



**Child & Family Services**

of Northwestern Michigan

*Support in times of crisis, challenge, and life transition.*



## Organizational Strategic Plan

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adopted May 30, 2018

# Executive Director's Message

Dear Friends:

We are pleased to share with you the latest Draft Edition of Child and Family Services of Northwestern Michigan's Strategic Plan. This document is meant to be a living, dynamic plan that is used daily to guide the work of each of our Service Lines and of our organization as a whole. We are (most) focused in four areas:

- Financials
- Infrastructure
- People
- Services/Management

Our strategic emphasis, which we call **FIPS**, is a product of feedback from our employees, volunteers, and other stakeholders. It was built from our last formal strategic plan in 2016, combined with the 2017 Strengths/Weaknesses/Opportunities/Threats (SWOT) analysis completed with the support of our partners at Samaritas, and the untiring efforts of Board President-Elect Gary Blair.

# Executive Director's Message *continued*

The primary lesson of the two years since our last Strategic Plan is balance. We know through painful reflection and decision making that our efforts must be focused equally on service delivery in support of our mission and responsible management of our resources, to maintain a financially sustainable organization.

To this end, our Strategic Plan supports:

- finding new and innovative sources of revenue, exploring social enterprises and lessening our dependence on payer partnerships.
- increasing the effectiveness of our management team, giving our directors and managers the tools they need to monitor their service line budgets and respond to variances and trends quickly and efficiently while ensuring service delivery
- continuous improvement in internal processes, procedures and systems. A great example of this is our new accounting and payroll software rolled out early this year, which is already creating efficiencies and making us more effective.
- collaboration and partnership with other providers in the community. This is perhaps the most challenging change, as it requires us to be more open, transparent, and trusting of the motives of others—and may require us to give up areas of “turf” in order to re-vision and recreate more effective community systems.
- a new governance model that engages a qualified, committed board and the larger community of stakeholders in fulfilling our mission.

# Executive Director's Message *continued*

We look forward with energy and enthusiasm to utilizing this plan as our way forward. Thank you for your interest and support of CFS!

