



Long-Range Strategic Plan

2018 – 2019 Operational Objectives
April 10, 2018

DRAFT

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Introduction

This document is the result of a series of meetings conducted with the leadership team of Safe Berks between January and April 2018. During these meetings, the participants:

1. analyzed the state of the organization—its strengths and weaknesses—as it exists today;
2. defined the business environment—its opportunities and threats—now and into the future;
3. identified the key issues facing the organization;
4. edited the mission statement and affirmed the vision statement for the organization; and
5. defined the long-range strategies, with supporting strategic actions, to be used by the organization to achieve its vision and fulfill its mission.
6. established the *Critical Measures of Success* that will be used to evaluate the organization's progress as it moves through its strategic plan; and
7. targeted the specific, short-term actions to be taken to implement the long-range strategies and assigned accountability to the appropriate individuals within the organization.

The results are as follows.

Strategic Assessment

Strengths

The strengths of Safe Berks, as identified by its leadership team, fall into five categories:

1. Our mission and the services we deliver to fulfill it
2. Our position within our community
3. The people associated with our organization
4. Our building and related facilities
5. Our current financial status

More specifically,

Our mission and the services we deliver to fulfill it

- We are consistently mission-driven.
- We are visionary in our program design.
- We provide a broad range of services.
- We provide essential services and programs in our community. We do what no other organization in our community does.

Our position within our community

- We are well regarded in the community. Our new brand is beginning to be recognized.

The people associated with our organization

- We are diverse. We reflect our community.
- We have a strong and dedicated board.
- Our staff members believe in our cause and mission.
- Our staff interacts well with their immediate supervisor.
- We have many subject matter experts on staff. We have significant expertise organizationally.

Our building and related facilities

- Our current building is functional (but it's cold in the winter).
- We feel safe in our facility. It is warm and inviting.
- We have, or shortly will have, a number of new technology tools to support the work we do.

Our current financial status

- We currently are financially stable (through multi-year federal grants).
- We have built a solid culture of philanthropy, and we are building a culture of volunteerism.
- We have a solid base of philanthropic support (but it's aging).
- Our financial support is broad-based (and not limited to a few wealthy donors).

Weaknesses

The weaknesses of Safe Berks, as identified by its leadership team, fall into three categories:

1. Our internal communication
2. Internal systems and resources issues
3. Some constraints of our facilities

More specifically,

Our internal communications

- Too many of our staff do not fully understand what each staff member does.
- We fall victim of the assumption too often. We assume everyone knows what everyone else does.
- Our staff rates communication as our most significant weakness.
- Some of our staff members are not disciplined in their email habits.
- There is a level of fear and lack of trust within our organization that we must address.

Internal systems and resource issues

- We do not coordinate services to clients as well as we should, and this causes frustrations.
- We lack clear guidelines for expectations from staff.
- Some of our people report a lack of accountability within our organization (and it is true to some extent).
- We have not incorporated data entry into our work activities.
- Despite our efforts, we lack outcomes measures and we have limited ability to report outcomes as a result.
- We have had high turnover over the past couple of years (27 people left in 2017 alone).
- Our staff has not kept up with our available tech tools.
- The nature of our work is sometimes disruptive to focusing on change work (serving walk-ins vs. performing outcome-data entry).
- Due to resource constraints and lack of focus, we are under-represented to victims of sexual violence.

Some constraints of our facilities

- We are outgrowing our space.
- Our counseling offices are smaller, and this limits the number of people we can see in them (without moving to a larger room).
- We lack storage space and a waiting area for children.

Opportunities

The opportunities facing Safe Berks as it moves forward fall into two categories:

1. Program and service opportunities
2. Internal systems and resource opportunities

More specifically,

Program and service opportunities

- Secure and use a mobile unit to increase our community presence.
- Increase our focus on homelessness as it impacts our mission. (Ninety percent of homeless women are homeless as a result of domestic violence.)
- Improve our interaction with the healthcare system.
- Increase our focus on economic advocacy and related services.
- Provide resources to address child homelessness.
- Increase/enhance our services to child survivors.
- Increase the community’s awareness of what we do.
- Enhance our focus on elder abuse.
- Increase our focus on prevention work.
- Expand our presence within the county (in addition to our current focus on the city).
- Examine the way we manage our sheltering activity.

