



STEPHEN
center

HELP • HOPE • HEROES

Strategic Plan

2019 - 2021

MISSION
MATTERS

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Our Strategic Planning Process

The Stephen Center began their strategic plan journey by completing three pre-activities in preparation to the full day of strategic planning. The prework included evaluating and discussing the double bottom line, completing an environmental scan and an on-line survey of foundations, staff and clients.

Double Bottom Line – was completed by the agency leadership staff and discussed with several Board members. The final report was distributed to participants of the strategic planning session prior to the day.

Environmental Scan – was completed with agency leadership staff and several Board members. This process was intended to look at trends, paradigms and approaches for homeless service organizations. Its documentation is included in this report.

On-line Survey – was completed by foundations, current employees and clients. The final report was reviewed prior to the strategic planning session, giving both staff and Board members time to reflect on the insights and perspectives of key stakeholders.

Strategic Plan – was completed by building consensus around the practical vision of the organization, barriers that would prevent reaching their vision, the strategic directions the organization will prioritize and setting the three-, two- and one-year goals. Board members that participated in the strategic planning day were: Craig Nelson, John Andreasen, Robert

Mission

Stephen Center Partners with the community, families and individuals to overcome homelessness, addiction and poverty.

Vision

To be a financially stable organization, recognized for leadership and excellence in treatment and housing for the homeless, addicted and poor.

Monaco, Jay Oxtan, Deb Vosika, Eric Ewing, Tom Foley, Louis Olivera, Jude Knipper, Jamee Kugler, and Madeline Moyer

Staff members that participated in the strategic planning day were: Gwen Teeple, Jeremy Davern, Michael Murphy, Teri Corcoran, Beth Robbins, Christine Salvatore, Sharon Hughbanks and Michael Wehling

Mission Matters

This strategic planning process was facilitated by Mission Matters. Mission Matters is a group of professionals who provide consulting services to non-profits, government entities, philanthropists, and socially responsible companies, with a special focus on leadership development, strategic planning, coaching, Board governance and capacity building. The facilitation method utilized is Technology of Participation (ToP). This method encourages participation of the entire group and for the facilitator to remain neutral.

Lead facilitator for this project was Beth Morrissette.

Environmental Scan

In preparation for the upcoming strategic plan, several Board members and the leadership staff came together to discuss trends, paradigms and approaches that are emerging in the field of homeless services. In addition to the knowledge and experience of the individuals in the room, three articles were distributed by the CEO to read in preparation of this activity. They were:

- HUD Recovery Housing Policy Brief
- MACCH (Metropolitan Area Continuum of Care for the Homeless), Coordinated Entry System (CES) Policy and Procedures, CES-PP-18-01: Access Policy and Procedures (approved 05/30/2018).
- MACCH Coordinated Entry System (CES) Diversion/Prevention Pilot Project Training Notes, 08/04/17

The table below lists trends, paradigms and approaches in four categories: Boundary, Emerging, Established and Dying. *Boundary* represents items that are on the horizon or may be radical ideas. *Emerging* is for items that may be experimental and/or gaining momentum. *Established* are items that hard to dislodge, well-funded practices and/or standard operating procedures. Finally, *Dying* items include things that are outdated are on their way out and/or no longer relevant.

Table 1. Environmental Scan

Stephen Center: Environmental Scan			
What are the trends, paradigms and approaches emerging in the field of Homeless Services?			
Boundary	EMERGING	ESTABLISHED	DYING
<ul style="list-style-type: none"> ➤ Diversion: Promoting early awareness & resources (internally) ➤ Define where we fit with diversion versus homeless shelter (community) ➤ Mental health & substance abuse services in shelter ➤ Capturing intern hours as volunteer hours ➤ Forecasting case management outcomes ➤ Poverty as a culture – need to bridge ➤ Standardizing data entry into HMIS across the metro (including consistency) 	<ul style="list-style-type: none"> ➤ New donors- what do they look like ➤ Outpatient HERO ➤ Formalize supportive services programming – life skills ➤ Collaboration among shelters ➤ Program expansion - geography ➤ HMIS – documentation info sharing ➤ Juvenile HERO ➤ Front door ➤ Diversion – formalizing documenting ➤ Peer support ➤ Access point 	<ul style="list-style-type: none"> ➤ Trauma informed care ➤ Permanent Supportive Housing ➤ Community collaboration at Stephen Center ➤ Shelter ➤ HERO treatment center ➤ Integrated mental health treatment 	<ul style="list-style-type: none"> ➤ Thrift store as money tree ➤ Tax law changes – standard deductions versus size ➤ <u>Foundation sunsettings / endowments?</u> ➤ United Way (style of giving) ➤ Transitional Living ➤ Going alone versus partnerships ➤ ESG grants ➤ Siloed mental health
		<div style="border: 1px solid black; padding: 5px; width: fit-content; margin: auto;"> <p>KEY</p> <p>Green = Pleasing Red = Caution <u>Both = Pleasing and Caution</u></p> </div>	

Following the identification of the items listed in the columns, the group discussed the implications of the columns. Below is a summary of the discussion.

