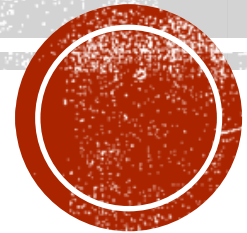




# **LAUREL HOUSE STRATEGIC PLAN**

June 2022 - June 2025



# WHAT IS A STRATEGIC PLAN?

## *Laurel House Mission:*

- *Advocate for and empower those impacted by domestic violence by providing crisis intervention, safe haven, supportive programs, and resources*
- *Advance social change through preventative education, community training, and collaboration to foster a coordinated response to domestic abuse*

- The strategic plan should support the overall **Laurel House Mission** and provide direction to allow the agency to grow and develop for the future.
- The strategic plan keeps the agency *centered* and is the umbrella for all agency activities.
- The plan helps address:
  - Where do we need to focus to be successful?
  - Where do we spend our time, money, and energy?
  - What is a “nice to have” versus a “need to do”?
  - Allows us to say “no” if activities don’t fit into the plan
- When building the plan, it is important to:
  - Evaluate capacity and impact for each strategy AND tactic
  - Establish metrics
  - Determine points for the activities



# DEVELOPMENT PROCESS

- In early 2020, Liz Vibber from Catalyst Center for Non-Profit Management (Bee Bergvall & Co.), conducted a survey of Board and staff members to understand the agency:
  - What does Laurel House do well? (Strengths)
  - Where do we have gaps? (Areas for Improvement)
  - Where do we want to grow as an agency? (Unmet needs, greater impact, more effective organization)
- We reviewed this information in spring 2020 to distill down to key strategy statements and key tactics with the following structure:
  - Overall Strategic statements and aspirational vision for a 3-5 year timeframe
  - Considerations/challenges
  - In Progress and Foundational tactics – What is currently underway and what to develop as a base for the future
  - Resources Needed, Responsibility (Board/staff), and Timeframe
- The next step was for the committee to refine this document for use in a workshop session with the Board to develop a final plan for review and approval

## **Enter the pandemic ....all work was put on hold.**

- November 2020 - CBIZ conducted a “Covid response” assessment, giving us insight and recommendations on adjustments Laurel House should continue in the Covid environment and into the future. We reviewed and selected certain items to build into our evolving strategic plan.
- February 2021 – All feedback from previous market research and CBIZ integrated into a draft Strategic Plan. Process put on hold due to other priorities.
- February 2022 - The Strategic Planning Committee reconvened in February and March 2022 to review and update the plan presented on slides 7-10.



# NEXT STEPS

- Board members to review strategic plan on slides 7-10
- Send any questions to Lynn Doerr ([lynn.doerr@outlook.com](mailto:lynn.doerr@outlook.com)) **by April 15** so she can prepare answers for the Board meeting on April 20
  - Board to vote on approval of the Strategic Plan for the June 2022-June 2025 time period
    - If adjustments are necessary, final approval may occur at the following meeting
- Ongoing – Committees/Point will report progress in Board meeting reports
  - Tactics will be embedded into the report templates and updated as appropriate
- Strategic Planning Committee will monitor progress against tactics on a semi-annual basis and report back to Board during June and December meetings



# Laurel House Mission

Example of connection between mission and strategy/tactics.

## Strategy

**Evaluate and maintain program effectiveness.** LH will deliver programs that are designed to effectively meet client goals and needs.



## Tactics

- Seek funding and outside support/assistance to devise and help implement tools and measures for skilled program evaluation
- Program Managers will develop/refine Program Evaluation Tools with input from staff, current and former clients, funders, and similar service organization
  - Staff will use tools to evaluate programs
  - Laurel House will ask clients to use tools to review/evaluate programs



# STRATEGIES

- 1. Evaluate and maintain program effectiveness**
- 2. Laurel House will maintain and continue to build a strong and diverse funding base**
- 3. Sustain and strengthen an effective and diverse work force**
- 4. Continue to strengthen and diversify the Board**
- 5. Broaden awareness of Laurel House services to under-served populations in all areas of Montgomery County**
- 6. Enhance Communication Capabilities**
- 7. Be the agency of choice for domestic violence issues in Montgomery County**



