

**AGENDA**  
**State and Local Advisory Team (SLAT)**  
**May 1, 2025**  
**9:30 a.m. – 12:00 p.m.**  
**1604 Santa Rosa Road**  
**Richmond, VA 23229**  
**Richmond/Henrico Rooms**

Note: This is an in-person meeting  
To accommodate interested members of the public, the meeting will be viewable at:  
<https://meet.goto.com/994172701>  
or via phone. 872-240-3212  
Meeting Passcode: 994-172-701

- **Call to Order / Welcome / Opening Remarks** Mills Jones
  - **Action Item:** Approval of Remote Participation per SEC Policy 2.1.3 and §2.2-3708, COV (if necessary)
  - **Action Item:** Approve Agenda and Certification of Quorum
- **Member Introductions**
- **Public Comment** (In-person and remote-5 minute limit per speaker)
- **Approval of Minutes – February 6, 2025 SLAT meeting**
  - **Action Item:** Approval of minutes from last SLAT meeting
- **Member Workgroup Updates**
- **Old Business**
  - Policy Update Kristi Schabo
  - Model Strategic Plan Template Workgroup Amy Swift
- **SEC Report**
  - March Meeting Update Mills Jones
- **OCS Update** Kristi Schabo
- **New Business**
  - Model Family/Youth Input Survey Kristi Schabo
  - Legislative/Budget Update Kristi Schabo
  - Sponsored Residential Discussion Amy Swift

- **SLAT Member Reports**

- State Representatives

○ VDH	Kyndra Jackson
○ DJJ	Linda McWilliams
○ DSS	Em Parente
○ DBHDS	Kari Savage
○ DMAS	Laura Reed
○ DOE	Sabrina Gross
○ DARS	Patricia Hodge

- Local Representatives

○ LDSS	Amy Swift
○ CSA Coordinator	Mills Jones
○ CSB	Sandy Bryant
○ CSU	William Stanley
○ J&DR Court	Honorable Marilyn Goss
○ Parent	Cristy Corbin
○ Private Provider	Shannon Updike
○ Public Schools	Kristina Williams-Pugh
○ Local Government	Lesley Abashian

- **Closing Remarks / Adjourn**

Mills Jones

- **Action Item:** Adjourn meeting

**Next SEC Meeting – Thursday, June 12, 2025**

**Next SLAT Meeting – Thursday, August 7, 2025**

**2025 SLAT Meetings**

November 6

**STATE AND LOCAL ADVISORY TEAM (SLAT)  
CHILDREN'S SERVICES ACT  
Richmond/Henrico Rooms  
1604 Santa Rosa Road  
Richmond, VA 23229**

**MINUTES  
February 6, 2025**

**Members Present:** Mills Jones, SLAT Chair; Sabrina Gross, DOE; Shannon Updike, VCOPPA; Laura Reed, DMAS; Grace Hughes, VDH; Amy Swift, CPMT – DSS Representative (*virtually*); William Stanley, CPMT – CSU Representative (*virtually*); Em Parente, VDSS (*virtually*); Patti Hodge, DARS; The Honorable Marilyn Goss, Juvenile and Domestic Relations District Court Representative; Kari Savage, DBHDS; Cristy Corbin, Parent Representative; Linda McWilliams, DJJ (*virtually*); Kristina Williams-Pugh, CPMT – School Representative

**Members Absent:** Lesley Abashian, CPMT – Local Government Representative; Sandy Bryant, CPMT – CSB Representative

**CSA Staff Members Present:** Mary Bell, Rachel Friedman, Marsha Mucha, Scott Reiner, Kristi Schabo

**Welcome/Opening**

Mills Jones called the meeting to order at 9:30 a.m. and welcomed everyone. Introductions were made. Several members asked to attend the meeting virtually: Linda McWilliams, Em Parente, William Stanley and Amy Swift. Their virtual attendance was approved on a motion by Shannon Updike, seconded by Laura Reed and carried.

**Public Comment Period**

There were no public comments.

**Approval of Minutes**

The November 7, 2024, meeting minutes were approved on a motion by Marilyn Goss, seconded by Shannon Updike and carried.

**Workgroup Updates**

- DARS and VDOE representatives serve on an Interagency Transition Team. Current initiatives involve youth and family engagement and review of resources available from other Team member agencies.
- The State Implementation Team for Evidence-Based Practices is currently working to assist with local implementation of evidence-based practices based on the HFW model to enhance access and support to youth and families.
- Health and Human Resource agencies in the Commonwealth are working on website accessibility for those with disabilities and limited language comprehension.

**Old Business**

- SLAT Bylaws – Ms. Schabo highlighted proposed revisions to the SLAT bylaws. The proposed revisions were first discussed at SLAT's November 7, 2024 meeting. Major revisions include:

- Article VI – Election of Officers – The term of office changed from one to two years, with no individual serving more than two consecutive terms in the same office.
- Article VII – Meetings—Provides for members or designated alternates to virtually participate in meetings following the parameters of SEC Policy 2.1.3.