Sincerely,



Gina Aranki  
Executive Director

# Committee Members

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Erica Walsh

Gina Aranki

Gary Blair

Mike Carda

Terry Paquet

Robin Grubbs

Kaylee Simerson

Linda Sommerville

Rachel Wasserman

Aprille Sutton

Krista Cooper

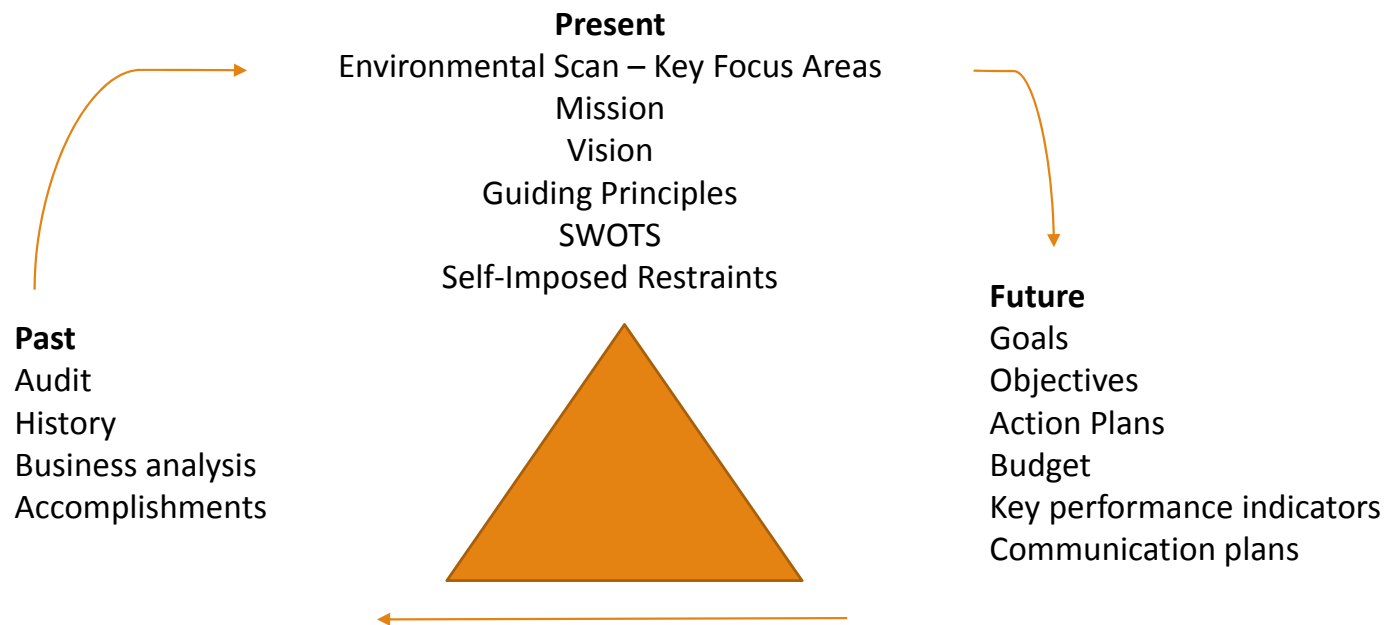
Paula Smith

Galen Krupka

Mickie Jannazzo

# The Planning Approach and Process

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# Environmental Scan

The committee identified and plotted key focus points in the development of the plan.

The results of this exercise are identified on the following slides as key focus areas.

These items are woven throughout the goals and objectives of the plan.

# Key Focus Areas

## **Financial**

- Financial stability
- Reduce debt
- Operating reserves
- Alternate revenue streams
- Budget and financial controls
- Donation base – donors and volunteers

## **Infrastructure**

- Update IT general Accounting system
- Facility improvement

## **People**

- Employee compensation
- Employee retention
- Employee benefits
- Employee training and development



# Key Focus Areas *continued*

## Services / Management

Leadership

Communications

HR services and revamp

Service delivery through technology

Strategic and tactical allies (Samaritas)

Accountability

Stay ahead of local needs and government financing programs

Involvement of local & state certification people and programs

Board members with expertise in what we need to grow

Continue to right size programs including evaluation of growth opportunities

Continue to get the right people in the business and in the right seats

Maintain existing focus on people, employees, clients, volunteers and community, serving with excellence

Update policies and procedures

Consistent classification and treatment of staff

Better integration of staff in all departments

# Key Focus Areas = FIPS

- ❖ Financials
- ❖ Infrastructure
- ❖ People
- ❖ Services/Management

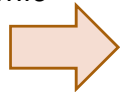
# SWOT Analysis

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Internal Assessment:  
Organizational Assessment,  
resources, people,  
culture, systems,  
partnerships, suppliers



External Assessment:  
Services, social trends,  
technology, regulatory  
environment, economic  
Cycles.



|               |            |
|---------------|------------|
| Strengths     | Weaknesses |
| Opportunities | Threats    |



# Mission Statement

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Our services support the safety and well being of children, youth, adults, and families in times of challenge, crisis, and life transition.



# Vision Statement

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Consistently striving to create communities where people are safe and healthy.

# Guiding Principles



## “CFS RISES To The Challenge”

- |                |  |
|----------------|--|
| Respect        | We will treat clients, volunteers, staff, referral sources, and all members of our community with compassion and dignity.                                    |
| Innovation     | We will create an inventive and exciting environment through proactive leadership that guides and sets industry standards for service delivery and advocacy. |
| Service        | We will serve by providing high quality, efficient, and versatile services for the greatest benefit of all stakeholders.                                     |
| Excellence     | We will conduct ourselves with the highest standards of integrity, ethics and fiscal responsibility.   |
| Sustainability | We will consistently work together to maintain a stable organization to accomplish our mission.  |

# Strategic Alignment



Strategic alignment is the process and the result of linking an organization's structure, governance, and resources with its goals, objectives, and implementation planning to meet its mission and vision.

