

CareBag, Inc.

Strategic Plan 2019 – 2023

Providing and teaching the homeless and indigent how to survive, thrive and move forward.



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CAREBAG STRATEGIC PLAN 2019 – 2024

Table of Contents

- EXECUTIVE SUMMARY 3**
- MISSION 3**
- VISION 3**
- VALUES 3**
- STRATEGIC GOALS – SUMMARY 4**
- STRATEGIC GOAL #1: Basic Needs Service 5**
- STRATEGIC GOAL #2: Sustainable Operating Model 6**
- STRATEGIC GOAL #3: Collaborations & Partnerships: 8**
- STRATEGIC GOAL #4: Revenue Streams 9**

CAREBAG STRATEGIC PLAN 2019 – 2024

EXECUTIVE SUMMARY

CareBag Inc. (CareBag) is a grassroots effort to provide basic hygiene needs to homeless individuals and families along the Treasure Coast and bordering counties of Florida. One of the greatest unaddressed challenges for those who are homeless is access to clean water and sanitation. Access to these simple commodities is not only essential for self-esteem but also has been declared a basic human right by the United Nations.

CareBag is committed to serve those who are most vulnerable – homeless individuals and families who lack access to necessities that create a basic quality of life. Through CareBag mobile shower units and hygiene pantry we will provide a safe environment in which these vulnerable persons can have access to a shower, clean underwear, a hot meal, a basic health screening and more; ultimately allowing them to reconnect with their dignity.

Key strategies over the planning period will address the following high priority objectives: providing basic needs service, implementing a sustainable operating model, building partnerships and collaborations, and achieving diversified funding sources.

MISSION

To provide proper hygiene care to men, women, and children on the Treasure Coast and bordering counties to restore dignity and wellness to the community.

VISION

CareBag's Mobile Shower Unit will provide access to personal hygiene for every man, woman, and child in need in the communities we serve. By providing this basic human right, we enhance individual dignity and protect the community's overall health.

VALUES

Leadership: We set the example to mobilize resources for the common good.

Integrity: We act with honesty, and our personal and professional conduct is above reproach.

Diversity and Inclusion: We respect and serve all people regardless of thought, belief, and background.

Accountability: We are good stewards for our community investments and honor the charitable intentions of our donors through our fiduciary responsibility.

Collaboration: We serve as the catalyst to convene key stakeholders in the community and connect those in need with the appropriate services and resources.

CAREBAG STRATEGIC PLAN 2019 – 2024

STRATEGIC GOALS – SUMMARY

- 1. Basic Needs Service:** Ensure that CareBag has mobile shower units available 4 days a week in the identified locations by July 2021. Ensure CareBag has established a mobile shower pantry to compliment the shower services offered and increase overall consistent hygiene of the homeless population by July 2022.
- 2. Sustainable Operating Model:** Develop a sustainable operating model by March 2021 that includes a steady-state organizational structure, identifies key processes, policies, and procedures, and assigns responsibility to the appropriate person.
- 3. Collaborations & Partnerships:** Develop and engage strategic partnerships needed to support CareBag's operations including location partners, task force partners and referral/intake sponsors. Secure at least 1 strategic partnership in each category by the end of each year in the planning period (Dec 2019, Dec 2020, Dec 2021, Dec 2022, Dec 2023 resulting in 15 strategic partnerships).
- 4. Revenue Streams:** Create a resource development plan that maximizes existing revenue sources by July 2021, identifies 10 new sources of revenue, and diversifies funding streams.

CAREBAG STRATEGIC PLAN 2019 – 2024

STRATEGIC GOAL #1: Basic Needs Service

Ensure that CareBag has mobile shower units available 4 days a week in identified locations by July 2021.

Ensure CareBag has established a mobile shower pantry to complement the shower services offered and increase overall consistent hygiene of the homeless population by July 2021.

Outcome: CareBag has mobile shower units available in specified locations at least 4 days a week; we provide showers to an increasing number of homeless people; and 25% of people benefit from a connection referred by CareBag.

