

Bringing the “WOW” back to Strategic Planning

May 2, 2018

Today's Agenda

- I. The Problem with the “Old Way” of Strategic Planning
- II. A New Approach
- III. Examples
- IV. Bringing Strategic Planning to Life
- V. Executing the Strategic Plan



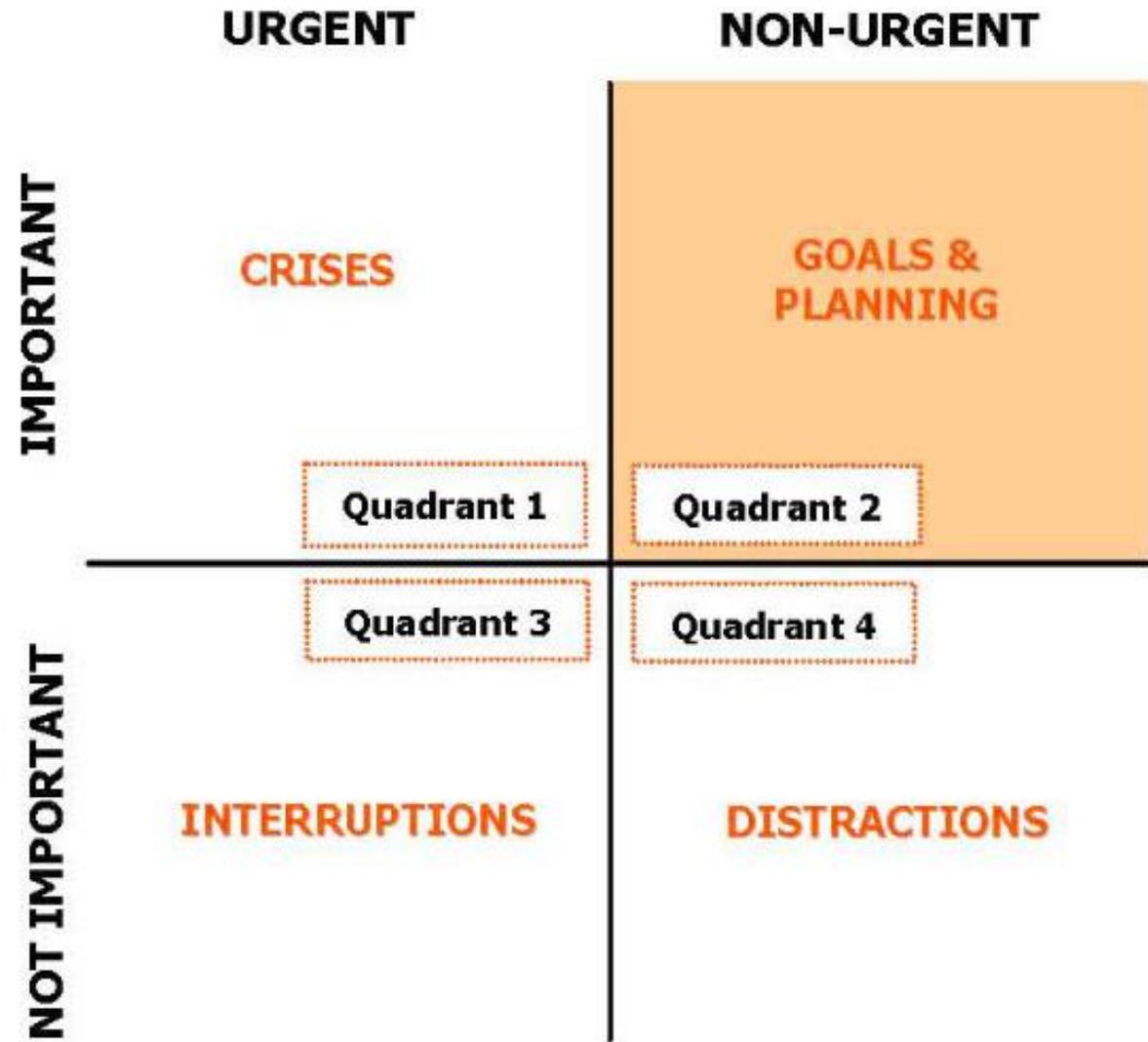
UMFS

WHO WE ARE