As we implement this approach, we define the organizational areas as:

- Child Welfare Services (Adoption, Foster Care, and Foster Home Licensing)
- Community Services (Crisis Services, Wraparound, and Safe Haven)
- Youth Services (Pete's Place and Outreach)
- Behavioral Health Services
- Development

Each area has a Director/Service Line Leader. In this critical role, the leaders balance service delivery and operational management. Each service line has Key Performance Indicators (KPIs) and key financial metrics, enabling them to adjust as necessary to meet budget and plan. Each of these leaders owns or participates in the execution of the plan's objectives to ensure our goal attainment. The Executive Director leads this group, along with our Administrative Services staff, in striking the necessary balance between service delivery and operational management. Each will perform Quality Service Reviews (QSRs) twice a year. The process will not only look at KPIs and financial metrics within a service line alone, but at process, procedures, and opportunities for continuous improvement across the entire organization.

# Strategic Alignment *continued*

This plan adopts a new governance model that provides greater transparency, varied and regular stakeholder involvement, defined financial accountability, and a more engaged board to support management from their demonstrated areas of expertise. We have been effective as an organization of late in recruiting board members whose skills, talents, and abilities can help in ensuring service delivery and operational management. The Executive Director continues to effectively engage these board members on various issues.

Our resources, specifically our employees, are a prime focus area of our planning. You will find many objectives within the plan that will ensure that we recruit, train, develop, and retain a superior workforce. This is crucial to complete our objectives and attain our goals.

The plan is a living, organic, and dynamic document that evolves as the business environment dictates. The development of an ongoing planning process with procedures, templates, calendar, and controls is part of the objectives set out in the plan.



# Strategic Alignment *continued*

We will manage the organization to this plan on a daily basis using:

- Goals
- Objectives
- Implementation planning
- Key Performance Indicators
- KPI Dashboards
- Financial Dashboards
- Budget
- Communication plan

# Goals

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- Maintain a financially sustainable organization
- Develop infrastructure that supports service delivery
- Develop and maintain a superior workforce
- Effectively manage and deliver core services

# Objectives

| Departments  | Child Welfare                                  | Community Programs                             | Youth Services                                 | Development                         | Administrative   | Behavioral Health                              |
|--|--|--|--|-------------------------------------|--|--|
| <b>Goal-1: Maintain a financially sustainable organization</b> |  |  |  |                                     |  |  |
| <b>Objectives:</b>   | Develop performance Dashboard S-001            | Develop performance dashboard S-001            | Develop performance dashboard S-001            | Develop performance dashboard S-001 | Develop enterprise-wide financial performance dashboard 001              | Develop performance dashboard S-001            |
|  |  |  |  | Maintain and expand donor base 002  | Maintain a net 0 budget 003  |  |
|  |  |  |  |                                     | Monitor, track and adjust quarterly to remain on budget and plan 004     |  |
|  |  |  |  |                                     | Ensure reporting and management accountability to service line level 005 |  |
|  |  |  |  |                                     | Develop alternate revenue streams 006                                    |  |
|  | Ensure that programs are self-sustaining S-007 | Ensure that programs are self-sustaining S-007 | Ensure that programs are self-sustaining S-007 |                                     | Ensure that programs are self-sustaining S-007                           | Ensure that programs are self-sustaining S-007 |
|  |  |  |  |                                     | Develop allocation method for non-restricted funding 008                 |  |
|  |  |  |  |                                     | Reduce debt 009  |  |
|  |  |  |  |                                     | Create operating reserves 010  |  |
|  |  |  |  |                                     | Retire our credit line a least once within each fiscal period 011        |  |
|  |  |  |  |                                     | Develop gross margin analysis 012  |  |
|  |  |  |  |                                     | Develop trend analysis 013   |  |

