



®

**July 2022 - 2027**

**ADOPT-A-FAMILY**  
*of the Palm Beaches, Inc.*  
**STRATEGIC PLAN**

**Adopt-A-Family of  
the Palm Beaches, Inc.**



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## History/Background

Adopt-A-Family's work began in 1983 when our founders "adopted" a family of four – a husband, wife, and two young children – who had been crushed by medical bills and forced into homelessness.

The family moved to Florida from Texas in search of a brighter future. They packed up their belongings and modest savings, but just before reaching Florida, one of the children became quite ill, requiring hospitalization. With the family's savings exhausted on medical bills, they arrived in West Palm Beach destitute. With nowhere to go and no money for rent, they moved under the Royal Palm Beach Bridge.

Palm Beach County residents Lucy Runyon, Jayne Ellison, and Kay Mansolill heard about the family on a local radio station. The women immediately located the family and moved them into a motel. The women helped the father secure a job in the technology industry and found an affordable apartment for the family. Runyon, Ellison, and Mansolill helped the family find a home, achieve stability, and reclaim dignity.

The experience sparked a desire to help more Palm Beach County families in crisis. The women saw too many "new, 'families in need' who were temporarily down on their luck and too modest to ask for help," according to Lucy Runyon. Runyon, an employee at the First National Bank in Palm Beach, conferred with their Board of Directors, and called her lawyer. Twelve hours later, the first Board of Directors for Adopt-A-Family of the Palm Beaches was born.

In 1984, Adopt-A-Family incorporated as a 501(c)(3) not-for-profit charitable organization. The women developed a list of families in need, and 50 Palm Beach County families were "adopted" during the agency's first year. Our founders garnered support from local businesses and institutions. Some of the companies that assisted in 1983 are still involved in the agency's efforts today.

Our founders were committed to the notion of "adopting" a family through a hard time and preparing them to become self-sufficient in the future. They taught families how to manage their money and to shop and prepare inexpensive meals. The women boosted the spirits of families through trips to the barber and beauty shop and holiday gift deliveries aboard a West Palm Beach Fire truck.

More than 37 years later, Adopt-A-Family has assisted more than 56,000 Palm Beach County families with children. While the agency's programs and services have expanded significantly since 1983, Adopt-A-Family is guided by the principals of our founders. Agency intervention provides the client-centered guidance families need to overcome barriers, cultivate a stable home environment, and envision and work toward a brighter future.

## Mission and Vision

### MISSION STATEMENT

**Strengthen families with children in their efforts to achieve stability and self-sufficiency by providing access to all-encompassing services.**

### VISION

**Families are stably housed and thriving.**

## Key Milestones

- AAF was founded in 1983 and incorporated in 1984.
- First agency in PBC to receive HUD funding for housing in 1992.
- First real estate purchase of 40-unit condo was purchased Project SAFE II 1996.
- Purchased 24 units for the Service Enriched Housing Program in 2000.
- Terry Bozarth Family Resource Center completed in 2003.
- Developed nine units for Wiley Reynolds Gardens Apartments in 2008.
- Was selected in 2010 as a subgrantee as part of the Lake Worth NSP2 program—developed 41 units, 17 sold and 24 retained as affordable rentals.
- Began operating Family Division of HRC in 2012.
- Deputy Director Matt Constantine was selected to serve as the agency's third CEO in 30 years in 2014.
- Julian Place and Jayne & Tim Donahue Community Center completed in 2020.
- Today, the agency owns 112 units of housing and operates 19 units of shelter.
- In 2021, awarded 15<sup>th</sup> consecutive 4-star rating by Charity Navigator.
- In November 2021, the agency received \$5M from the Day 1 Family Foundation.
- Over 56,000 families have been served since opening the doors in 1983.