<u>TACTICS/ACTION ITEMS</u>	<u>MILESTONES</u>	<u>METRICS</u>	<u>OUTCOMES</u>
<ul style="list-style-type: none"> Assess the communities with the most critical need for this service and identify specific geographic locations for mobile shower units to be in place. 	<ul style="list-style-type: none"> By September 30, 2019 	<ul style="list-style-type: none"> Date met Y/N 	CareBag has identified several locations to serve; Place of Hope, Palm City, Grace way Village and have started discussions with those facilities
<ul style="list-style-type: none"> Acquire 1 more shower unit by March 2020 and the necessary supplies and trucks needed to support the additional unit 	<ul style="list-style-type: none"> By March 2020 	Date met Y/N	<ul style="list-style-type: none"> # of clients served because of additional locations and units Total # of clients served. # of days per week mobile shower unit is available
<ul style="list-style-type: none"> Acquire a mobile shower pantry by March 2020 and the necessary supplies and vehicle needed to support this initiative 	<ul style="list-style-type: none"> By March 2020 	Date met Y/N	
<ul style="list-style-type: none"> Determine appropriate marketing channels (text blast, partner promotion) that are is the most effective in reaching the homeless demographic and implement a campaign. 	<ul style="list-style-type: none"> By May 2020 	Date met Y/N	The targeted community is aware of the service we provide.
<ul style="list-style-type: none"> Establish 3 or more new locations to serve. 	<ul style="list-style-type: none"> By July 2020 	Date met Y/N	<ul style="list-style-type: none"> # of new locations identified # of days per week mobile shower unit is available
<ul style="list-style-type: none"> Identify, Analyze, and track additional services clients need and referrals given to be able to provide information regarding overall outcome/impact. 	<ul style="list-style-type: none"> By Dec 2020 	Date met Y/N	<ul style="list-style-type: none"> # of referrals made each location # of referrals made in total each month

CAREBAG STRATEGIC PLAN 2019 – 2024

<u>TACTICS/ACTION ITEMS</u>	<u>MILESTONES</u>	<u>METRICS</u>	<u>OUTCOMES</u>
			<ul style="list-style-type: none"> • # of referrals for core services • # of clients that actually engage a referral
<ul style="list-style-type: none"> • Establish 2 or more new locations to serve. 	<ul style="list-style-type: none"> • By April 2021 	Date met Y/N	# of new locations identified # of days per week mobile shower unit is available

STRATEGIC GOAL #2: Sustainable Operating Model

Develop a sustainable operating model by March 2020 that includes a steady-state organizational structure, identifies key processes, policies, and procedures, and assigns responsibility to the appropriate person.

***Outcome:** Org structure has been created; processes, policies, and procedures are identified; key positions are staffed with the appropriate people with the proper skill sets.*

<u>TACTICS/ACTION ITEMS</u>	<u>MILESTONES</u>	<u>METRICS</u>	<u>OUTCOMES</u>
<ul style="list-style-type: none"> • Define what constitutes a critical issue. 	<ul style="list-style-type: none"> • By Nov 2019 	<ul style="list-style-type: none"> • Date met Y/N 	Staff and BOD have clearly defined expectations and procedures for escalation of critical issues.
<ul style="list-style-type: none"> • Identify preferred means to contact Executive Director and the BOD based on type of critical issue (text blast, email blast, calling tree). 	<ul style="list-style-type: none"> • By Nov 2019 	<ul style="list-style-type: none"> • Date met Y/N 	Clear communication channels established
<ul style="list-style-type: none"> • Determine the desired size of the operation including the creation of an org chart. 	<ul style="list-style-type: none"> • By December 2019 	<ul style="list-style-type: none"> • Date met Y/N 	CareBag has optimized current structure and is positioned to achieve the organization size and structure required by the end of the planning period.
<ul style="list-style-type: none"> • Identify the broad functional areas of the organization and the major processes in each functional area. Identify core policies needed as an organization (HR, compliance, legal, information security, client data and security, etc.) 	<ul style="list-style-type: none"> • By December 2019 	<ul style="list-style-type: none"> • Date met Y/N 	The functional areas of the organization and daily operating procedures are defined. Appropriate policies have been identified.
<ul style="list-style-type: none"> • Determine BOD responsibilities and how many and which 	<ul style="list-style-type: none"> • By December 2019 	<ul style="list-style-type: none"> • Date met Y/N 	