Table 2. Implications of Environmental Scan

IMPLICATIONS	
<ul style="list-style-type: none"> ➤ Vision or understanding of poverty – alignment to us would risk resources ➤ Inconsistency use of HMIS impact our clients & bottom line ➤ Our HMIS data helps us – when looked at individually and not as a metro ➤ Tax law changes - Messaging for raising money – why are we doing it differently – the donations are even more important today 	<ul style="list-style-type: none"> ➤ Collaborations impact not only our bottom line but also programming and outcomes ➤ Our funding changes in the Dying column is creating a change in our funding support landscape ➤ Tax law changes – we can’t be all things to all people. What do we do really well? Should we focus more on what we do really well?

Stakeholder Input

Another pre-activity was gathering input from stakeholders' such as foundations, employees and clients. This was intended to provide a snapshot of perspectives. Board members and staff came together prior to the strategic planning session to discuss key takeaways from the report. Below is a summary of the discussion. Their team names were based on the word they heard most often from each other while discussing the report. A full report titled *Key Stakeholder, Employee and Consumer Interview Results* was distributed to the Board of Directors in advance to the strategic planning day.

Table 3. Stakeholder Input Report Takeaways

<u>Team: Brand / Messaging</u>	
What caught your attention? <ul style="list-style-type: none">• Lack of messaging• Number of activities & who to articulate• Communication & coordination	What areas give you pause about the future? <ul style="list-style-type: none">• Need to evolve programs to meet needs• Lack of funding to meet demand• How to reach donors by clearly articulating what we do
What are strengths that give confidence? <ul style="list-style-type: none">• We are doing it• Actively addressing addiction & mental health as key drivers	What opportunities are most intriguing? <ul style="list-style-type: none">• Guild• Alignment & cooperation among nonprofits. All in the same boat learning & coordinating, not competing

Table 3. Stakeholder Input Report Takeaways – continued

<u>Team: "s" Work</u>	<u>Team: Communication</u>
<p>What caught your attention?</p> <ul style="list-style-type: none"> • Community participation / collaboration • Agency participation • Communication <p>What are strengths that give confidence?</p> <ul style="list-style-type: none"> • H.E.R.O. • Working with families • Staff experience & education • Relationships with foundations • Facility... and its DRY <p>What areas give you pause about the future?</p> <ul style="list-style-type: none"> • Sober has its limits • Thrift store 😊 • Do we have the team to grow... YES • Space issues <p>What opportunities are most intriguing?</p> <ul style="list-style-type: none"> • Leverage our strengths and GROW <ul style="list-style-type: none"> ◦ H.E.R.O. ◦ Juvenile services ◦ Diversion ◦ Family services • Donor cultivation • Multi-campus – casework, increased staff 	<p>What caught your attention?</p> <ul style="list-style-type: none"> • # of surveys that were received (low) vs uscrs • Anonymous letter – how do we respond • Messaging / communication – we need to do a <u>better job!</u> <p>What are strengths that give confidence?</p> <ul style="list-style-type: none"> • Sober & dry facility • Location – we are where we are supposed to be • Staff is seen as committed & knowledgeable • Staff sees value in partnering with other organizations • Substance abuse works with sober & dry facility <p>What areas give you pause about the future?</p> <ul style="list-style-type: none"> • Competition for fundraising for nonprofits (lack) • We need to set ourselves apart what is our anchor / makes us unique / niche • Succession planning for future staff / team • Doing better job with our funders / donors so they understand our programs <p>What opportunities are most intriguing?</p> <ul style="list-style-type: none"> • <u>Communication / messaging! – Doing it right</u>

Strategic Planning Day

Throughout the strategic planning process, we had one focus question that served as our guidepost for discussions and ideas.

WHAT DO WE WANT TO SEE IN PLACE FOR STEPHEN CENTER BY DECEMBER 31, 2021 AS A RESULT OF OUR WORK TODAY?

Review Mission

Stephen Center's mission is:

Stephen Center Partners with the community, families and individuals to overcome homelessness, addiction and poverty

Stephen Center's vision is:

To be a financially stable organization, recognized for leadership and excellence in treatment and housing for the homeless, addicted and poor.

Current Reality

Next, the team began listing the strengths and weaknesses of the current environment. This includes internal and external factors. The internal strengths and weakness of Stephen Center and the external opportunities and threats we must plan for. We began the conversation by discussing accomplishments since the last strategic plan.