## Strengths

- **Dedicated, resilient, compassionate staff with strong sense of teamwork – The Heart of the Employees**
- **High ethical standards**
- **Great leadership, CEO and Board of Directors (active and committed)**
- **Positive work culture: Friendly, family-oriented, dedicated to mission**
- **Supported by the community; Meets a crucial need in the community, longevity, consistency**
- **Flexible**
- **Fiscally responsible**
- **Transparent, honest**
- **Well-known and respected by donors and community**
- **Resources**
- **Dedication to families**
- **Adaptability**
- **Focus on solutions for individual**
- **Desire to make lives better**
- **Consistency in providing services**



**IV. SWOT Analysis**

## Weaknesses/Opportunities

- Increase and improve communication
- Program assessment
- More development/training opportunities (also, new employee orientation)
- Educational opportunities for children of clients
- Employee recognition; Staff appreciation
- Wrap around services at the Lewis Center
- Overall organizational efficiency and effectiveness
- Resources - when not qualified for any of AAF services
- Training for families
- Affordable housing
- Service projects in the community
- Collaborative partnerships
- Working from home, when possible
- Pursue grants, funding; Better utilize agency financial assets
- Wrap around services
- Competitive salaries – employee retention
- Expand mental health services
- Target middle school kids
- National accreditation

## Threats

- Keeping staff that lacks commitment; not having enough staff
- Staff turnover and loss of knowledge
- Change in leadership structure
- Push back, not listening and making change happen
- Taking advantage of workplace flexibility
- When employees feel unappreciated, over-extending staff
- Too much growth – too soon
- Mission drift
- Climate of inequality in PB – makes accomplishing mission difficult
- Client accountability
- Length of time to re-enter program
- Poor communication
- Negative attitudes
- Lack of access to wrap around services
- Funding cuts; not having enough funding
- Fear of failure
- External forces i.e., hurricanes
- Not being open-minded
- Lack of truly affordable housing
- Overwhelming number of families to serve

**V. Areas of Focus**



The following is our

**2022 - 2027**

**Strategic Plan**

which highlights our key strategies

and objectives that will lead

**ADOPT-A-FAMILY OF THE PALM**

**BEACHES, INC.**

to greater success!

## Areas of Focus

### Program and Service Excellence

*Building on current efforts, create and deliver programs that are executed with excellence and a strong attention to exceeding expectations.*

### Talent Management and Culture

*Identify, attract, and retain a talented and diverse board and workforce while maintaining and enhancing the agency's unique culture built on: respect, collaboration, inclusion, safety, and health.*

### Fiscal Strength

*Ensure continued financial sustainability with a focus on diverse revenue streams.*

### Operational Efficiency and Effectiveness

*Strengthen operations (money, information, systems, and physical assets) to ensure the efficient and effective management of resources and Board engagement.*

*\*\*While completing the strategic planning process, **branding and marketing** should be kept in mind when discussing each of the four primary focus areas.*

# Action Plans

## AREA OF FOCUS: Program and Service Excellence

Objective	Partners	Person Responsible	Completion Date	Notes
Assess all programs and identify improvement opportunities in changing environments.	-GEO Group -Prime Time (Grow) -Gold Seal (Grow)	Nydia, Lyndsey, Jessica, & Emily	July 2023	Design an ongoing assessment tool - Include items i.e. ROI, satisfaction, length of time in program, need for bilingual staff, collaborative partnerships. Develop a timeline of how to complete this. Provide board of directors with a monthly assessment.
Develop a plan to increase advocacy among key stakeholders.		Matt, Kelly, Jessica Board of Directors	September 2022 – meet to define and assess our comfort level.	Need to define what we mean by advocacy. Reach out to John C., Chris O. & Bill P. to help guide the staff on next steps.
Enhance overall advocacy efforts for clients and societal issues i.e., affordable housing.	-HHA Engagement and Advocacy Pillar -Nonprofit Housing Developer Forum	Matt, Kelly, & Jessica, & Board of Directors	July 2023	Kelly and Jessica will begin attending the school board meetings. Jessica is attending advocacy pillar meetings. Matt attends NHD forum.
Develop and implement strategies to enhance community awareness of programs/services and 40 years of service.	-561Media -Jennifer Martinez	Kelly, Layren, Nydia, & Lyndsey	December 2022	AAF 40 <sup>th</sup> Year Celebration. Include Bill P. in this conversation. Need to discuss a timeline on this.
Expand volunteer base and overall experience.		Layren	July 2023	Consider community service programs/students; Confirm need for a volunteer coordinator. Youth Success Coach position includes volunteer coordinator tasks and responsibilities – will keep an eye on this and reevaluate in December 2022.
Increase capacity of data collection.		Lyndsey	July 2023	In process of hiring a data coordinator. – Hired! Plan for expanding data collection capacity.

