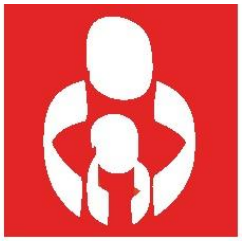
Engage 2020

The Strategic Plan
for Family Service of Roanoke Valley



Family Service
of Roanoke Valley

Strengthen Families. Heal Trauma. Restore Hope.

August 2017

The Engage 2020 Strategic Plan was developed using a community-focused approach engaging the Board of Directors, Leadership Team, staff, community partners, and supporters to create a guiding document to lead this 116-year-old agency into a new decade. In this process, organizational leaders revised the Mission and Vision statements, created a new Business Model Statement, and built a Strategic Plan to ensure the awareness, impact and vitality of Family Service of Roanoke Valley moving forward.

The Engage 2020 Strategic Plan is designed to lay out the strategic objectives as outlined below, and serve as a guideline for board, leadership team and staff members to develop individual actions items in support of the objectives.

Family Service will use the strategic planning process and resulting document to enhance its commitment to Performance and Quality Improvement (PQI). PQI is the ongoing improvement of products, services or processes through incremental and breakthrough improvements.

The agency will embrace the six principles of continuous improvement:

Principle 1 – Improvements are based on small changes, not major paradigm shifts or new inventions.
Principle 2 – Ideas come from employees.
Principle 3 – Incremental improvements are typically inexpensive to implement.
Principle 4 – Employees take ownership and are accountable for improvement.
Principle 5 – Improvement is reflective.
Principle 6 – Improvement is measurable and potentially repeatable.

Engage 2020 is a fluid document that will be reviewed every 60 days by the Strategic Engagement Team made up of the Executive Committee of the Board of Directors, along with the agency's Leadership Team.

Our Mission

The mission of Family Service of Roanoke Valley is to transform lives by healing trauma and restoring hope for families and individuals of all ages through mental health counseling, case management and life skills education.

Our Vision

A community invested in health and well-being, recognizing inherent strengths and respecting the honor and dignity of all.

Our Values

We recognize inherent strengths in every individual and assume positive intent in every interaction.

We value:

- professional and ethical behavior.
- consistent, purposeful communication to promote engagement.
- creativity and innovation.
- quality in our program services and our interactions with the community.
- diversity and cultural sensitivity.
- being a part of a caring community.

Business Model Statement

Family Service of Roanoke Valley serves the greater Roanoke Valley region through counseling, case management and life skills education available regardless of age or ability to pay. We provide accessible and holistic services to strengthen families, heal trauma and restore hope. People in our community are able to access services thanks to investments by state and federal agencies, United Ways of Roanoke Valley and Franklin County, fees for direct service, and the generous support of corporate, faith-based, foundation, and individual donors.

Engage 2020
the Strategic Plan of Family Service of Roanoke Valley

To fulfill our mission and shape our vision, we will…

Strengthen the people and culture of Family Service of Roanoke Valley:

1) Develop and implementing a comprehensive Communications Plan.
2) Conceptualize, launch, and promote the Family Service Training Institute.
3) Build, promote, and steward a Culture of Engagement.

Reinforce the programs and impact of Family Service of Roanoke Valley:

1) Develop and conduct a Program Audit as a part of the Matrix Map.
2) Analyze and improve methods of service delivery for target population.
3) Explore unmet needs of the Roanoke Valley.

Guarantee the vitality of Family Service of Roanoke Valley:

1) Develop and conduct a Financial Review as a part of the Matrix Map.
2) Explore opportunities to achieve intended impact.
3) Lead community conversations around and exploring opportunities for collaboration, shared services, and other partnerships.

Strengthen the people and culture of Family Service of Roanoke Valley

As directed by the Marketing and Development Committee and Leadership Team

1) Develop and implement a comprehensive Communications Plan.

- Conceptualize and implement a comprehensive Communications Plan facilitated by a third party. The plan will serve to promote engagement and awareness among internal and external audiences, including staff, leadership team, board, community partners, clients, and supporters.
- Focus on defining a central identity for the agency.
- Create messaging that connects the agency across programmatic areas and communicates the central identity, with the goal of working seamlessly across programs and increasing knowledge among board, staff and community members about agency functions and the impact on people served.