Table 4. Accomplishments

Accomplishments
<ul style="list-style-type: none">• Built new building<ul style="list-style-type: none">○ Transition went well○ Resulted in established relationships with more donors○ Improvement serving more with caseworkers○ Better med monitoring with new med room• Expanded services –<ul style="list-style-type: none">○ Juvenile services○ Permanent Supportive Housing (PSH)• Leadership change – New Director• 100% turnover in leadership either through promotions or resignations• New marketing director• Additional funding for services<ul style="list-style-type: none">○ Stabilized financially• Board diversity<ul style="list-style-type: none">○ Emphasis on broader representation○ Utilizing board matrix• Exited transitional housing• More involvement of Program Directors in decision making• Becoming safer – cameras, secure card swiper• Externally all playing well versus operating as silos• Increase presence & awareness in community• More food donations because our capacity for storage grew<ul style="list-style-type: none">○ Our reputation in the community – take it to Stephen Center, if they can't use it, they will find someone who can• Increase use of volunteers

Table 5. Current Reality

<p style="text-align: center;"><u>Strengths</u></p> <ul style="list-style-type: none"> • Gwen's knowledge • Leadership experience • Very experienced staff – caring, dedicated, alumni • Facilities – new building & design, security, dry facility • Funder support • Location • Client feedback • HERO • Genuine care about the mission – helps achieve outcomes • Saint Maggie • Nomination committee – staggered term limits • Use of evidenced based practice • People stay because of the mission 	<p style="text-align: center;"><u>Opportunities</u></p> <ul style="list-style-type: none"> • To help with health services, medication • Coordinated within community, sector • Utilize technology better • Pretrial – TL building • TL – assets • Finding partners to expand services – i.e., juvenile HERO, west Omaha • Florence home – space for juvenile, assessment? • Region 6 • Retail space • Church some day
<p style="text-align: center;"><u>Weaknesses</u></p> <ul style="list-style-type: none"> • Location – outside bleak • Succession plan • Diversity of leadership team – race, gender, age, all of the above • Messaging – from top down • Board training – assimilation • Better connected to what we do – how it connects to funding • Thrift store financial weakness • Space – office space – not enough • Lack of clarity on defined roles of staff • Limited space available for program space • Benefits / pay for staff – value add proposition? 	<p style="text-align: center;"><u>Threats</u></p> <ul style="list-style-type: none"> • Competition - OHB (juvenile services) • Behaven – IOP • Monitor for-profit threat • Funders – donations – sunseting • Change in tax credit laws – unknown – maybe less individual gifts • Economic cycle • Client feedback – Google reviews – on-going monitoring • Transparency – public relations • Reputation risk • Media

Practical Vision

This was a time for Board members and the leadership team to share their practical hopes and aspirations for the future of Stephen Center. Participants were instructed to “Imagine that it is three to five years from now, Stephen Center has been selected as the premier homeless service organization of the year. Stephen Center is going to be highlighted by a major news magazine as the ‘organization of the year’. You have been selected to conduct the tour for the reporters through the organization.”

Participants were then asked a series of thought-provoking questions to ponder as they envision the future for Stephen Center. After small group discussion and large group consensus work, a set of practical vision elements were agreed upon. These practical vision elements set the stage for agreement amongst Board members and leadership team for a shared vision of Stephen Center's future.



Table 6 represents the group work and consensus to discover the practical vision elements. The items listed below each agreed upon vision element, provide insight into some of the intent and conversations that led the group to the practical vision elements.

Table 6. Practical Vision Consensus Building

Community Engagement	Financial Responsibility	Dynamic Campus Master Plan	Program Impact	Organizational Communication & Development	Recognized Leadership in Community Services	
Engagement of volunteers in academic / service requirements	Communication of program and financial efficiency	Planned 'campus' vision (vs. piecemeal)	Separate detox program – turn no one away	Lunch & learn with staff	Lunch & learn with Clients/donors and elected officials	Communication of program and financial efficiency
Empower guild – greater utilization	Planned giving Budget line item	Church demolition	Expansion of services – locations	Improved wages & benefits – staff	Increase community awareness (stories)	Collaboration between shelters
	Diversity of revenue	Expand Q Street campus	Juvenile HERO best in class	Groom succession resources from within	Become the “go to” resource for elected officials & media	Education of staff, clients, donor base, key stakeholders
	Financial stability – 5-year commitments – double donor base – no debt in expansion	More space for clients	After-care services added	Periodic meetings with staff & clients	Recognition outside of homeless/treatment community (marketing)	Awareness of Stephen Center in local government, judicial, and related of key statistics & success delivered
	Why do donors choose Stephen Center?	Stephen Center is a community/campus not just a facility	Additional mental & physical health partnerships	Improving internal team building (communication)	Stephen Center model is changing lives across the country	Solidify standing in behavioral health
	Balanced budget		Establish program facilities across Omaha	Staff / Board interaction	Leadership as MACCH matures	Increased MACCH involvement and influence
	Positive cash flow		Innovation programming	Periodic surveys of staff / clients		

Underlying Blocks

Next, the team turned their attention to the true meaning of Stephen Center's practical vision and the underlying blocks within the vision. Addressing the underlying blocks or barriers would allow Stephen Center's leadership and employees to create strong strategic directions by addressing barriers that would prevent Stephen Center from realizing their vision and fulfilling a successful strategic plan

We began this discussion by answering the question, "What is currently blocking our achievement of this vision?"

