

CASA Child Advocates of Montgomery County



**Strategic Plan
2015 - 2018**



Internal	<p>Strengths</p> <ul style="list-style-type: none"> • Successful in mission • CASA is the only organization who does what we do • Strong board and staff, passionate volunteers • Easy case for support (abused, neglected children) • Strong support from State and National CASA • Good community collaboration and relationships, including CPS, legislators • History, respect in the community • Financial position 	<p>Weaknesses</p> <ul style="list-style-type: none"> • Lack of diversity including geographic in board and volunteers • Lack of diversified funding • Lack of name recognition, brand confusion • Need more sophisticated data analysis (donor, volunteers, children, outcome measures) • Limited group “project” volunteer opportunities • Attracting and retaining influential and financially capable supporters
External	<p>Opportunities</p> <ul style="list-style-type: none"> • Cross training with other agencies and CASAs • Increase name recognition, branding effectiveness • Increase data driven outcome measures for children • Increase our donor loyalty and moves management • Increase corporate support • Strong demographics in our community • Focus on sectors that are growing 	<p>Threats</p> <ul style="list-style-type: none"> • Possibility of losing government grants • One crisis with a volunteer and child could ruin the organization • Difficulty recruiting fast enough to meet demand • Weather or event disrupting the gala • Increasing competition for people’s dollars and time • Current (2016) economy

Values:

- Compassion—for children and their families
- Integrity—always acting in the best interest of the child with honesty in the face of opposition
- Tolerance—respect for diversity
- Teamwork/Collaboration—the ability to make progress utilizing internal and external resources

Outcomes of our initiatives: What will we have achieved in 3-5 years?

- CASA Child Advocates of Montgomery County is a leading voice in our community speaking up about the impact of abuse and neglect on the children and the community. Our children's voices will be heard not just in the Court but in the Community.
- We are making a significant impact on the lives of children at risk of abuse and neglect by raising awareness of the issues and collaborating with prevention support services.
- We have ensured that every child is strongly connected to caring biological family members.
- We will have significantly improved the lives of the children in the foster care system by lobbying to make Trust Based Relational Intervention (TBRI) mandatory and supporting a Foster Care Redesign that is performance-based on single providers who are proactive and outcome focused rather than reactive and compliance focused. These placement resources should be in the community and close to home.
- We will have collaborated with community partners to prepare and support 'at risk' foster youth to transition successfully to responsible adulthood.
- Our Advocates will be recognized by the community and the state for their skills, effectiveness and determination to find capable, caring adults who will provide abused and neglected children with a lifelong, nurturing support structure. They are our most effective recruiters.
- Our donors and supporters are 'engaged' and have a loyal commitment to our cause.
- Our CASA Child Advocates organization and Board are productive, effective and motivated. We are recognized as non-profit leaders in our community and in the State.
- Our funding is diversified and we have built an endowment for future funding

Issues for Future Strategic Discussion

- CPS is moving more towards family based services. We need to investigate how CASA is able to help provide a voice for these children. In particular, the issues around whether these cases go through the court system. How could this work? (Goal 2)
- There is a growing realization that youth in the foster care system are unprepared for adulthood. We need to make sure our Advocates are trained and supported to ensure strong life-skills are built. How can we do this better? (Goal 2)
- Our Advocates may be with a child through to adulthood. We need to be able to transition our support for a child into mentorship as they age out. The mentoring may be through community collaborators, including faith based organizations. (Goal 2)
- Now that we are able to provide an Advocate for every child who needs one, how will that change our communications? (Goal 1)
- Do we need to do better at obtaining and retaining influential donors? Effective non-Advocate volunteers? Are we making the same mistakes over and over again? Goal 4)
- Why do we distinguish between children (e.g.: RAPR, “new” children, PMC, etc.)? Is it time for us now to count all children? (Goal 1)
- Do we need to re-think our Board committee structure? (Goal 6)

