

# HopeSparks Family Services

## STRATEGIC PLAN 2008-2011

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### VISION STATEMENT

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We are the first choice of people seeking creative and caring service.

Visioning Themes:

- Measurable community impact.
- Becoming the “go to” place.
- Satisfied clients – “raving fans.”
- Known for something.
- Best place to work.
- Significant funding sources.
- New name.

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### MISSION STATEMENT

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We strengthen families by inspiring courage and confidence to motivate a lasting change.

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### COMMITMENTS TO OUR COMMUNITY

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1. Providing a work environment that recognizes both the needs of its primary customers and the needs of its employees.
2. Serving children, youth, adults, older adults and families of diverse backgrounds and needs as they seek to achieve and maintain responsibility and direction in their lives and in the broader community.
3. Strengthening the responsiveness and effectiveness of social systems through advocacy, innovation and high standards of quality.
4. Providing comprehensive services to its customers through strategic alliances with other organizations.
5. Anticipating the future directions and needs of society, and providing the services to meet those needs.

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### VALUES

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- The infinite worth of each person: each person is a unique creation.
- Diversity: HopeSparks values diversity in its staff and volunteers as in those it serves.
- Interdependence: Every individual and/or organization is interdependent with others.

- Excellence: Excellence is the objective for all agency services and operations.
- Innovation: Ongoing change calls for creativity in developing and providing services.

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### KEY STAKEHOLDERS

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- Clients and their families.
- HopeSparks staff.
- Strategic/funding partners.
- Board of Directors.
- Vendors (including consultants and trainers).
- Media.

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### ORGANIZATIONAL STRENGTHS

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- Positive financial momentum (e.g. positive bottom line in 2007; increased grants and other contributed funding).
- Broad programming and services meeting the diverse needs of a number of families.
- New children's wing.
- Capacity to change lives, restore joy and health.
- Clients view HopeSparks as a good, kind, caring place.
- Strategic/funding partners view HopeSparks as responsive, family-friendly, and professional.
- Strategic/funding partners see HopeSparks programs and services as unique, good quality and needed.
- Acquisition of Tacoma Learning Center.
- Improved community presence through collaborations (e.g. TLC and HOPE Centers).

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### ORGANIZATIONAL ASPIRATIONS

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- Clarity of purpose – a great plan, with clear strategic direction and goal setting.
- Increased revenues (earned and contributed) to enhance programs, infrastructure, salaries, employee training and profitability.
- Sustainable funding and profitability.
- Improved teamwork, accountability, recognition and communication among employees.

- Better cultural integration between TLC and HopeSparks staff, and between administrative and clinical staff.
- Stronger board engagement, committee activity and membership.
- Development of executive leadership team (e.g. CEO backup, succession planning, and enhanced financial management capacity).
- Long-term facility solutions for TLC.
- Broader revenue base for TLC.

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### ORGANIZATIONAL CHALLENGES

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- Maintaining profitability – especially in the face of economic downturn and growing costs.
- Finding new revenue sources (earned and contributed); competition for contributed income.
- Need to increase community visibility, presence and awareness of programs offered.
- Expanding to meet the growing/changing needs of the community and families served while preserving quality of programs and services.
- Continued needs for more space.
- Keeping salaries competitive and morale high; enhancing training opportunities for staff.
- Attracting and retaining high performing staff.
- Attracting and retaining high performing board members.

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### ASSUMPTIONS

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- HopeSparks will remain a 501(c)(3) nonprofit organization.
- Mission will remain to strengthen families.
- To remain sustainable and flexible, we will need to continue to increase both contributed and earned income.
- We will need to continue to work hard to attract and retain quality staff.
- We will continue to focus and find opportunities within our core competencies.
- In order to protect our clients, we will not have programs to serve perpetrators of domestic violence and sexual assault.
- All HopeSparks fundraising will adhere to the AFP Code of Ethics and Donor Bill of Rights.

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- Our cost of doing business will increase by at least 4-5% annually.

### CRITICAL PLANNING ISSUES/AREAS

1. Sustaining profitability.
2. Broadening community presence.
3. Effectively and efficiently running programs and services for greatest community impact.
4. Attracting and retaining high performing staff.
5. Attracting and effectively engaging high performing board members.
6. Exploring new program / service opportunities as we focus on short-term sustainability issues.
7. Investigating whether to prepare for a capital / endowment campaign.

### Three-Year Strategic Goal Setting

*Strategic Goals = Broad-based, SMARTER outcomes you want to achieve over the next three-to-five years.*

*S = Specific enough to guide annual business planning.*

*M = Measurable enough to know when you've achieved it.*

*A = Acceptable to your key stakeholders.*

*R = Realistic enough to achieve in three years.*

*T = Timely enough to guide and monitor progress.*

*E = Extends your capabilities beyond current levels.*

*R = Rewarding to implement and achieve.*

### CRITICAL ISSUE/AREA #1: Sustaining Profitability

**OBJECTIVES:** We have the resources necessary to continually grow and improve our service to the community while maintaining a positive bottom line of at least 3% annually.

