



Success 4 Kids & Families

Strategic Plan

2018-2022

Table of Contents

I. Executive Summary	3
II. Authorization.....	3
III. Mission, Vision and Values	4
IV. Organizational Profile and History	5
a. Brief history of the organization	5
b. Description of Programs and Services	6
c. Agency Stakeholders.....	8
V. Organizational Mandates	8
VI. Critical Issues and Challenges	9
VII. Self- Assessment (SWOT Analysis)	9
VIII. Strategic Goals, Objectives – 2018-2022.....	11
Appendix A: Organizational Chart.....	??
Appendix B: Board of Directors.....	??
Appendix C: Policy and Procedures re: Strategic Plan	??
Appendix D: CCAT	??
Appendix E: Jan Baskin report.....	??
Appendix F: Hillsborough County Environmental Scan	??
Appendix G: Department of Juvenile Justice Environmental Scan.....	??

I. Executive Summary

Success 4 Kids & Families (S4KF) utilized a sustainability planning methodology developed by the Finance Project for strategic planning purposes. S4KF's first strategic plan began in September 2007 and was completed in June 2008. The plan was in force from 2007-2012. In January, 2012, the next strategic planning process was initiated during a board retreat and that plan was in place through 2017. Based on the actions voted on by the Board of Directors, the new strategic planning process began in November of 2017 and the plan was voted on and accepted by the Board of Directors in May of 2018. The plan will be in effect from 2018-2022.

The Finance Project is a consultant agency located in Washington, D.C (Langford & Flynn, 2003). Their sustainability planning methodology is a proven, federally approved model curriculum and planning process that emphasizes strategic finance planning along with seven other elements. These elements include establishing a clear vision and mission, the collection and measurement of outcomes, generating and maintaining broad based community support, identifying and maintaining communication with key champions, recognizing and adapting to changing conditions and the strengthening of internal systems.

Goals developed for the 2012-2017 sustainability plan were as follows:

Goal 1: Prepare the organization for Health Care Reform

Goal 2: Geographically expand services to children, youth and families

Goals developed for the 2018-2022 are as follows:

Goal 1: Increase overall funding stability by decreasing reliance on contracts.

Goal 2: Improve participant outcomes through consistent, high-quality service delivery

II. Authorization.

Success 4 Kids & Families 2007-2012 Strategic Plan Approved June 30, 2008

Success 4 Kids & Families 2012-2017 Strategic Plan Approved June 30, 2012

Success 4 Kids & Families 2018-2022 Strategic Plan Approved May 22, 2018

III. Mission, Vision and Values

As part of this strategic planning process the mission was revised and a vision was developed. The decision to revise the mission came as a result of a focus group with employees. There was consensus agreement that the current mission was not understandable for the general public and needed to be shortened. Additionally, S4KF did not have a vision statement and it was important that one be developed.

The following Vision Statement, Mission Statement and Agency Values were developed with input from the Board of Directors, staff, the leadership team and consumers.

Vision Statement:

A community free of stigma where individuals and families have the support they need to live fully engaged and successful lives.

Mission Statement:

Success 4 Kids & Families provides quality care coordination through innovative mental wellness and educational services to strengthen and empower individuals and families.

Agency Values

*We embrace the core values of **Respect, Integrity, Quality and Innovation** and emphasize the following in all we do:*

- **Consumer driven care:** *The best interests of the individuals and families we serve are the central consideration in all we do. To achieve positive impact, services must be strengths focused, driven by each person's individual needs and delivered in their home or community in their primary language.*
- **Diversity and cultural competence:** *Diversity in our people, services and programs enriches learning opportunities in our agency and enhances our ability to accomplish our mission. Cultural awareness and sensitivity in the delivery of our services is critical to engaging individuals and families and achieving positive outcomes.*
- **Community and collaboration:** *Accomplishing our mission requires a positive and productive working environment internally and in the community. Interacting with dignity and respect always is paramount to ensuring productive and quality partnerships that can enhance positive outcomes for the individuals and families we serve*