# STRATEGIC PLAN: THREE-YEAR PLAN

Strategy	Tactics	Metrics - To be determined by the point team and reported through status reports.	Point (Board/Staff)	Considerations/Challenges/Resources
<p><b>#1 – Evaluate and maintain program effectiveness.</b> LH will deliver programs that are designed to effectively meet client goals and needs.</p>	<ul style="list-style-type: none"> <li>• Seek funding and outside support/assistance to devise and help implement tools and measures for skilled program evaluation</li> <li>• Program Managers will develop/refine Program Evaluation Tools with input from staff, current and former clients, funders, and similar service organization               <ul style="list-style-type: none"> <li>• Staff will use tools to evaluate programs</li> <li>• Laurel House will ask clients to use tools to review/evaluate programs</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Securing funding or outside support</li> <li>• Program Evaluation Tools will measure:               <ul style="list-style-type: none"> <li>• Parameters/outcomes as determined by activity (overall use, effectiveness, etc.)</li> </ul> </li> <li>• Potential phone surveys with clients</li> </ul>	<ul style="list-style-type: none"> <li>• Executive Director</li> <li>• Deputy Director</li> <li>• Board/HC Representative TBD</li> </ul>	<ul style="list-style-type: none"> <li>• Staff Capacity</li> <li>• Funding</li> <li>• Safe/confidential follow up</li> <li>• Subjective nature - shelter outcomes, long term educational outcomes</li> </ul>
<p><b>#2 – Laurel House will maintain and continue to build a strong and diverse funding base.</b></p> <p><b>Aspirational:</b> Sustained support from the business community</p>	<ul style="list-style-type: none"> <li>• Research funding mix and opportunities; benchmark against other regional similar sized non-profits and understand unrestricted funding sources</li> <li>• Create a comprehensive Fund Development Plan for a multi-year period (3+ years) to include:               <ul style="list-style-type: none"> <li>• Determine the ROI for fundraising/development activities and make decisions on relevance</li> <li>• Board involvement/role</li> <li>• Research corporate “team” volunteer opportunities (based on other similar non-profits)</li> <li>• Develop/maintain a diverse funding base</li> <li>• Complete donor relationship map</li> <li>• Develop “Planned Giving” offering</li> </ul> </li> <li>• Capital Campaign “post mortem” on funding sources to apply to GenOPs funding</li> </ul>	<ul style="list-style-type: none"> <li>• Set a timeline for funding mix analysis completion with findings</li> <li>• Multi-year plan - measure against baseline and conduct subsequent quarterly analysis on progress against goals               <ul style="list-style-type: none"> <li>• Event ROI analysis with decisions on future activities</li> </ul> </li> <li>• Assess whether Capital Campaign sources convert to regular donations</li> </ul>	<ul style="list-style-type: none"> <li>• Senior Director</li> <li>• Executive Director</li> <li>• Board Fund Development Chair</li> <li>• Capital Campaign Chair</li> <li>• Finance Committee</li> </ul>	<ul style="list-style-type: none"> <li>• Board committee capacity</li> <li>• Creating and managing corporate team volunteer opportunities</li> <li>• Aspirational: Gaining entry to corporate decision makers</li> </ul>

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Strategy	Tactics	Metrics - To be determined by the point team and reported through status reports.	Point (Board/Staff)	Considerations / Challenges/Resources
<p><b>#3 – Sustain and strengthen an effective and diverse work force.</b> Continue focus on hiring a diverse staff reflective of the community served and continue to enhance Human Resources capabilities to support the organization’s growth.</p>	<ul style="list-style-type: none"> <li>• Develop a thoughtful and comprehensive succession plan for LH staff</li> <li>• Conduct market compensation analysis (finance committee, HR) and develop plan to address based on current needs</li> <li>• Structure a sustainable HR function:               <ul style="list-style-type: none"> <li>• Develop and maintain a formal diversity and inclusion program (DEI)</li> <li>• Evaluation of HR related tools and processes to streamline and support activities</li> </ul> </li> <li>• Hybrid working environment management and effectiveness evaluation</li> <li>• Evaluate professional development needs for staff (part of staff evaluation process)</li> </ul>	<ul style="list-style-type: none"> <li>• Documented succession plan by specific date</li> <li>• Timeline set for market compensation analysis</li> <li>• Annual HR evaluation on progress to goals:               <ul style="list-style-type: none"> <li>• Hiring effectiveness parameters (# of applicants, hired, retained, DEI goals)</li> <li>• Tool development and utilization</li> </ul> </li> <li>• Staff feedback - “climate check”</li> </ul>	<ul style="list-style-type: none"> <li>• HR Director</li> <li>• Executive Director</li> <li>• Deputy Director</li> <li>• Finance Committee</li> <li>• Fund Development Committee</li> </ul>	<ul style="list-style-type: none"> <li>• Capacity of a part time HR Director</li> <li>• Funding</li> </ul>
<p><b>#4 – Continue to strengthen and diversify the Board.</b> Board will be reflective of the community served and needs of the organization</p>	<ul style="list-style-type: none"> <li>• Develop a comprehensive recruitment plan for the Board incorporating DEI principles</li> <li>• Continue Board enhancements: Assess Board structure and term limits; update Committee structure; expand training</li> <li>• Evaluate Board compliance against commitments (6-month check in with Governance Committee)</li> </ul>	<ul style="list-style-type: none"> <li>• Measured by board composition against baseline on an annual basis</li> <li>• Documented changes to Board structure, etc.; number of trainings offered</li> <li>• Governance Committee to monitor/assess Board members involvement and commitment</li> </ul>	<ul style="list-style-type: none"> <li>• Board Governance Committee</li> </ul>	<ul style="list-style-type: none"> <li>• Recruiting people with lived experiences (DV, poverty) and culturally diverse individuals</li> <li>• Matching skills to need</li> </ul>