GOAL	OBJECTIVE/MEASURE	TACTICS	RESPONSIBILITY/ ACCOUNTABILITY
<p>GOAL 1: Provide an Advocate for every child in the foster care system in Montgomery County who needs one</p>	<p>1. Provide an Advocate for every child in the foster care system who needs one Percent of all children to be served: 2014 93% of non-RAPR* cases 2015 96% 2016 100% 2017 100% 2018 100%</p> <p>* Refusal to Accept Parent Responsibility (RAPR). Children in the system whose parents have not abandoned them, but have given them up for extreme mental health issues. CASA will consider effectiveness and need for Advocates in these cases.</p> <p>2. Recruit enough Advocates to serve every child in the foster care system who needs an Advocate Advocates to recruit: 2013 65 (actual, GY) 2014 76 (actual, GY) 2015 53 (actual, GY) 2016 52 (based on adjusted growth projections) 2017 53 2018 54</p> <p>3.Total Active Advocates to serve during the year: 2013 190 (actual, GY) 2014 218 (actual) 2015 234 (actual GY) 2016 241 (based on adjusted growth projections) 2017 246 2018 251</p>	<p>1. Review best practice solutions to improve assignment and effectiveness of Advocates who work full time. a. Analyze case type, case outcome, and advocate retention of full time volunteers to develop a “Best Practice” process for assigning Advocates who work b. Initiate a focus group of Advocates who are employed F/T to review current practices and offer workable solutions to challenges posed by current processes c. Recognize the employers of volunteers with letters or certificates</p> <p>2. Include the total number of children in care in monthly stats – Pat 10/1/2015</p> <p>3. Update and implement a best practices for Recruiting & Retention – (annually) a. Provide yearly updates and improvements to existing “Best Practices of Recruiting”</p>	<p>a.Pat. 11/1/16</p> <p>b.Pat. 11//1/16</p> <p>c. Pat. 11/1/16</p> <p>2. Pat. 11/1/16</p> <p>a. Judy/Pat. 6/1/16 and annually</p>

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	<p>Note: by 2017, either change the CASA FY or begin to measure recruiting goals based on FY</p> <p>4. Maintain Advocate Retention at 80% or more</p>	<ul style="list-style-type: none"> b. Conduct annual satisfaction Survey c. Conduct Advocate Appreciation events – closed case luncheons, annual volunteer recognition, Board recognition d. Provide monthly feedback assessments with Advocates on closed cases e. Provide birthday recognition for Advocates f. Provide monthly program data g. Add volunteer recognition board to our website h. Connect with volunteers who have left our program i. Continue Volunteer Support Group j. Provide Texas Conference Scholarship k. Celebrate Advocate Anniversaries <p>4. Analyze retention and satisfaction data</p> <p>5. Implement an ongoing measurement program to assess the impact/effectiveness of recruiting and retention initiatives</p>	<ul style="list-style-type: none"> b. Pat. 6/1/16 and annually c. Pat. 11/1/15 and ongoing d. Pat. 11/1/15 and ongoing e. Pat. 11/1/15 and ongoing f. Pat. 11/1/15, ongoing g. Pat/Alli. 11/1/16 h. Pat. 11/1/16 and ongoing i. Pat. 11/1/16 and ongoing j. Ann/Pat 6/1/16 and ongoing k. Pat. 6/1/16 and ongoing <p>4. Pat/Judy. 11/1/16 and annually</p> <p>5. Pat/Judy. 11/1/16 and annually</p>

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	<p>5. Implement Communications plan that results in measurable analytics and measurable recruiting results</p> <ul style="list-style-type: none"> • Increase press mentions to an average of at least 3 per month • Increase speaking engagements to an average of at least 5 per month 	<ul style="list-style-type: none"> • Update and implement yearly a best practices Communications Plan that results in measurable analytics and measurable recruiting results by 7/15. • Revise communications to reflect serving all children who need an Advocate • Develop and implement plan to include staff and board in speaking engagements. Include Chambers and key civic groups. • Develop plan to continue social media tactics after the National Grant runs out • Develop and implement sustainable process for collecting Advocate success stories • Create and use thank you's developed by our foster youth 	<p>Alli. 7/15 (annually)</p> <p>Alli. 4/1/16</p> <p>Alli/Judi. 5/1/16</p> <p>Alli. 8/1/16</p> <p>Alli. 8/1/16</p> <p>Alli. 8/1/16</p>
<p>GOAL 2. Increase the quality of our Advocacy</p>	<p>1. Train 100% of Advocates in Trust Based Relational Intervention (TBRI) by 2017</p>	<ul style="list-style-type: none"> • Develop a plan to train Advocates in TBRI • Include basic TBRI in mandatory Advocate Training by 10/31/15 • Train 10 Advocates more in-depth in TBRI by 10/31/16 • Advocate for TBRI training for specific placements • Identify TBRI-trained resources in our area in every area that support children in care 	<p>Pat. 10/31/15</p> <p>Pat. 10/31/15</p> <p>Pat. 10/31/16</p> <p>Pat. 10/31/16</p> <p>Pat. 10/31/16</p>