## Action Plans

### AREA OF FOCUS: Program and Service Excellence

Objective	Partners	Person Responsible	Completion Date	Notes
Strengthen and ensure ongoing client feedback system is in place and make needed changes.		Nydia	July 2023	Client survey developed by program management – culturally sensitive, client based – Need to establish schedule for when each program will distribute survey – e.g. case closure, biannually, etc. Web-based survey through Microsoft Forms – need to get stats

## Action Plans

### AREA OF FOCUS: Talent Management & Culture

Objective	Partners	Person Responsible	Completion Date	Notes
Conduct an assessment to identify development and training needs; Develop organization-wide plan.		Robyn & Arianna	September 2022	Work with Arianna on budget. Need to develop a listing of mandatory trainings. Increase training and development budget to approx. \$38k. Check w/ funders on mandatory training and training schedules. OSHA Safety – ALICE?
Expand utilization of performance management system.	Paylocity	Robyn	Ongoing	Need to formalize ongoing feedback. Use performance journals more.
Design a new employee orientation program and robust onboarding program.		Robyn & Ashley	February 2023	Utilize videos and online capabilities. Continue new hire luncheons
Assess and expand the employee appreciation programs.		Robyn & Ashley	July 2023	Activities and appreciation. Department recognitions/team cohesion.
Establish regular staff meetings, at a minimum on a quarterly basis, to enhance communication and build employee feedback systems.		Robyn, Ashley, & Matt	July 2023	In-person – quarterly, can do Zoom on the off months
Develop plans to more effectively identify, attract, and retain a high-performance workforce.		Robyn, Ashley, Arianna, and Matt	July 2023	Flexible work schedule. Will need to look at budget, technology needs Build a retention plan

## Action Plans

### AREA OF FOCUS: Talent Management & Culture

Objective	Partners	Person Responsible	Completion Date	Notes
Develop and implement a succession plan for critical positions including a training and development component.		Robyn, Matt, & Emily	December 2022	
Design and implement a comprehensive diversity and inclusion program.	Barbara Cheives	Robyn, Emily, & core equity team	December 2022	
Revisit values statements and implement plans to integrate into other systems, i.e. new employee on-boarding and performance management.		Robyn & Ashley	July 2023	Review the updated values that were addressed at the Strategic Planning Retreat.
Implement strategies focused on a safe work environment.		Robyn, Matt, & Arianna	July 2023	ALICE training (or similar), OSHA, Non-violent crisis intervention, CPR, Home visit safety, etc.
Implement Annual Employee Engagement Survey		Robyn	TBD	Bring external data to review with respect to the results – what’s going on in PBC, across the nation, etc. – be able to compare what’s happening here with other organizations nationally

## Action Plans

### AREA OF FOCUS: Talent Management & Culture

Objective	Partners	Person Responsible	Completion Date	Notes
<b>BOARD</b>				
Assess and revise board member identification process to ensure affirmative steps are taken to attract diverse board members.		Governance & Nominating Committee with Penny as the lead	Report on this at August 2022 board meeting	Meet quarterly moving forward – starting in June. Need date to revise the entire process for Nominating and Governance. Will have plan on how the committee will run at the October/November meeting
Review and revise board member roles and responsibilities.		Chris Oberlink	September 9, 2022	Nominating & Governance Committee
Create and adopt a clear vision statement.		Bill, Kirstin, Matt	August 25, 2022	Bring a vision and values discussion to our next staff meeting. Vision statement approved at August board meeting.
Enhance overall board member experience including a robust onboarding program.		Kirstin	October 2022 Board Meeting	Networking, social opportunities, develop a plan on how to do this Establish solid board orientation program – Completed inaugural board orientation on June 24.
Design and conduct annual board self-assessment.			Completed in May 2022	Need to do a full board assessment as well.
Assess feasibility of hiring a board/staff liaison.				