**GOAL #1.1:** Increase earned income by amounts sufficient to meet our net revenue objectives while meeting other agency goals.

#### Strategies to Achieve Goal 1.1:

- Map cost of revenue for all programs.
- Create sound, program-specific business planning models (including both earned and contributed income assumptions) that combine to achieve agency goals and objectives.
- Renegotiate contracts in line with business models.

- Explore strategies (e.g. amenities, hours of operation, marketing, etc.) to attract more high-paying clients.
- Increase profitability of fee-based services by at least 10% while continuing to serve our low income clients (*Note: we may need to allocate contributed income, as well*).

#### Measures of Success

- Ratio of revenue to cost of providing fee-base services (by service, by staff).
- Year-end financials reach minimum of 5% net revenue.

**GOAL #1.2:** Increase contributed income by at least 10% annually over the entire planning period, achieving maximum standards of continued quality improvement in fundraising.

#### Strategies to Achieve Goal 1.2

- Include appropriate contributed income assumptions in the business model created for each program.
- Create an annual development plan for the overall agency to be presented each November for the next year.

#### Measures of Success

- Major giving increased to:
  - At least 50 major donors by 12-08 and increasing by 5% annually over the planning period.
- Grants income increased by 10% annually.

**GOAL #1.3:** Achieve cash on hand (quasi-reserve) equivalent to at least 45 days' total agency operating expenses (\$300,000 in current dollars) by the end of FY 2011 and increasing each year thereafter toward an ultimate goal of 90 days' cash on hand.

#### Strategies to Achieve Goal 1.3:

- Follow individual program business plan guidelines.

#### Measures of Success

- Cash on hand by the end of FY 2011.

### CRITICAL ISSUE/AREA #2: Broadening Community Awareness and Support

**OBJECTIVES:** Clients can find us; funders know we are doing good stuff; non-clients think of us when they want to become/refer a client; a position on our board is recognized as a place of honor.

**GOAL #2.1:** Increase community awareness of the HOPESPARKS among key stakeholder groups: prospective clients (all income levels), funders, vendors, potential referrers, community leaders, other prospective board members.

#### Strategies to Achieve Goal 2.1

- Complete the branding process with Rusty George Creative by 12-31-08.
- Approach Taproot Foundation for web design to start in first quarter 2009.
- Convene a Public Relations Task Force comprised of Board, staff and community members to advise public relations planning.
- Develop and implement a comprehensive public relations program.

#### Measures of Success

- Comprehensive public relations program in place by the end of 2009.
- Referrals not adversely affected by name change.
- Increase of at least 5% in client – initiated contacts over the planning period.
- Increase of at least 25% in positive media (TNT etc) hits over the planning period.
- Increase in positive community awareness as measured by pre- and post-surveys (if funded).

### CRITICAL ISSUE/AREA #3: Effectively and Efficiently Running Programs and Services

**OBJECTIVES:** We effectively and efficiently run programs and services to achieve the greatest possible community impact.

**GOAL #3.1:** Implement a management information system that produces program-specific monthly service statistics and annual outcome reports for all programs.

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### Strategies to Achieve Goal 3.1

- Management team determines what measures will be tracked and develops the spreadsheet/system.

### Measures of Success

- System developed and tested by 8-31-08
- System operating fully and satisfactorily by 9-15-08
- Report available to management team by 15<sup>th</sup> of each month.

**GOAL #3.2:** Implement a comprehensive clinical information management system to handle client billing, scheduling, treatment notes and reporting.

### Strategies to Achieve Goal 3.2

- Management Team will evaluate a software package (Therapist Helper) and seek bids for installation.
- Management Team will seek grant funding to defray the costs of software and installation.

### Measures of Success

- Therapist Helper evaluated by Management Team by 6-30-08.
- Bid formalized by 7-3-08.
- Funding in place by 10-15-08.
- Functional system in place and fully operational by 1-1-09.

### **CRITICAL ISSUE/AREA #4: Attracting and Retaining High Performing and Skilled Staff**

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**OBJECTIVES:** We offer the opportunities, work environment, resources, salaries, and benefits necessary to attract and retain the high quality staff we need to achieve our mission.

Aspects to consider:

- Why do people stay? Respect; they feel valued; chance to grow; flexibility; salaries need to be at least market rate.

**GOAL #4.1:** Achieve recognition by a highly regarded list of best places to work within 3 years.

### Strategies to Achieve Goal 4.1

- Research *Business Examiner* and *Washington CEO* qualifications as a basis for planning.
- Develop plan and goals based on criteria and other nonprofit benchmarks.
- Stay above current market wage scale.

### Measures of Success

- Nominated and win as best place to work.

**Goal 4.2:** Every staff member will have the resources (technology and building maintenance) needed to do his/her job efficiently and effectively by July 2009, and ongoing thereafter.

### Strategies to Achieve Goal 4.2

- Pre-survey staff regarding the resources they need and to determine target goals for satisfaction.
- Create annual plans for technology, training and employee safety.