The proposed revised SLAT bylaws were approved on a motion by Patti Hodge, seconded by Cristy Corbin and carried. The revised SLAT bylaws will be submitted for final approval by the SEC at their March 13, 2025 meeting.

- Policy Update – Ms. Schabo reported that the following policies are currently under review:
  - Policy 2.1.3 Individual Participation in State Executive Council Meeting by Electronic Means (first 45-day public comment period ended January 31, 2025 – no comments received.) This policy provides guidance to the SEC regarding the parameters of electronic participation in SEC meetings or any committees established by the SEC. The proposed changes bring the current policy into compliance with the guidelines set forth in §2.2-3708.2 and §2.2-3708.3, as amended, effective July 1, 2024.
  - Policy 4.4.2 Medicaid Funded Services (second 60-day public comment period ending February 17, 2025 – no comments received to date.) This policy is a verbatim restatement of language that has been included in the Appropriation Act since 2011.
  - Policy 4.5.3 Administrative Funds (second 60-day public comment period ending February 17, 2025 – no comments received to date.) The proposed changes align the existing policy with a new administrative funding process utilized by OCS that is more streamlined and accessible to localities.
  - Policy 4.3 “Carve-out” of Allocation for Development of New/Expanded Services (Adopted April 30, 2013) – This policy was repealed by the SEC at its December 12, 2024 meeting. The policy had never been used, and funds had never been appropriated for its intended purpose.
- SEC Strategic Plan – Ms. Schabo reported that SLAT members Em Parente and Amy Swift are serving on the Model Strategic Planning Template Workgroup developing a template and guidance document that will be available for localities to use in their strategic planning processes. A notification will be sent out once the documents are available and they will also be posted on the CSA website.

## **SEC Report**

Mr. Jones reported on the following items from the December 12, 2024 SEC meeting:

- The SEC will be asked to review/approve a model Family Survey form and best practice guidelines. OCS is developing the form and guidelines that will be shared with the SLAT and the SEC..
- CSA FY2024 was successfully closed with no pending matters to resolve. Policy 4.5.2 Time Frames Regarding CSA Pool Fund Reimbursements was amended by the SEC in 2024.
- A statutory change was introduced in the 2025 General Assembly Session to include CHINS as an eligible population for CSA. This change was also recommended by the Commission on Youth (COY) Study of the Use and Impact of Relief of Custody on Care and Support of Youth. The legislation would have no fiscal impact.

## **OCS Updates**

Ms. Schabo provided updates in the following areas:

- HB2282 and SB801 were introduced in the 2025 General Assembly Session to include CHINS-eligible youth as an eligible, sum-sufficient population for CSA. HB2282 failed to report from Committee. SB801 is still active.

- A budget proposal has been recommended for CSA funding that would provide one pool of sum sufficient funding available to reimburse localities, thereby eliminating allocations and the necessity for a supplemental funding process.
- Total CSA expenditures for FY2024 were \$550M, up approximately \$68M from the previous year.
- OCS has recently released several new tools, including an updated CSA User Guide, updated CSA and Special Education guidance, and new CANVaS reports, which are available on the CSA dashboard.
- OCS received \$100,000 from the \$2M granted to VDSS to increase website accessibility. OCS is working with a contractor for a complete overhaul of the CSA website, which should be completed by July 2025
- SLAT members were provided with copies of five OCS reports submitted to the General Assembly.
- Updated guidance documents are available on the CSA website: Policy Manual, CSA User Guide and Special Education Guidance. As policies and guidance are being updated periodically, please refer to the latest policy/documents on the CSA website.
- A New CSA Coordinator Academy will be held in Richmond on May 6 – 8, 2025.
- The Annual CSA Conference will be held in Roanoke October 15-16, 2025 with a pre-conference session to be held on October 14, 2025. SEC member Melvin Roy will be the keynote speaker.

### **New Business**

Kristi Schabo reported that one of the two-year metrics in the SEC's Strategic Plan is developing a process to acknowledge areas of local excellence and best practices. SLAT members received a document on the process containing eligibility, criteria, and how to nominate a local CSA program for the recognition. The first award will be presented at the March 13, 2025, SEC meeting.

### **Member Updates**

Members reported for their agencies and organizations on the current legislative session, projects, new programs, and other ongoing activities. Members continue to work within their agencies and advocate through their associations for improvements to services and service delivery for Virginia's children, youth, and families.