## Action Plans

### AREA OF FOCUS: Talent Management & Culture

Objective	Partners	Person Responsible	Completion Date	Notes
On an annual basis, at the beginning of each fiscal year, chair must submit a plan of their meeting schedules for the year.		Committee chairs	Starting in July 2022	Some have already incorporated this.
Review, revise, and provide comments to bylaws and committee charters	Phil DiComo	Lynda Murphy Tequisha Myles Chris Oberlink John Castronuovo	August 2022 Board Meeting	Review scheduled at August Nominating and Governance Committee meeting.

## Action Plans

### AREA OF FOCUS: Fiscal Strength

Objective	Partners	Person Responsible	Completion Date	Notes
Expand and diversify funding streams including the development of key messaging.		Kelly, Matt, & Layren	July 2023	
Conduct reserve study and identify adequate levels to ensure sustainability and ensure there is awareness of prior utilization/purchase.		Greg & Arianna	Completed in 2021, will need another around 2025	Moving forward with a system that will allow us to do live updates to the reserve analysis. – e-maintenance will assist with this.
Enhance donor relationships by improving ongoing communication utilizing newsletters and other outlets	-561Media -Jennifer Martinez	Kelly & Layren	October 2022	Communications Plan – Need to go out to bid for a consultant/contractor to develop this.
Maximize use of Raiser’s Edge.		Layren & Arianna	July 2023	Improve reconciliation process between Raiser’s Edge and accounting system. Provide training and develop standards for data input. Hired Mary Tost-Dunning at end of July 2022 for Database Coordinator position.
Develop a formal process to assess proposed new programs/initiatives.		Arianna, Emily, & Matt	July 2023	

## Action Plans

### AREA OF FOCUS: Operational Efficiency and Effectiveness

Objective	Partners	Person Responsible	Completion Date	Notes
Develop and implement a comprehensive communication plan to increase and improve internal and external communication – in person/remote, website, speeches, all collateral and social media.	-561Media -Jennifer Martinez	Layren & Kelly	October 2022 – for a draft plan, July 2023 to implement	Communication Plan, streamlining all items for internal use – signatures, fonts, documents, etc. Jodi and Tori will also be involved with this process.
Conduct a review of 100% of policies and procedures; implement needed changes.		Emily, Nydia, Robyn, Jessica, & Lyndsey	July 2023	Need a schedule for this project – Present to the board the schedule of this project at August 2022 board meeting.
Conduct ongoing monitoring of capital assets and make necessary enhancements.		Arianna, Greg, & Robyn	July 2023	Reserve analysis completed in 2021, will need to update by 2025
Conduct an IT study and identify opportunities for an increase in user-friendly systems utilizing technology (i.e., inventory system).	Digital Tsunami	Michele, Robyn, & Arianna	July 2023	
Develop a formal, comprehensive Quality Assurance Program.		Emily, Matt, Lyndsey, & Fabiola	July 2023	



## Key Indicators

- **Budget Plan vs Actual**
- **Donor Activity (Development & Special Events Committee)**
- **Capacity Utilization**
- **Report on Unmet Needs**
- **Staff Satisfaction (Implement an annual employee engagement survey)**
- **Grant Activity**
- **Client Satisfaction**
- **Charity Navigator Ratings**

## The Strategic Plan Review Process

### 2022-2027 Strategic Plan

Upon approval, the plan will be monitored and updates will be provided to the Senior Staff monthly.

**Strategies** *(Check One)*

**Objectives:** \_\_\_\_\_

**Date:** \_\_\_\_\_

Objectives	Action Steps	Results	Red/Yellow/Green
<b>Barriers:</b>			
<b>Plan Adjustments:</b>			
<b>Pending Items with due date:</b>			