CAREBAG STRATEGIC PLAN 2019 – 2024

<u>TACTICS/ACTION ITEMS</u>	<u>MILESTONES</u>	<u>METRICS</u>	<u>OUTCOMES</u>
committees may be needed for the organization.			
<ul style="list-style-type: none"> Write job descriptions for each staff, volunteer, and BOD position to include responsibilities and skills required. 	<ul style="list-style-type: none"> By Jan 2021 	<ul style="list-style-type: none"> Date met Y/N 	Each staff member, volunteer, committee chair, and BOD has a written job description.
<ul style="list-style-type: none"> Develop and draft policies to be reviewed by your attorney. 	<ul style="list-style-type: none"> Policies drafted by Jan 2021. Policies approved by attorney by Feb 2020 	<ul style="list-style-type: none"> Date met Y/N Date met Y/N 	Policies created and approved
<ul style="list-style-type: none"> Develop an org chart based on current state. 	<ul style="list-style-type: none"> By Jan 2020 	<ul style="list-style-type: none"> Date met Y/N 	
<ul style="list-style-type: none"> Perform gap analysis between the two to develop an action plan on how to get there. 	<ul style="list-style-type: none"> By Feb 2020 	<ul style="list-style-type: none"> Date met Y/N 	
<ul style="list-style-type: none"> Develop appropriate performance reporting to assess organizational performance and achievement of strategic goals 	<ul style="list-style-type: none"> By Feb 2020 	<ul style="list-style-type: none"> Date met Y/N 	key performance indicators (KPIs) of the organization are determined including what data needs to be reported to whom and how frequently.
<ul style="list-style-type: none"> On a bi-annual basis, assess progress by reviewing achievement of milestones and metrics. 	<ul style="list-style-type: none"> September 2020 March 2021 September 2021 March 2022 September 2022 March 2023 	<ul style="list-style-type: none"> Date met Y/N 	The appropriate performance metrics and reports have been developed, are shared on a regular and recurring basis with the appropriate stakeholders, and CareBag uses this data to assess performance and make course corrections, as necessary.
<ul style="list-style-type: none"> Close staffing gaps (new hires, training, eliminate poor organizational fits) This date seems too far out given the criticality of this goal. If you plan to have job descriptions and gap analysis finished in Jan/Feb of this year, perhaps year-end 2020 is a better date for this? 	<ul style="list-style-type: none"> By Dec 2023 	<ul style="list-style-type: none"> Date met Y/N 	Organizational has the correct complement of people and skills

CAREBAG STRATEGIC PLAN 2019 – 2024

STRATEGIC GOAL #3: Collaborations & Partnerships:

Develop and engage strategic partnerships needed to support CareBag’s operations including location partners, task force partners and referral/intake sponsors. Secure at least 1 strategic partnership in each category by the end of each year in the planning period (Dec 2019, Dec 2020, Dec 2021, Dec 2022, Dec 2023 resulting in 15 strategic partnerships).

Be the catalyst to convene key stakeholders in the community (nonprofits, community leaders, donors, business leaders, political leaders, etc.) to connect those in need with the appropriate services and resources.

***Outcome:** CareBag knows the types of strategic partnerships that are needed, operations are running smoothly, and we have established one strategic partnership in each area annually so that by the end of the planning period, we have 15 viable strategic partnerships. CareBag is known in the community as the catalyst that brings together appropriate organizations to affect change in the community.*

<u>TACTICS/ACTION ITEMS</u>	<u>MILESTONES</u>	<u>METRICS</u>	<u>OUTCOMES</u>
<ul style="list-style-type: none"> Determine the key services and resource referrals needed by the clients served that could be addressed through strategic partnerships. 	<ul style="list-style-type: none"> By Nov 2019 	<ul style="list-style-type: none"> Date met Y/N 	CareBag has developed a matrix of key needs that can be addressed by location partners, task force partners and referral/ intake sponsors.
<ul style="list-style-type: none"> Develop a partnership template to serve as the basis for all agreements. 	<ul style="list-style-type: none"> By Dec 2019 	<ul style="list-style-type: none"> Date met Y/N 	MOU or agreement template created
<ul style="list-style-type: none"> Identify the appropriate persons and organizations that align with needs established and contact them to determine interest. Pursue if there is interest. 	<ul style="list-style-type: none"> By Dec 2019 By Dec 2020 By Dec 2021 By Dec 2022 By Dec 2023 	<ul style="list-style-type: none"> Date met Y/N 	<ul style="list-style-type: none"> # of strategic partnerships # of each type of strategic partnerships
<ul style="list-style-type: none"> Assess which opportunities would provide the maximum benefit to CareBag in terms of visibility and community impact. Expand our presence in the community by having a CareBag representative participate in other homelessness initiatives 	<ul style="list-style-type: none"> By June 2020 By Dec 2020 	<ul style="list-style-type: none"> Date met Y/N 	# of people participating in other homelessness initiatives. Which ones