This part of the workshop included participants working by themselves in silence, sharing in small groups and using the work of the small group to develop consensus around the question with the whole group.

The participants were prompted to find the concrete external policies, patterns or structures, internal images, perceptions or attitudes that get in their way of progress toward our vision.

An example to illustrate the intent of this discussion was an image of a dandelion. The process of analyzing underlying barriers does not involve solving isolated problems, but identifying the root causes of many surface issues. It is like weeding dandelions. If you cut down the dandelions, they grow back within a few days unless you dig down and remove the tap root. In barrier analysis we are looking for that underlying cause for the symptoms being experienced in your organization.

Before the participants began individually, they were told to avoid the words "lack of". We're looking for what's there, not what's missing. It's like working in your garden watering the plants and the water running from the hose suddenly stops. You don't just stare at the hose and shout, "There's no water" (lack of). You turn to check if there is a kink in the hose. If someone stepped on it or if someone turned off the water. In this exercise we're looking for the kinks or blocks rather than announcing what's not there.

Below is the table of underlying barriers the team developed.

Table 7. Underlying Blocks

Community Engagement	Financial Responsibility
<ul style="list-style-type: none"> • <u>Uncoordinated</u> – messaging – no process / planning in place • Not a priority in the past • <u>Neglected</u> – undervalued • Poor image • <u>Unclear</u> organization of community engagement 	<ul style="list-style-type: none"> • Rules ... unstable government programs • Systemic – “Jacked” premise behind them (Medicaid) • What worked for old shelter not work today for larger need • Foundation perception of services • Tax law changes • Availability of funds • Build opportunity to consistently be transparent
Dynamic Campus Master Plan	Program Impact
<ul style="list-style-type: none"> • <u>Reluctance on</u> – availability of space/purchase property & funds 	<ul style="list-style-type: none"> • Sustainable funding • Resources – quality, capacity constraints, \$ constraints • Space – facility • Can't expand to expand – need to complete gap identification • Foundation buy-in • Tell our story better – need to articulate the benefit for our community, the individual & over all programming/organization • Navigating Politics – explicit & covert
Organizational Communication & Development	Recognized Leadership in Community Services
<ul style="list-style-type: none"> • Structured / program – employee development plan • Limited funding • Uncoordinated – structure • Fragmented • Not always know what other groups are doing – mission focused versus organizational focus • Priority overall communication • Too much email – volume is high – no delineation of information • Siloed departments 	<ul style="list-style-type: none"> • Time – away from current roles – prioritizing level of supervision responsibilities • Fighting fires – intensity of the day • Not empowering others • Disorganization / duplication • Getting pulled in 19 directions – undedicated role of marketing position • Unawareness in the community of Stephen Center (and programs) • Limited involvement at MACCH • Not enough community champions of Stephen Center • Weak physical presence • Resources – number of people for the work


Strategic Directions

The team was asked to consider what actions they could take to best address the identified underlying barriers. These actions will lead to the strategic directions that the STEPHEN CENTER will address over the next three years.

We began this discussion by answering the question, “What innovative, substantial actions can deal with these obstacles and move us toward our vision?”

This part of the workshop included participants working by themselves in silence, share in small groups and using the work of the small group to develop consensus around the question with the whole group.

Once the actions were identified by the group, the participants grouped the actions and identified the common directions the actions will drive. Each group was given a name. The three strategic directions are:

- 
- 1. MARKETING PROSPEROUS OUTREACH**
 - 2. ENERGIZING AND DEVELOPING OUR WORKFORCE**
 - 3. PRIORITIZING, PLANNING AND FUNDING FOR PROGRAMS**

The team was asked to consider what actions they could take to best address the identified barriers. These actions will lead to the successful implementation of the strategic directions. Each participant was asked to identify concrete, realistic answers to the question, “What innovative, substantial actions will deal with the barriers or blocks and move us toward our vision?”

Below is the table of the key actions listed for each strategic direction.