Internal systems and resource opportunities

- Conduct a comprehensive process to orient everyone as to what everyone else does.
- Codify our work activities so everyone can have access to our diverse work activities.
- Create a staff portal (and discipline its use).
- Address underlying fears within our organization.
- Create an open dialogue on trust and accountability within our organization.
- Increase our volunteer recruitment activities (to capitalize on the Baby Boom generation).
- Create or hire an HR “buffer”/resource.
- Provide management skill training for our directors/supervisors.

Threats

The threats currently facing Safe Berks fall into two basic categories:

1. Those threats primarily within our control
2. Those threats primarily outside of our control

More specifically,

Those threats primarily within our control

- We could lose our funding.
- We could fail to successfully address some of our culture issues (internal).
- We may fail to reduce our turnover.
- We may fail to respond to/address the increased awareness of sexual assault.

Those threats primarily outside of our control

- There could be backlash against domestic and sexual violence claims.
- We could be subjected to negative publicity (deserved or undeserved).

Key Issues

Based on the identification and analysis of the current strengths and weaknesses and potential opportunities and threats as detailed previously, we have concluded that the following key issues must be addressed in Safe Berks' long-range plan.

Program and service issues

- How do we create the “safest Berks” in the world?
- Should we remain in the housing business, and if no, how would we handle it? How should we approach “sheltering” in the future?
- What is our community's need, and how will we respond to it?

Philanthropy issues

- How can we further enhance our cultures of philanthropy and volunteerism?
- How can we capture more, larger financial donors?
- Should we focus on major gifts, and if yes, how?

Internal/operational issues

- How do we build trust within our organization?
- How can we raise the perceived value of our mission above individual staff members' personal issues?
- How can we positively impact our culture to enhance our staff's work experience?
- How can we help all of our staff fully understand all that we do?
- How can we better communicate:
 - data?
 - policies/mission/impact?
- How can we improve inter-department communication?
- How can we improve cross-functionality within our agency?
- How can we advance our culture to address the issues raised by our staff in our survey?
- How would a full-time HR person impact our organization?
- How can we better monitor and gather our outcomes?
- How can we optimize our technology tools?
- How can we optimize our current space?

Mission Statement

Safe Berks provides safe haven and support to victims of domestic violence and sexual assault. Our advocacy and education programs increase awareness of oppression and promote the prevention of domestic violence and sexual assault.

Vision Statement

In 2018, as the leadership of Safe Berks begins its planning activities, it has created the following vision of the outcomes of its efforts.

Berks County is free from domestic violence and sexual assault.

Our Values

Safety – We believe that the physical, emotional, and psychological safety of all individuals is a basic human right.

Respect – We value the dignity of all individuals, appreciating our differences and cultural and ethnic diversity.

Empowerment – We support our clients in making their own life decisions, and our team to take initiative and make their best contribution to fulfilling our mission.

Justice – We strive to create a community where DV and SA are no longer tolerated, and where the principles of fairness and equality, including equal access to resources, are extended to all individuals.

Long-Range Strategies

Based on the strategic assessment as detailed previously, Safe Berks has identified three overriding strategies, with supporting strategic actions, it will implement in its efforts to fulfill its mission, achieve its vision, and address its key issues.

Safe Berks will build an organizational culture anchored in trust and accountability.

Strategic Actions

- Define our desired culture. What does trust and accountability mean at Safe Berks?
- Fully deploy our intranet throughout our organization and create full accountability to it.
- Create an organization-wide core competency in performance evaluation, both formal and informal.
- Develop and launch Safe Berks U (SBU) as a monthly education session for all staff. (The purpose of SBU will be to teach our fellow staff members how Safe Berks works.)

Safe Berks will launch and support a comprehensive development effort that includes annual, major, and deferred giving.*Strategic Actions*

- Develop the capability to show the outcomes of our work (both statistical and anecdotal).
- Develop our board into a fundraising resource.
- Reinvent our annual campaigns.
- Refocus our existing resources to support our development activities.
- Structure our current planned giving activities into a planned giving program.
- Structure our major giving activities to provide financial support for our new program initiatives.

Safe Berks will assess its current service model and develop it to create a genuinely safe Berks County.*Strategic Actions*

- Conduct a needs assessment with our clients.
- Conduct a SWOT analysis on our programs and services and use this assessment to guide our program development activities.
- Create a fishbone diagram describing the progression of services we will provide to our community.
- Develop a solution to the financial insecurity that many of our clients face, with a special focus on childcare and transportation solutions.
- Bring our services out into the larger community (using the clubhouse model). Focus program resources in other areas of the city and the county.
- Develop a communication process to educate the public at large about what we do and what we do not do.
- Train law enforcement to tell individuals, in domestic violence situations, to call Safe Berks for assistance.

