- Kim Fortunato - President, Campbell Soup Foundation
- Pamela Lawrence - Neighborhood & Community Investment Specialist, HUD
- Ryan Kusumoto - President & CEO, Parents and Children Together

#### **Recent Former BT Staff Member**

Prepared by Dunleavy & Associates

February 2021

Page 4 of 12

- Ed Rodriguez - Former SSC Park Springs

The stakeholders selected to participate in one-on-one interviews represented a cross section of partners, funders, leaders and staff. The interviews typically lasted 60 minutes and were conducted via phone during the months of February and March. All responses were kept anonymous, and the significant trend findings were presented to the SPC.

## **FOCUS GROUPS**

### **National Staff**

- Sofya Mirvis, Senior AD - Camden Based
- Diane Young Johnson, Senior AD - Camden Based
- Shannon Kay, Senior AD - Camden Based
- Lori Ward, AD of Projects and Partnership Development - Camden Based
- Neil Maruszewski, Data Systems Manager - Camden Based
- Deloris Westmoreland, Senior AD - based out of Piedmont Senior Tower, Atlanta, GA

### **Michaels Staff**

- Roger Williams, Senior VP, Michaels Management Affordable
- Sandy Cipollone, Senior VP, Michaels Management Affordable
- Chuck Durnin, Senior VP, Michaels Management Affordable
- Stacie Brach, Regional VP, Michaels Management Affordable (Elk Grove, California Based)
- Marc Getson, Vice President, Michaels Management Affordable

The focus group participants were all internal to either the Better Tomorrows or Michaels organizations. The sessions were conducted via Zoom, and similar questions were posed to both groups. It was determined at the onset of the planning that a desired outcome was to strengthen and reinforce the partnership between Better Tomorrows and Michaels. These focus groups, while facilitated separately, were an opportunity to achieve that goal.

Following the Board approval of Strategic Priority language in June of 2020, planning for actually implementing the recommendations then began. The Strategic Planning Implementation Committee launched on July 28 2020 and met through the Fall.

## **IMPLEMENTATION PLANNING COMMITTEE CO-CHAIRS**

- Sofya Mirvis & Derrick Kirce - Service Delivery; Programming
- Pat Schwartz & Sharon Ingram - Service Delivery; Operations
- Anni Peterson & Joann Fida - Fund Development
- Lori Ward & Lauralee Brown Markus - Communications
- Lori Ward & Diane Young Johnson - Partnerships

The implementation teams were tasked with identifying the supporting objectives, strategies and tactics for each strategic priority. These co-chairs and their respective committee members were in part leaders in the priority areas, but not exclusively.

## **ADVISORY COMMITTEE**

### **Chairs**

- Howard Tucker & Nelson Morgan

## Michaels Advisors

- Kimberlee Schreiber (JC) MMA President
- Ken Crawford (SPC) MDA Executive Vice President
- Bessie Hampton (SPC and JC) MMA RPM
- Judy Parrish (JC) MMA Community Manager
- Laura Zaner (SPC Key Informant) Michaels Marketing

## IV. OUTCOMES

The following reviews the Strategic Priority topics, supporting approaches and goal language.

### ➤ SERVICE DELIVERY

- Programming
  - Define Core Programs - (Outcomes and Impact) as Contracted Services
  - Targeted Local Impact - Community Specific (Enhanced Core Programs)
  - Program Alignment & Staff Capacity - Balancing Resident Need and Staff Skills
- Operations
  - Staff Training - Knowledge & Best Practices to Provide Core Programming & Services
  - Policies & Procedures - Updated and Consistent
- Succession & Growth / Leadership Development

***Develop initiatives that reinforce consistent and stable service delivery standards and methodologies, while incorporating practices that address the unique needs of each individual community.***

- ### ➤ FUNDRAISING (Advancement)
- Diversity

***Establish and deploy a robust and diversified fundraising strategy.***

### ➤ COMMUNICATION

- Branding & Marketing
- Internal Communication

***Invest in communications activities that increase name recognition and create platforms from which to tell the Better Tomorrows story.***

### ➤ PARTNERSHIPS

- Better Tomorrows & The Michaels Organization
- National
- Local

***Commit to the development of new, and reinforcement of current, partnership programs and relationships.***

## **Strategic Direction Statement**

By fiscal year end 2023, Better Tomorrows will have increased our impact on the residents and communities we serve through initiatives dedicated to service delivery, partnership development and funding expansion. To support these initiatives, commitments will also be made in the areas of communications and leadership development.

## V. IMPLEMENTATION OBJECTIVES & STRATEGIES

The following pages review the high-level implementation plans for the Strategic Priorities. Specifically the supporting objectives and strategies. While detailed tactics were included in the planning discussions, that information is not reflected below. The time periods (short, intermediate and long) generally represents years 1, 2 and 3 of the period 2021- 2023.

### SERVICE DELIVERY

*Develop initiatives that reinforce consistent and stable service delivery standards and methodologies, while incorporating practices that address the unique needs of each individual community.*

#### Focus Area: Define Core Programs - (Outcomes and Impact) as Contracted Services

##### Objective:

Deliver consistent programs that increase self-sufficiency for families and promote aging in place for seniors, beginning January 2021.