# STRATEGIC PLAN: THREE-YEAR PLAN

Strategy	Tactics	Metrics - To be determined by the point team and reported through status reports.	Point (Board/Staff)	Considerations/Challenges/Resources
<p><b>#5 – Broaden awareness of Laurel House services to under-served populations in all areas of Montgomery County.</b> LH will strengthen community partnerships with diverse organizations, specifically those led by and/or designed to serve BIPOC (Black, Indigenous, and People of Color); LH will expand awareness and provide programs and services with demonstrated impact to male victims and LGBTQ/gender-fluid individuals.</p>	<ul style="list-style-type: none"> <li>• Identify and prioritize the most impactful BIPOC partnerships to meet community needs               <ul style="list-style-type: none"> <li>• Initiate outreach efforts to these leaders and discuss connection and collaboration points</li> </ul> </li> <li>• Participate in county and other local collaborative initiatives focused on DEI</li> <li>• Print and digital materials to include information on services for these individuals</li> <li>• Network with LGBTQ Business Council and other relevant Montgomery county groups to raise awareness</li> <li>• Educate referral sources (law enforcement, social services, medical professionals, etc.) on service availability</li> </ul>	<ul style="list-style-type: none"> <li>• Annual review of the number of targeted versus successful connections and partnerships</li> <li>• Set partnership goals to review annually</li> <li>• Semi-annual review of print and digital materials used</li> <li>• Measure networking efforts against baseline</li> <li>• Training and outreach efforts attendance, retention, and referral measures</li> <li>• Measure changing demographics of client base</li> </ul>	<ul style="list-style-type: none"> <li>• Executive Director</li> <li>• Board President and Vice Presidents</li> <li>• Deputy Director</li> <li>• Senior Director</li> <li>• Board member TBD based on connection to these communities</li> </ul>	<ul style="list-style-type: none"> <li>• Staff and Board capacity and time</li> </ul>



# STRATEGIC PLAN: THREE-YEAR PLAN

Strategy	Tactics	Metrics - To be determined by the point team and reported through status reports.	Point (Board/Staff)	Consideration s/ Challenges/Re sources
<p><b>#6 – Enhance communication capabilities.</b> Communication will be consistent, thorough, available through various channels and across all locations, to meet a diverse set of needs.</p>	<ul style="list-style-type: none"> <li>Board:               <ul style="list-style-type: none"> <li>Mission Moments – (Board/staff present on different aspects of Laurel House services)</li> <li>Board Portal – web-based document repository implementation</li> </ul> </li> <li>Community:               <ul style="list-style-type: none"> <li>Metrics to measure effectiveness of communication modes</li> <li>Continue access through virtual meeting capabilities</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>Number of presentations</li> <li>Set timeline to poll Board members on effectiveness</li> <li>Community mode use rates (Social Media analytics - email open rates, Twitter retweets, FB Likes, etc.)</li> <li>Survey Monkey to determine gaps</li> </ul>	<ul style="list-style-type: none"> <li>Senior Director</li> <li>Development Associate</li> <li>Executive Director</li> <li>Deputy Director</li> <li>Executive Assistant</li> <li>Governance Committee (assign Mission Moments)</li> </ul>	<ul style="list-style-type: none"> <li>Staff capacity</li> <li>Board capacity</li> </ul>
<p><b>#7 – Be the agency of choice for domestic violence issues in Montgomery County.</b> Laurel House will be an agency that is well-known and accessible to donors, clients, funders, and a broad range of community partners and will be the local news “go-to” agency for DV related stories and events.</p>	<ul style="list-style-type: none"> <li>Develop/update Marketing Plan to identify key target audiences ( donor/funder, volunteers, community, non-English speakers) and how to reach them (via email, website, newsletter, Social Media, PR, Annual Report, etc.)</li> <li>Safe Haven Center (SHC) opening and media blitz</li> <li>Media training for specific Board members on how to handle news inquiries</li> </ul>	<ul style="list-style-type: none"> <li>Track response rates for audiences across the different engagement mediums via Google Analytics, social media reports, donor retention, press coverage of LH, hotline, text line, DART calls, newsletter open rates, website traffic, etc.</li> <li>Measure awareness of SHC and service utilization increases/decreases (versus current use of shelter); survey client/donor base on SHC knowledge (including walk-ins)</li> <li>Set timeline for Board Media training completion; measure utilization as spokesperson</li> </ul>	<ul style="list-style-type: none"> <li>Senior Director</li> <li>Development Associate</li> <li>Executive Director</li> <li>Deputy Director</li> <li>Board Fund Development Committee</li> </ul>	<ul style="list-style-type: none"> <li>Staff capacity</li> <li>Board capacity</li> </ul>