2) Conceptualize, launch, and promote Family Service Training Institute.

- Provide leadership and professional development for non-profit and for-profit personnel and direct service providers. Consider possibility of providing service to clients through training institute model.
- Determine best business model to serve the dual purpose of training the next generation of local leaders and raising revenue to continue to achieve the agency's community impact.
- Utilize institute to meet goals of engagement culture, including increasing professional development opportunities, training and resources for staff.

3) Build, promote, and steward a Culture of Engagement.

- Focus on talent recruitment and retention, employee recognition and communication, and connectedness among staff and between board and staff members.
- Investigate strategies to enhance fundraising and grant-seeking activities incorporating support from all involved entities such as board and staff.
- Consider impact of total benefits on employee engagement, and consistently communicate efforts being made to enhance benefits and plan for agency vitality.

Reinforce the programs and impact of Family Service of Roanoke Valley

As directed by the Program Committee and Leadership Team

1) Develop and conduct a Program Audit.

- Use community focus groups conducted as part of strategic plan as starting point for Program Audit.
- Work within the context of the Program Committee to determine process for engaging the Board of Directors, Leadership Team, staff and community members (if needed) in defining intended impact of agency and analyzing activities based on Matrix Map model.

2) Analyze and improve methods of service delivery for target population.

- Continue to explore wrap-around services for families and individuals of all ages to ensure maximum efficiency and effectiveness, and create greater overall impact. Utilize the Communications Plan to create messages that communicate the agency's focus on low-income and uninsured populations while also emphasizing the agency's quality services available to all.
- Review intake, billing, service delivery, and utilization review processes to ensure client access and progress toward goals. Ensure seamless cross-agency referral process and enhance community referrals and collaborations.
- Explore efficiencies in service delivery including the need for a separate sliding scale fee client waiting list, counselor case load management, and cross-agency services to meet needs of all clients and program recipients.

3) Explore the unmet needs of the Roanoke Valley.

- Identify areas of potential unmet needs as those identified in the strategic planning process as well as others identified over time, emphasizing the agency mission.
- Consider focus on trauma exposed/underserved populations, including LGBTQ+, Limited English Proficiency, racial minorities, domestic violence survivors, child abuse survivors, older adults, etc.
- Consider expansion of personal affairs management, and expansion into general mental health case management/care coordination services.

Guarantee the vitality of Family Service of Roanoke Valley

As directed by the Finance Committee and Leadership Team

1) Develop and conduct a Financial Review.

- Use community focus groups conducted as part of strategic plan as starting point for Financial Review.
- Work within the context of the Finance Committee to determine process for engaging the Board of Directors, Leadership Team, staff and community members (if needed) in defining intended impact of agency and analyzing activities based on Matrix Map model.

2) Explore methods to improve overall client experience and outcomes.

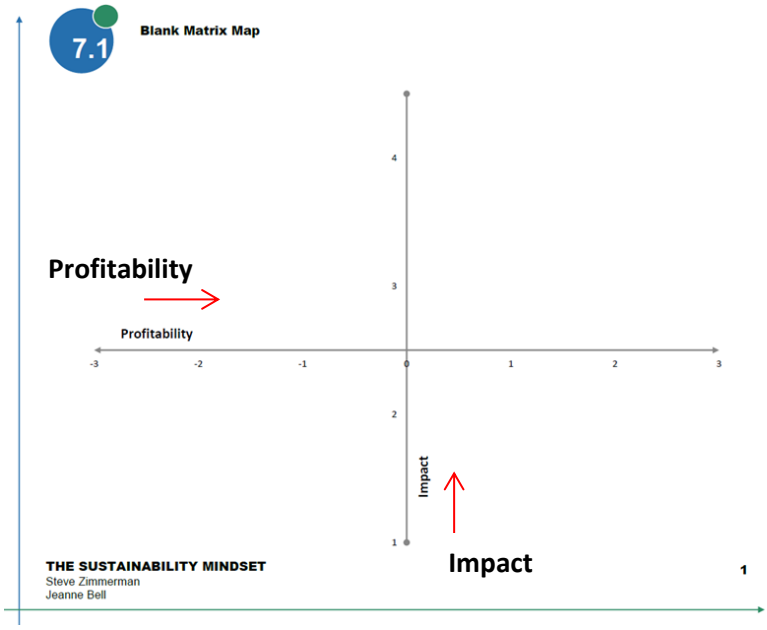
- Explore budgetary implementation of needed improvements in technology and physical plant, as well as investments in staff and board (such as total benefits, succession planning and recruitment) to enhance client outcomes, overall agency experience, and sustainability.
- Consider options to expand influence of program beneficiaries and supporters, including Youth Awards program, TOP Alumni events, staff alumni profiles, and board member features.
- Identify agency activities with additional capacity and develop plans to maximize revenue.

