Letter from Leadership

Over the past 9 months, St. Mary’s Home for Children staff and Board have worked hard to develop a strategic plan that will propel our organization forward. This plan is being launched during a time of significant change and challenge in our operating environment.

Some of the changes in our environment have been apparent for some time. For example, the state’s continued efforts to serve children closer to home have resulted in less reliance on congregate care and out of district education placements. Our commitment to the national Building Bridges Initiative, and continued commitment to focus on safety, permanency and well-being has resulted in the need for more person-centered services that include the entire family as part of the solution. Stakeholder voice and choice are increasingly moving us to listen more and individualize our services.

At the same time, we are finding ourselves increasingly challenged by external factors, including diminishing resources, to continue our heritage of innovation, create efficiencies, address long-standing issues with our physical plant, and to reinvest in our staff.

This plan seeks to guide our efforts to take on these challenges head-on as an agency while furthering our growing reputation for excellence, impact, and leadership in our state and region for serving those impacted by trauma. At the same time, this plan provides us with concrete direction to become the best-known provider (rather than the best-kept secret) and increase our philanthropic support to solidify and diversify our funding.

I want to thank the entire Board and staff for their input into this process. At the same time, I want to express my particular appreciation for the Planning Committee members -- board and staff -- that shepherded this process together with our consultants, Fio Partners, LLC.

Sincerely,

Marisa Albanese
Board Chair

Members of the Strategic Planning Team

Carlene McCann, CEO
Linda Mobriant
Melissa Santoro
Patty Olney

John F. Lombari
Marisa Albanese, Board Chair
Nicole Froment
Wayne Brown
Our Strategic Planning Process and Key Findings

A Strategic Planning Committee was formed in the summer of 2018, in order to guide the work of the strategic planning process on behalf of the St. Mary’s Home for Children’s Board of Directors. The goals of this process were to create a shared vision and a plan to realize this vision. A third party consultant (Fio Partners, LLC) was engaged to provide experience and input to the efforts.

Starting in September 2018, the Strategic Planning Committee has worked with Fio to determine and review the information base needed to support the planning process. The Committee adopted Fio’s Framework for Strategic Management

The structure of the plan correlates to Fio Partners Strategic Management Framework to guide its efforts.

Strategic Management Framework

The Committee and Fio gathered data from internal and external sources to capture observations of the organization from a variety of perspectives, from the larger human services field, from the community as well as an analysis of infrastructure of the organization.
Activities undertaken or developed over the course of the process included:

- Board survey and analysis
- Staff climate survey and analysis
- Financial analysis
- Stakeholder interviews and summary report
- Management assessment and development stage review
- Programmatic assessments
- MacMillan Matrix
- Agency Logic Model
- Donor Interviews
- Program Participant Focus Groups
- State data review and analysis

The information gathered was shared with the Board of Directors in March 2019, who provided input to the vision for the organization and informed the overall strategic direction reflected in the plan, as well as provided input into goals, objectives and strategies. Staff leadership worked with Fio to consolidate this input and transform the information gathered into a three-year strategic plan to guide the agency.

The resultant strategic plan for 2019-2022 prioritizes developing organization-wide strategies that strengthen all agency programs and promote “St. Mary’s way of work,” as well as programmatic enhancements and innovation, together with developing a robust marketing and fund development plan, focusing on staff recruitment and retention, reinvesting in agency facilities, and further developing the Board.

The strategic plan lays out a three-year scope of work, with high-level goals and objectives, key strategies and action plans. Each year, a detailed work/action plan will be developed and monitored to inform implementation and hold ourselves accountable to the work to be done.
What We Learned

We are a Well Kept Secret

Community stakeholders hold St. Mary’s in high regard as a community partner. The agency is recognized for its leadership in the field and as a partner that plays fair by leveraging the strengths of other organizations. This esteem is held similarly by community providers and state agency personnel. At the same time, the agency is not viewed as well known or visible in the broader community. Focus group participants were generally not aware of St. Mary's prior to receiving services and donors and partners alike noted the need to increase community awareness and potentially rebrand.