Table 8. Strategic Directions Consensus Building

Marketing Prosperous Outreach	Energizing and Developing Our Workforce	Prioritizing, Planning and Funding for Programs
<p style="text-align: center;"><u>Community Engagement</u></p> <ul style="list-style-type: none"> • Avoid duplication – cooperate with community partners • Broader staff engagement in MACCH activities • Identify meeting where we belong – send & empower staff • Increased community outreach by staff & Board • Create continuum case management focus group 	<p style="text-align: center;"><u>Staff Development</u></p> <ul style="list-style-type: none"> • Clearly define roles & responsibilities • Annual employee engagement survey <u>with follow-up plan!</u> • Add resources <ul style="list-style-type: none"> ◦ Ex: interns or loaned executives • Use of interns – hook them in young – like HERO in admin wing • Create an employee recognition program • Implement employee development at ALL levels 	<p style="text-align: center;"><u>Financial</u></p> <ul style="list-style-type: none"> • Develop innovative funding • Develop funding for specific projects
<p style="text-align: center;"><u>Marketing</u></p> <ul style="list-style-type: none"> • Goal – employees to do outreach – speaking engagements • Tell our complete story (New GM at channel 6) • Refine tour strategy • Expand use of social media • Updated program marketing materials • Annual development & marketing plan – strengthen committee actions 	<p style="text-align: center;"><u>Internal Interactions</u></p> <ul style="list-style-type: none"> • Directors meetings every other month – reported to Board (when appropriate) by Mike • Develop more personal communication • Committed, consistent – senior leadership meetings weekly – share 1. Successful outcome; 2. Issue trying to resolve • Broaden staff involvement in management activity 	<p style="text-align: center;"><u>Business Plan</u></p> <ul style="list-style-type: none"> • Program plan – prioritize, due diligence • Develop detailed proposal for juvenile HERO expansion • Deliver fair & legit proposal to church to force action (campus expansion) • Thrift store 😊

Goals: 3 Years, 2 Years, 12 months

Strategic Direction 1: Marketing Prosperous Outreach
Team Members: Tom, Deb, Teri, Michael Murphy

First-Year Goals	Two-Year Goals	Three-Year Goals
<p><u>1.</u> Goal Year ONE:</p> <ul style="list-style-type: none"> Identify naming opportunities & secure funding for 2 -3 years <p>by whom: Tom and Teri</p>	<p><u>1.</u> Goal Year TWO:</p> <ul style="list-style-type: none"> Engage two naming opportunities 	<p><u>1.</u> Goal Year THREE:</p> <ul style="list-style-type: none"> Minimize dependence on foundations by increasing private donations
<p><u>2.</u> Goal Year ONE:</p> <ul style="list-style-type: none"> Measure & increase guild engagement through time, talent & resources (internal & external) <p>by whom: Nancy (Beth) and Teri</p>	<p><u>2.</u> Goal Year TWO:</p> <ul style="list-style-type: none"> Increase guild membership and contribution 	<p><u>2.</u> Goal Year THREE:</p> <ul style="list-style-type: none"> Guild fundraising increased 15% from 2019 amount
<p><u>3a.</u> Goal Year ONE:</p> <ul style="list-style-type: none"> Increase community outreach by staff & Board (lead generation – determine baseline) <p>by whom: Deb and Michael Murphy</p>	<p><u>3.</u> Goal Year TWO:</p> <ul style="list-style-type: none"> 85% of Board involved in community outreach. (part of Board culture) 	<p><u>3.</u> Goal Year THREE:</p> <ul style="list-style-type: none"> 100% of Board involved in community outreach.
<p><u>3b.</u> Goal Year ONE:</p> <ul style="list-style-type: none"> Leverage internal stakeholders for external communication success <p>by whom: Deb and Michael Murphy</p>		

Strategic Direction 2: Energizing and Developing Our Workforce

Team Members: Madeline, Sharon, Beth, John

First-Year Goals	Two-Year Goals	Three-Year Goals
<p><u>1.</u> Goal Year ONE:</p> <ul style="list-style-type: none"> Evaluate & create plan to strengthen Human Resources – include job responsibilities <p>by whom: HR committee</p>	<p><u>1.</u> Goal Year TWO:</p> <ul style="list-style-type: none"> Roll out new job responsibilities – Org Chart 	<p><u>1.</u> Goal Year THREE:</p> <ul style="list-style-type: none"> Improved job performance and job satisfaction
<p><u>2.</u> Goal Year ONE:</p> <ul style="list-style-type: none"> Increase internal agency communications (keep it simple & effective) <p>by whom: Officers</p>	<p><u>3.</u> Goal Year TWO:</p> <ul style="list-style-type: none"> In-person communication has increased (as measured by employee engagement survey) 	<p><u>3.</u> Goal Year THREE:</p> <ul style="list-style-type: none"> Asses past two-year outcomes and make recommendations for future goal actions
<p><u>3.</u> Goal Year ONE:</p> <ul style="list-style-type: none"> Launch an employee engagement survey & create follow-up plan; consider outsourcing, budget allowing! <p>by whom: HR committee</p>	<p><u>3.</u> Goal Year TWO:</p> <ul style="list-style-type: none"> Increase number of responses, engagement & favorable responses in annual engagement survey 	<p><u>3.</u> Goal Year THREE:</p> <ul style="list-style-type: none"> Operationalize feedback loop from survey results to organizational improvements