CAREBAG STRATEGIC PLAN 2019 – 2024

<u>TACTICS/ACTION ITEMS</u>	<u>MILESTONES</u>	<u>METRICS</u>	<u>OUTCOMES</u>
<ul style="list-style-type: none"> CareBag holds a leadership role on SLC homelessness task force to be established. 	<ul style="list-style-type: none"> December 2021 	<ul style="list-style-type: none"> Date met Y/N 	key stakeholders convene regularly to address the overall homeless problem. # of collaborative meetings held over a certain time period

STRATEGIC GOAL #4: Revenue Streams

Create a resource development plan that maximizes existing revenue sources by July 2020, identifies 10 new sources of revenue, and diversifies funding streams.

***Outcome:** Through the combination of grants, individual donations, corporate sponsors, and fundraising events, CareBag has an optimized, diversified, and sustainable revenue mix that maximizes net revenue and no one single source of net revenue is more than 40% of the annual budget.*

<u>TACTICS/ACTION ITEMS</u>	<u>MILESTONES</u>	<u>METRICS</u>	<u>OUTCOMES</u>
Based on projected organizational structure, develop a multiyear budget that includes a reserve fund and revenue requirements.	<ul style="list-style-type: none"> By April 2020 	<ul style="list-style-type: none"> Date met Y/N 	Budget Created <ul style="list-style-type: none"> # of new revenue sources brought online each quarter % of budget for each new revenue source
<ul style="list-style-type: none"> Analyze current fundraising mix and look at opportunities to increase total revenue by leveraging the 4 key fund sources (grants, individual donations, corporate sponsors, and special events). 	<ul style="list-style-type: none"> By April 2020 	<ul style="list-style-type: none"> Date met Y/N 	Contribution margin by revenue source calculated; efforts to maximize revenue from existing streams are accomplished; the optimal revenue mix is calculated/implemented. No one single revenue source is more than 40% of the annual budget.
<ul style="list-style-type: none"> Identify all grant opportunities available to apply for and develop a plan to ensure proposals are written and submitted by RFP deadlines. 	<ul style="list-style-type: none"> By May 2020 	<ul style="list-style-type: none"> Date met Y/N 	
<ul style="list-style-type: none"> create a list of corporate sponsors to solicit and at what monetary level 	<ul style="list-style-type: none"> By May 2021 	<ul style="list-style-type: none"> Date met Y/N 	

CAREBAG STRATEGIC PLAN 2019 – 2024

<u>TACTICS/ACTION ITEMS</u>	<u>MILESTONES</u>	<u>METRICS</u>	<u>OUTCOMES</u>
<ul style="list-style-type: none"> • Increase the number of donors and amounts donated by 10% YOY. • Determine/establish entry points for donor cultivation. • Attract younger donors through Social Venture Partners. • Determine Major Gift Level 	<ul style="list-style-type: none"> • By May 2020 	<ul style="list-style-type: none"> • Date met Y/N 	<ul style="list-style-type: none"> • # of new donors each month • \$/% increase of each donation. • Total # of donors • # of donors in each demographic category Total donations as a percent of budget
<ul style="list-style-type: none"> • Determine Special Events CareBag will put on as an organization. 	<ul style="list-style-type: none"> • By May 2020 	<ul style="list-style-type: none"> • Date met Y/N 	<ul style="list-style-type: none"> # of events Type of event determined
<ul style="list-style-type: none"> • Create a stewardship and cultivation plan 	<ul style="list-style-type: none"> • By June 2020 	<ul style="list-style-type: none"> • Date met Y/N 	
<ul style="list-style-type: none"> • Create a Marketing Plan that continues to drive awareness of CareBag’s mission and vision and creates entry points for giving opportunities. 	<ul style="list-style-type: none"> • By July 2020 	<ul style="list-style-type: none"> • Date met Y/N 	