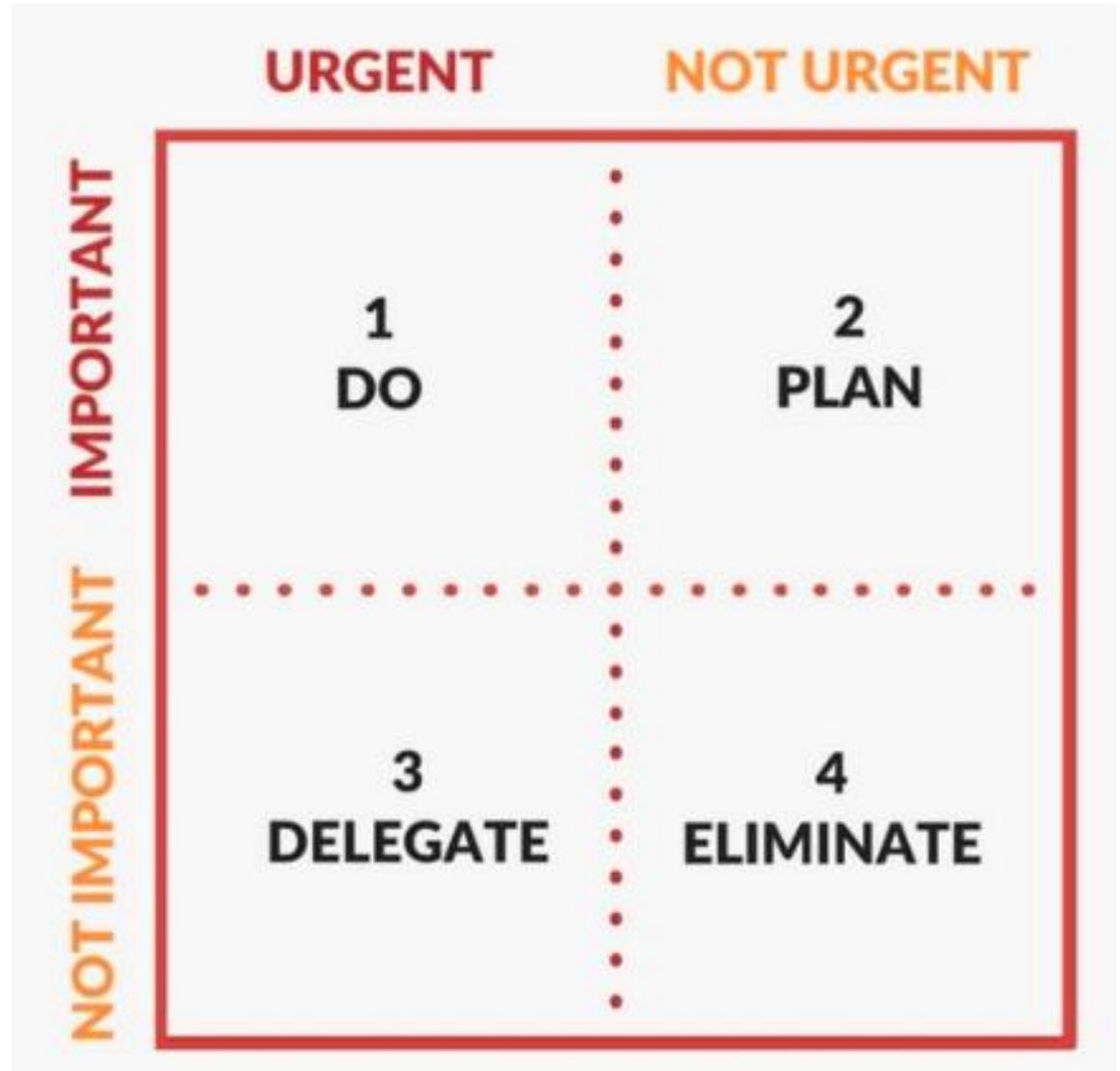
Our Problem

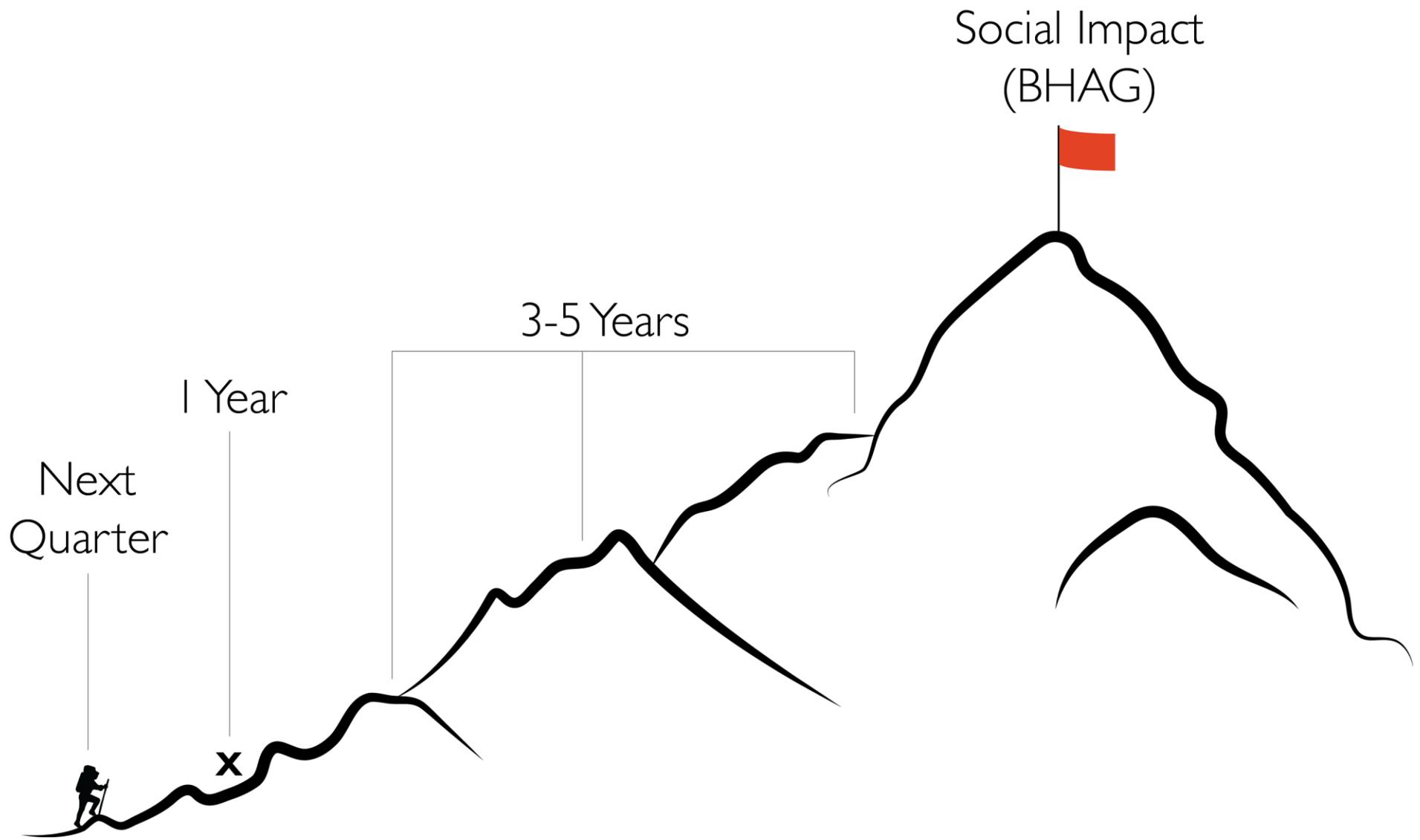


Our Problem



Our Problem

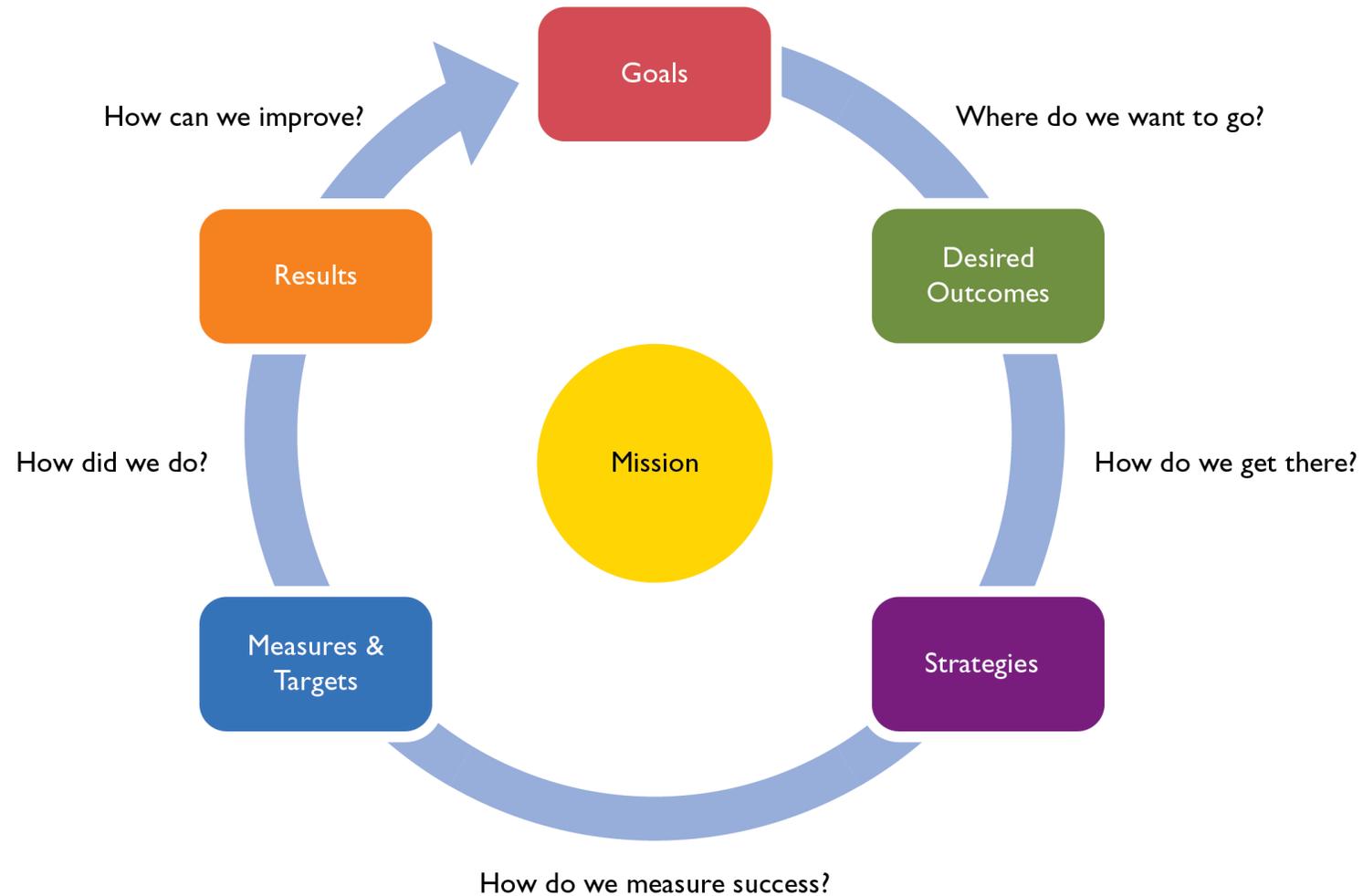




