Exceptional Children's Foundation

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Strategic Plan Goals and Objectives
July 1, 2017 – June 30, 2020

GOAL 1: Enhance, from baseline measurements, client service excellence and expand reach into areas of need.

Objective 1: Conduct a review and establish updated program and business metrics, including Employee Satisfaction Surveys, Outcome Reports, and internal and external reporting in order to provide improved data-driven decision-making July 2018.

Responsible: CEO, CAO, CPO, Manager QA/QI, Program Directors.

Action Items:

a) Review all programmatic service data gathering and reporting mechanisms (Employee Satisfaction Surveys, Regional Center Surveys, Outcomes Reports etc.) and establish a clear baseline for measuring future performance by January 2018.

b) Develop and implement integrated business metrics gathering, analytical and reporting tools identified in Action Item a) by June 2018.

c) Prepare for and receive full three-year accreditation from the Commission of Accreditation of Rehabilitation Facilities (CARF) by June 2018.

Objective 2: Explore and actualize expansion and growth of current and new programming throughout the three year period.

Responsible: CEO, CAO, CFO, CPO, Program Directors.

Action Items:

a) Establish a new Art Center in ELARC's catchment area by December 2017.

b) Expand the San Pedro Art Center to include a gallery similar to the Downtown Art Center by May 2018.

c) Explore licensing requirements, Regional Center interests, including North Los Angeles Regional Center (NLARC), for converting the Valverde Residential facility from an ICF-DDN to an ICF-DDCN by June 2018.

d) Review criteria and determine ECF's ability to develop integrated, affordable housing under the Housing and Urban Development (HUD) 202 program, or other (City, County) funding opportunities by June 2019.

e) Develop and implement community art programs from the San Pedro and Exceptional Building facilities by July 2018.

f) Launch the comprehensive Exceptional Training Academy program options (up to 5*) by July 2018. (*Computer, Warehouse, Janitorial, Culinary and Retail)

g) Develop vocational transitional training between the Kayne Eras School and the ECF Training Academy by September 2018.

Objective 3: Identify and ensure qualitative and quantitative infrastructure backbone is implemented supporting programmatic service delivery by July 2020.

Responsible: CEO, CAO, CPO, the Facilities Manager, IT, Program Directors.

Action Items:

a) Develop and implement fleet maintenance and replacement program by January 2018.

b) The Facilities Maintenance Department with develop and implement an annual inspection and preventative maintenance program for all ECF locations by July 2018.

d) Implement electronic attendance, testing, grades and performance tracking for Kayne Eras students by January 2019.

e) Complete full-implementation of Therap Services software for programs (Early Start, APP, EPS, CEE, Art Centers, Supported Employment, DAC, and ADP), integrating Accounting billing and reporting by July 2020.

Objective 4: All ECF programs will reach Home and Community Based Services (HCBS), Center for Medicaid Services (CMS), and the Workforce Integration and Opportunity Act (WIOA) compliance by January 2022.

Responsible: CEO, **CPO, Program Directors**.

Action Items:

a) Ensure all ECF sites have updated disaster action and recovery plans by September 2017.

b) Establish the following programs in East Los Angeles Regional Center's (ELARC) catchment area (APP and EPS) by January 2018.

c) Implement WASC programmatic changes identified in the 2016 review and apply for full-accreditation by July 2019.

d) Identify possible programmatic updates/changes to the Adult Day Program (ADP) and Adult Day Center (ADC) at the S. Mark Taper building, including possible physical relocation into a community integrated site by January 2019.

GOAL 2: Enhance Staff Development from baseline measurements.

Objective 5: Human Resources will develop and implement short-term and long-term staff recognition; accounting for tenure, accomplishments, performance by January 2018.

Responsible: **CEO, CAO, CPO, HR, Program Directors**.

Action Items:

- **a)** HR and a cross-functional committee of staff will formulate an annual recognition program based on tenure by November 2017.
- **b)** HR and a cross-functional committee will implement a series of strategies recognizing performance and accomplishments by November 2017.
- **c)** HR will develop and implement a revised annual performance management system for Management and Direct Care staff by November 2017.

Objective 6: Human Resources will formulate a tracking and measurement system for monitoring and increasing the quality of candidates, while reducing the time to hire from baseline measurement by July 2018.

Responsible: CAO, CPO, HR, Program Directors.

Action Items:

- **a)** HR will ensure all departments are trained and utilizing the ADP recruitment process and software by August 2017.
- **b)** HR will track, analyze, and report on the effectiveness of recruiting posting solutions (Craigslist, Indeed, job fairs, flyers etc.) for each category of job position within ECF for the period July 2017 thru January 2018.
- **c)** HR will reduce the "Time to fill" positions by 20%, compared with January 2017-July 2017, by July 2018

Objective 7: Provide a comprehensive market-based analysis for all positions, and develop a plan to meet or exceed market wages for all categories of staffing by January 2020.

Responsible: CEO, CAO, CFO, CPO, HR, Program Directors.

Action Items:

- **a)** Comprehensive market salary survey will be completed bi-annually and make actionable for all positions by October 2017.
- **b)** A comparison of current positions/pay-rates will be identified against the market survey, with gaps identified and a plan to close gaps for existing staff completed by January 2018.
- **c)** All current staff positions will be brought to market wages (measured against the 2017 salary survey) by January 2020.

Objective 8: Develop a comprehensive management/leadership training program for the benefit of all ECF Directors and Managers by July 2019.

Responsible: CEO, CAO, CPO, HR, Program Directors.

Action Items:

- **a)** A core competency study will be completed for all Managers and Directors positions by December 2017.
- **b)** Curriculums supporting core competencies will be identified externally or developed internally for Managers and Directors by July 2018.
- **c)** All Managers and Directors, in consultation with their respective supervisors, will complete the competency training program by June 2020.