How We Are Organized/Capacity

Feedback from the Board of Directors suggests that the agency's current organizational structure may be insufficient to adequately support current work. In particular, the Board focused on the need to free up more of the executive director’s time to be external (be it raising money, increasing community awareness, creating new partnerships, or advocating for increased community support). Similarly, staff feedback related to the need to improve intra-agency communication speaks to the many and diverse programs that the agency operates and the extent to which they do or do not interconnect and align. Recognizing that the agency has undergone significant programmatic growth in the past decade, these growing pains are not uncommon or unexpected; aligning all of these current initiatives is a critical opportunity to consider at this juncture. Finally, to the extent that the agency wants to add product lines (e.g., prevention), care will need to be given to how this work is organized and integrated into the current or potentially a new organizational structure.

Our Staff Are Happy Yet Leaving

St. Mary’s has a unique situation where there is high morale among staff yet more than half surveyed indicate that they are likely to leave the agency in the next three years. Not surprisingly, compensation is a major driver of this potential turnover in staffing. In
addition, it has been experienced that qualified candidates choose not to work at St. Mary’s due to financial reasons. Beyond financial considerations, the staff has identified opportunities in areas such as providing employees with more support, improving cross-agency communication and problem-solving and strengthening middle management.

There is also recognition that while the line staff is very diverse, more can be done in this area with respect to the leadership team and management staff. This is particularly important due to both the changing nature of the workforce in Rhode Island as well as the changing demographic composition of those that St. Mary’s serves.

**Continued Evolution of the Board Is Needed**

The role of the Board as ambassadors is a critical one. Board members themselves indicated that they can all do more to support the organization’s community relations and fundraising efforts and use their influence and connections to create access, clear obstacles, and raise funds. In addition, the Board indicated that there is a need to ensure Board perpetuation and fit with organizational needs. There is a sense that the nominating process for new Board members can be improved to ensure that the Board reflects the community and includes the talents and competencies needed to advance the organization’s mission.
Proposed New Mission

Partnering with youth, adults, and families, St. Mary's Home for Children fosters resilience and potential through a continuum of innovative residential, community-based, education, and prevention services.

Proposed New Vision for Our Community

We envision a future:

- Where all children are safe and well cared for in their homes and communities, and become healthy adults engaged in healthy relationships;
- Where those we serve are engaged in positive reciprocal relationships within their family and community systems, and develop the skills and strengths they need to attain well-being and thrive in their family, school and community;
- Where families, neighbors and community members have a meaningful understanding of the short and long term impacts that trauma has on individuals and families; and they provide appropriate supports to youth and families who have been impacted by trauma; and
- Where our local, community and state systems respond to crisis situations with informed curiosity, active support and the expertise or resources needed to maximize the safety and well-being of all involved.

Our Vision for Our Organization

We envision a future for St. Mary's where:

- Our evidence-informed programs and innovative practices continue to evolve to meet the needs of the individuals we serve today and in the future;
- We actively expand to include a more defined focus on prevention;
- We are sought out and recognized more (locally and nationally) for our expertise in specialized services and as a thought leader;
- Families and adults seek out our support and consistently view our organization as a partner and resource; and
- We are able to expand and diversify our revenue sources to improve our financial sustainability and our ability to recruit and retain a diverse pool of top talent.
Proposed New Values

**Innovative** -- We create new knowledge in our field, use creative solutions to solve problems and meet the needs of those we serve

**Equity** -- We meet each youth, adult, and family where they are to meet their unique needs through care that is both culturally and linguistically aware.