3) Lead community conversations around and exploring opportunities for collaboration, shared services, and other partnerships.

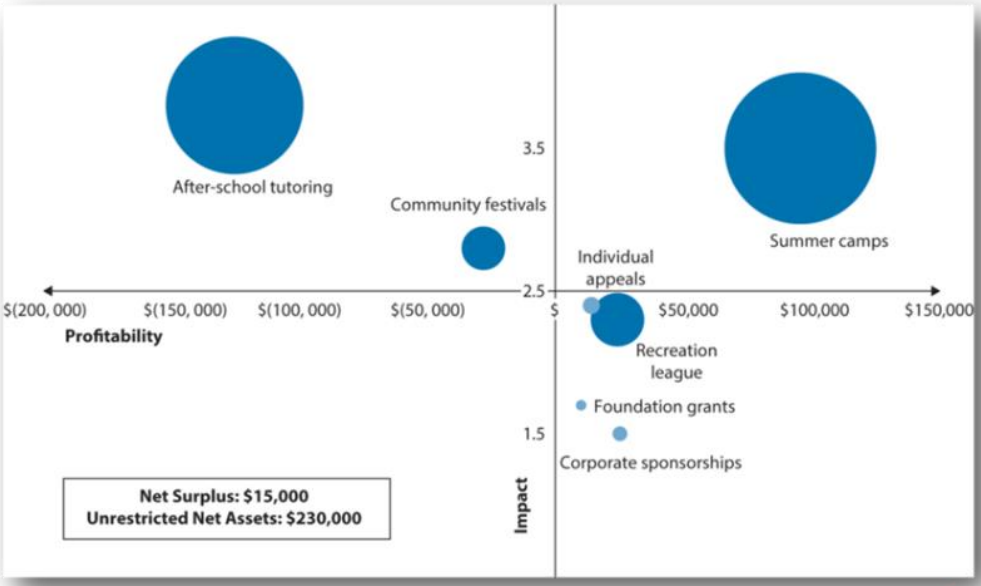
- Explore shared services and mergers to strengthen the position of Family Service.
- Continue to stay apprised of grant and funding trends, especially in regard to capacity building opportunities.
- Engage board, staff and community members in opportunities to invest in mental wellness as part of the continuum of services necessary to guarantee overall community strength.

The Matrix Map

The first project that will be undertaken by board committees and members of Leadership Team will be the creation of the Family Service of Roanoke Valley Matrix Map as outlined in *Nonprofit Sustainability: Making Strategic Decisions for Financial Viability and the corresponding The Sustainability Mindset*.