# Objectives

|  | Child Welfare  | Community Programs   | Youth Services   | Development  | Administrative   | Behavioral Health  |
|--|--|--|--|--|--|--|
| <b>Goal-2: Develop infrastructure that supports service delivery</b> |  |  |  |  |  |  |
| <b>Objectives:</b>   | Continually review and improve processes, procedures, assets and tools S-014 | Continually review and improve processes, procedures, assets and tools S-014 | Continually review and improve processes, procedures, assets and tools S-014 | Continually review and improve processes, procedures, assets and tools S-014 | Continually review and improve processes, procedures, assets and tools S-014 | Continually review and improve processes, procedures, assets and tools S-014 |
|  |  |  |  |  | Maintain and enhance facilities 015  |  |
|  | Utilize technology to deliver services and reduce expense S-016              | Utilize technology to deliver services and reduce expense S-016              | Utilize technology to deliver services and reduce expense S-016              |  | Utilize technology to deliver services and reduce expense S-016              | Utilize technology to deliver services and reduce expense S-016              |
|  |  |  |  |  | Evaluate a remote worker policy to eliminate space constraint 017            |  |
|  |  |  |  |  | Risk Management review process 018   |  |
|  |  |  |  |  | Safety and Security process 019  |  |
|  |  |  |  |  | Strategic plan process to review update and revise 020                       |  |

# Objectives

|  | Child Welfare  | Community Programs   | Youth Services   | Development  | Administrative   | Behavioral Health  |
|--|--|--|--|--|--|--|
| <b>Goal-3: Develop and maintain a superior workforce</b> |  |  |  |  |  |  |
| <b>Objectives:</b>                                       |  |  |  |  | Institute Board compensation committee 021                                       |  |
|  |  |  |  |  | Develop recruitment plan 022   |  |
|  |  |  |  |  | Implement employee referral program 023  |  |
|  |  |  |  |  | Implement employee retention award 024   |  |
|  | Complete employee skill inventories S-025  | Complete employee skill inventories S-025  | Complete employee skill inventories S-025  | Complete employee skill inventories S-025  | Complete employee skill inventories S-025  | Complete employee skill inventories S-025  |
|  | Implement and review development plans for employees S-026                       | Implement and review development plans for employees S-026                       | Implement and review development plans for employees S-026                       | Implement and review development plans for employees S-026                       | Implement and review development plans for employees S-026                       | Implement and review development plans for employees S-026                       |
|  | Provide ongoing training programs in support of employee development plans S-027 | Provide ongoing training programs in support of employee development plans S-027 | Provide ongoing training programs in support of employee development plans S-027 | Provide ongoing training programs in support of employee development plans S-027 | Provide ongoing training programs in support of employee development plans S-027 | Provide ongoing training programs in support of employee development plans S-027 |
|  |  |  |  |  | Succession plan 028  |  |