**Person-Centered** -- we partner with those we serve and individualize our services to ensure that they have voice and choice in determining their desired outcomes

**Respect** -- we treat everyone with dignity, compassion, and an appreciation for their unique strengths

**Integrity** -- we are ethical, honest, and trustworthy; we are transparent in all of our interactions, and responsible stewards of our resources

**Excellence** -- we are committed to the use of evidence-informed practices in all that we do, and ensuring that our staff are well trained and supported to deliver the highest quality services

**Collaborative** - we seek to partner with others to build relationships and networks of support for those we serve
Our Goals 2019 - 2022

Goal #1: Align our programs to maximize the impact of our work for youth, adults, families, and communities.

Goal #2: Strengthen our relationships with community partners, community leaders, and funders to advance our mission and increase our sustainability.

Goal #3: Improve human resources related systems and professional development to support organizational growth.

Goal #4: Invest in our internal capacity to support the evolution of our organization.

Goal #5: Continually develop our board of directors to further drive impact and support our vision.
Goal #1: Align our programs to maximize the impact of our work for youth, adults, families, and communities.

OBJECTIVE 1: Enact agency-wide initiatives that support all programs

Strategy 1: Enhance family engagement/whole family support efforts
Action Plans
1) Create an agency-wide caregiver council that informs and advises the organization on family engagement and support
2) Explore strategies to make St. Mary’s even more welcoming to families

Strategy 2: Strengthen natural/community supports and wraparound services that support the basic needs of those we serve
Action Plans
1) Catalogue and ensure agency-wide awareness of our current resources
2) Identify gaps and develop new partnerships / relationships with other organizations
3) Formalize efforts and strategies to provide and/or connect youth to summer programming and internships (consider designating a staff responsible)
4) Continue providing basic needs and wraparound supports through existing agency services where possible, new agency services where practical, and partnerships with community agencies where necessary

Strategy 3: Become a leader in prevention and community education
Action Plans
1) Increase our community presence and program visibility by getting our experts out into the community to do community education and training
2) Explore establishing formal partnerships with organizations that serve youth, bringing our services and expertise to complement their services and expertise
3) Prepare the organization for Families First Prevention Act
4) Ensure that intellectual property and training offered by St. Mary’s is protected and compensated appropriately
5) Explore partnering with the City of North Providence to become a trauma-informed community

Strategy 4: Meet or exceed the national CLAS standards for culturally and linguistically appropriate services in health and healthcare
Action Plans:
1) Adjust strategies to serve youth, adults and families with various diversities
2) Identify champions for cultural and linguistic awareness
3) Develop organizational supports in the following areas: data, policies and procedures, community engagement, collaboration and performance management
Strategy 5: Develop and promote organizational level outcomes for the entire agency

Action Plans:
1) Improve gathering and analysis of program data to demonstrate outcomes and impact to current and potential payers
2) Seek opportunities for public recognition (locally and nationally) of agency work and impact

OBJECTIVE 2: Enact program level enhancements to support growth and competitive position.

Strategy 1: Increase revenue and number served in our outpatient department

Action Plans:
1) Collaborate with DCYF to expand programs
2) Explore multi-year grant and other funding sources to grow programs
3) Leverage our innovative community-based programs to increase national visibility as experts in sexual abuse / sexual exploitation treatment
4) Differentiate programs from competitors with respect to serving adults and our specialty in sexual abuse and trauma treatment
5) Secure funding and implement changes necessary to make Families Impacted by Sexual Abuse (FISA) Curriculum an evidence-based practice
6) Increase consultation and training to collaborative partners
7) Strengthen organizational culture in areas of accountability and innovation

Strategy 2: Enhance the continuum of residential services

Action Plans:
1) Finalize the process of transforming psychiatric and medical care for residents to become recognized as a psychiatric residential treatment facility
2) Develop mechanisms to reduce the average length of stay to create more capacity utilizing home-based teams
3) Promote/highlight trauma-informed model to differentiate the program from competitors
4) Increase national visibility as consultants for the Building Bridges Initiative
5) Strengthen relationships with third party payers to increase referrals and reimbursement, and continue to pursue offering ARTS program to Tuffs
   • Package program description, outcomes, and impact, as well as pricing
   • Cultivate and build relationships with these payers to develop mutually beneficial contracts
6) Strengthen transition services for older teens by developing program components specifically for older adolescents to meet their age-appropriate and developmental needs
7) Strengthen organizational culture in areas of accountability and innovation
Strategy 3: Reposition the George N. Hunt School to grow