- Mr. Jones noted that CSA needed more information about and/or approved services for sponsored residential care for children in foster care. He asked representatives from DBHDS to include this topic as part of their presentation at the February 21, 2025 OCS office hours.
- DJJ reported that one of the recommendations from the COY study on The Use and Impact of Relief of Custody on Care and Support on Youth was that DJJ develop best practices to distribute to CSUs when a parent comes in to intake desiring to petition for relief of custody. The best practices will be designed to inform parents of services available in their community.
- DBHDS will be expanding services in existing Federally Qualified Health Centers (FQHC) to include mental health services. Recovery high schools are also planned for the Augusta-Waynesboro-Staunton area, Loudoun and Virginia Beach.

### **Adjournment**

There being no other business, the meeting adjourned at 11:55 a.m. on a motion by Laura Reed, seconded by Shannon Updike and carried. The next meeting is scheduled for May 1, 2025.



# CSA Strategic Planning

Tools for Local Community Planning and Management Teams

May 2025

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# Introduction

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Section [2.2-5206.4](#) of *the Code of Virginia* requires Community Policy and Management Teams (CPMT) to “Coordinate long-range, community-wide planning that ensures the development of resources and services needed by children and families in its community including consultation on the development of a community-based system of services established under [§16.1-309.3](#).” Additionally, the Virginia Appropriation Act ([Chapter 2, Item 268.B.3](#)) requires that “Each locality receiving funds for activities under the Children’s Services Act (CSA) shall have a utilization management process...” As a result, local CPMTs are required to engage in a long-range strategic planning process that gathers input from stakeholders and formulates a plan to achieve the community’s vision for the Children’s Services Act (CSA) program. With this guidance and supporting documents, the State Executive Council for Children’s Services aims to support localities as they work to meet these statutory requirements.

## What is Strategic Planning

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In short, strategic planning defines what we do (our mission), what we strive to be (our vision), and our aspirations (our goals). Engaging in the strategic planning process helps a CPMT clearly define long-term goals and map how short-term strategies and corresponding benchmarks contribute to achieving them. This, in turn, provides a clear sense of where the CSA program is headed and enables a locality to ensure that the system operates in a manner that maximizes its impact.

Strategic planning is formally defined as a long-term, future-oriented process of assessment, goal setting, and strategy building that develops an explicit path between the present and a future vision. It is a disciplined effort to produce an actionable future-oriented plan that shapes and guides the work of the CPMT. Strategic planning and the corresponding activities are the responsibility of the CPMT. Strategic planning activities should be data-driven, inclusive of all CPMT members, and focused on building consensus, resulting in a comprehensive plan that addresses the locality’s needs and successfully carries out its programmatic mission. As a result, engagement by the entire CPMT in the strategic planning process is fundamental.

Effective strategic planning articulates where a CSA program is headed, the actions required to make progress, and how it will measure its success. By creating a strategic plan, CPMTs help ensure that all components of the CSA program are working toward the shared vision. Strategic planning enhances programmatic operations by soliciting input from various sources and fostering a consensus on a local program’s direction. Along with focusing energy and resources, the strategic planning process allows stakeholders to develop a sense of ownership of the CSA program’s vision and mission.

## **Strategic Planning Is**

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- A deliberate and collaborative process
- A future-oriented process of assessment, goal setting, and strategy
- Focused on long-term measurable programmatic goals
- Specific to each locality
- Driven by data
- Ongoing

## **Strategic Planning Is Not**

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- A to-do list for the short or long term
- Driven by one goal, one idea, or one set of demands
- All things to all people
- About everything a program does
- Full of jargon
- To be “left on the shelf”

## **Role of Continuous Quality Improvement (CQI) in Strategic Planning**

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The Code of Virginia ([§§2.2-2648 D.15](#), [2.2-5206.13](#), and [2.2-5208.5](#)) requires localities to review and analyze aggregate CSA data and develop long-range program plans. Historically, this activity has been referred to as “Utilization Management;” however, in 2019 a shift occurred, and the process is now known as Continuous Quality Improvement (CQI) to minimize confusion with CSA Utilization Review.

Continuous Quality Improvement is a data-driven decision-making process that ensures resources are expended effectively and efficiently. CQI focuses on detailed process improvements and data analysis to identify and address specific, isolated issues. While strategic planning and CQI aim to make programmatic improvements, CQI focuses on implementing small, incremental changes to processes and operations to enhance quality consistently. In contrast, strategic planning is a broader approach that focuses on long-term programmatic goals and defines the program’s overall direction and priorities. CQI is a key component of strategic planning, and it is not uncommon for several CQI-based activities to occur throughout the strategic planning process. The CQI process implements specific initiatives to achieve the broader organizational goals outlined in the strategy.

# Components of a Strategic Plan

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## **Vision Statement**

A CSA program's vision statement is an aspirational description of what the program or community aims to achieve in the future. It is the big-picture view and provides a clear guide for choosing current and future courses of action. The vision statement defines what the community wants the CSA program to accomplish in the long term and sets the tone for the strategic plan. All elements of the strategic plan should be aligned with the vision.