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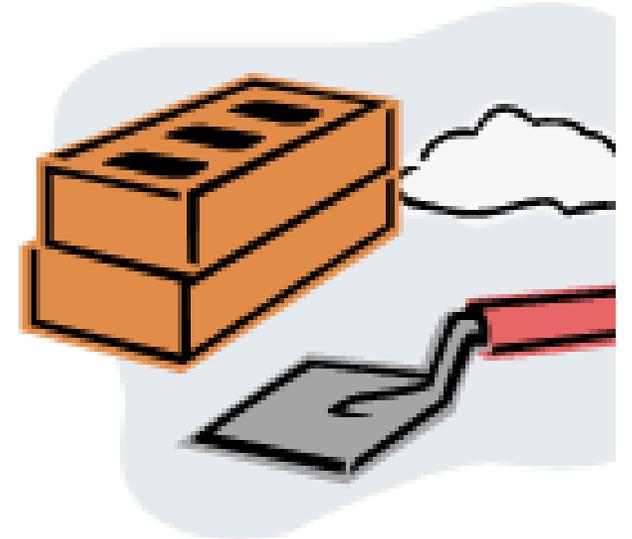
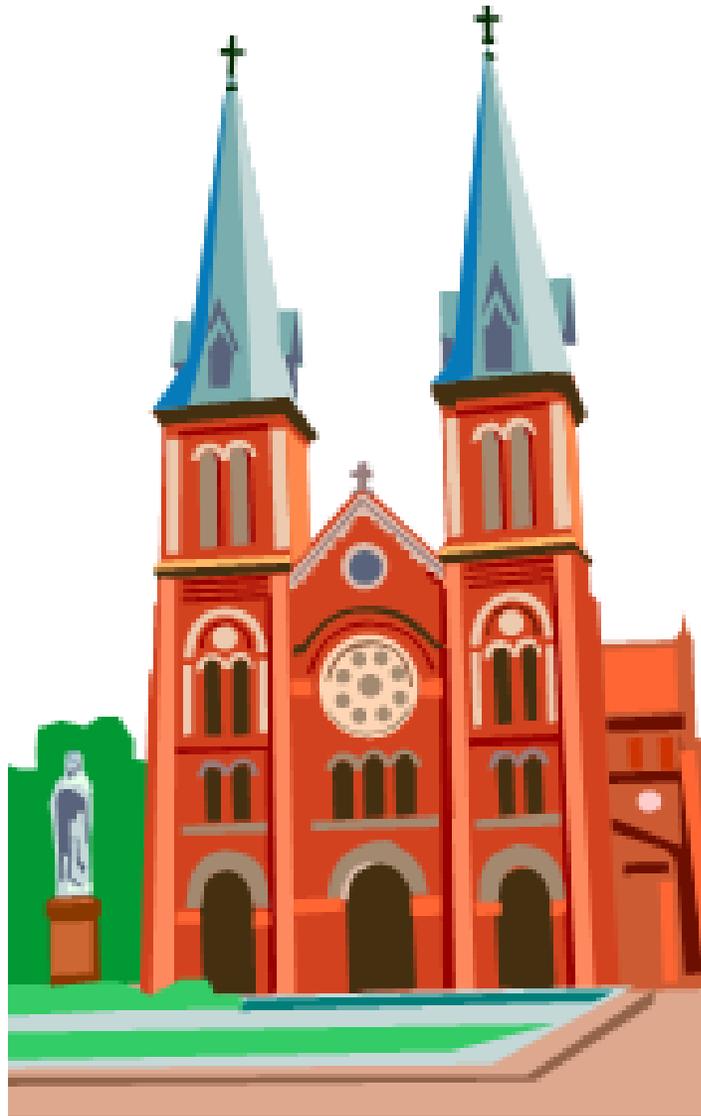
Strategic Planning Process



