CSA Strategic Planning: Tools to Help Leaders Lead

KAREN REILLY-JONES, LCSW
CHESTERFIELD/COLONIAL HEIGHTS

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OCS CONFERENCE
Learning Objectives

- Participants will explore the strategic planning (SP) process from development to re-evaluation through various locality examples of strategic plans.

- Participants will be provided tools for SP development and assessment to take back to their communities.

- Participants will gain knowledge and skills in developing; assessing and implementing their strategic plan to best meet their community’s needs.
What is your community’s blueprint?
Importance of Being Strategic

- Clear mindset of goals and objectives
- Playing off the same sheet of music - but with different instruments!
- Build upon strengths, fill in weaknesses
- Establish plans (vision, mission, and goals)
- Understand and use resources available
- Investing time in the process
- Define outcomes
“A first step in being strategic is to engage in a process to understand one another’s values, lay a common foundation of principles, and develop a shared vision for the system of care.”

- Shelia Pires, Building Systems of Care: A Primer/2002
Strategic Steps

1) Establish Values and Philosophy, Vision/Mission

2) Assess Needs/Strengths

3) Establish Plan (Goals and Objectives)

4) Evaluate and re-evaluate
“If you don’t know where you are going, how are you gonna’ know when you get there?”

Yogi Berra
**Vision vs. Mission Statement**

- **Vision (the Dream)**
  - Short statement describing clear and inspirational long term change, as a result of the work done. Statement should be the compass to lead in the direction for quality results.

- **Mission (the what & why)**
  - Short, one sentence statement describing the reason and importance of the program to use when making decisions about priorities and actions.
Vision Statements

• To partner with families and all CSA stakeholders to implement a system of are that drives community practices to promote healthy, productive families within our community.

• CSA will strive to be a leader in the community in improving outcomes for children and their families by providing effective and innovative systems of care.

• The Department of Community and Human Services envisions a community in which residents enjoys a sense of well being and self sufficiency.
Vision Statement

- What is your community’s long term dream?
- Based on shared values and principles
- Inspiring
- Easy to understand by broad population
- Short enough to be on a T-Shirt.
Common Themes

- Partnership
- Collaboration
- Well-being
- System of Care
- Healthy families and children
Mission Statements

• To promote a comprehensive system of community-based care that strengthens families through facilitating collaborative efforts.

• The CPMT shall pursue and encourage collaborative activities that seek to insure the provision of child-centered, family-focused, community-based services.

• To comprehensively and seamlessly serve eligible children and families regardless of how or where they enter the system.
Mission Statement

- One to two sentences
- Rooted in guiding principles and beliefs
- Action oriented
- More specific on intended outcomes
- Broad and inclusive in order not to exclude others
Common Themes

- To promote
- To build
- Collectively
- Comprehensively
- Seamlessly
- Child-centered, family-focused, community based
- Quality services
- Accessibility
Tools?
Step Two: Assess Needs/Strengths

- Community Inventory/SWOT Analysis
- Community mapping
- Service gaps assessment
- CPMT/FAPT retreats
- Surveys (family, youth, providers, staff)
Community Inventory/SWOT
- CPMT/FAPT members input on key principles of SOC
- Identifies strengths and weaknesses
- Establishes priorities, goals, action & training plans
Community Mapping
- Visual presentation
- Community relationships, assets, and gaps
• **Service Gap assessment**
  - CPMT agencies’ feedback- all levels
  - Local data/outcomes

• **CPMT/FAPT member retreats**
  - Invest the time to collaborate
  - Re-energize the mission, vision, and guiding philosophy
  - Share data/outcomes
    - Family/youth surveys
    - Service outcomes
Step Three: Plan

- Establish Goals and Objectives
  - Measurable indicators
  - Time frames
  - Responsible party
Examples

- Clarify and operationalize the roles and responsibilities of the CPMT.
  - Create charter for CPMT
  - Include annual retreat in CPMT charter
  - Confirm core values
  - Develop expectations of CPMT roles
  - Review and updated the CPMT Program Committee charter reporting requirement and coordination with CPMT

- By September CPMT meeting
- Responsible party: CPMT work group
Examples etc.