IV. Organizational Profile and History

a. Brief history of the organization

Success 4 Kids & Families is a non-profit agency providing mental and behavioral health services to children and their families (www.s4kf.org). Working as an umbrella, the agency offers four core services. It provides intake/assessment and case management to children and their families who are experiencing emotional or behavioral issues in Hillsborough County. It provides educational liaison support to the child serving systems in Hillsborough County. S4KF provides intake and case coordination to pregnant women and their infants as well as assessment for infants born at Tampa General Hospital and Brandon Hospital. Additionally, S4KF provides therapeutic intervention to families with children at high risk of removal from their homes. Finally, the agency provides system of care training and coaching on a fee for service basis to state and local agencies across the country and Canada.

Organizational Information and Milestones

From December, 2006 through October 2011, Success 4 Kids & Families was located at 1311 North Westshore Boulevard, Suite 302 in Tampa, Florida. Since 2006, the organization has expanded its office space twice to meet the growing needs of the agency. The agency has two locations at this time. The main office is located at 2902 N. Armenia Ave., Ste. 200, Tampa, FL 33607. The second location, is located at Mary Lee's House, 2806 N. Armenia Ave., Tampa, FL 33607.

The organization was founded in April 2005 with three programs and an operating budget of \$600,000. The staff consisted of five full time and four contractual employees. In October 2005, The Children's Board of Hillsborough County increased their grant to S4KF from \$350,000 to \$495,000. This enabled the agency to expand its' current programs and add another full-time position. In July 2006, the agency received several additional grants from the Department of Juvenile Justice, the 13th Judicial Circuit, and the Agency for Community Treatment Services. This added \$400,000 to the operating budget, created one new program, and expanded the current programs.

As of June 2009, Success 4 Kids & Families had a \$2.1 million operating budget with ten funding sources, eighteen full-time employees and 35 contractual staff. In 2009, the organization added the Healthy Start program. Healthy Start is a home visiting program for pregnant women and infants up to the age of one. With the new Healthy Start contract, Success 4 Kids & Families had a \$4.2 million operating budget with 15 distinct funding sources, 60 full-time employees and 40 contractual staff.

Due to a new contract with Hillsborough Kids Inc. (HKI) in January 2010, Success 4 Kids & Families had an operational budget of \$6.1 million with 13 distinct funding sources, 86 full time employees and 40 contractual staff. With the end of the contract in December 2012 the budget 2013 operational budget settled at just over \$5 million.

As of January 2018 the operational budget is \$4.6 million with 68 full time employees and 25 independent contractors. S4KF currently has 16 distinct funding sources, that including federal, state and county funding, along with private foundations.

b. Description of Programs and Services

Program Overview

There are four main groups of programs operating under the Success 4 Kids & Families umbrella: educational liaison for system partners; training; children and family care coordination and therapeutic programs and youth and adult care coordination and therapeutic programs.

The educational liaison program is the Multi-Agency Network for Students with Emotional Disabilities, known as SEDNET. The Florida Legislature created The SED Network in 1981. It was designed to prevent children from entering residential, psychiatric facilities by acting as an educational liaison between the local school district, agencies and local government. SEDNET projects across the state provide technical assistance and training to support building capacity of local school districts in their efforts to ensure that the needs of youth with or at-risk of Emotional/Behavioral Disabilities are being met educationally and therapeutically. This service is provided primarily with one full time staff with additional assistance from the Executive Director and support staff.

Local, state and national trainings are provided based upon system of care values and principles. Trainings are offered in several areas including wraparound, targeted case management, best practice and documentation trainings based upon system of care values and principles and motivational interviewing. There are several staff that participate in providing these services.