70% of all strategic
change initiatives fail.

John Kotter

Our Need





Getting hearts and minds engaged

Example Plan



MISSION
UMFS is an unwavering champion for high-risk children and families, collaborating with communities to help them reach their full potential.

VISION
Creating a world where caring, opportunity and generosity are passed on from generation to generation – empowering all children to contribute to society as engaged citizens.

VALUES
Start with Strengths – Always!
Relationships Are Our Building Blocks
Passion Unleashes Greatness
Collaboration Multiplies Impact
Relentlessly Pursue Solutions

FY 2016-2019 Strategic Directions



Pioneer a replicable, sustainable social impact model, which actively engages and improves the lives of children and families



Creatively attract and cultivate unwavering champions to achieve our vision



Expand existing funding and develop new sources of capital to strengthen current operations and create new, innovative ventures

We are committed to purposeful collaborations, partnerships, alliances, and new technologies in order to achieve these directions.

FY 2016-2019 Strategic Directions



Pioneer a replicable, sustainable social impact model, which actively engages and improves the lives of children and families

4-Year Metrics:
• 80% of staff, volunteers, and community partners are championing our social impact model, which will be copyrighted or trademarked



Creatively attract and cultivate unwavering champions to achieve our vision

4-Year Metrics:
• 85% staff retention
• 25% increase in donors, family partners, and volunteer hours
• 70% promoters (NPS)



Expand existing funding and develop new sources of capital to strengthen current operations and create new, innovative ventures

4-Year Metrics:
• Contribute 5% surplus to reserves

We are committed to purposeful collaborations, partnerships, alliances, and new technologies in order to achieve these directions.

July 2017-June 2018 Agency KPIs



Roll out Social Impact Goal and Develop Systems to measure metrics.



Overall retention rate: 80% NPS = 65% promoters (all unwavering champions).



To maximize our social impact, UMFS will practice good stewardship and revenue growth.

Example Plan



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FY 2016-2019 Strategic Directions

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PEOPLE



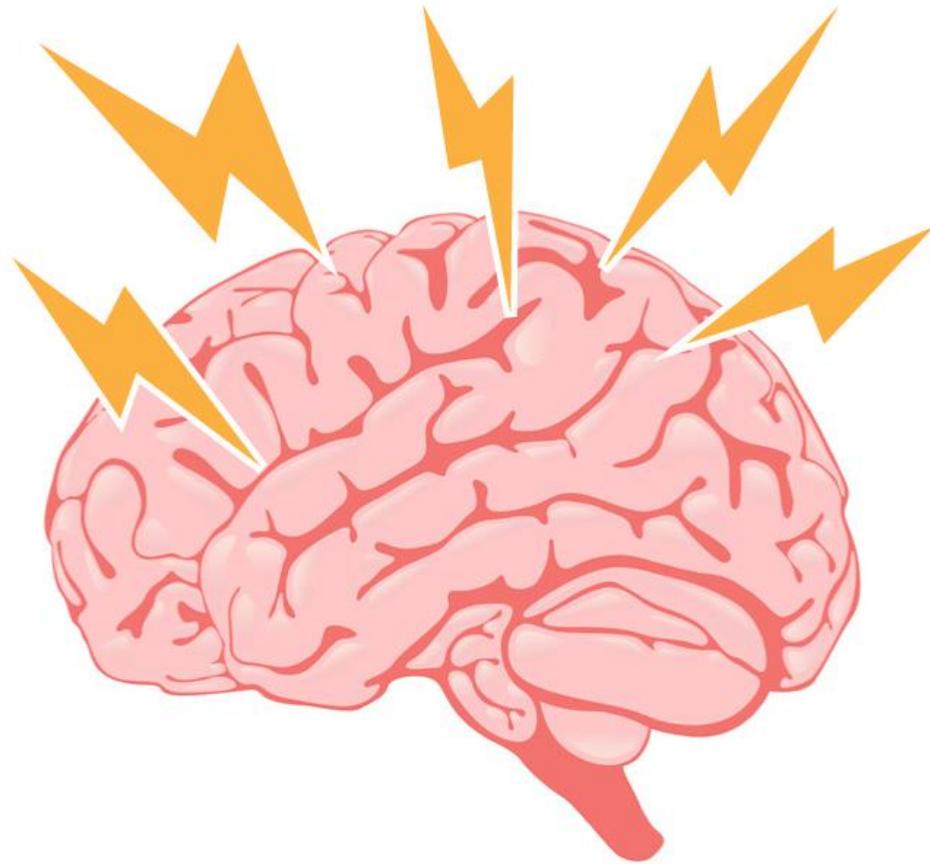
Engage Key People Through...