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	<p>2. Provide the opportunity for education advocacy assistance to all Advocates by 2017</p>	<ul style="list-style-type: none"> • Work with ISD on which children need education advocacy, position CASA as a resource, getting CASA included in the education decision. 	<p>Pat. 7/1 annually</p>
	<p>3. Expand CASA’s PMC offerings to include life skills assistance to all 15 – 18 year old youth in foster care by 2017</p>	<ul style="list-style-type: none"> • Put in place a method for aggregating answers to youth questions (in the Fostering Futures resources) in order to improve the program • Investigate changing the transportation policy. Work with Advocates, other CASAs and insurance to update transportation recommendations. Take recommendation to the Board • Initiate a State CASA discussion and a Board discussion about expanding Fostering Futures to provide support to Advocates to continue as mentors if the child chooses, and measuring long-term impact. (Consider mentor training and community partners). 	<p>Pat. 7/31/16</p> <p>Pat/Ann. 5/31/16</p> <p>Ann. 3/31/17</p>
	<p>4. Complete an investigation to consider adding Advocates for court-appointed Family Based Services</p>	<ul style="list-style-type: none"> • Begin conversation with Leshia • Understand Travis County practices • Understand funding (VOCA/CVC) implications • Consider Task Force to consider issues, recommend policy changes 	<p>Pat. 10/31/16</p> <p>Pat. 10/31/16</p> <p>Ann. 10/31/16</p> <p>Pat. 10/31/16</p>

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	5. Identify and put in place an extended family support structure for every child	<ul style="list-style-type: none"> • Train Advocates and work with CPS to include the family conversation at the beginning of each case • When family is identified for older children, include contract for us to contact them at intervals (for outcome measures) 	Pat. 10/31/16 Pat. 10/31/16
GOAL 3. Grow the organizational capacity of CASA Child Advocates to match the needs of the abused/neglected foster care population in Montgomery County, Texas	<ol style="list-style-type: none"> 1. Grow the Case Supervisor staff to match Advocate growth, with <ul style="list-style-type: none"> • Case Supervisor to Advocate Ratio between 1:30 and 1:35 • Cases Served by Volunteers to remain at or above 95% 2. Grow non-Program staff to support CASA, with Program Percent of Expenses remaining at or above 65%. 75% Program Expenses by 2017. 3. Increase strategic use of technology to improve staff efficiency and Advocate effectiveness (qualitative measure) 4. Increase percent of Advocates who provide online time and mileage reporting (and 	<ul style="list-style-type: none"> • Update projections annually • Hire as needed <ul style="list-style-type: none"> • Update projections annually • Hire as needed • Convene a task force to develop a space plan suitable to support the work of staff and volunteers • Develop a financial model to determine whether to buy or lease <ul style="list-style-type: none"> • Update Technology Plan yearly, by 7/15 • Give Advocates email addresses through MS Office • Convert phone system to a VoIP system <ul style="list-style-type: none"> • Develop plan 	Ann/Pat. 7/16 (annually) Ann/Pat. 7/16 (annually) Ann 7/16 (annually) Ann 7/16 (annually) Ann. 3/17 Finance Committee. 3/17 Ann. 7/15/16 (annually) Ann. 5/31/16 Ann. 10/31/16 Pat. 3/1/17

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	investigate attaching Advocate notes to CASA Manager)		
GOAL 4: Create a sustainable financial structure to support growth	<p>1. Grow Total Revenue other than Events, VOCA and CVC to:</p> <p>2013 \$ 226,426 (actual) 2014 \$ 330,803 (actual) 2015 \$ 368,348 (actual) 2016 \$ 487,160 (budget) 2017 \$ 526,128 (+8%) 2018 \$ 568,223 (+8%)</p> <p><small>*Based on QuickBooks, not audit. Includes all Revenue except CVC, VOCA, GALA, In-Kind, SuperHero Run, and Northside Lexus Golf Tournament.</small></p> <p>2. Increase Total Corporate Funding to:</p> <p>2014 \$291,777 (actual) 2015 \$255,879 (actual) 2016 \$276,349 (8%) 2017 \$298,457 (8%) 2018 \$322,334 (8%)</p> <p><small>*Based on QuickBooks, not audit. Comes from Individual and Business Donor List.</small></p> <p>3. Maintain a financial reserve of 45 – 55% of operating expenses</p>	<ul style="list-style-type: none"> • Update Development Plan yearly by 7/15. • Increase effectiveness of Annual Campaign • Implement annual Direct Mail campaigns that show profit by 11/1/17 • Initiate new Corporate Campaign • Meet with at least 3 POTENTIAL individual donors per month (in addition to making deliveries) • Institute new Stewardship Plan • Develop and implement donor loyalty plan • Meet with at least 2 potential or current CORPORATE donors per month • Develop annual budgets that result in a 44 – 55% cash reserve • Investigate whether to add an endowment 	<p>Cliff. 7/31/15 (annually)</p> <p>Cliff/Board. 6/31/16</p> <p>Cliff. 11/30/16</p> <p>Cliff 5/31/16 Ann/Cliff. 3/16</p> <p>Ann/Cliff. 10/31/16 Ann/Cliff. 10/31/16</p> <p>Ann/Cliff. 6/31/16</p> <p>Ann/Finance Committee /Board (10/15 annually) Ann/Finance Comm/Board. 3/31/16.</p>

