

Strategic Plan 2020-2025

VISION

By 2025 our vision is to have helped 15,000+ citizens to be a part of, not apart from, their communities.

We will be recognized in Martin, St. Lucie, Indian River and Okeechobee counties as the organization to turn to for raising healthy and participatory families, supporting our special needs citizens and as an outstanding steward of government funds, fee-based services and those generously provided by a growing number of philanthropic friends.

By fostering an entrepreneurial spirit, analytical rigor and revenue enhancements we will reverse our 87% reliance on government and grant-based funding to a diversified 50%, by developing fair fee-based services and philanthropic partnerships with individuals and groups.

Mission

Helping People Succeed transforms lives by realizing potential, creating hope and building futures through education, counseling, training and employment.

Organization Philosophy

We are an organization that thrives in a continuing state of renewal, rebalancing as needed to serve the changing needs of our community in unprecedented times.

To aid us in sustaining our balance and expanding our services we accepted a Community Foundation Martin - St. Lucie grant that provides us professional business and programmatic expertise to review, understand and enhance our core structures, plan our growth and improve our delivery of services. The *Performance Beyond Today* program included assessments of our board of directors and our organization, as well as review of structures, processes, data analysis and reporting that will help us to refine and enhance many aspects of our organization.

Using the insights of the program, combined with input from our staff and supporters, we have been able to identify opportunities to update our best practices that are the underpinning of our sustainability.

Planning Methodology

The Leadership Team (Board of directors, senior staff leadership and our *Performance Beyond Today* guide) made a commitment to involve every staff member in the strategic planning process in order to glean the best and most workable ideas and to assure that each employee would have a personal stake in the plan's success.

- A comprehensive assessment survey was conducted with the board of directors
- A comprehensive assessment survey was conducted with the entire staff
- Input from 2019 individual division meetings was included
- Our *Performance Beyond Today* guide interviewed key staff and board members, along with a review of processes and procedures
- Organization Goals formulated in 2016 by employees were reviewed
- Attention was given to the Environmental Scan insights



Strategic Plan 2020-2025

Environmental Strengths

Mission and Mission Statement – a strong, clear, powerful mission that the organization is living every day.

Reputation – The organization is known for being results-oriented with demonstrated outcomes and a track record of success throughout its history.

Culture – a diverse, inclusive, mutually supportive culture that reflects the people we serve, with a strong sense of collaboration that helps us achieve our goals.



People – a strong board that is personally invested in the success of the organization; a staff with a family-first attitude, professionalism combined with compassion and a willingness to extend themselves to new challenges and opportunities, plus a group of volunteers and donors that care about the organization and willingly lend their time, talents and treasure.

Services – unique services, community-based, continually evaluated, geographically accessible, award-winning and with measurable outcomes.

Financial stability – history of positive income.

Clients -- a client base that appreciates the services received.

Facility -- a new building that creates an identity, a vision of permanence and space to grow.

Capital Campaign – an opportunity to introduce or re-introduce the organization to the community.

Opportunities for Growth – regional opportunities to expand current services, service extensions and prospects for fee-for-services programs.

Strategic Plan 2020-2025

Focus Areas

Financial – Financial sustainability is a key consideration in turbulent times. Funding sources, both governmental funders and grant funders, have not kept pace with the increase in costs and there are uncertainties about future support for nonprofits. Cash constraints limit our ability to remain competitive in compensation, benefits and program growth. *Helping People Succeed* has a need for capital funds to invest in efficient technology and infrastructure. Funding a sustaining endowment is an essential component for future stability. Funds are needed to invest in expansion of services and to address emerging needs in the community. Identifying new income opportunities is essential to our future growth and sustainability.

Personnel – Attracting and retaining outstanding employees, effective orientation and onboarding, quality training and supervision are constant challenges in a competitive market. An expanded human resources management system and staff is needed to reduce risks, increase performance and support the expanded vision.