## **Mission Statement:**

A CSA program's mission statement is a declaration of its purpose and the reasons behind its existence. Developing a mission statement brings together the individual agencies of the CPMT, unifying their purpose in support of the local System of Care. Without a mission, a CPMT lacks the clarity of purpose and direction in its work and risks individual agencies remaining isolated in their respective areas of focus. Aligning the mission and vision statements is essential for consensus building and is the first crucial step to strategic planning, as both act as a foundation for the strategic plan.

## **Goals:**

CPMTs should utilize data to identify the strengths and needs of their local CSA program. Several resources and tools are available in the resources section of this document to assist with this process. The identified strengths and needs gathered from the programmatic data should inform strategic planning goals. Goals should be SMART (specific, measurable, achievable, relevant, and time-bound) and directly related to the mission and vision of the local CSA program. A SMART goal template, as well as a "Strategic Planning Might Ask" document, can be found in Appendix B and C to assist in developing strategic planning goals.

## **Strategies:**

Strategies are the specific courses of action the program will take to achieve its measurable goals.

## **Action Plan:**

The action plan is comprehensive, including detailed steps and timelines for implementing each strategy, along with benchmarks, responsible parties, and deadlines for milestones and plan completion.

# SWOT Analysis

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CPMTs need to have a mechanism to identify strengths and weaknesses, and a SWOT analysis can be a valuable tool to assist in the strategic planning process. A SWOT analysis is a strategic planning tool that evaluates a program's **S**trengths, **W**eaknesses, **O**pportunities, and **T**hreats. Knowing these points will help a program leverage its resources, shore up gaps, and realistically plan its path to the agency's overall vision. A comprehensive SWOT analysis will ground the strategic plan, ensuring that the goals, objectives, and strategies address observable challenges and maximize a program's resources.

**Steps in a SWOT Analysis:** There are several ways to complete a SWOT analysis; however, most formats include the following seven steps. Please see Appendix D for a SWOT analysis template.

- 1. Gather a Diverse Team (CPMT)**
- 2. Collect Data**
- 3. Brainstorm Strengths:**
  - What does the program do well?
  - What are the program's core competencies?
  - What makes the program different from others?
- 4. Identify Weaknesses:**
  - What resources are lacking?
  - What can the program do better?
  - What are the program's internal barriers?
- 5. Spot Opportunities:**
  - What state or local resources are available?
  - What other agencies can assist the program?
  - How broad is the locality's system of care?
- 6. Pinpoint Threats:**
  - What are the negative economic trends?
  - Where is the program vulnerable?
  - Have there been any legislative or political changes?
- 7. Synthesize and Strategize**
  - How can strengths be maximized?
  - How can weaknesses be addressed?
  - How can opportunities be seized?
  - How can threats be countered?

## Implementation and Plan Review

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Upon implementation of the plan, evaluation and monitoring are essential to the strategic planning process. To closely monitor the plan's progress toward goals and strategies, as well as the achievement of benchmarks, CPMTs must develop a plan review schedule. This review schedule should include the frequency of plan reviews, a structure for documenting plan reviews, and modifications made to the plan. A sample Strategic Plan Review template is available in Appendix E.

## Modifying the Plan

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It is essential to recognize that while a strategic plan may span several years, it is not intended to stagnate. Modification is a part of the monitoring process. If, during monitoring, the CPMT identifies that the strategies are not effectively addressing the plan's goals and objectives, it is appropriate to brainstorm the reasons and make adjustments as necessary to keep the plan moving forward. Likewise, if the locality or program identifies new priorities that need to be addressed mid-term, changing the plan is essential to moving toward the program's vision and keeping the strategic plan relevant. Some situations that may necessitate plan modifications include organizational restructuring, leadership changes, operational adjustments, legislative updates, budget or resource reallocations, and performance gaps.

## Reporting Results: “What do we do with the plan now?”

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Strategic plan reporting is the process of communicating how effectively a program is achieving its strategic goals. It involves collecting, analyzing, and openly sharing data with stakeholders in a structured way. This ensures that everyone understands the program's progress toward completing the strategic plan, as indicated by ongoing data reviews. CPMTs are responsible for Continuous Quality Improvement (CQI), which uses the following questions to evaluate strategic goal progress:



## Resources for use in the Strategic Planning Process

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The State Executive Council (SEC), State and Local Advisory Team (SLAT), and the Office of Children's Services (OCS) have developed various tools and resources to assist local CPMTs in strategic planning. While it is not necessary to utilize every resource, the following tools will provide CPMTs with information to fuel their strategic planning process.