- Focus groups
- Surveys
- Interviews



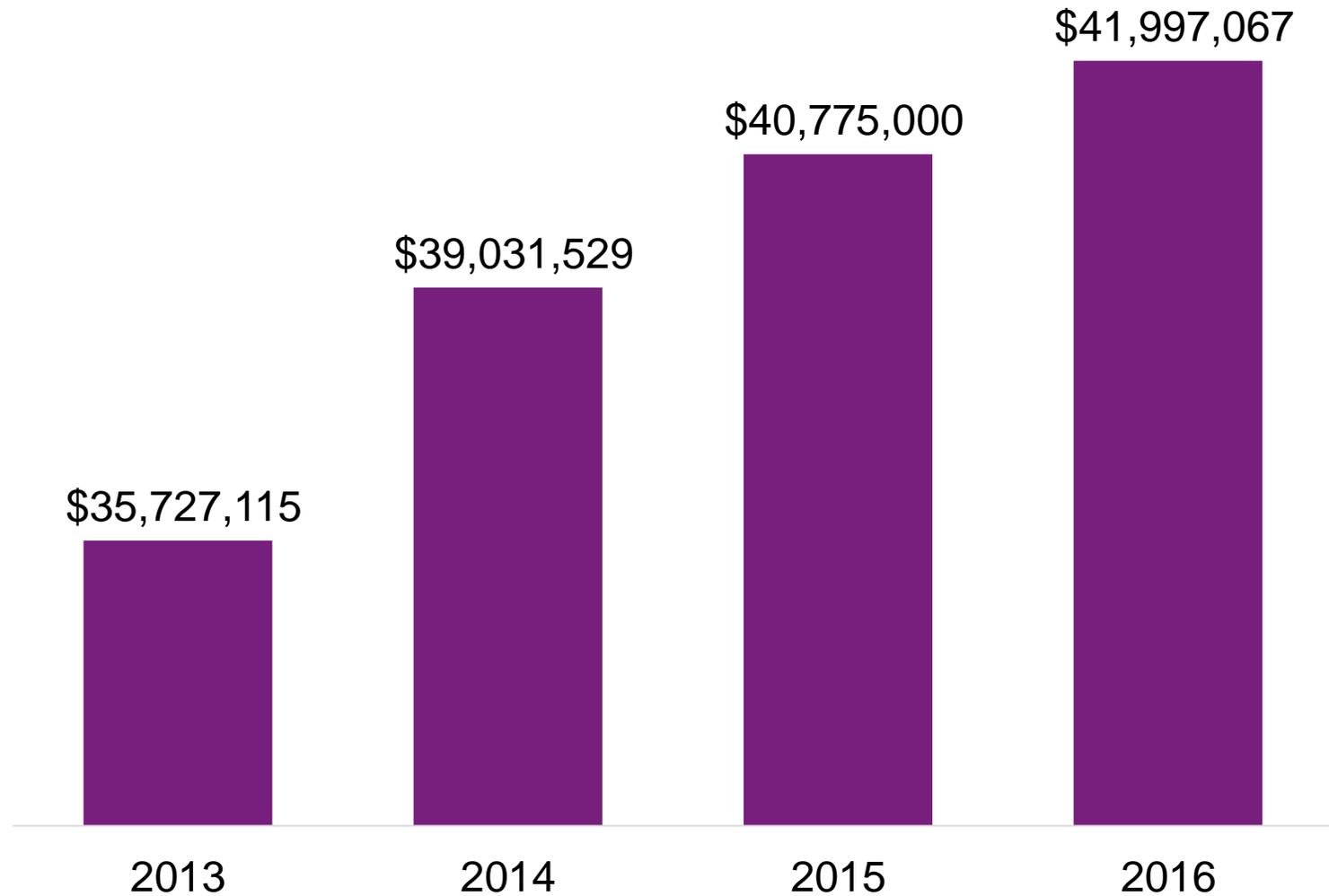
Internal & External Scan

Sparks



State Payment for Social Services

City of Richmond



ACES can have lasting effects on....