##### **Short-Term Strategy**

Develop program standards that address the following 5 core areas for families, seniors and special needs residents:

- Financial Literacy, Job Readiness and Stability, Academic Support
- Health, Wellness, and Nutrition, Social and Community Engagement

##### **Intermediate-Term Strategy**

Define best practices, program requirements and expectations for each of the program core areas to ensure consistency in programming. (3-6 months)

##### **Long-Term Strategy**

Develop systems of measurement and program outcomes for achieving family self-sufficiency and aging in place for seniors. (6-9 months)

#### Focus Area: Targeted Local Impact - Community Specific (Enhanced Core Programs)

##### Objective:

Develop partnerships within one of the following networks in the site's local community that works to support Better Tomorrows Programming (4-6 mo. from starting at a site):

##### **Advisory Committee**

This is spearheaded by the SSC that may include local spiritual leaders, community stakeholders, head of resident association, etc. to act as a site advisory board.

##### **Social Service Coalition**

This can be an existing partner's meeting or one that is spearheaded by the social service coordinator, inclusive of key community partners.

##### **Existing Community Partners Meeting**

Any local neighborhood meeting at which partners of interest are present.

##### **Short-Term Strategy**

Create a process of organizing and attending off-site networking meetings that is agreed upon with our partners in property management. (1-3 months from starting at a site)

**Intermediate -Term Strategy**

Begin to actively attend existing or self-created networking meetings aimed to develop BT presence in the meetings and network. (4-6 months from starting at site)

**Long -Term Strategy**

Establish ongoing partnerships that increase the effectiveness of our programs services as a result of long-term site involvement. (1-2 yrs. from starting at site)

**Focus Area: Program Alignment with Staff Capacity (Resident Need vs. Staff Skills)**

**Objective:**

Identify current staff capacity within the new program standards and create a plan for staff development and utilizing community partners as content experts.

**Short-Term Strategy**

Create an implementation plan of new program standards, including trainings on best practices, program requirements and expectations for all 5 core areas beginning January 2021.

**Intermediate-Term Strategy**

Secure content experts across Better Tomorrows in 5 core areas to facilitate programming, train coordinators, provide follow-up or utilize as referral sources. (4-6 months)

**Long-Term Strategy**

Obtain site profile information with demographic, site needs and available resources for each site, utilizing these as a starting point for hiring and training staff. (1 yr.)

**Focus Area: Staff Training - Knowledge & Best Practices to Provide Core Programing & Services**

**Objective:**

Create an organizational training plan that delivers consistency and best practices to staff at all levels of the organization. Create uniformity in professional development that is Regional yet consistent.

**Short-Term Strategy**

Create and implement onboarding checklist/tool addressing individual training needs from the interview through 90 days of employment.

**Intermediate-Term Strategy**

Develop a calendar of internal and external (required/suggested) trainings that Better Tomorrows staff attend throughout the year.

**Long-Term Strategy**

Create an ongoing training system for all levels of the organization that address new, veteran and inter-departmental employees' training needs.

*Ensure training meets the needs of the regional variances. (Resources, community need, partners)*

**Focus Area: Core Programing / Services Best Practices**

**Objective:**

Ensure that Better Tomorrows is a leader in providing consistent quality core programming to residents by operating as a community partner that engages with other partners.

**Short-Term Strategy**

Develop a resource/document identifying the regional multi layers service activities of each of the core programming areas.

**Intermediate -Term Strategy**

Create a Standard Operating Manual, including the Suggested Models (Living Tools of the Trade) to support new and existing SD Team members in not just the “What” but the “How-To” of Service Delivery including: addressing Regional variances service and partnerships/resource development.

**Long-Term Strategy**

Develop and Implement process (to be developed) that utilizes the new tools and systems to support the regional approach of support.

**Focus Area: Succession & Growth / Leadership Development**

**Objective:**

Create Leadership opportunities for advancement and offer a Succession Plan for the Better Tomorrows team.

**Short-Term Strategy**

Define and assign responsibilities for employees (job descriptions, daily operations template, orientation, evaluations, training and development plans etc.)

**Intermediate -Term Strategy**

Identify resources to support our leadership development goal.  
Develop a Leadership Program Model, including identifying staff to engage in the mentor development opportunity.

**Long-Term Strategy**

Formalize and communicate the leadership process at BT.  
Build a path of Leadership by empowering Managers to become Leaders.

**FUNDRAISING**

*ESTABLISH AND DEPLOY A ROBUST AND DIVERSIFIED FUNDRAISING STRATEGY.*

**Focus Area: Research and Design Fund - to provide seed dollars for innovative site program ideas implemented by SSC, to showcase their ideas that work before applying for grant dollars.**

**Objective:**

Within a six to eight-month time frame, poll 100% of family and elder sites to identify programs, activities, events and services organized around the categories of Health, Wellness and Nutrition, Financial Literacy, Job Readiness and Stability, Academic Support, and Social and Community Engagement that will serve as an informational source and fundraising tool.