### **CSA Data and Outcomes Dashboard (CQI) and CQI Tools:**

The CSA CQI tools consist of the CSA Data and Outcomes Dashboard (CQI), a Documentation Template with Instructions, and a set of uniform terms and definitions. CPMTs and local CSA partners can utilize the service's expenditure and performance data on the dashboard to identify areas of focus for strategic planning, develop long-range, data-driven action plans, and continually review them to ensure strategies are on track. The CQI Documentation Template enables CPMTs to track the data elements examined, the discussions that occurred, and the planning that followed. CQI tools can be found on the OCS website at <http://www.csa.virginia.gov/Resources/ContinuousQualityImprovement>. The Data and Outcomes Dashboard (CQI) information is updated monthly and available under the Applications section of the CSA homepage.

### **CSA Utilization Reports:**

The [CSA Utilization Reports](#) provide statewide and locality-specific service and expenditure data, filterable by mandate type, service placement type, service name, and expenditure category. Most reports include distinct child count, total expenditures, average annual expenditure, per diem, and total length of stay. CSA Utilization Reports are generally updated daily.

### **CSA Financial Reports:**

The [CSA Financial Reports](#) help track and analyze CSA allocations and expenditures. Numerous statewide and locality-specific reports allow comparisons across multiple fiscal years. These reports help identify local spending trends and changes over time.

### **CSA Performance Measures:**

The [CSA Performance Measures/Outcome Indicators Report](#) is an annual document of statewide performance and locality comparisons on the six performance measures established by the SEC:

- The percentage of youth who decreased their score on the Child Behavioral and Emotional Needs School Domain of the Child and Adolescent Needs and Strengths (CANS), the mandatory CSA assessment instrument, from a baseline assessment to the most recent reassessment.
- the percentage of youth who decreased their score on the School Domain of the CANS from a baseline assessment to the most recent re-assessment.
- The percentage of youth who had a reduced score on the Strengths Domain of the CANS from a baseline assessment to the most recent reassessment (indicating improvement).
- the percentage of youth receiving Community-Based Services (CBS) of all youth receiving CSA-funded services.
- the percentage of foster children in foster care who are in family-based placements; and
- the percentage of children who exit from foster care to a permanent living arrangement.

This report can be utilized in strategic planning to identify areas that require improvement. Strategic goals can be established to improve performance when a program's percentage falls below statewide or peer locality levels.

### **Service Gap Survey:**

Section [2.2-5211.1.2](#) requires that the CPMT report annually to OCS on "gaps in services needed to keep children in the local community and any barriers to the development of those services." This requirement is met by the CPMT's annual submission of the "[Service Gap Survey](#)." The Service Gap Survey can serve as a strategic planning resource to identify critical services lacking in a region and opportunities to coordinate with neighboring CSA programs to attract needed services to the area as a long-term goal.

### **Local CSA Program Audit Reports:**

OCS Program Audits evaluate the effectiveness of internal controls and organizational practices applicable to the financial and operational activities of CSA. Local program audit reports can be found on the OCS website (<https://www.csa.virginia.gov/LocalGovernment/Index/0>).

## Appendix A

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### Definitions

**Action Plan** is comprehensive, including detailed steps and timelines for implementing each strategy, as well as the responsible parties and deadlines for milestones and plan completion.

**Benchmark** is a reference point against which an agency can compare its processes, operations, and products.

**Continuous Quality Improvement (CQI)** is an ongoing cycle of collecting data and using it to make decisions to improve programs and services. CQI is the repeated process of identifying and analyzing data for strengths and challenges, testing, implementing, learning from, and revising solutions.

**Data/Data Point** is a fact or measure that is represented numerically and/or graphically. Examples include the percentage or number of something, a pattern, or a percentage change (decrease or increase) over time.

**Focus Area** is a specific aspect or domain in which a program chooses to concentrate strategic planning efforts. Some CSA-specific focus areas are training, service delivery, administrative procedures, and local policy.

**Goal** is a desired outcome, result, or achievement in the strategic planning process.

**Key Performance Indicators** are the measurable metrics used to track progress toward achieving goals and objectives.

**Mission Statement** is a concise description that encapsulates the purpose of a company, defining its culture, goals, and values.

**Outcome** is a measurable and observable result or change for an individual, group, organization, system, or community that results from the provision of services or support. It can also include changes that are observed after modifications to the ways services or supports are delivered.

**Performance Measure** is a description or result of work, used to tell a story about whether an agency or activity is achieving its objectives and if progress is being made toward attaining its goals.

**Responsible Party** is a person or group accountable for completing assigned work and activities towards the achievement of a goal.

**Results-Based Accountability** is a framework that utilizes a data-driven decision-making process to help communities and organizations consider and take action to address problems.

**SMART Goals** are organizational goals that are specific, measurable, attainable, relevant, and time-specific.

**Strategic Planning** is the process of developing a high-level plan for achieving a program or organization's long-term goals or objectives. Strategic plans provide a framework for future decision-making and guide resource allocation broadly.