- Develop a CSA Family Engagement committee
  - By February CPMT meeting
  - Responsible Party: CSA Coordinator, CPMT member, FAPT member, parent representative

- CSA will have an operational System of Care incorporating changes such as Medicaid managed care and ICC.
  - Develop and provide orientation for start up
  - Identify stakeholders in local SOC
  - Provide training on Medicaid changes
  - Define common elements among agencies
  - Develop a sustainability plan
    - By July 1, 2014
    - Responsible party: Director of MHSADS
Common Goals

- Family Engagement
- Community Collaboration
- Data informed
- Quality/Effective Services
Barrier Busters

- Cross training/job shadowing
- Share information
- Give families/youth voice
- Establish communication channels
- Promote and practice flexibility in practice
- Address myths/assumptions
- Establish common outcome measures
- Keep values and mission mindful
Family Engagement

- Establish philosophy and practice expectations
  - Family friendly meetings
  - Easy to understand language at meetings/Interpreters
  - Families informed and prepared for meetings
  - FAPT parent representative role
  - Publications/communications

- Training
  - Family engagement and sensitivity
  - Cultural sensitivity
Community Collaboration

- Establish shared vision and philosophy
  - Review agency mandates
  - FAPT/CPMT retreats
  - Establish guiding principles

- Establish efforts in communication between agencies
  - Job shadowing
  - Cross agency training
Community Collaboration cont.

• Increase role understanding among community agencies
  - Inter-department trainings
  - Shared funding resources
  - Celebrate shared successes
  - Case management

• Establish expectations and accountability measures
  - CSA eligibility and compliance
  - Establish roles
  - Check lists
  - Risk management reviews
Data Informed

- **Establish outcome indicators**
  - CPMT Data reports
  - CANS
  - LOS
  - End of year reports
  - Benchmarking

- **Cost goals**
  - Budget neutral
  - Local resources (schools, general funds)

- **Types of services**
  - Community based/parent support
  - Culturally supportive
  - Foster care prevention services
  - Non-mandated services
  - Child/program/service specific
Data Informed Examples

- **Reduce number of residential placements by 10%**
  - Increase access to CBS
  - Increase CBS service array
  - Earlier access to services

- **Increase discharge to home from RTF by 15%**
  - Increase access to CBS for families
  - Increase utilization of ICC services
  - Provide case managers training on discharge planning
Quality and Effective Services

- Develop and/or identify available natural resources
  - Community collaboration through SOC teams
  - Build on private provider partnerships
  - Connect with community resources

- Increase specific service needs- cultural, trauma informed care, evidence based-practices, etc.
  - Identify and meet w/ providers that are experts in field
  - Outreach to regional partners
- Establish clear expectations for service outcomes
  - Define and clarify roles and expectations in contracts
  - Define and communicate desired outcomes
  - Share outcomes with community partners

- Utilize feedback surveys for quality improvement
  - Youth
  - Family
  - FAPT/CPMT members

- Train case managers on services
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<tr>
<th>GOAL</th>
<th>Objective</th>
<th>Target date</th>
<th>Responsible party</th>
<th>Status</th>
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<td>Increase Spanish speaking providers for community based services.</td>
<td>1) Identify providers to meet &amp; address identified needs to build capacity. CPMT members submit topics for discussion.</td>
<td>December 2016</td>
<td>CSA Coord. and DSS Asst. Director</td>
<td>2/2016-providers identified &amp; meeting dates set</td>
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<td>Increase knowledge of CSA process across CPMT agencies and families.</td>
<td>1) Develop and disseminate CSA information guide.</td>
<td>July 2016</td>
<td>FAPT members, CSA Coord. CPMT agency supervisors.</td>
<td>2/2016- CPMT agencies identified responsible supervisors</td>
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Step Four+: Evaluate

- CPMT set regular evaluation/review process
  - Monthly CPMT agenda items
  - Annual meetings/retreats
RE-Evaluate

• Use data to inform practice
  ◦ Establish goals
    ▪ 200 day LOS for RTF
    ▪ 80% return home rate
    ▪ 20% increase in CBS
  ◦ Benchmark w/other localities

• Identify barriers/threats
  ◦ Examine how to overcome them
  ◦ Determine opportunities
Appreciation

- City of Alexandria
- Albemarle County
- Henrico County
- Loudon County
- Powhatan County
- Prince William County
- Roanoke County
- Rockingham County
Questions?

- Do you feel better informed for strategic planning process?