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		<ul style="list-style-type: none"> • Support next level of needs for building capacity <ul style="list-style-type: none"> ○ Grow the board giving capacity to realistically consider a capital campaign in FY 2017 	Governance Committee/Finance Committee 1/31/16 (and annually)

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<p>GOAL 5: Break the cycle of abuse by collaborating in the community and working in the legislature to improve the lives of the children we serve and help them heal</p>	<p>Support the collaborative Community Youth Outreach Alliance with Montgomery County Youth Services and Angel Reach to provide a Resource Center and stable housing for youth experiencing homelessness, particularly those youth transitioning from foster care.</p>	<ul style="list-style-type: none"> • Leveraging CASA communications, management, legal and legislative advocacy experience, assist the CYO Alliance to create an efficient, leveraged, effective operation by July 2018 • Drive legislative change that improves the chances of success for youth exiting the foster care system by getting on the Texas CASA legislative agenda: records are sealed for foster youth aging out of the system so the youth can start their adult life with a clean background. • Drive legislative change that improves the chances of success for younger children by getting on the Texas CASA legislative agenda: CASA can file a motion when there is no lawyer on the case. • Identify substandard and harmful services and advocate for improvement 	<p>Robyn/Ann. 7.31.18 (ongoing)</p> <p>Legislative Committee Chair. 10.31.16</p> <p>Legislative Committee Chair. 10/31.16</p> <p>Pat/Legislative Committee. 10.31.16</p>

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		<ul style="list-style-type: none"> • Make and continue PERSONAL relationships with Montgomery County/Community <ul style="list-style-type: none"> • Judges – Court Appointed & Juvenile • Legislatures – House & Senate Members • County – Commissioners • City – Mayor • Law Enforcement – Sheriff & Constable • Continue and advance work with the LAT (Legislative Advocacy Team) <ul style="list-style-type: none"> • Austin • CEO and Staff Engagement • Volunteer – Speaking • Work issues at the Legislative Sessions – 85th <ul style="list-style-type: none"> • Preparation, Presentation, and Execution Groundwork • CASA at the Capitol • Senate & House – Meet/Greet Staffers and Elected Officials • Messaging for “BILL” authorship and passage • Obtain and update Endorsements <ul style="list-style-type: none"> • Proclamations • Personal Letters • Gala Table Sponsorships 	<p>Legislative Committee Chair. 10/31/16, annually</p> <p>Legislative Committee Chair. 5/31/16, annually</p> <p>Legislative Committee Chair. 5/31/16, annually</p> <p>Legislative Committee Chair. 5/31/16, annually</p>

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		<ul style="list-style-type: none"> • Speaking Opportunities – Chamber/Fund Raising/Conferences • Implement Legislative Best Practices <ul style="list-style-type: none"> • Jury Duty Funding • Adopt a Legislator 	Legislative Committee Chair. 5/31/16, annual
GOAL 6: Enhance the quality of Montgomery County CASA administration and governance	<p>15 active board members in place 2013 11 2014 (14 actual) 2015 14 2016 15 2017 15</p> <p>100% of Board Members in Blue Ribbon Society</p> <p>100% of Board members are actively engaged in the committees and Advisory Council</p>	<ul style="list-style-type: none"> • Increase Board diversity by using the Board matrices and recruiting purposefully • Develop and implement a new Board dashboard, and assess annually by 10/15 for compliance with strategic plan and organization support Board training or strategic planning in place annually by 10/31 of each year • Update Committee Leadership Expectations 	<p>Gov Committee 10/31/15</p> <p>Ann/Cliff/Gov Committee 10/15</p> <p>Ann / Governance Committee 10/15</p> <p>Ann/Governance Committee. 1/31/16</p> <p>Governance Committee. 10.31.16</p> <p>Ann 3/31/16</p>

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	<p>Increase use of data to create knowledge that drives our organization</p>	<ul style="list-style-type: none"> • Schedule regular Strategy reviews, complete by 3/31 of each year • Board training or strategic planning in place annually by 10/31 of each year • Reconsider Board/committee structure • Implement donor analytics plan, including understanding of donor retention 	<p>Ann/Governance Committee 10/31/16 annually Ann/Governance Committee 10/31/16 Ann/Cliff. 3/31/16</p>