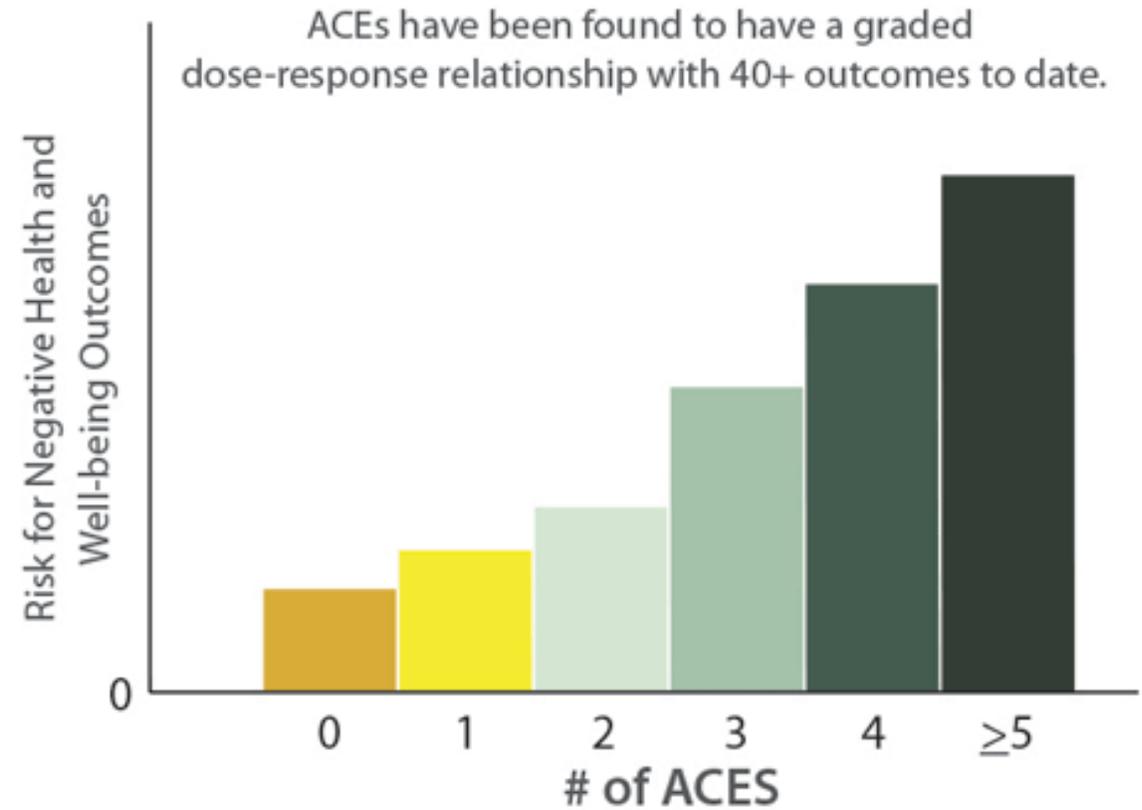
Health (obesity, diabetes, depression, suicide attempts, STDs, heart disease, cancer, stroke, COPD, broken bones)



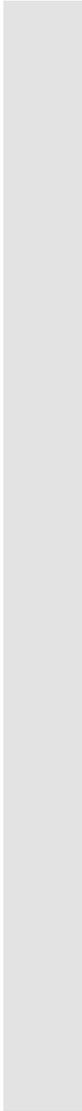
Behaviors (smoking, alcoholism, drug use)



Life Potential (graduation rates, academic achievement, lost time from work)



*This pattern holds for the 40+ outcomes, but the exact risk values vary depending on the outcome.