### **Short-Term Strategy**

Document 'Virtual Impact Profile - (VIP)' i.e. Site Profile for each site. The VIP would capture data from each site that could include but not be limited to: Site Name; SSC/AD/RPM/VP Name; Location; Number of Apartments; Population Demographics; Number of Residents; Ethnicities; Number of Persons with Disabilities; Age Demographics; Programs (lists and photos); Geographic details (rivers, mountains, urban, rural, isolated, etc.); History (if it impacts the ambience of the housing community); Photograph of; Reach out to site coordinators to update the "donor" and "partnership" page on the BT website and to submit quotes from residents and partners.

### **Intermediate-Term Strategy**

Publish each VIP onto the BT website.

### **Long-Term Strategy**

Set periodic reviews of VIP content.

### **Objective:**

Create funding opportunities by amplifying programs, activities, events and services that are successful at one site and could be mirrored at multiple sites.

### **Short-Term Strategy**

Request that the new Director of Fund Development get to know each site and personnel through video conferencing on All-Staff and Team calls.

### **Intermediate-Term Strategy**

Poll SSC & ADs on ways they successfully raise funds for their site.  
Fund 2 or 3 seed projects, give \$\$ to a site and report the results with keys to factors that made the projects successful.

### **Long-Term Strategy**

Launch an ask campaign to get 100% participation of BT staff and Board.  
(Full participation shows potential funders our dedication to our work and increases the likelihood of their funding -- even \$1 donation counts)

## **COMMUNICATION**

*INVEST IN COMMUNICATIONS ACTIVITIES THAT INCREASE NAME RECOGNITION AND CREATE PLATFORMS FROM WHICH TO TELL THE BETTER TOMORROWS STORY.*

### **Focus Area: Internal Communication**

### **Objective:**

By year two, establish a baseline of the Better Tomorrows story at national and the 121 sites for all employees, thereby connecting to their daily work adding meaning, passion and engagement to each employees' experience.

The aim is to institutionalize the legacy of Jackie Jones and to emphasize that Michaels and BT are "partners in ensuring compliances are met."

### **Short-Term Strategy**

BT to work with Michaels marketing spreading awareness of BT story (i.e. inspire Michaels by hand picking stories for the Michaels intranet)

### **Intermediate-Term Strategy**

Foster a climate that promotes organizational association and brand identity among Better Tomorrows staff.

### **Long-Term Strategy**

Promote effective communication exchanges and institutionalize feedback loops from BT staff to National and from BT to MMA (and vice versa).

## **Focus Area: Branding and Marketing - External Communication**

### **Objective:**

By year two, boost brand awareness among at least 140 targeted national and local partners.

### **Short-Term Strategy**

Ensure brand consistency on all marketing products through all marketing mediums.

### **Intermediate-Term Strategy**

Increase Better Tomorrows brand engagement with its audiences (Internal and External.)

### **Long-Term Strategy**

Develop a Better Tomorrows “Reintroduction Campaign” to reacquaint key constituents with the organization.

## **PARTNERSHIPS**

*Commit to the development of new, and reinforcement of current, partnership programs and relationships.*

## **Focus Area: Better Tomorrows & The Michaels Organization**

### **Objective:**

Increase partnership opportunities with Michaels by engaging in at least 1 annual shared community activity and/or partnership engagement.

### **Short-Term Strategy**

Develop consistent communication sharing to foster partnership opportunities between Better Tomorrows and Michaels. “We’re better together”

### **Intermediate-Term Strategy**

Inform communications tools to share best practices and interesting stories happening at sites.

### **Long-Term Strategy**

Work with Michaels to identify partnership opportunities.

## **Focus Area: National Partners**

**Objective:**

Increase national engagement by partnering on at least 2 national social campaign efforts each year and by participating in at least 1 national conference.

**Short-Term Strategy**

Conduct an assessment of current national partners and update regularly.

**Intermediate-Term Strategy**

Identify national issues that Better Tomorrows embraces and partner with other entities that embrace like issues (cancer awareness, food security, child abuse, financial literacy), with partners like:

National Night Out, Girl Scouts, Habitat for Humanity, Salvation Army, Home Depot,  
National Breast Cancer Awareness Coalition, Creative New Jersey.

**Long-Term Strategy**

Create opportunities for staff to attend and present at conferences related to affordable housing and resident service coordination.

**Focus Area: Local Partners**

**Objective:**

Develop at least 2 potential partnership opportunities with entities from the local partner categories list each year, at every site.

**Short-Term Strategy**

**IDENTIFY** - Determine, with intentionality, which potential collaborations will result in mutually beneficial partnerships.

**Intermediate-Term Strategy**

**NETWORK** - Encourage local staff to be intentional about creating opportunities to increase contact with potential partners.

**Long-Term Strategy**

**TRAIN** - Ensure staff are equipped with the knowledge needed to develop partnerships. Any training opportunities developed will be done in collaboration with the Program Sub-committee.