**Strategy** refers to a specific course of action that the program will take to achieve its measurable goals, objectives, and strategic issues.

**Target Date for Completion** is a deadline by which a goal is to be accomplished, or a period during which a planned actions are to be taken.

**Utilization Management** is a process of reviewing aggregated, program-level data to determine if program funding, resources, and approaches are adequate and provided efficiently. This is a Code of Virginia requirement for CPMTs.

**Utilization Review** is a process of reviewing individual cases to determine if the appropriate treatment plan and services are in place based on the client's current level of need. This review includes formal assessment of the necessity, efficiency, and appropriateness of the services and treatment plan for an individual.

**Vision Statement** is a future-oriented declaration that describes a program's long-term goals and aspirations.

## Appendix B

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### SMART Goal Formula for Strategic Planning

**What do you want to accomplish  
(what is the change you want to achieve)?**



**How will you measure this change?**



**What is the time frame to achieve this change?**

## Appendix C

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### Questions to Ask in the Strategic Planning Process

#### When Developing Your Strategic Plan:

- Where are we now?
- Where do we want to go? What is our vision?
- What are the barriers to achieving our CSA Vision?
- Who needs to be involved?
- Who are we missing?
- What are we already doing well?
- What do we want this plan to accomplish?
- Do we possess the necessary skills, resources, etc.?
- How will we know if this plan is successful?

#### When Reviewing Your Strategic Plan:

- Does the CSA Vision continue to support and reflect the priorities of the CPMT?
- Does the CPMT continue to support the CSA Team Mission?
- Do the goals, strategies, and benchmarks continue to align with the CSA Vision?
- Are we making progress toward the goal and strategies? If so, how do we know?
- If not, what barriers, challenges, or needs are hindering progress?
- What specific steps will be taken to address these barriers, challenges, and needs?
- Which benchmarks have we achieved?
- Are CPMT members actively engaged in the activities outlined in the Strategic Plan? How do we know?
- Is the Strategic Plan having the desired impact? How do we know?
- What specific updates will be made to the Strategic Plan?

## Appendix D

### SWOT Matrix Template

#### INTERNAL FACTORS

STRENGTHS +	WEAKNESSES –
<i>What do we do well? What internal resources do we have? What advantages do we have over similar programs?</i>	<i>What factors within our control hinder our ability to be more effective? What areas need improvement? What does our program lack?</i>

#### EXTERNAL FACTORS

OPPORTUNITIES +	THREATS –
<i>What opportunities exist in our area of expertise that we can benefit from? Is the opportunity sustainable or one-time?</i>	<i>What factors out of our control detract from our ability to be more effective?</i>

[https://www.smartsheet.com/sites/default/files/2022-12/IC-Simple-SWOT-Matrix-Template-11542\\_WORD.docx](https://www.smartsheet.com/sites/default/files/2022-12/IC-Simple-SWOT-Matrix-Template-11542_WORD.docx)

## Appendix E

### Strategic Plan Review Form

<b>Locality:</b>	enter locality	<b>Date of Review:</b>	select date
<b>Vision:</b> enter vision			
<b>Mission:</b> enter mission statement			

1. Does the CSA Vision continue to support and reflect the priorities of the CPMT? Yes ☐ No ☐
2. Does the CPMT continue to support the CSA program mission? Yes ☐ No ☐
3. Do the goals, strategies, and benchmarks continue to align with the CSA program's Vision and Mission?  
Yes ☐ No ☐

Plan Goals	
<b>Focus Area</b>	enter focus area #1
<b>Goal 1:</b>	enter goal
<b>Goal 2:</b>	enter goal
<b>Goal 3:</b>	enter goal
<b>Focus Area</b>	enter focus area #2
<b>Goal 1:</b>	enter goal
<b>Goal 2:</b>	enter goal
<b>Goal 3:</b>	enter goal
<b>Focus Area</b>	enter focus area #3
<b>Goal 1:</b>	enter goal
<b>Goal 2:</b>	enter goal
<b>Goal 3:</b>	enter goal

4. Are the plan strategies accomplishing the intended goals? ☐ Yes ☐ No How do you know?

enter data
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5. Are there changes to the plan that need to be made? ☐ Yes ☐ No If yes, list changes.

enter changes to the plan
---------------------------

6. Next steps:

enter next steps
------------------

enter locality name

– Strategic Plan

Plan Dates: 

select date

 to 

select date

Overall CSA Program Goal (Vision Statement): 

enter vision statement

CSA Program Mission Statement: 

enter mission statement

Focus Area: 

enter focus area

Goal #1:

enter goal #1

Strategy	Target Date for Completion	Responsible Party	Benchmarks	Comments
Strategy #1: <div>enter strategy</div>	<div>select date</div>	<div>enter text</div>	<div>enter text</div>	<div>enter text</div>
Strategy #2: <div>enter strategy</div>	<div>select date</div>	<div>enter text</div>	<div>enter text</div>	<div>enter text</div>