Care coordination and therapeutic services are the core programs of the organization. Success 4 Kids & Families has several programs that take the framework of the SED Network and the community trainings and puts them into practice. S4KF utilizes an individualized, consumer directed care approach to working with individual youth/adults, children and their families. Unlike a "one-size fits all" approach, S4KF provides comprehensive services to individuals and families using four processes: strength-based assessment, individualized service planning (also known as a family support plan), service brokering or case management services and in some cases evidence based therapeutic intervention. The programs assess a family's strengths and challenges as well as their ability to provide crisis management and emergency planning to their family. S4KF uses this information to create a detailed service plan that addresses these needs. For quality assurance purposes, every ninety days there is a review of the service plan with the family. To implement the service plan, service brokering or case management is performed. Service brokering not only includes the securing of services, but also linking, assessing, coordinating and monitoring of these services. Services are provided to the entire family, not just the identified child, and are subject to change depending on the family's needs. The philosophy of all programs is that children cannot be treated in isolation from their family and adults cannot be treated in isolation from their community.

The Healthy Start program uses the core tenets of case management in its state mandated model of care coordination and home visiting to pregnant women and infants to age one. While Healthy Start uses a prescriptive model of service, value-added components of the independent case management model have also been utilized in addition to two evidenced based therapeutic intervention; Mothers and Babies and Moving Beyond Depression.

c. Agency Stakeholders

As illustrated in the diagram below, Success 4 Kids & Families identifies its primary stakeholders as pregnant women, new mothers and infants and individuals and families with emotional, behavioral, or mental health needs residing in Hillsborough County. Its secondary stakeholders include staff, board members, contractors, training recipients, primary funders, private donors, community partners & referral sources, .



V. Organizational Mandates

Throughout the sustainability planning process all decisions related to the current and future (strategic) direction of direct service programs, funding, key champions and broad based community support followed the organizational mandate using the following criteria:

- ✓ Children stay in their home/community/school vs. out of home/community/school care.
- ✓ Voluntary vs. Mandatory for families to choose services.
- ✓ Consumer Directed Care vs. Professional Driven Medical Model

- ✓ Ensure that all contracts contain sufficient funding for infrastructure requirements
- ✓ Continuous evaluation of program efficacy and financial sustainability

VI. Critical Issues and Challenges

Funding is a critical issue and challenge for the agency. For this reason, the agency scans the environment for funding opportunities and is venturing into more fundraising opportunities. As the agency reviews funding opportunities part of the challenge is to make sure that the services represent the areas that relate to the mission and vision of the agency and meet the organizational mandates. As the agency moves into allocating some internal resources to fundraising, the challenge is in the limit nature of those resources. At this time S4KF does not employ development or marketing staff so the majority of the tasks fall to staff with existing job duties.

VII. Self- Assessment

SWOT Analysis – 2018

The S4KF Leadership Team, supervisors, staff and two consumer focus groups completed a SWOT analysis of the agency in February/March 2018. This analysis focused on the direction of the agency, current array of services and opportunities for expansion. The complete SWOT analysis is included as an appendix.

In summary, the S4KF organizational SWOT revealed the following information:

1. *Strengths:* Universally, in each group surveyed the fact that S4KF adheres to System of Care (SOC) values, which include; being community based; culturally and linguistically competent and family driven/youth guided were listed as strengths. Other strengths mentioned include the attention to quality services, community leader for mental health services with children and families, diversification of services and funding and treating their staff well.
2. *Weaknesses:* Regarding the weaknesses of the organization a few items were mentioned across several groups including the lack of unrestricted funds, lack of presence on social media, difficulties surrounding the current electronic health record, the reliance on other organizations for therapists and cost of benefits/lack of raises over past few years.

3. *Opportunities:* Essentially the opportunities listed represent the ability to address some of the weaknesses identified. The item that occurred the most was the prospect of increasing the therapy department to employ more therapists, thus decreasing the reliance on other organizations. Additionally, items surrounding increasing our brand presence through several different avenues including the opportunities for training (wraparound) others around the region, expanding our social media presence and fundraising for unrestricted funds.
4. *Threats:* As always the number one threat identified was related to various funding cuts. With S4KF's dependence on contract-based funding this threat is especially strong. Additionally, new competitors from the private sector who are operating similar services is of concern. Lastly, several members of the Leadership Team are near retirement age. There will need to be a focus on succession planning in the coming years so not to experience a lack of leadership in the agency.