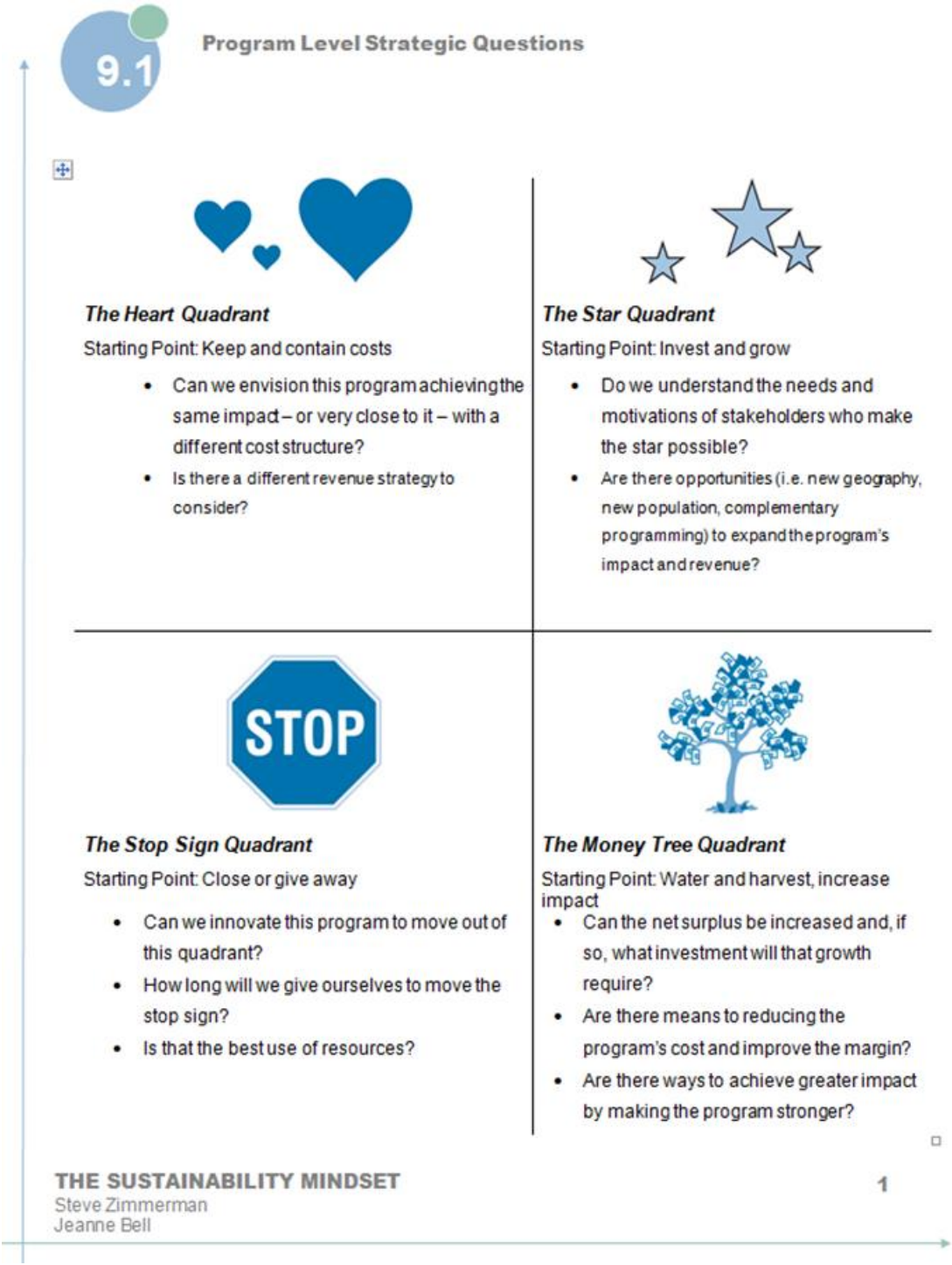


As outlined by Bell and Zimmerman, the Matrix Map brings together the impact and profitability of various activities, including programs and fundraising initiatives, to create a graphic representation and "access them together in an integrated manner and make decisions understanding the implications to both our financial viability and mission impact." To the right is a blank matrix map upon which all programs would be plotted. The matrix map sample, below, does take into the account the relative expense of each program and accounts for those and other measures by sizing the plot accordingly.



CompassPoint spectrum nonprofit services

The first steps are the completion of the **Financial Review**, which will determine the profitability and scope of each activity, and the **Program Audit**, which will determine the mission impact of each activity. Then, each program will be plotted on the Matrix Map, allowing the board and Leadership Team to answer the questions as outlined in the four quadrants (see Program Level Questions).



The Matrix Map will form the basis for the agency's strategic decisions in regard to funding opportunities, program expansion and/or revision, staffing/budgeting needs, and agency focus over the next several years as a result of Engage 2020.