# Objectives

|   | Child Welfare                                    | Community Programs   | Youth Services   | Development  | Administrative  | Behavioral Health   |
|---|--|--|--|--|---|---|
| <b>Goal-4: Effectively manage and deliver core services</b> |  |  |  |  |   |   |
| <b>Objectives:</b>  | Recruit/retain quality foster/adoptive homes 029 | Crisis: Assure CQI of crisis services, with special attention to training, supervision, and turnover 030 | Assure the CQI of services to homeless/runaway/at-risk youth 031             | Increase community awareness of CFS 032  | Improve service delivery through increased aptitude on Intacct and WFG 033                    | BHS: Fully implement pre- and post assessments for all clients (ASEBA) 034                        |
|   | License qualified relatives 035                  | Crisis: Increase capacity to respond to people in crisis 036   | Continue participation in YHDP collaborative 037                             | Maintain/enhance internal/external communications 038  | Increase managers' knowledge and understanding of financial aspects of service management 039 | BHS: Adjust IC program for max benefit to contractors/CFS (units/week/worker; add therapist?) 040 |
|   | Maintain/reduce caseload size at 10-13 041       | Crisis: Increase effectiveness of GT/Leelanau Suicide Prevention Coalition 042                           | Expand transitional /supportive housing options for older homeless youth 043 | Increase annual revenue 044  |   | BHS: Continue to adjust/maximize billing practices 045  |
|   |  | Crisis: Increase capacity of community to respond to people at risk of suicide 046                       | Build Host Homes as another option for youth shelter 047                     | Increase grant writing effort 048  | Increase advocacy efforts with legislators and others 049                                     | TA: Maximize DHHS contract 050  |
|   |  | Wrap: Maintain/maximize level of referrals compared to staffing 051                                      |  | Increase fundraising for Harbor Springs 052  |   | TA: Continue to help create trauma-informed community/org/foster parents 053                      |
|   |  | Wrap: Improve data collection + reporting systems 054  |  | Recruit/retain volunteers of all kinds and build capacity through their role as stakeholders and ambassadors 055 |   |   |
|   |  | Wrap: Acquire/develop survey tools to obtain program feedback 056  |  |  |   |   |

# Objectives

|  | Child Welfare   | Community Programs  | Youth Services  | Development   | Administrative  | Behavioral Health   |
|--|---|---|---|---|---|---|
| <b>Goal-4: Effectively manage and deliver core services Cont Objectives:</b> |   | SH: Maintain/increase program revenue 057                                   |   |   |   |   |
|  |   | SH: Develop Kids Club 058   |   |   |   |   |
|  |   | SH: Maintain matching funds 059   |   |   |   |   |
|  | Establish key performance indicators S-060                                  | Establish key performance indicators S-060                                  | Establish key performance indicators S-060                                  | Establish key performance indicators S-060                                  | Establish key performance indicators for all service lines S-060            | Establish key performance indicators S-060                                  |
|  | Evaluate on-going programs bi-annually S-061                                | Evaluate on-going programs bi-annually S-061                                | Evaluate on-going programs bi-annually S-061                                | Evaluate on-going programs bi-annually S-061                                | Evaluate on-going programs bi-annually S-061                                | Evaluate on-going programs bi-annually S-061                                |
|  | Identify and prioritize elements for improvement in all service lines S-062 | Identify and prioritize elements for improvement in all service lines S-062 | Identify and prioritize elements for improvement in all service lines S-062 | Identify and prioritize elements for improvement in all service lines S-062 | Identify and prioritize elements for improvement in all service lines S-062 | Identify and prioritize elements for improvement in all service lines S-062 |
|  | Develop and monitor plans for improvement S-063                             | Develop and monitor plans for improvement S-063                             | Develop and monitor plans for improvement S-063                             | Develop and monitor plans for improvement S-063                             | Develop and monitor plans for improvement in all service lines S-063        | Develop and monitor plans for improvement S-063                             |

