

# CSA Strategic Planning: Tools to Help Leaders Lead



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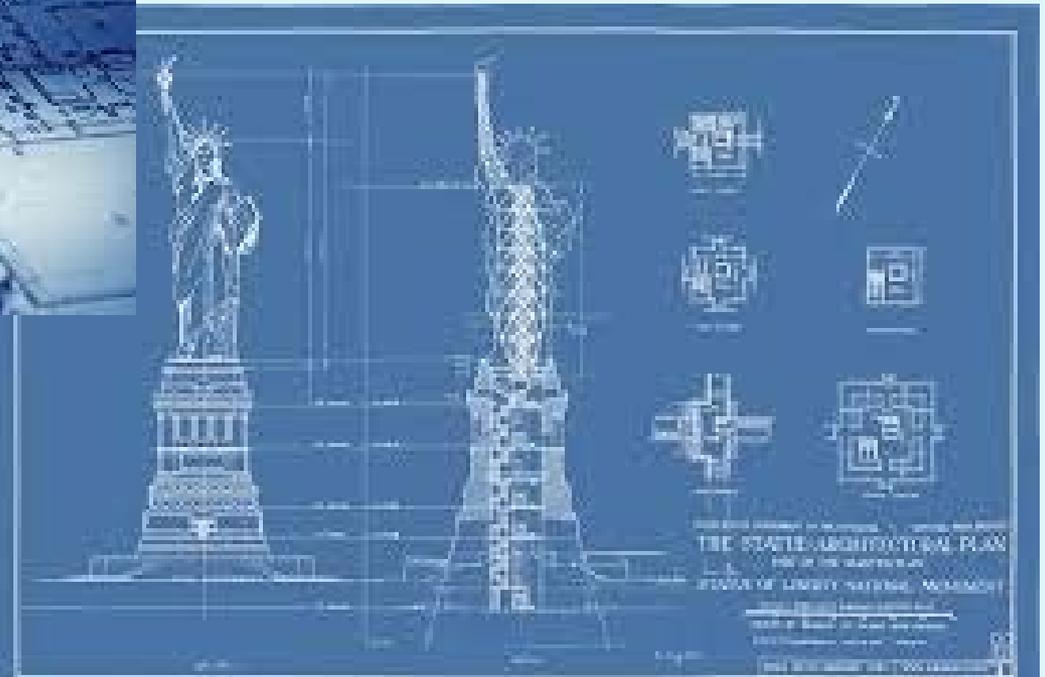
**APRIL 2016  
OCS CONFERENCE**

# Learning Objectives



- Participants will explore the strategic planning (SP) process from development to re-evaluation through various locality examples of strategic plans.
- Participants will be provided tools for SP development and assessment to take back to their communities.
- Participants will gain knowledge and skills in developing; assessing and implementing their strategic plan to best meet their community's needs.

# What is your community's blueprint?



# Importance of Being Strategic



- Clear mindset of goals and objectives
- Playing off the same sheet of music- but with different instruments!
- Build upon strengths, fill in weaknesses





- Establish plans (vision, mission, and goals)
- Understand and use resources available
- Investing time in the process
- Define outcomes



# System of Care



**“ A first step in being strategic is to engage in a process to understand one another’s values, lay a common foundation of principles, and develop a shared vision for the system of care.”**

- Shelia Pires, Building Systems of Care: A Primer/2002

# Strategic Steps



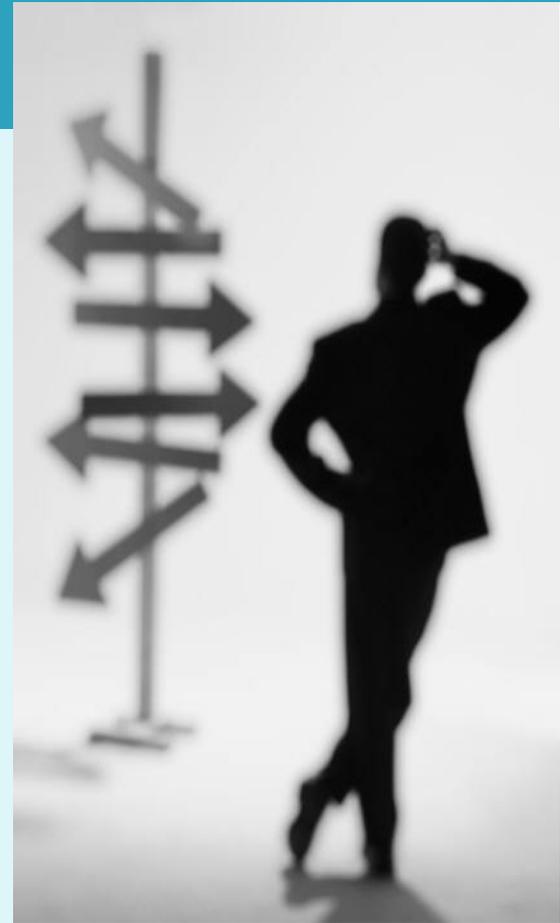
- 1) **Establish Values and Philosophy, Vision/Mission**
- 2) **Assess Needs/Strengths**
- 3) **Establish Plan (Goals and Objectives)**
- 4) **Evaluate and re-evaluate**