Objective 9: Develop a comprehensive succession plan, identifying developing and promoting internal and external sources of talent for the top-three tiers of management (C-level, Director-level, and
Management-level) positions by January 2020.

Responsible: CEO, CAO, CDO, CFO, CPO, HR, Program Directors.

Action Items:

- **a)** Develop a succession plan policy statement with transition options for various positions by January 2018.
- **b)** Using core competency study in Objective 4:, develop a career map for staff career development by July 2019.
- **c)** Identify and implement career tools (education/training, job-shadowing, on-the-job-training, etc.) to prepare and promote internal candidates by January 2020.

GOAL 3: Enhance community awareness and engagement of ECF.

Objective 10: Through well-coordinated efforts, engage in marketing and communication endeavors across all mediums to ensure visibility of ECF's mission, activities and client outcomes to stakeholder groups.

Responsible: CEO, CDO, Director of Marketing & Communication, CPO

Action Items:

- a) Develop donor-centered content, including various forms of storytelling, to communicate "the ECF story" via client, program, staff, board and organizational channels; and develop clear messaging around how donors can make an impact.
- b) Annually coordinate the timely promotion of ECF events and activities, e.g. Art Exhibits, Open Houses, new/expanded programs.
- c) By July 2019, contract with a brand expert to value the organization's name identity and the opportunity for "exceptional" branding across all program and agency operations.

Objective 11: Inform and educate client families, donors, colleagues and other ECF Stakeholders about the need to support and advocate for issues and legislation that can impact our clients and their families, the general population served by ECF, and ECF operations.

Responsible: **CEO, CDO, Director of Marketing and Communications, CPO**

Action Items:

a) Remain engaged with current legislative, trade and advocacy groups that maintain strong ties with Sacramento and governing/funding agencies.

b) Annually**,** develop (or update) contact lists for efficient and effective communications with stakeholder groups (internal and external).

c) Annually update calendars of event/activity cycles where timely alerts/communications and actions may be taken.

d) Develop a method by which the quality of outreach is measured by June 2018.

Objective 12: Create collaborative partnerships with diverse individuals and stakeholder groups to leverage new business, advocacy, and fundraising opportunities.

Responsible: **CEO, CDO, Director of Marketing and Communication, Director of Donor Relations, CPO**

Action Items:

a) Host an Open House at ECF Headquarters (Kayne Eras Center) to introduce the community to the recently renovated offices and ECF's unique history time wall.

b) Convene annual Business Partner Recognition luncheon to thank partners and educate them to current business-related opportunities with ECF.

c) Host an Art Center program 50th Anniversary celebration event in the second half of calendar year 2018.

d) Identify opportunities to develop and/or maintain active relationships with local area chambers of commerce, including LA Area Chamber, Culver City Chamber, LAX/Coastal Chamber, Inglewood Chamber, and advocacy groups (CDSA, CAHF, Coalition of Service Providers, CAPSES).

e) Build or strengthen relationships with financial and wealth advisors to educate them to ECF's charitable giving and estate planning options beginning in 2018.

f) Annually, identify key elected officials to visit and educate on issues and legislation that impacts individuals served by ECF.

g) Annually identify up to three volunteer projects throughout ECF for volunteer engagement. Explore the feasibility of a formal volunteer program to start by July 2018.

Objective 13: Through effectively coordinated, multi-faceted effort, fundraise annually to augment/meet budgeted operational and capital needs.

Responsible: **Board Members, CEO, CDO, Director of Donor Relations, Director of Marketing & Communications, Director of Foundation and Corporate Giving**

Action Items:

- **a)** Annually identify and present to members of the Board the strategies and resources ECF will employ to raise funds for fiscal year operations. Funds will be raised through grant development, special events, campaigns and individual donor engagement, cultivation, solicitation and stewardship activities.
- **b)** Following a de-briefing of the 35th Annual Golf Benefit, assess the cost/benefit of continuing or reinventing the annual event by December 2017.
- **c)** Develop an Emerging Leaders event to introduce and engage early/mid career professionals with ECF by June 2018.
- **d)** Convene the Development Committee 3-4 times per year to develop maintain active engagement of the Board in fundraising activities.

<u>GOAL 4: Each year, improve ECF's financial position through operational efficiencies, revenue enhancements, prudent expense and investment management.</u>

Objective 14: Meet or exceed the overall Board-approved annual operating budget through effective communication and monitoring.

Responsible: **CEO, CFO, CDO, CPO and CAO**

Action Items:

- **a)** Develop, present and adopt realistic revenue & expense budgets by June 30 of each year.
- **b)** Enhance technology, within annual budgeted allocations, throughout the operations to improve efficiency, data collection and communication.
- **c)** Generate, review, discuss and present monthly department and/or consolidated statements of financial activities at executive, director and Board Committee meetings.
- **d)** Ensure the convening of the Investment Committee with Investment Managers regularly to ensure investments within ECF guidelines.

Objective 15: Expand the e-commerce operation (EOJSolutions.com) annually to: contribute a net revenue to ECF operations beginning with FY 17-18 while maintaining its mission-related tax status.

Responsible: **CEO, CFO, VP of Business Development, CDO**

Action Items:

- **a)** Maintain monthly contact with partner Source America and ECF sales forces and business partners to coordinate an effective promotion and sales strategy of EOJ Solutions throughout the country.
- **b)** Set up appropriate number of appointments with potential customers of EOJ Solutions each month while maintaining high quality customer service to existing (satisfied) customers.
- **c)** Ensure the creation of diverse and adequate employment and support of qualifying individuals as the business expands.