This SWOT analysis was presented to the Board of Directors in March 2018 and members discussed and agreed that these accurately represent the organization.

In addition to the SWOT, the agency participated in two additional evaluations by external consultants. With funding through the Children's Board of Hillsborough County and expertise from the Non-Profit Leadership Center, S4KF participated in a Core Capacity Assessment Tool (CCAT). "The CCAT Final Report is intended to help your organization determine its strengths and opportunities for improvement. Based on anonymous responses from organizational leaders including senior management and board members, the report is a snapshot of how the organization is progressing, based on the perceptions and experiences of insiders. The CCAT provides a confirmation of the organization's strengths and suggestions for strengthening its capacities."(TCC's Core Capacity Assessment Tool, August 2017, Report and Recommendations, Success 4 Kids and Families).

Recommendations for organizational sustainability and growth included:

- Increasing the number of staff/volunteers doing outreach, community organizing and advocacy;

- Increasing the number of staff/volunteers with marketing and development skills;
- Increasing the readiness of staff to become leaders;
- Increase board-staff interaction to strengthen their working relationship;

Additionally, S4KF engaged the services of Jan Baskin, with Business Enhancement Strategies, LLC to perform a readiness assessment of the agencies fundraising capacity. After completing the assessment she presented her findings to the Board of Directors in March of 2018. Key recommendations included the board taking a larger role in connecting key people and additional funds to the agency; investing in a fundraising computer program and engaging volunteers to assist with fundraising plan.

Environmental Scan

An environmental scan was completed through two different methods: questioning staff, clients and contractors regarding the gaps in services; and reviewing two outside environmental scans , one completed by the Department of Juvenile Justice in December of 2017 and a scan of mental health and substance abuse providers completed by Hillsborough County on 2/20/2018. After reviewing all information several gaps in services emerged including housing, transportation and in-home mental health therapy. Providing housing and transportation would not be in-line with the mission of the agency, but expanding the in-home therapy provided by S4KF would be possible.

VIII. Strategic Goals, Objectives – 2018-2022

1. Goal 1: Increase overall funding stability by decreasing reliance on contracts.
 - a. Objective 1a: Increase board participation in funding stability functions
 - i. Strategy: Complete a board training on “elevator speech”.
 - ii. Strategy: Increase board engagement with the agency by bringing more staff into the meetings to present their programs.
 - iii. Strategy: Add fundraising opportunities/issues as a permanent item on board agenda.
 - b. Objective 1b: Increase the presence of S4KF brand.
 - i. Strategy: Acquire an intern to assist with social media needs

- ii. Strategy: Seek out new private funding sources and respond to at least 5 grant opportunities per year.
 - iii. Strategy: Analyze the possibility of allocating additional human resources to fundraising (grant exploration/writing) or engaging volunteers to assist.
 - iv. Strategy: Complete a formalized succession plan to ensure leadership continuity.
- 2. Goal 2: Improve participant outcomes through consistent, high-quality service delivery
 - a. Objective 2a: Obtain and implement a new Electronic Health Record System.
 - i. Strategy: Review new EHR systems with partner, CFBHN
 - ii. Strategy: Hold focus group of staff/contractors to discuss strengths and weaknesses of current EHR.
 - iii. Strategy: Identify group of staff to assist with implementation of new EHR.
 - b. Objective 2b: Increase staff engagement in performance measurement & quality improvement activities
 - i. Strategy: Develop a dashboard available to all staff on key outcomes
 - ii. Strategy: Include quality and outcomes on all staff evaluations.
 - iii. Strategy: Identify additional reports from the EHR system to assist with monitoring of quality and compliance issues.