# Objectives

|   | Child Welfare                                | Community Programs                           | Youth Services                               | Development                                  | Administrative  | Behavioral Health                            |
|---|--|--|--|--|---|--|
| <b>Goal-4: Effectively manage and deliver core services Cont Objectives</b> | Develop stakeholder communication plan S-064 | Develop stakeholder communication plan S-064 | Develop stakeholder communication plan S-064 | Develop stakeholder communication plan S-064 | Develop enterprise stakeholder communication plans S-064  | Develop stakeholder communication plan S-064 |
|   |  |  |  |  | Identify and develop new programs or services as stand-alone, partnership or alliance ventures 065                            |  |
|   |  |  |  |  | Test new, proposed programs in a pilot phase, evaluate based on pre-defined metric attainment prior to general deployment 066 |  |
| <b>Programs</b>   | Foster Care                                  | Crisis                                       | Outreach                                     | All Programs                                 | None  | Counseling                                   |
|   | Licensing                                    | Wrap-Around                                  | Transitional Living                          |  | Foundation  | Trauma                                       |
|   | Independent Living                           | Safe Haven                                   | Basic Care                                   |  |   |  |
|   | Adoption 1-Spec.Needs                        | Early-on TBA                                 | Substance Abuse Preven.                      |  |   |  |
|   | Adoption 2- Infant                           |  | Host Homes                                   |  |   |  |
|   |  |  |  |  |   |  |
|   |  |  |  |  |   |  |
| <b>Locations</b>  | Traverse City<br>Harbor Springs              | Traverse City                                | Traverse City<br>Shelter                     | Traverse City<br>Harbor Springs<br>Shelter   | Traverse City<br>Harbor Springs<br>Shelter  | Traverse City<br>Harbor Springs              |



# Implementation Plan

Each of the plan's 66 objectives have a high level tasking plan (example below) that has a designated service line along with a specific owner. The owner's responsibility is to ensure each objective is completed. The owner will identify a lead responsible for each task. Resources that will assist in completing the tasks are also identified in the plan. The owner and the designated resources will identify the start and stop date for each task. The plans will be reviewed as specified by the plan measurement. The Executive Director will review progress on the plan with the owner once a month. The tasking plans are available from the Executive Director.

|              |   |           |                                     |      |      |            |           |
|--------------|---|-----------|-------------------------------------|------|------|------------|-----------|
| Project      | Implementation Planning                                 |           |                                     |      |      |            |           |
| Goal         | Maintain a financially sustainable organization         |           |                                     |      |      |            |           |
| Objective    | Develop enterprise wide financial performance dashboard |           |                                     |      |      |            |           |
| Number       | 001   |           |                                     |      |      |            |           |
| Service Line | Administrative  |           |                                     |      |      |            |           |
| Owner        | Director of Finance                                     |           | Measurement: Monthly review with SL |      |      |            |           |
| Task Number  | Description   | Resources | Funds                               | Lead | Days | Start Date | Stop Date |
| 1            | Define dashboard for each service line                  | DF,SL     |                                     |      |      |            |           |
| 2            | Aggregate Service line dashboards to enterprise view    | DF,SL     |                                     |      |      |            |           |
| 3            |   |           |                                     |      |      |            |           |

# Key Performance Indicators

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## Child Welfare Dashboards

### Adoption

Total Census

Total Capacity

Number of Children Placed

Number of Children Finalized

Number of Internal Adoption Referrals

Total Adoption Referrals

### Foster Care

Total Census

Total Capacity

Number of Placements

Number of Re-Placements

Number of Unpaid Cases

### Licensing

Number of New Licensed Homes

Number of Enrolled Homes

Total Active Cases

Number of Closed Homes

Total Capacity

## Community Programs Dashboard

### Crisis Services

Contacts Fielded

Text Messages Received

Served in Education/Training

Served in Free Legal Aid Clinic

### Wraparound

Number of Clients

Number in Out of Home Placement after 6 Months

Left Wrap to Residential After 6 Months

Graduated Successfully From Wrap

Number of Units

Number Served With Crisis Respite

### Safe Haven

Number of Units

Number of New Referrals

Number of Visits

Number of Exchanges

Number of Staff Hours

# Key Performance Indicators *continued*

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## Youth Services Dashboard

- Number of Host Homes Receiving Stipends
- Number of Host Home Bed Nights
- Number of Pete's Place Bed Nights
- Number of Safe Exits from Shelter
- Number of Units of Counseling
- Number of Units of Case Management
- Number of Units of Crisis Service
- Number of Community Outreach Activities