# Step One: Shared Values and Philosophy



*“If you don’t know  
where you are going,  
how are you gonna’  
know when you get  
there?”*

Yogi Berra



# Vision vs. Mission Statement



- **Vision (the Dream)**
  - Short statement describing clear and inspirational long term change, as a result of the work done. Statement should be the compass to lead in the direction for quality results.
  
- **Mission (the what & why)**
  - Short, one sentence statement describing the reason and importance of the program to use when making decisions about priorities and actions.

# Vision Statements



- To partner with families and all CSA stakeholders to implement a system of care that drives community practices to promote healthy, productive families within our community.
- CSA will strive to be a leader in the community in improving outcomes for children and their families by providing effective and innovative systems of care.
- The Department of Community and Human Services envisions a community in which residents enjoys a sense of well being and self sufficiency.

# Vision Statement



- What is your community's long term dream?
- Based on shared values and principles
- Inspiring
- Easy to understand by broad population
- Short enough to be on a T-Shirt.



# Common Themes



- Partnership
- Collaboration
- Well-being
- System of Care
- Healthy families and children

# Mission Statements



- To promote a comprehensive system of community-based care that strengthens families through facilitating collaborative efforts.
- The CPMT shall pursue and encourage collaborative activities that seek to insure the provision of child-centered, family-focused, community-based services.
- To comprehensively and seamlessly serve eligible children and families regardless of how or where they enter the system.

# Mission Statement



- One to two sentences
- Rooted in guiding principles and beliefs
- Action oriented
- More specific on intended outcomes
- Broad and inclusive in order not to exclude others

# Common Themes



- To promote
- To build
- Collectively
- Comprehensively
- Seamlessly
- Child-centered, family- focused, community based
- Quality services
- Accessibility

# Tools?



# Step Two: Assess Needs/Strengths



- **Community Inventory/SWOT Analysis**
- **Community mapping**
- **Service gaps assessment**
- **CPMT/FAPT retreats**
- **Surveys (family, youth, providers, staff)**



- **Community Inventory/SWOT**
  - CPMT/FAPT members input on key principles of SOC
  - Identifies strengths and weaknesses
  - Establishes priorities, goals, action & training plans





- **Community Mapping**

- Visual presentation
- Community relationships, assets, and gaps





- **Service Gap assessment**
  - CPMT agencies' feedback- all levels
  - Local data/outcomes
  
- **CPMT/FAPT member retreats**
  - Invest the time to collaborate
  - Re-energize the mission, vision, and guiding philosophy
  - Share data/outcomes
    - ✦ Family/youth surveys
    - ✦ Service outcomes



# Step Three: Plan



- **Establish Goals and Objectives**
  - Measurable indicators
  - Time frames
  - Responsible party



# Examples



- **Clarify and operationalize the roles and responsibilities of the CPMT.**
  - Create charter for CPMT
  - Include annual retreat in CPMT charter
  - Confirm core values
  - Develop expectations of CPMT roles
  - Review and updated the CPMT Program Committee charter reporting requirement and coordination with CPMT
- **By September CPMT meeting**
- **Responsible party: CPMT work group**

# Examples etc.



- **Develop a CSA Family Engagement committee**
  - By February CPMT meeting
  - Responsible Party: CSA Coordinator, CPMT member, FAPT member, parent representative
  
- **CSA will have an operational System of Care incorporating changes such as Medicaid managed care and ICC.**
  - Develop and provide orientation for start up
  - Identify stakeholders in local SOC
  - Provide training on Medicaid changes
  - Define common elements among agencies
  - Develop a sustainability plan
    - ✦ By July 1, 2014
    - ✦ Responsible party: Director of MHSADS

# Common Goals



- **Family Engagement**
- **Community Collaboration**
- **Data informed**
- **Quality/Effective Services**

# Barrier Busters



- Cross training/job shadowing
- Share information
- Give families/youth voice
- Establish communication channels
- Promote and practice flexibility in practice
- Address myths/assumptions
- Establish common outcome measures
- Keep values and mission mindful



# Family Engagement



- **Establish philosophy and practice expectations**
  - Family friendly meetings
  - Easy to understand language at meetings/Interpreters
  - Families informed and prepared for meetings
  - FAPT parent representative role
  - Publications/communications
- **Training**
  - Family engagement and sensitivity
  - Cultural sensitivity