Critical Measures of Success

In order to evaluate the effectiveness of and progress toward its long-range strategic plan, Safe Berks will measure and track the following POTENTIAL *Critical Measures of Success*. The results will be reviewed by the leadership team on a regular basis.

Strategy I:

- Percent of turnover
 - Voluntary
 - Involuntary
- Employee Net Promoter Score

Strategy II:

- Dollars of annual gifts
- Number of annual givers
- Dollars of major gifts
- Number of major givers
- Number of known planned gifts
- Dollar amount of planned gifts received
- Total dollars in Safe Berks' endowment

Strategy III:

- Number of individuals served
- Number of families served
- Number of individuals who report achieving their intended outcomes
- Community *Domestic Safety Index*

2018 - 2019 Operational Objectives

During the first year (2018 – 2019) of this long-range strategic plan, Safe Berks will implement the following operational objectives:

- Fully deploy our intranet throughout our organization and create full accountability to it. *Jasmine*
- Define our desired culture. What does trust and accountability mean at Safe Berks? *Mary Kay*
Create an organization-wide core competency in performance evaluation, both formal and informal.
- Develop the capability to show the outcomes of our work (both statistical and anecdotal).
Christine
- Reinvent our annual campaigns. *Mary Kay*
- Conduct a needs assessment with our clients. *Christine*
Conduct a SWOT analysis on our programs and services and use this assessment to guide our program development activities.
Create a fishbone diagram describing the progression of services we will provide to our community.
- Bring our services out into the larger community (using the clubhouse model). Focus program resources in other areas of the city and the county. *Christine*

Appendix

2018 – 2019 Operational Objectives
with action steps

2018 – 2019 Timeline

Critical Measures of Success Worksheet

Objective/action steps	Accountable person	Target date
1. Fully deploy our intranet throughout our organization and create full accountability to it.	<i>Jasmine</i>	
1.1 Finalize the technology considerations for our intranet and launch it.	Jasmine	7/1/18
1.2 Create/hold a contest to name our intranet.	Jasmine	4/18 – 5/18
1.3 Define the information that will be placed on the intranet.	Jasmine	4/18 – 5/18
1.4 Create content that will be changed/updated daily.	Jasmine	4/18 – 5/18
1.5 Define the information each department will send to Jan each day for posting on the intranet.	Jasmine	4/18 – 6/18
1.6 Send an email reminder to each staff member for the first 30-60 days. Conduct a trivia contest (or other fun activity) to reinforce the email reminders.	Jasmine	7/1/18 – 8/31/18
1.7 Create a schedule of supervisory oversight to ensure early compliance. Identify staff members who are not using the intranet and work with them until they become frequent users.	Jasmine	7/1/18 – 8/31/18
1.8 Create a “breaking news” alert service to employees for emergency situations.	Jasmine	7/1/18

Objective/action steps	Accountable person	Target date
2. Define our desired culture. What does trust and accountability mean at Safe Berks? Create an organization-wide core competency in performance evaluation, both formal and informal.	Mary Kay	
2.1 Digest and discuss <i>The Five Dysfunctions of a Team</i> as a leadership team.	Mary Kay	5/18 – 6/18
2.2 Conduct a facilitated process with our leadership team to define our understanding of trust and accountability. <i>What Result do we commit to?</i>	Mary Kay	5/18 – 6/18
2.3 As part of our facilitated process, define the current status of trust and accountability in our organization.	Mary Kay	5/18 – 6/18
2.4 Develop a statement of what we believe, as a leadership team, we need to do to deploy our cultural change. <i>What will we be Accountable to?</i>	Mary Kay	5/18 – 6/18
2.5 Determine how we will deploy and reinforce our desired culture throughout our agency. Develop a timeline for implementation. <i>What is our performance Commitment?</i>	Mary Kay	7/18 – 6/19
2.6 Identify a curriculum (and related system) on performance evaluation and train our leadership in it.	Mary Kay	7/18 – 12/18
2.7 Determine how each member of the leadership will use the newly-learned performance evaluation skills and system to improve trust and accountability.	Mary Kay	7/18 – 6/19
2.8 Create a structured system of inter-department dialogs (perhaps led by our new head of counseling). Ask each department to identify areas of disconnect with other departments.	Mary Kay	7/18 – 6/19
2.9 Create a culture score card and use it every six months to evaluate our progress.	Mary Kay	12/18
2.10 Create a training program that informs each person in our organization how each department works and their related policies and procedures.	Mary Kay	7/18 – 6/19
2.11 Change our performance evaluation for our leaders to put a unique focus on our progress building trust and accountability.	Mary Kay	6/18
2.12 Create a regularly scheduled dialogue with our senior leaders to evaluate our collective progress. <i>How will we remove Fear of Conflict?</i>	Mary Kay	7/18 – 6/19
2.13 Determine how we will further deploy our performance evaluation competency throughout our agency.	Mary Kay	6/19
2.14 Identify staff members who seem unwilling to share our values of trust and accountability and determine their next steps.	Mary Kay	7/18 – 6/19