Action Plans:

1) Strengthen competitive transitional/vocational components to connect more students to employment and post-secondary opportunities
2) Develop an experiential, project based learning environment
3) Enhance parent/family/student engagement to ensure voice and choice through meetings, events, activities and a Student Council
4) Continue to increase the use of technology in classrooms so students keep pace with in-district peers
5) Further strengthen trauma-informed learning, Social Emotional Learning (SEL) and the Positive Behavioral Interventions and Supports (PBIS) model to meet the needs and goals of current students
6) Strengthen transition services for older teens
   - Build community partnerships that support the development and transition of adolescents (e.g., Prepare RI) to adulthood and the workforce
   - Develop program components specifically for older adolescents to meet their age-appropriate and developmental needs
7) Strengthen organizational culture in areas of accountability and innovation
Goal #2: Strengthen our relationships with community partners, community leaders, and funders to advance our mission and increase our sustainability.

OBJECTIVE 1: Develop and implement a comprehensive marketing and public relations plan to increase awareness and support

Strategy 1: Develop a new brand that reflects the breadth and depth of services currently provided and unique expertise delivered
Action Plans:
1) Engage marketing expertise (e.g., professional, interns, etc.) to assist the agency in developing its brand identity; consider factors related to agency name vis a vis its services and populations served
2) Implement recommendations, including updating materials

Strategy 2: Develop and execute an agency-wide marketing plan
Action Plans:
1) Develop and resource a marketing communications plan for the agency that identifies customers, messaging, and tactics to “get the word out.”
   - Include a media relations strategy as part of the plan to secure earned media
2) Transform the website and create a social media presence to highlight agency activities and impact
3) Initiate an e-newsletter to update the community on agency activities and accomplishments
4) Integrate marketing efforts with fund development strategies and tactics
5) Create a dedicated marketing position within the agency

OBJECTIVE 2: Build capacity to advocate for issues of greatest concern to St. Mary’s and those we serve

Strategy 1: Enhance and formalize our advocacy work
Action Plans:
1) Develop an Advocacy Committee to include families and Board members
2) Research critical issues impacting those we serve
3) Develop an annual advocacy agenda in conjunction with the RI Coalition for Children and Families.
4) Cultivate relationships with key policy influencers
5) Develop means to educate state and local decision makers
Goal #3: Improve human resources related systems and professional development to support organizational growth.

OBJECTIVE 1: Recruit top talent to ensure high-quality services

*Strategy 1: Continuously review benefits to ensure that they are competitive and attractive for potential employees*

*Action Plans:*

1) Review benefit plans to become more responsive to employee needs by exploring a cafeteria-style plan
2) Explore wellness program that compensates staff for keeping themselves healthy

*Strategy 2: Seek to build a pipeline of future employees*

*Action Plans:*

1) Enhance and formalize relationships with colleges and universities in the region

OBJECTIVE 2: Strengthen our ability to retain and develop talent to ensure continuity of staff and leadership

*Strategy 1: Enhance organizational culture to be diverse, inclusive, and equitable; and to have a development approach towards its staff*

*Action Plans:*

1) Strengthen efforts to build diversity at all staff levels by assessing and improving upon current Affirmative Action Plan; and building a pipeline of diverse leaders and career ladders to help them progress through the organization to leadership levels
2) Provide leadership development opportunities for staff
3) Create a talent assessment program to identify emerging leaders and strategies to retain them
4) Identify in-house career opportunities that go beyond a single program or department
5) Find new ways to support intra-agency communication across all levels of staff and departments to improve the flow of accurate and timely information. Support middle management to more effectively communicate.