# Community Collaboration



- **Establish shared vision and philosophy**
  - Review agency mandates
  - FAPT/CPMT retreats
  - Establish guiding principles
- **Establish efforts in communication between agencies**
  - Job shadowing
  - Cross agency training



# Community Collaboration cont.



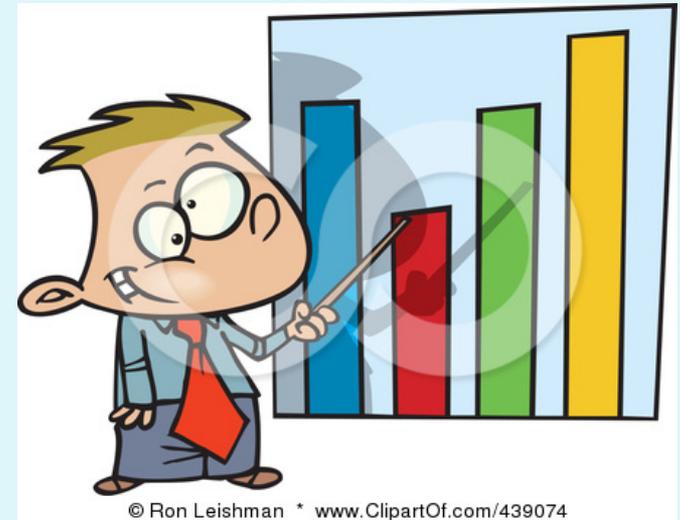
- **Increase role understanding among community agencies**
  - Inter-department trainings
  - Shared funding resources
  - Celebrate shared successes
  - Case management
  
- **Establish expectations and accountability measures**
  - CSA eligibility and compliance
  - Establish roles
  - Check lists
  - Risk management reviews



# Data Informed



- **Establish outcome indicators**
  - CPMT Data reports
  - CANS
  - LOS
  - End of year reports
  - Benchmarking
- **Cost goals**
  - Budget neutral
  - Local resources (schools, general funds)
- **Types of services**
  - Community based/parent support
  - Culturally supportive
  - Foster care prevention services
  - Non-mandated services
  - Child/program/service specific



# Data Informed Examples



- **Reduce number of residential placements by 10%**
  - Increase access to CBS
  - Increase CBS service array
  - Earlier access to services
  
- **Increase discharge to home from RTF by 15%**
  - Increase access to CBS for families
  - Increase utilization of ICC services
  - Provide case managers training on discharge planning

# Quality and Effective Services



- **Develop and/or identify available natural resources**
  - Community collaboration through SOC teams
  - Build on private provider partnerships
  - Connect with community resources
  
- **Increase specific service needs- cultural, trauma informed care, evidence based-practices, etc.**
  - Identify and meet w/ providers that are experts in field
  - Outreach to regional partners



- **Establish clear expectations for service outcomes**
  - Define and clarify roles and expectations in contracts
  - Define and communicate desired outcomes
  - Share outcomes with community partners
  
- **Utilize feedback surveys for quality improvement**
  - Youth
  - Family
  - FAPT/CPMT members
  
- **Train case managers on services**

# Sample



<b>GOAL</b>	<b>Objective</b>	<b>Target date</b>	<b>Responsible party</b>	<b>Status</b>
Increase Spanish speaking providers for community based services.	<ol style="list-style-type: none"><li>1) Identify providers to meet &amp; address identified needs to build capacity.</li><li>2) CPMT members submit topics for discussion.</li></ol>	December 2016	CSA Coord. and DSS Asst. Director	2/2016- providers identified & meeting dates set
Increase knowledge of CSA process across CPMT agencies and families.	<ol style="list-style-type: none"><li>1) Develop and disseminate CSA information guide.</li><li>2) Establish annual training for case managers.</li></ol>	July 2016	FAPT members, CSA Coord. CPMT agency supervisors.	2/2016- CPMT agencies identified responsible supervisors

# Step Four +: Evaluate



- CPMT set regular evaluation/review process
  - Monthly CPMT agenda items
  - Annual meetings/retreats



# RE-Evaluate



- Use data to inform practice
  - Establish goals
    - ✦ 200 day LOS for RTF
    - ✦ 80% return home rate
    - ✦ 20% increase in CBS
  - Benchmark w/other localities
- Identify barriers/threats
  - Examine how to overcome them
  - Determine opportunities



# Appreciation



- **City of Alexandria**
- **Albemarle County**
- **Henrico County**
- **Loudon County**
- **Powhatan County**
- **Prince William County**
- **Roanoke County**
- **Rockingham County**

# Questions?



- Do you feel better informed for strategic planning process?