Objective/action steps	Accountable person	Target date
3. Develop the capability to show the outcomes of our work (both statistical and anecdotal).	<i>Christine</i>	
3.1 Define the desired outcomes and outputs we are working towards. Create a hierarchy of outcomes/outputs.	Christine	4/18 – 6/18
3.2 Develop a system to track metrics and report results monthly.	Christine	7/18 – 6/19
3.3 Develop and implement a system to gather anecdotal results.	Christine	7/18 – 6/19
3.4 Create and produce a quarterly report detailing our outcomes. Share with our board/stakeholders/funders.	Christine	7/18 – 6/19

Objective/action steps	Accountable person	Target date
4. Reinvent our annual campaigns.	<i>Mary Kay</i>	
4.1 Change the timing of our annual campaign to Mother's Day. Create a month-long annual campaign in conjunction with our Father's Day Walk.	Mary Kay	5/19
4.2 Continue to promote our walk around Father's Day, but add a creative element to it. Evaluate the success of our "new and improved" Father's Day walk.	Mary Kay	6/18, 6/19
4.3 Re-construct our annual campaign materials to support our mission, outcomes, and the community's need.	Mary Kay	7/18 – 4/19
4.4 Form two taskforces to develop differentiators for each of fundraisers (safety net, stand-up guy).	Mary Kay	7/18 – 4/19
4.5 Create a "Go Fund Me" type of campaign with a challenge attached to it. (Conduct it around Mother's Day.)	Mary Kay	1/19 – 4/19

Objective/action steps	Accountable person	Target date
5. Conduct a needs assessment with our clients. Conduct a SWOT analysis on our programs and services and use this assessment to guide our program development activities. Create a fishbone diagram describing the progression of services we will provide to our community.	<i>Christine</i>	
5.1 Determine the best way to survey our clients in order to better understand their needs (online survey vs. telephone survey vs. focus groups vs. individual interviews, or some appropriate combination of this mix).	Christine	4/18 – 6/18
5.2 Conduct the survey(s) that will serve us best with an effective sampling of clients.	Christine	4/18 – 6/18
5.3 Compile the survey results into a functional report and share with our leadership team/board.	Christine	4/18 – 6/18
5.4 Using the client needs report, meet with our leaders and staff and evaluate our current programs against the needs as identified in our needs assessment report. Identify our current programs that address our clients' needs and those that don't. Identify our clients' needs for which we currently have no service or program and those services or programs that fit our mission and are most needed in the community.	Christine	7/18 – 10/18
5.5 Create a (fishbone) diagram that captures our current services and identify those we intend to initiate. Prioritize the services and programs we will introduce into a Phase 1, Phase 2, and Phase 3 ranking.	Christine	7/18 – 10/18
5.6 Review the results of this objective with our staff and board for input and support.	Christine	7/18 – 10/18
5.7 Develop a specific plan and timeline for implementing those services most needed, but not currently available, to our clients.	Christine	9/18 – 7/19
5.8 Secure the funding necessary to launch our new programs.	Christine	9/18 – 7/19
5.9 Launch programs according to the plan as identified in action step 5.7.	Christine	9/18 – 7/19
5.10 Develop a rigorous process to evaluate the effectiveness of our new programs and implement that process. Incorporate these measures into a <i>Community Domestic Safety Index</i> .	Christine	5/19 – 6/19
5.11 Incorporate the outcomes delivered by our new programs and services into our (quarterly) outcomes monitoring report.	Christine	5/19 – 6/19