## Behavioral Health Dashboard

- Number of Counseling Sessions
- Number of Clients Served in Counseling
- Number of Internal Foster Referrals
- Number of DHHS Referrals
- Number of Community Referrals
- Number Awaiting Trauma Assessments
- Number of Active Trauma Assessments
- Number of Completed Trauma Assessments
- Number of Units Provided by CFS Staff
- Number of Units Provided by Contractors

## Development Dashboard

- Number of New Donors
- Number of Retained Donors
- Number of Community Outreach Activities/Events
- Grants Received
- Individual Donations Received
- Client Needs Received
- In-Kind Received

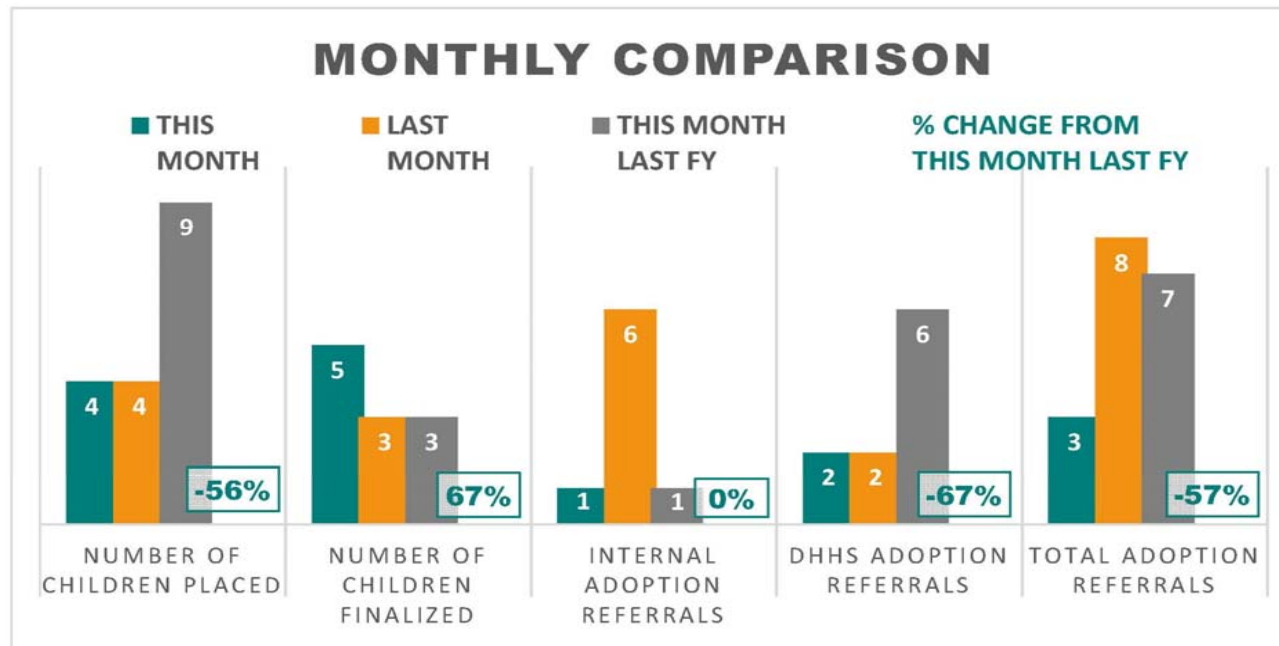
# KPI Dashboard

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A dashboard has been developed for each service line (Child Welfare Services, Community Services, Youth Services, Behavioral Health Services, and Development).

The KPIs show current month, prior month, year to date, year over year, and the specific goal for the fiscal year. The visualization of this data will enable quick analysis of performance to goal. The dashboard review will become part of the weekly directors' Roundtable meeting agenda.