OBJECTIVE 3: Build organizational capacity to support current and future work

*Strategy 1: Review and adapt organizational structure to strengthen internal operations*

*Action Plans:*

1) Assess organizational structure to identify opportunities to create more capacity and greater programmatic alignment
2) Explore ways to redistribute the CEO’s responsibilities to senior staff in order to free up capacity to focus on strategic issues and philanthropy
3) Explore the potential of hiring a director of programs to oversee and coordinate program operations
4) Enhance the existing emergency succession plan with a formal written succession plan that includes process and board responsibilities
Goal #4: Invest in our internal capacity to support the evolution of our organization.

OBJECTIVE 1: Reinforce our infrastructure and operational systems and safeguards

Strategy 1: Develop a reinvestment strategy for the physical plant

Action Plans:
1) Complete facility assessment process and continue to strengthen the work of the Buildings & Grounds Committee
2) Establish maintenance and capital budgets associated with programmatic changes
3) Develop energy savings strategies and allocate savings into facility reinvestment/capital improvement fund

Strategy 2: Strengthen our financial management structure

Action Plans:
1) Explore ways to decentralize the budget process to place more accountability and autonomy on agency directors and department heads
2) Continuously review internal control procedures as the organization evolves and changes

Strategy 3: Continue to enhance and expand risk management practices

Action Plans:
1) Continual development of the business continuity plan as a living document
2) Expand data-reporting, monitoring and assessment of high risk practices (including restraints, residential, etc.)
3) Continue annual risk reporting to the Board of Directors, and engage them in more active discussion regarding risks

Strategy 4: Increase capacity in Information Management

Action Plans:
1) Develop an information management plan for the organization and review risks on an annual basis
2) Ensure that the capital budget includes investments in IT infrastructure and software to maintain currency
3) Develop and document protocols for data entry, analysis and reporting to ensure consistency and accuracy of resulting reports
4) Ensure annual staff training on privacy and data security
OBJECTIVE 2: Enhance our quality improvement system and process

Strategy 1: Build out our Quality Improvement practices at the agency level

Action Plans:
1) Develop and implement an agency-wide client feedback system
2) Engage Caregiver, Youth & Student councils in the process
3) Work with managers to use results for training and program improvement
4) Utilize results to promote agency and services in marketing, social media and website
5) Develop clear, formal systems for data collection and reporting
6) Review and streamline administrative policies and procedures to ensure that they are efficient, leverage technology, and promote collaboration between departments
7) As program models mature, seek out partnerships to develop outcomes studies to measure long(er) term effectiveness
Goal #5: Continually develop our board of directors to further drive impact and support our vision.

OBJECTIVE 1: Enhance fund development efforts to increase donors and donations

Strategy 1: Activate the Board of Directors to take a leading role in raising funds

Action Plans:
1) Engage current Board members to assist with relationship cultivation and development, making introductions and making connections prior to and at events
2) Evolve our fundraising practices
   ● Adopt best practices to assist with moving donors intentionally from one level of giving to the next
   ● Conduct cultivation gatherings
   ● Increase personal contact with donors
   ● Develop and implement intentional donor retention and stewardship strategies
3) Identify new sources of support
   ● Pursue naming opportunities with respect to current and to be renovated space
   ● Develop a planned giving program to support endowment building
   ● Identify potential corporate supporters to provide both financial and other support to the organization
   ● Engage national funders as it relates to the agency’s promising and evidence-informed practices
   ● Expand the network of local funders by hosting a Grantmakers Council Board meeting
4) Increase the capacity of the development function
   ● Free up executive director to be able to spend more time on development efforts
   ● Explore creating dedicated grant writing capacity
   ● Build staffing capacity to support special events and donor stewardship
   ● Establish clear expectations regarding fund development role of Board members
   ● Define and include board commitments in development plan
   ● Continue to expand development plan to include grants calendar, potential grants and anticipated revenue
   ● Identify specific fundraising efforts as part of the agency’s budget

OBJECTIVE 2: Strengthen Board governance function

Strategy 1: Build Board knowledge and skills to advance the work of the Board

Action Plans:
1) Conduct Board training on general functions of nonprofit boards, on targeted skills such as meeting facilitation, and on trends in the field.
2) Define roles and responsibilities as a Board
● Provide training, tools, and support for Board members to serve as agency ambassadors and to support St. Mary’s community relations efforts

3) Create opportunities for board socialization that promotes cohesion and relationship building

4) Periodically reflect on decisions the board has made to evaluate the impact of these decisions

5) Establish annual board goals; self assess performance against these goals quarterly.