Objective/action steps	Accountable person	Target date
6. Bring our services out into the larger community (using the clubhouse model). Focus program resources in other areas of the city and the county.	<i>Christine</i>	
6.1 Evaluate the results of our survivor workshop and determine our next steps.	Christine	2019 and Beyond
6.2 Conduct our survivor workshop as part of Hope Springs Clubhouse in the city.	Christine	2019 and Beyond
6.3 Fully pilot our workplace program in-house and determine if and how we can take it out into the community.	Christine	2019 and Beyond

Safe Berks 2018-19 Strategic Plan Timeline

[illegible]

Safe Berks
2018-19 Strategic Plan Timeline

Obj./ Action	Summary of Action	Acctbl. Person	Apr '18	May '18	Jun '18	Jul '18	Aug '18	Sep '18	Oct '18	Nov '18	Dec '18	Jan '19	Feb '19	Mar '19	Apr '19	May '19	Jun '19	Jul '19	Continue 2019 and Beyond
4	Reinvent our annual campaigns.	Mary Kay																	
4.1	Change the timing of our annual campaign to Mother's Day. Create a month-long annual campaign in conjunction with our Father's Day Walk.	Mary Kay														●			
4.2	Continue to promote our walk around Father's Day, but add a creative element to it. Evaluate the success of our "new and improved" Father's Day walk.	Mary Kay			●												●		
4.3	Re-construct our annual campaign materials to support our mission, outcomes, and the community's need.	Mary Kay				●	●	●	●	●	●	●	●	●	●				
4.4	Form two taskforces to develop differentiators for each of fundraisers (safety net, stand-up guy).	Mary Kay				●	●	●	●	●	●	●	●	●	●				
4.5	Create a "Go Fund Me" type of campaign with a challenge attached to it. (Conduct it around Mother's Day.)	Mary Kay										●	●	●	●				
5	Conduct a needs assessment with our clients. Conduct a SWOT analysis on our programs and services and use this assessment to guide our program development activities. Create a fishbone diagram describing the progression of services we will provide to our community.	Christine																	
5.1	Determine the best way to survey our clients in order to better understand their needs (online survey vs. telephone survey vs. focus groups vs. individual interviews, or some appropriate combination of this mix).	Christine	●	●	●														
5.2	Conduct the survey(s) that will serve us best with an effective sampling of clients.	Christine	●	●	●														
5.3	Compile the survey results into a functional report and share with our leadership team/board.	Christine	●	●	●														
5.4	Using the client needs report, meet with our leaders and staff and evaluate our current programs against the needs as identified in our needs assessment report. Identify our current programs that address our clients' needs and those that don't. Identify our clients' needs for which we currently have no service or program and those services or programs that fit our mission and are most needed in the community.	Christine				●	●	●	●										
5.5	Create a (fishbone) diagram that captures our current services and identify those we intend to initiate. Prioritize the services and programs we will introduce into a Phase 1, Phase 2, and Phase 3 ranking.	Christine				●	●	●	●										
5.6	Review the results of this objective with our staff and board for input and support.	Christine				●	●	●	●										
5.7	Develop a specific plan and timeline for implementing those services most needed, but not currently available, to our clients.	Christine						●	●	●	●	●	●	●	●	●	●	●	
5.8	Secure the funding necessary to launch our new programs.	Christine						●	●	●	●	●	●	●	●	●	●	●	
5.9	Launch programs according to the plan as identified in action step 5.7.	Christine						●	●	●	●	●	●	●	●	●	●	●	
5.10	Develop a rigorous process to evaluate the effectiveness of our new programs and implement that process. Incorporate these measures into a Community Domestic Safety Index.	Christine														●	●		
5.11	Incorporate the outcomes delivered by our new programs and services into our (quarterly) outcomes monitoring report.	Christine														●	●		
6	Bring our services out into the larger community (using the clubhouse model). Focus program resources in other areas of the city and the county.	Christine																	
6.1	Evaluate the results of our survivor workshop and determine our next steps.	Christine										●	●	●	●	●	●	●	●
6.2	Conduct our survivor workshop as part of Hope Springs Clubhouse in the city.	Christine										●	●	●	●	●	●	●	●
6.3	Fully pilot our workplace program in-house and determine if and how we can take it out into the community.	Christine										●	●	●	●	●	●	●	●

Safe Berks 2018-19 Critical Measures of Success

[illegible]