Goal #2: 

enter goal #2

Strategy	Target Date for Completion	Responsible Party	Benchmarks	Comments
Strategy #1: <div>enter strategy</div>	<div>select date</div>	<div>enter text</div>	<div>enter text</div>	<div>enter text</div>
Strategy #2: <div>enter strategy</div>	<div>select date</div>	<div>enter text</div>	<div>enter text</div>	<div>enter text</div>

Goal #3: 

enter goal #3

Strategy #1: <div>enter strategy</div>	<div>select date</div>	<div>enter text</div>	<div>enter text</div>	<div>enter text</div>
Strategy #2: <div>enter strategy</div>	<div>select date</div>	<div>enter text</div>	<div>enter text</div>	<div>enter text</div>

Focus Area: enter focus area				
Goal #1: enter goal #1				
Strategy	Target Date for Completion	Responsible Party	Benchmarks	Comments
Strategy #1: enter strategy	select date	enter text	enter text	enter text
Strategy #2: enter strategy	select date	enter text	enter text	enter text
Goal #2: enter goal #2				
Strategy	Target Date for Completion	Responsible Party	Benchmarks	Comments
Strategy #1: enter strategy	select date	enter text	enter text	enter text
Strategy #2: enter strategy	select date	enter text	enter text	enter text
Goal #3: enter goal #3				
Strategy	Target Date for Completion	Responsible Party	Benchmarks	Comments
Strategy #1: enter strategy	select date	enter text	enter text	enter text
Strategy #2: enter strategy	select date	enter text	enter text	enter text

Focus Area: enter focus area				
Goal #1: enter goal #1				
Strategy	Target Date for Completion	Responsible Party	Benchmarks	Comments
Strategy #1: enter strategy	select date	enter text	enter text	enter text
Strategy #2: enter strategy	select date	enter text	enter text	enter text
Goal #2: enter goal #2				
Strategy	Target Date for Completion	Responsible Party	Benchmarks	Comments
Strategy #1: enter strategy	select date	enter text	enter text	enter text
Strategy #2: enter strategy	select date	enter text	enter text	enter text
Goal #3: enter goal #3				
Strategy	Target Date for Completion	Responsible Party	Benchmarks	Comments
Strategy #1: enter strategy	select date	enter text	enter text	enter text
Strategy #2: enter strategy	select date	enter text	enter text	enter text

# Strategic Plan Review Form

<b>Locality:</b>	enter locality	<b>Date of Review:</b>	select date
<b>Vision:</b> enter vision			
<b>Mission:</b> enter mission statement			

1. Does the CSA Vision continue to support and reflect the priorities of the CPMT? Yes ☐ No ☐
2. Does the CPMT continue to support the CSA program mission? Yes ☐ No ☐
3. Do the goals, strategies, and benchmarks continue to align with the CSA program's Vision and Mission? Yes ☐ No ☐

Plan Goals	
<b>Focus Area</b>	enter focus area #1
<b>Goal 1:</b>	enter goal
<b>Goal 2:</b>	enter goal
<b>Goal 3:</b>	enter goal
<b>Focus Area</b>	enter focus area #2
<b>Goal 1:</b>	enter goal
<b>Goal 2:</b>	enter goal
<b>Goal 3:</b>	enter goal
<b>Focus Area</b>	enter focus area #3
<b>Goal 1:</b>	enter goal
<b>Goal 2:</b>	enter goal
<b>Goal 3:</b>	enter goal