OBJECTIVE 3: Continue to evolve the Board composition to reflect the larger community, diverse perspectives, and needed skills and competencies.

Strategy 1: Create a pipeline and process for continuously developing the Board Action Plans:

1) Restructure / redesign the nominating committee and include governance functions under its purview
   ● Establish criteria for board selection that include philanthropic engagement
   ● Review and revise the requirements and expectations of Board members related to philanthropic support and activities
   ● Recruit a critical mass of Board members that are part of the philanthropic/giving community

2) Assess Board Assets and Needs
   ● Inventory skills and attributes of current Board members
   ● Identify competencies needed to support governance function and drive the strategic plan

3) Recruit New Board members based on needs and gaps
   ● Explore the use of an External Nominating Committee
   ● Leverage friend-raising activities to help identify potential Board members
   ● Consider parents and former clients for seats on Board

4) Create an orientation and onboarding process for new Board members that includes shadowing and clear expectations
   ● Develop a role description for board members that includes expectations for Board service

5) Review and revise bylaws as needed to streamline the nominating process

6) Consider implementing a give/get policy for Board members
Monitoring Our Progress

Implementation Approach

The Strategic Plan is a living document that is a road map by which the Executive Director, Directors and Board of Directors should be held accountable. It is utilized to create annual goals and detailed written work plans that identify who is responsible, due dates and measures of success. Progress against annual goals is monitored through regular and documented updates on plan progress internally among administration, and at Board of Directors meetings. Desired key results, noted below, guide our concrete measures of success in annual work plans. A Strategic Plan Progress Presentation is additionally held annually with all staff and Board members invited.

Key Results

The implementation of the Strategic Plan is envisioned to enact a set of measurable key results. For each goal, the table below outlines key areas of measurement and proposed key results. Annual work plans identify measures of success guided by these areas wherever possible. In some areas, baseline data, as well as management capacity to measure and report on progress will need to be created as part of the strategic plan implementation. It is envisioned that a dashboard of key results would be created to track progress against key results and be reported to the Board of Directors.
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<th>Proposed Key Results</th>
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<td>Family attendance at meetings, events, etc.</td>
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<td>Family Functioning</td>
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<td>Natural Supports / Community Collaboration</td>
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<td># relationships with business community</td>
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<td>Prevention Impact</td>
<td># of community members trained</td>
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<td>CLAS Standards</td>
<td>Staff climate survey results</td>
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<td>Organizational Level Outcomes</td>
<td>Child outcomes post treatment</td>
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<td># families successfully reunified for more than 1 year</td>
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<td>Innovation</td>
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<td>Residential</td>
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<td>Community Influence</td>
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<td>- # of members on advocacy committee</td>
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<td>Reduction in Open Positions</td>
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<td>· Average length of openings</td>
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<td>Enhanced Staff Competencies</td>
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<td>Donor Acquisition - new contributors</td>
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<tr>
<td></td>
<td></td>
<td>Donor Cultivation Activities</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Donor Retention - annual/recurring donations</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Increase in donor gift size</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Diversification of Funding</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Dollars Raised by type/source (individual, corporate, etc.)</td>
</tr>
</tbody>
</table>

| | Board Governance | Written roles; # trained |
| | Board Engagement | Board Survey (participation, satisfaction) |
| | Board Support | Dollars raised by Board (giving/getting) |
| | Board Development | Board Diversity |