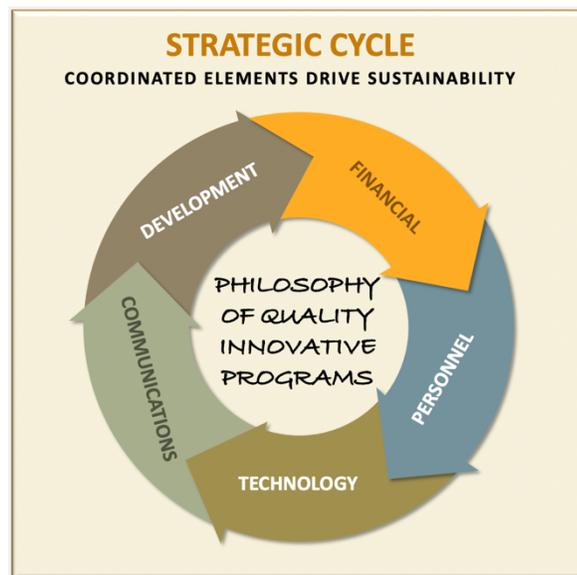
Technology – Cybersecurity is a major issue for the organization as a whole, along with ongoing technology training for staff. Premiere telehealth technology and essential infrastructure improvements, including electronic health records requirements, have the potential to optimize our mobile staff and allow us to reach more clients in need. These improvements require major investment.

Marketing/Public Relations/Fundraising – As a nonprofit, *Helping People Succeed* seeks to involve the entire community in its work. A professional communications program is essential to support current programming, fundraising efforts, community education, growth plans and sustainability. Developing, implementing and sustaining a comprehensive communications program requires fulltime focus by an experienced communication professional. Adding this position will result in broader awareness of our essential services, attract donor and funder dollars, improve internal/external messaging and increase our employee recruiting efforts.

Development Program – Even the most efficiently operated nonprofits rely on fundraising to augment portions of their mission investment. There are valuable services that are not fully reimbursed. Pilot programs must be funded until they prove their value. We will require funds to supplement essential programs, invest in pilot projects and fund expansion platforms until the return on investment is realized. To expand our independent funding capacity, we will add a specialist in business development and innovative funding approaches. This position will eventually cover its own costs plus operating fund annual goals.

Strategic Direction – In an analysis of current programs and opportunities, the Strategic Planning Team identified the fact that future growth and service improvement are dependent on new and enhanced, sustainable revenue streams.

The strategic direction of *Helping People Succeed* must therefore have a strong entrepreneurial attitude and must foster business development.



Strategic Plan 2020-2025

Goals, Strategies, Tactics

Goal 1 Governance Structure

Assignment: Individual Board Chairs, President/CEO

- Review and enhance the structure of the governing boards
- Clarify roles, responsibilities and relationships of the three functioning boards
- Review and update bylaws and policies
- Update committee descriptions, goals, member skills, reporting and timelines
- Revise recruiting procedures, scripts, criteria (reflecting BOD Profile Survey results)
- Recruit new members to fill gaps in each board
- Develop comprehensive onboarding and orientation programs for new members
- Create education programs about fiduciary responsibilities and role of board members

Goal 2 Align operating structure to the 2025 vision

Assignment: President/CEO, *Performance Beyond Today* resource

Working with the 2025 Vision as a guide and addressing current environment and market influences, reimagine the organization's operating structure.

- Evaluate market needs and opportunities
- Align operating structure to provide best in class services to needs
- Invest in enhanced reporting systems for optimizing organizational performance
- Enhance operations communications to strategic leadership team and board of directors
- Apply process improvement tools to transform waste into additional service capacity

Goal 3 Explore fee-for-service and private pay programs

Assignment: President/CEO, *Performance Beyond Today* resource, special task force

Add: Business Development and Marketing Specialist

Study new funding concepts and opportunities to reduce reliance on grants and government funding to 50% of income, thereby increasing sustainability and financial stability

- Create a task force of entrepreneurial community members who understand nonprofits
- Research and report on opportunities to:
 - Initiate fee-for-service programs
 - Extend current programs to new private pay markets
 - Identify funded, collaborative partnerships (public and private sectors)
 - Explore concepts beyond current boundaries
- Establish programming goals, with milestones and timelines

Enculturate a level of comfort and understanding among staff about the need to develop financial independence and security for the organization.