4. Are the plan strategies accomplishing the intended goals? ☐ Yes ☐ No How do you know?

enter data

5. Are there changes to the plan that need to be made? ☐ Yes ☐ No If yes, list changes.

enter changes to the plan

6. Next steps:

enter next steps

## CSA FAPT: Family Satisfaction Survey

**I was treated with respect at the FAPT meeting.**



**YES**



**NO**

**I got to speak about my child/family at the FAPT meeting.**



**YES**



**NO**

**I helped the team make the plan.**



**YES**



**NO**

**I understood what was being said about my family at the FAPT meeting.**



**YES**



**NO**

**The services we are receiving are helping my child and family.**



**YES**



**NO**

**I know who to call if I have questions about CSA.**



**YES**



**NO**

**What else would you like to share about your experience with CSA?**

## CSA FAPT: Youth Satisfaction Survey

**I was treated with respect at the FAPT meeting.**



**YES**



**NO**

**I got to speak at the FAPT meeting.**



**YES**



**NO**

**I helped the team make the plan.**



**YES**



**NO**

**I understood what was being said about me at the FAPT meeting.**



**YES**



**NO**

**The services I am receiving are helping me.**



**YES**



**NO**

**I know who to call if I have questions about CSA.**



**YES**



**NO**

**What else would you like to share about your experience with CSA?**

## 2025 General Assembly Session - Summary of CSA-Related Legislation<sup>1</sup>

Bill # / Title	Chief Patron	Bill Summary
<a href="#">SB 801</a> – Children’s Services Act; changes to state pool funds.	Favola	<p>This bill makes a number of changes to the Children's Services Act state pool of funds for the provision of public or private nonresidential or residential services for troubled youth and families, including (i) removing from the purpose of the state pool of funds the consolidation of categorical agency funding and the institution of community responsibility for the provision of services; (ii) removing language specifying that references to funding sources and current placement authority for the target population served by the state pool of funds are for the purpose of accounting for the funds and should not be intended to categorize children and youth into funding streams in order to access services; (iii) modifying the target population served by the state pool of funds by (a) removing references to the Department of Education's private tuition assistance and the Interagency Assistance Fund for Noneducational Placement for Handicapped Children and (b) adding children and youth who are determined to be a child in need of services, as such term is defined in relevant law; (iv) removing the requirement that the financial and legal responsibility for certain special education services remains with the placing jurisdiction, unless the placing jurisdiction has transitioned all appropriate services; (v) requiring that the uniform assessment instrument used to determine eligibility for funding through the state pool of funds be approved by the State Executive Council for Children's Services; and (vi) modifying the eligibility criteria for funding through the state pool of funds by adding language that (a) specifies that the child or youth's emotional or behavioral problems have resulted in the child or youth, or place the child or youth at imminent risk of, entering purchased residential care and (b) includes the determination by a court that the child or youth is a child in need of services, as such term is defined in relevant law. The bill also includes technical changes. This bill was a recommendation of the Virginia Commission on Youth.</p>
<a href="#">HB 1733/SB 1372</a> — Children; petition for relief of care & custody, investigation by local department of social services.	Cole Suetterlein	<p>This bill requires a local department of social services, as a part of its investigation after the referral of a request for a petition for relief of the care and custody of a child, to (i) refer the parent to the local family assessment and planning team and (ii) create a written report. The bill directs the Department of Social Services, in coordination with the Virginia League of Social Services Executives, to create a template for and provide guidance on what should be included in such a written report.</p> <p>The bill also directs the Office of the Children's Ombudsman to convene a work group composed of relevant stakeholders to (a) determine the factors a court should consider when determining whether there is good cause shown for a petitioner's desire to be relieved of the care and custody of a child and (b) explore the potential benefits and considerations of raising the standard of evidence for granting temporary relief of custody from the current standard of preponderance of the evidence to clear and convincing evidence. The bill directs the workgroup to submit a report of its findings and recommendations to the Chairs of the House and Senate Committees for Courts of Justice and the Virginia Commission on Youth by November 1, 2025. Certain provisions of the bill have a delayed effective date of January 1, 2026. This bill was a recommendation of the Virginia Commission on Youth.</p>

<sup>1</sup> Pending Governor’s actions.

<a href="#">HB 2260</a> – Child in need of services; expands definition.	Delaney	This bill expands the definition of a "child in need of services" for purposes of juvenile and domestic relations district courts to include a child who remains away from, deserted, or abandoned his family or lawful custodian during one occasion and is at demonstratively at risk of coercion, exploitation, abuse, or manipulation or has been lured from his parent or lawful custodian by means of trickery or misrepresentation or under false pretenses.
<a href="#">HB 1600</a> – Budget Bill	Torian	<p>Amends and adds items to Chapter 2 of the Acts of Assembly of 2024, Special Session I.</p> <p>Specific to CSA, this amendment decreases CSA funding by \$5,000,000 (from \$503,650,250 to \$498,650,250) to reflect general fund savings from a 5.0% limit on the growth rate in state reimbursement to localities for private day special education services in the second year. The introduced budget included the language imposing a limit but did not reflect any savings in the CSA budget. This one-time action redirects the savings to fund special education services in public schools to help support children in the least restrictive environment.</p> <p>This amendment also adds reporting requirements for the Office of Children’s Services, in coordination with the Department of Education, regarding the transition of students from private day education services to local education agencies. This report is to be delivered to the General Assembly by October 1 of each year and shall include “(i) recommendations made to each LEA and progress made in improving the LEA's ability to serve students; (ii) an assessment of barriers to students returning to a LEA from a private day placement including instances when the LEA refuses or is unable to provide a less restrictive environment due to a lack of available transition services and recommendations for returning students to public school who are deemed eligible; and (iii) trends in behavioral and emotional diagnoses including students on home-based instruction that may require private day placements.”</p> <p>Also, the following language was added, which removes the allocation and supplemental funding process beginning July 1, 2025:</p> <p><i>“For the fiscal year beginning July 1, 2025, the Office of Children's Services shall cease the allocation process and reimburse localities for eligible services as requests are submitted.”</i></p>