Strategic Direction 2: Energizing and Developing Our Workforce – continued

First-Year Goals	Two-Year Goals	Three-Year Goals
<p><u>4.</u> Goal Year ONE:</p> <ul style="list-style-type: none"> Implement & grow intern program <p>by whom: Mandy, Sharon & Beth</p>	<p><u>4.</u> Goal Year TWO:</p> <ul style="list-style-type: none"> Implement and grow role 	<p><u>4.</u> Goal Year THREE:</p> <ul style="list-style-type: none"> Intern program is part of standard of operation’s procedure
<p><u>5.</u> Goal Year ONE:</p> <ul style="list-style-type: none"> Create an employee recognition program <p>by whom: HR Committee</p>	<p><u>5.</u> Goal Year TWO:</p> <ul style="list-style-type: none"> Employees respond more favorably to recognition program questions in annual survey 	<p><u>5.</u> Goal Year THREE:</p> <ul style="list-style-type: none"> Implement an employee development plan

Strategic Direction 3: Prioritizing, Planning and Funding for Programs

Team Members: Jude, Jeremy, Jay, Craig, Christine, Gwen, Mike

First-Year Goals	Two-Year Goals	Three-Year Goals
<p><u>1.</u> Goal Year ONE:</p> <ul style="list-style-type: none"> • Completion of thorough evaluation & recommendation on direction of thrift store <p>by whom: Board Committee – TBD</p>	<p><u>1.</u> Goal Year TWO:</p> <ul style="list-style-type: none"> • Execute year one of recommendations 	<p><u>1.</u> Goal Year THREE:</p> <ul style="list-style-type: none"> • Execute year two of recommendation
<p><u>2.</u> Goal Year ONE:</p> <ul style="list-style-type: none"> • Develop fair proposal to church for action <p>by whom: Finance Committee</p>	<p><u>2.</u> Goal Year TWO:</p> <ul style="list-style-type: none"> • Develop campus Master plan 	<p><u>2.</u> Goal Year THREE:</p> <ul style="list-style-type: none"> • Begin implementing year one of Master plan
<p><u>3.</u> Goal Year ONE:</p> <ul style="list-style-type: none"> • Develop methodology to evaluate current & future programs <p>by whom: Program Committee</p>	<p><u>3.</u> Goal Year TWO:</p> <ul style="list-style-type: none"> • Evaluate current and future programs (i.e., PSH scattered site) 	<p><u>3.</u> Goal Year THREE:</p> <ul style="list-style-type: none"> • Evaluate current and future programs (i.e., PSH scattered site)
<p><u>4.</u> Goal Year ONE:</p> <ul style="list-style-type: none"> • Become CARF accredited across the organization <p>by whom: Christine</p>	<p><u>4.</u> Goal Year TWO:</p> <ul style="list-style-type: none"> • Develop detailed proposal for juvenile HERO expansion (PRIORITY) <p>by whom: CEO, COO, CFO</p>	<p><u>4.</u> Goal Year THREE:</p> <ul style="list-style-type: none"> • Develop detailed proposal for HERO west Outpatient services

Implementation

Quarter by Quarter – Year ONE

Strategic Direction 1: <u>Marketing Prosperous Outreach</u>				
FIRST YEAR GOALS	QTR 1	QTR 2	QTR 3	QTR 4
<p><u>1. Goal Year ONE:</u></p> <ul style="list-style-type: none"> Identify naming opportunities & secure funding for 2 -3 years <p>by whom: Tom and Teri</p>	<ul style="list-style-type: none"> Define naming opportunities Obtain naming policies from like organizations <p>by whom: Teri</p>	<ul style="list-style-type: none"> Committee meeting with Board, volunteers & guild <p>by whom: Teri</p>	<ul style="list-style-type: none"> Draft of plan to full Board <p>by whom: Teri</p>	<ul style="list-style-type: none"> Begin implementation or menu of naming options <p>by whom: Teri</p>
<p><u>2. Goal Year ONE:</u></p> <ul style="list-style-type: none"> Measure & increase guild engagement through time, talent & resources (internal & external) <p>by whom: Nancy (Beth) and Teri</p>	<ul style="list-style-type: none"> Stephen Center education of guild <p>by whom: Nancy</p>	<ul style="list-style-type: none"> Engagement of new members <p>by whom: Teri & Nancy</p>	<ul style="list-style-type: none"> Survey Guild for personal engagement commitments <p>by whom: Nancy</p>	<ul style="list-style-type: none"> Begin implementation of personal engagement <p>by whom: Nancy & Teri</p>