- Create educational initiatives
- Communicate positive messaging
- Involve thought leaders and early adopters in the process

Strategic Plan 2020-2025

Goal 4 Develop and execute an expansion plan

Assignment: President/CEO, strategic leadership team, Board of Directors task force

Building on years of successful programming, *Helping People Succeed* will create a plan to expand its critical programs to areas of need and opportunity in the region.

Evaluate opportunities and plan to:

- Expand mental health services to adult populations
- Develop an Infant Mental Health program
- Expand and develop services that will attract private-pay clients, including counseling parenting classes for families not currently financially eligible for reimbursed services
- After school care
- Programs for fathers
- Transition programs for clients 16 to 25
- Partnerships with complimentary community organizations
- Additional service locations
- Baby Steps to Indian River and Okeechobee counties
- Employment opportunities in Indian River and Okeechobee counties
- Autism Navigator certification, Occupational Therapy, Physical Therapy, Applied Behavioral Analytics and other related services
- Expand functional literacy components within each program of *Helping People Succeed*

Goal 5 Invest in Human Resources

Assignment: President/CEO, strategic leadership team, Board of Directors task force

Helping People Succeed will enhance current efforts and create an optimal organization that provides an exemplary workplace.

- Invest in a professional, regional compensation evaluation report
- Review *Helping People Succeed's* program of compensation and benefits
- Engage employees in evaluation process to prioritize improvements
- Invest in new technology to improve efficiencies, management, reporting and security

Develop an Employee Recognition program led by a committee of staff members who are empowered to recommend activities that are meaningful to other employees and that celebrate breakthrough moments.

Encourage employee involvement in all aspects of the organization through a formal suggestion and feedback process.

Strategic Plan 2020-2025

Goal 6 Enhance decision-making data reporting

Assignment: CFO, President/CEO, Board of Directors task force

Develop programmatic and financial reports based on "dashboard indicators" to assist the board and leadership team in making decisions and identifying opportunities

- Incorporate a "Trends" component in Leadership Team deliberations
- Report significant trends to the board on a regular basis
- Provide board updated legislative and regulatory news

Goal 7 Communications/Community Awareness

Assignment: President/CEO

Add: Communications Director position

Helping People Succeed will become more widely known and recognized as the lead agency providing essential services to achieve and maintain self-sufficiency to residents of Martin, St. Lucie, Okeechobee and Indian River counties.

- Develop and implement multifaceted communications program
- Improve the website to make it more consumer friendly
- Identify key market segment and craft effective messaging for each
- Motivate volunteers
- Support grant and funding requests
- Increase return on social media investment

Goal 8 Expand Fundraising Platform

Assignment: President/CEO, Gift Planning Officer, Board of Directors Task Force

While *Helping People Succeed* intends to provide the highest quality of services offered most efficiently, we will require funds to supplement critical programs, invest in pilot projects, and fund expansion platforms until the return on investment is realized.

Our development strategy should expand to include the resources necessary to develop every reasonable avenue of total funding. We will engage a task force lead by the Foundation Board, but fully inclusive of the Operating Board and community volunteers to execute a more complex development plan with goals and milestones set by the Operating Board and CEO as necessary to help achieve annual goals.

Additional components of the annual plan will focus on means to develop a risk preparation fund that would see the organization through any potential challenges in the future.

We will invest in the development infrastructure as necessary to achieve our goals most cost-effectively.

This may include a development officer in another geographical area, and a grants writer to consolidate and coordinate all grant applications, management and reporting.

Strategic Plan 2020-2025

Goal 9 Succession Planning

Assignment: President/CEO, Board of Directors

To assure sustainment of the organization over time, a well-crafted succession plan is required for board membership and organizational leadership.

- Establish emergency leadership protocols for each area
- Determine succession strategies, policies and procedures
- Conduct annual updates
- Institute a leadership development program for board and operations
- Institutionalize in board handbook and operations manual