### Measures of Success

- Staff satisfaction as revealed by pre- and post-surveys.
- Annual technology and training plans completed by October of each year, to include measures.
- Employee safety plans completed by February of each year.

**Goal 4.3:** Maintain the right mix of staff to achieve service and profitability goals.

### Strategies to Achieve Goal 4.3

- Evaluate as element of program business plan.
- Marketing targeted to attract employees with particular qualifications.

### Measures of Success

- Measurably achieve profitability and service goals as established in program business plans.

### **CRITICAL ISSUE/AREA #5: Attracting and Engaging High Performing Board Members**

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#### OBJECTIVES:

- Diversify the Board in talents, skills and ethnicity.
- Training opportunities for Board members.
- Reinvigorate the Board Mentorship program.
- Measure participation and turnover.
- Focus efforts on Advisory Council.

**GOAL #5.1:** Improve the recruitment and retention of high quality board members who possess the diversity of talents, skills, and characteristics (e.g. ethnic/racial, geographic representation and contacts) HS needs.

#### Strategies to Achieve Goal 5.1

- Recruit and involve a core group of board-quality volunteers (e.g. the Advisory Council, Public Relations Task Force, etc.) who work with the board on special projects, issues, fundraising, and other tasks.
- Consider term limits and other strategies to promote diversification of talents, skills, and perspectives.
- Increase exposure to agency staff so that board learns more about the agency and what staff do.
- Reach out to major corporations/community partners to identify and recruit board members who are interested in developmental opportunity.

#### Measures of Success

- The board has developed active relationships with people who understand /represent the groups and communities we serve.
- Board contains more representatives from the medical, insurance, education, and human services, and government sectors.
- At least 10-15 quality board volunteers work on board-commissioned HS task forces each year.

**GOAL #5.2:** Improve board member involvement, engagement and effectiveness in HOPESPARKS governance, advocacy and fundraising.

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- Develop marketing strategies and tools to promote endowment.

### Strategies to Achieve Goal 5.2

- Each new board member receives a chair-appointed mentor.
- Board establishes and monitors annual goals for its own performance (e.g. attendance, board giving, board fundraising, etc.)
- Board receives more education about what the agency does and how it does it from management, staff, other experts.
- Expect every board member to serve on at least one committee/task force each year.
- Ensure that each committee/task force has a highly committed board leader who drives the process forward.
- Perform a board self-evaluation survey each year.

### Measures of Success

- Board member satisfaction with board performance increases, as measured by self-evaluation surveys.
- Average board meeting attendance exceeds 70%.
- Total board giving increases by at least 25% per year over the next 3 years.
- Total board fundraising increases to an average of at least \$5,000 per board member by 2011.

### CRITICAL ISSUE / AREA #6: Exploring new program / service opportunities as we focus on short - term sustainability issues.

**OBJECTIVES:** Aggressively evaluate needs and opportunities to maximize community outreach and agency capacity for service.

**GOAL #6.1:** Maximize opportunity afforded by our affiliation with the Hope Centers to expand clients served by our TLC and counseling programs.

### Strategies to Achieve Goal 6.1

- Marketing.
- Program description.
- Staff optimization and controlled growth.

### Measures of Success:

- Increase in regional and military clients in Lakewood and Gig Harbor (TLC and counseling).
- Contribute xx% toward the positive bottom line while serving xx% more people.
- Continual outcomes based evaluation (OBE) of client impact.

**GOAL #6.2:** Have a system in place to evaluate community opportunities

### Strategies to Achieve Goal 6.2

- Create a process to continually evaluate possible mergers and acquisitions.
- Create a process to continually examine public RFP/RFQ (Request for Proposal) for new and expanding programs.
- Continue to evaluate all relevant local needs assessments.
- Increase staff participation in various appropriate coalitions.

### Measures of Success:

- System and processes developed by 10-1-08 and evaluated annually.
- Coalitions evaluated, selected and joined.

### CRITICAL ISSUE / AREA #7: Strengthening Organizational Fundraising Capacity

**OBJECTIVES:** Position HS for significant endowment growth and readiness to mount and manage a future capital/endowment campaign.

**GOAL #7.1:** Grow our Endowment fund to at least 200K by 2011.

### Strategies to Achieve Goal 7.1:

- Evaluate/develop appropriate policies for the administration, investment, spending and acceptance of endowment funds.
- Evaluate planned giving program opportunities and develop appropriate policies to begin.

### Measures of Success:

- We reach our goal amount in endowment at the end of the planning period.

**GOAL #7.2:** Complete by mid-2011 a study to assess the feasibility of mounting and managing a major HOPESPARKS capital/endowment campaign.

### Strategies to Achieve Goal 7.2:

- Develop the fundraising and leadership capacity, strategic plan, and project/capital plans necessary to create a clear and compelling case and otherwise prepare for an effective feasibility study.
- Get bids for consultant.
- Board evaluate the bids and costs.

### Measures of Success:

- Feasibility study completed.

### NEXT STEPS

What?	Who?	By When?