Strategic Direction 1:

Marketing Prosperous Outreach (continued)

FIRST YEAR GOALS	QTR 1	QTR 2	QTR 3	QTR 4
<p>3a. Goal Year ONE:</p> <ul style="list-style-type: none"> Increase community outreach by staff & Board (lead generation – determine baseline) <p>by whom: Deb and Michael Murphy</p>	<ul style="list-style-type: none"> Educate staff & Board on how they can increase outreach <p>by whom: Development Committee</p>	<ul style="list-style-type: none"> Implementation of outreach best practice <p>by whom: Development Committee</p>	<ul style="list-style-type: none"> Corporate messaging out speaking <p>by whom: Development Committee</p>	<ul style="list-style-type: none"> Evaluate Rinse <p>by whom: Development Committee</p>
<p>3b. Goal Year ONE:</p> <ul style="list-style-type: none"> Leverage internal stakeholders for external communication success <p>by whom: Deb and Michael Murphy</p>	<ul style="list-style-type: none"> Craft elevator speech messaging Develop external elevator speech <p>by whom: Development Committee</p>	<ul style="list-style-type: none"> Training booklets / cards – equip <p>by whom: Development Committee</p>	<ul style="list-style-type: none"> Marketing radio ads, etc. <p>by whom: Development Committee</p>	<ul style="list-style-type: none"> Wash Repeat <p>by whom: Development Committee</p>

Strategic Direction 2:

Energizing and Developing Our Workforce

FIRST YEAR GOALS	QTR 1	QTR 2	QTR 3	QTR 4
<p><u>1. Goal Year ONE:</u></p> <ul style="list-style-type: none"> Evaluate & create plan to strengthen Human Resources – include job responsibilities <p>by whom: HR committee</p>	<ul style="list-style-type: none"> Look at outsourcing HR – Jeremy Evaluate current policies & procedures <p>by whom: Jeremy & Madeline (HR Committee)</p>	<p style="text-align: center;">~~No Action~~</p> <ul style="list-style-type: none"> Waiting on SD2.G3 - survey 	<ul style="list-style-type: none"> Use survey results to develop plan <p>by whom: HR Committee</p>	<ul style="list-style-type: none"> Put plan in place <p>by whom: Jeremy & Madeline (HR Committee)</p>
<p><u>2. Goal Year ONE:</u></p> <ul style="list-style-type: none"> Increase internal agency communications (keep it simple & effective) <p>by whom: Officers</p>	<ul style="list-style-type: none"> Develop internal communication strategy Quarterly town halls – submit questions ahead of time <p>by whom: Officers</p>	<ul style="list-style-type: none"> Quarterly town hall with officers <p>by whom: Officers</p>	<ul style="list-style-type: none"> Quarterly town hall with officers <p>by whom: Officers</p>	<ul style="list-style-type: none"> Quarterly town hall with officers Assess if quarterly is appropriate frequency <p>by whom: Officers</p>

Strategic Direction 2:

Energizing and Developing Our Workforce (continued)

FIRST YEAR GOALS	QTR 1	QTR 2	QTR 3	QTR 4
<p>3. Goal Year ONE:</p> <ul style="list-style-type: none"> Launch an employee engagement survey & create follow-up plan; consider outsourcing, budget allowing! <p>by whom: HR committee</p>	<ul style="list-style-type: none"> Secure survey vendor <p>by whom: Madeline & Jamee</p>	<ul style="list-style-type: none"> Establish questions asked Load employee data Launch & compile <p>by whom: Jamee & Jeremy</p>	<ul style="list-style-type: none"> Evaluate results Present results to staff <p>by whom: HR Committee</p>	<ul style="list-style-type: none"> Develop follow-up plan & move forward addressing issues <p>by whom: HR Committee</p>
<p>4. Goal Year ONE:</p> <ul style="list-style-type: none"> Implement & grow intern program <p>by whom: Mandy, Sharon & Beth</p>	<ul style="list-style-type: none"> Review intern training process Establish meeting times Review intern job descriptions Identify new intern opportunities <p>by whom: Sharon, Beth, Mandy</p>	<ul style="list-style-type: none"> Engage with & market intern opportunities both internal & external Evaluate new opportunities & follow-up <p>by whom: Sharon, Beth, Mandy</p>	<ul style="list-style-type: none"> Continue to engage Evaluate & follow-up <p>by whom: Sharon, Beth, Mandy</p>	<ul style="list-style-type: none"> Continue to engage Evaluate & follow-up <p>by whom: Sharon, Beth, Mandy</p>

Strategic Direction 2:

Energizing and Developing Our Workforce (continued)

FIRST YEAR GOALS	QTR 1	QTR 2	QTR 3	QTR 4
<p><u>5. Goal Year ONE:</u></p> <ul style="list-style-type: none"> • Create an employee recognition program <p>by whom: HR Committee</p>	<p>~~No Action~~</p>	<p>~~No Action~~</p>	<ul style="list-style-type: none"> • Develop employee recognition plan using survey results <p>by whom: Jamee & HR Committee</p>	<ul style="list-style-type: none"> • Put plan in place <p>by whom: HR Committee</p>

Strategic Direction 3:

Prioritizing, Planning and Funding for Programs (continued)

FIRST YEAR GOALS	QTR 1	QTR 2	QTR 3	QTR 4
<p><u>1. Goal Year ONE:</u></p> <ul style="list-style-type: none"> Completion of thorough evaluation & recommendation on direction of thrift store <p>by whom: Board Committee – TBD</p>	<ul style="list-style-type: none"> Determine cross representation for committee to evaluate thrift store & establish criteria (January) <p>by whom: ED, Board President, Past President</p>	<ul style="list-style-type: none"> Hold first meeting and establish criteria (February) <p>by whom: Thrift Store Committee</p>	<ul style="list-style-type: none"> Complete evaluation & document recommendation to Executive Committee <p>by whom: Thrift Store Committee</p>	<ul style="list-style-type: none"> If executive Committee agrees then present to Board in June <p>by whom: Thrift Store Committee / Executive Committee</p>
<p><u>2. Goal Year ONE:</u></p> <ul style="list-style-type: none"> Develop fair proposal to church for action <p>by whom: Finance Committee</p>	<ul style="list-style-type: none"> Meet with church leadership to understand needs of the church & congregation <p>by whom: ED, Board President</p>	<ul style="list-style-type: none"> Finance committee will meet to develop proposal & seek Board approval (June) <p>by whom: Finance Committee</p>	<ul style="list-style-type: none"> Designated S.C. Board (ED, President, & TBD) present proposal to church (July) <p>by whom: ED, Board President</p>	<ul style="list-style-type: none"> TBD based on Church decision

Strategic Direction 3:

Prioritizing, Planning and Funding for Programs (continued)

FIRST YEAR GOALS	QTR 1	QTR 2	QTR 3	QTR 4
<p>3. Goal Year ONE:</p> <ul style="list-style-type: none"> Develop methodology to evaluate current & future programs <p>by whom: Program Committee</p>	<ul style="list-style-type: none"> Identify what core areas we want to see outcomes from within each program <p>by whom: Christine & Teri (Program Committee)</p>	<ul style="list-style-type: none"> Create dashboard for Board approval <p>by whom: Christine & Teri (Program Committee)</p>	<ul style="list-style-type: none"> Board approval and put on Board portal/website <p>by whom: Christine & Teri (Program Committee)</p>	<ul style="list-style-type: none"> Feedback from community stakeholders <p>by whom: Christine & Teri (Program Committee)</p>
<p>4. Goal Year ONE:</p> <ul style="list-style-type: none"> Become CARF accredited across the organization <p>by whom: Christine</p>	<ul style="list-style-type: none"> Prepare & submit application Develop department CARF “box” requirements <p>by whom: Christine, Beth, Sharon, Christine L</p>	<ul style="list-style-type: none"> Review policies & procedures to ensure CARF compliance <p>by whom: Christine, Beth, Sharon, Christine L</p>	<ul style="list-style-type: none"> Complete survey <p>by whom: Christine, Beth, Sharon, Christine L</p>	<ul style="list-style-type: none"> Accreditation achieved!!!

Creativity is thinking up new things. Innovation is doing new things. A powerful new idea can kick around unused for years, not because its merits are not recognized, but because nobody has assumed responsibility for converting it from words to actions. Ideas are useless unless used. The proof of their value is only in their implementation.

Theodore Levitt

Recommendations

- Review Draft strategic plan with executive committee. Have executive committee confirm strategic plan proposed to full board approval.
- Engage the absent Board members by reviewing the new strategic plan and ask for their commitment to support the implementation.
- Hold a Board vote to approve the new strategic plan.
- Add progress on the strategic directions to regular updates at the Board meetings.
- During the November 2019 Board of Directors meeting celebrate the accomplishments for each strategic direction and review / update Year Two Goals and set new quarterly action steps.
- Review current committees, identify which current committees support the strategic plan and should remain, which do not and should be stopped and what committee is missing and should be added.
- Consider using committee work as a way to engage non-Board members and future Board members in the work of Stephen Center. Not all committee members must be current Board members.
- All committees should have a chair, clear expectation of time commitment and a set monthly or quarterly meeting time (depending on the work needed by the committee).