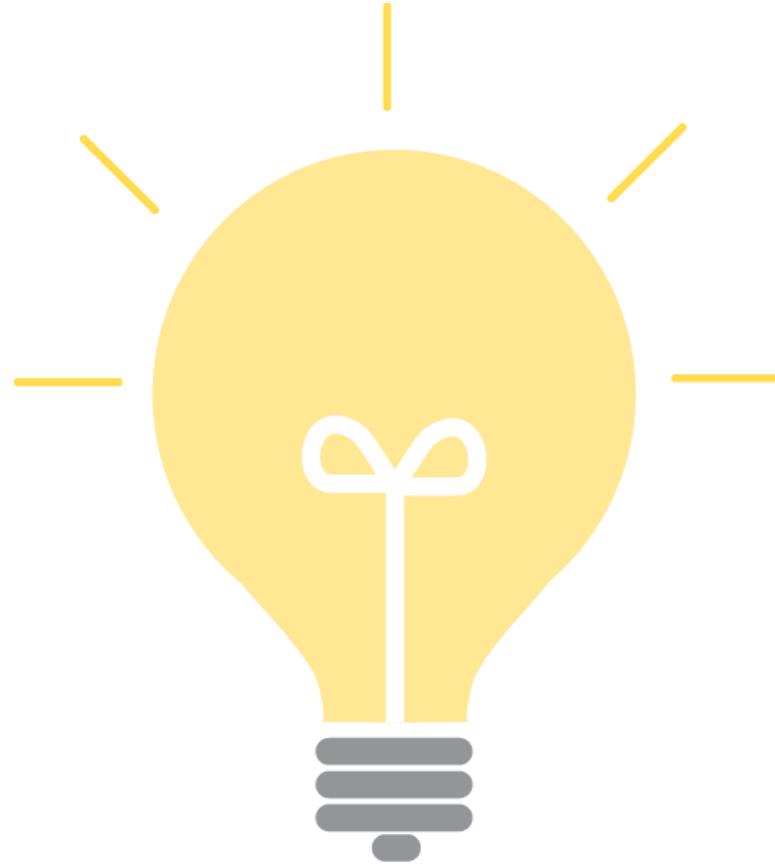
Critical Numbers

Metrics that Matter

Leading & Lagging Indicators



Bringing it to Life





Making Our Mark

A 180-second story of how UMFS defined our Social Impact

July 2017-June 2018 Agency KPIs
Second Quarter Update



ON TARGET



Roll out Social Impact Goal and Develop Systems to measure metrics.



Each regional center and program participated in the Social Impact training.

ON TARGET



Overall retention rate: 80%.
NPS = 65% promoters (all unwavering champions).



UMFS' staff retention rate YTD is 85%. Retention is calculated by dividing the total number of employees

WATCH



To maximize our social impact, UMFS will practice good stewardship and revenue growth.



The development team has received 54% (\$752,000) of their goal for FY18.

Effective Communication

Routine will set You Free



align

Example Plan



MISSION

The Richmond City CPMT is committed to providing a quality system of care that empowers at-risk youth and their families to strengthen their well-being, independence and family system.

VISION

The Richmond City CPMT is committed to the identification, development and provision of resources and services needed by children and their families in the City of Richmond.

VALUES

- Every child deserves a stable and nurturing family.
- Children and families are best served by collaborative, family-focused, strength-based systems of care.
- Strong communities help support families by increasing accessible services.

FY 2018-2021 Strategic Directions



Engage families, staff, volunteers and parents to create a city-wide movement for sustainable systems of care.



Adopt trauma responsive practices throughout all services that touch Richmond City to ensure long-term success for youth.



CPMT will adopt strategic budgeting practices and intentionally invest in preventative and sustainable services.

We are committed to purposeful collaborations, partnerships, alliances, and new technologies in order to achieve these directions.

FY 2018-2021 Strategic Directions



Engage families, staff, volunteers and parents to create a city-wide movement for sustainable systems of care.

4-Year Metrics:

All CSA involved agencies have developed a city-wide mission statement and will align strategic plans for involving Richmond City youth and families.



Adopt trauma responsive practices throughout all services that touch Richmond City to ensure long-term success for youth.

4-Year Metrics:

Richmond City CPMT will agree on a trauma-informed practice that is directive enough to operationalize trauma-informed principles, global enough to apply to all departments.



CPMT will adopt strategic budgeting practices and intentionally invest in preventative and sustainable services.

4-Year Metrics:

Richmond City CPMT will establish an on-going practice to review and implement budgeting processes on a regular basis.

We are committed to purposeful collaborations, partnerships, alliances, and new technologies in order to achieve these directions.

July 2018-June 2019 Richmond City Key Performance Indicators



CPMT, DJJ, RPS, DSS, Dept. of Health, RBHA, and DJS will share their strategic plans with each other and determine the commonalities and crossover.



CPMT will conduct a pretest-posttest assessment to determine readiness for effective systems of care.



A needs assessment will be conducted to help CPMT understand the baseline of our trauma informed system of care in Richmond City.



Agreement will be gained on the strategic plan and an on-going schedule of review will be established to ensure progress is made.

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Questions?