# KPI Dashboard - *example*

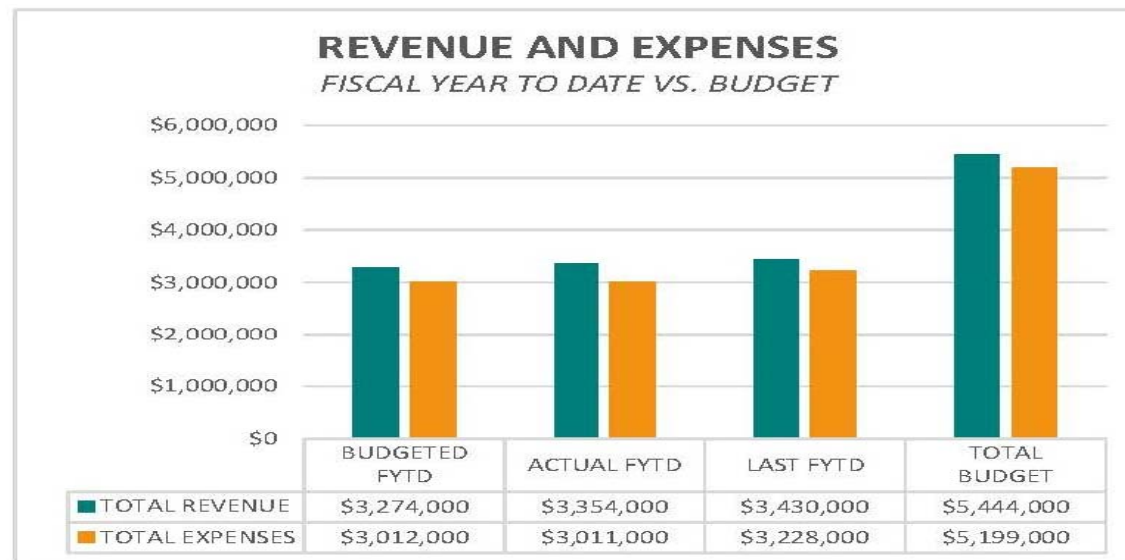


# Financial Dashboards

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The financial dashboard will track revenue, expense, trending, and margin targets at the enterprise and service line level. It will depict the current month, prior month, year to date, year over year and comparison to budget.

# Financial Dashboards - *example*



|                             | <u>REV</u> | <u>EXP</u> |
|-----------------------------|------------|------------|
| % CHANGE FROM LAST FYTD     | -2%        | -7%        |
| % OVER/UNDER BUDGETED FYTD  | 102%       | 100%       |
| % OVER/UNDER BUDGET TO DATE | 62%        | 58%        |

# Summary

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The Strategic Planning process has taken us through a detailed analysis of input from internal and external stakeholders to define our areas of focus. It enabled us to evaluate our strengths, weaknesses, opportunities, and threats. In doing so we framed an understanding of how to apply our strengths, shore up our weaknesses, explore our opportunities, and prepare to address threats. We also have reflected once again on our most recent accomplishments that demonstrate the forward progress that we are making. We have more sharply defined our mission and vision statements in this plan. We have adopted guiding principles that show how CFS will rise to meet the challenge of providing broad quality services to our community. The adoption of key self-imposed restraints will serve as internal parameters within which we will operate. The aspects of the plan that will insure our strategic focus are found in our four goals and sixty-six objectives that were identified in the planning process.

These, along with implementation plan tracking of objectives, KPIs, and financial measurements that will be implemented across all service lines, will ensure management control in new and exciting ways.



# Summary *continued*

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We will utilize our new state of the art, cloud-based accounting and HR system as the platform to deliver these tools to management. The Executive Director and Service Line Leaders will evaluate implementation plan tracking and KPI and financial dashboards monthly to ensure plan and budget progress/compliance. As identified within the objectives, an operational review of all service lines will be completed bi-annually. A series of objectives that cascade across the enterprise have been included to ensure we develop and maintain a superior workforce to meet our goals and to provide outstanding service to our clients. Additionally, the Executive Director will execute the objective that will implement an annual strategic planning cycle building on the methodology utilized in this planning process. She will also ensure alignment with the new governance model, “Smart Community.”