

Strategic Plan Overview

Mission Empower, educate, and equip kinship caregivers of disadvantaged children in Metro Atlanta

Vision Kinship caregivers receive all the support they need to raise healthy, successful children outside of the foster care system

Values

- Community
- Empathy
- Equity
- Family
- Realistic Optimism

Strategic Goals

- Implement a system to better respond to client needs
- Develop a housing community for low-income grand-families
- Build internal capacity
- Invest in marketing and branding
- Prioritize client needs through advocacy and collaboration
- Enhance the Board's capacity to support ISDD's growth

Big Bold Goal*

Open our first intergenerational housing community by 2028

**The Big Bold Goal is an aspirational and ambitious goal.*

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Planning Process Description

Innovative Solutions for Disadvantage and Disability (ISDD) sought a planning process to develop a strategic framework that:

- Offers a guiding map for program growth and resource deployment
- Ensures continued organizational strength
- Outlines rebranding efforts
- Provides opportunities for continued Board development and growth

Toward this end, ISDD engaged Dolph Goldenburg and Lexie Linger of Successful Nonprofits® to structure and facilitate a participatory strategic planning process. As part of the planning process, 2 staff members and 6 Board members served on a Strategic Planning Work Group:

- Rainie Jueschke, Executive Director
- Thindiwia Meredith, Program Director
- Tonya Holody, Board Chair
- Breanne West, Board Vice Chair
- Jacob Rumery, Board Treasurer
- Jessicah Nix, Board Member
- Matt Sales, Secretary

ISDD's Board started the Environmental Scan before engaging consultants. Their work included interviewing key stakeholders, updating the mission and vision, and considering possible strategic directions.

The Work Group and consultants continued the environmental scan process in February 2022 by:

- Reviewing financial trends, program outcomes, and Board performance
- Exploring branding needs and opportunities
- Conducting focus groups with key clients, staff, and the Board
- Identifying a benchmark partner and conducting a Learning Journey

Based on the results of the Environmental Scan, the Work Group drafted recommendations for a Big Bold Goal and 5-Year Strategic Goals. ISDD's staff leaders provided feedback and suggested Annual Objectives that support the over-arching Strategic Goals.

The Work Group presented the results of the Environmental Scan as well as the proposed 5-Year Strategic Goals and Annual Objectives at a full-day, in-person Board retreat. The interactive retreat included opportunities for Board members to provide feedback and make additional recommendations for the final plan.

Using this information, the Work Group finalized the strategic plan draft for final Board review. The Board approved the plan on November 17, 2022.

Environmental Scan Results

Financial Analysis

The Work Group analyzed five years of ISDD’s financial statements to identify trends and opportunities for growth. The analysis demonstrated that ISDD has a history of financial strength, and the Work Group focused on opportunities to ensure continued growth and financial sustainability.

The Work Group began with a review of ISDD’s revenue, expense, and net over the previous 5 years (Figure A). This data shows ISDD has enjoyed consistent growth and healthy surpluses.

The one exception is Fiscal Year (FY) 2018, when ISDD closed with a small deficit. This was the result of an intentional decision to pivot programing, which changed funding sources. This one-time deficit was an anomaly because (a) the one-time deficit is relatively small, (b) strategy pivots may result in short-term deficits, and (c) ISDD has since seen steady growth.

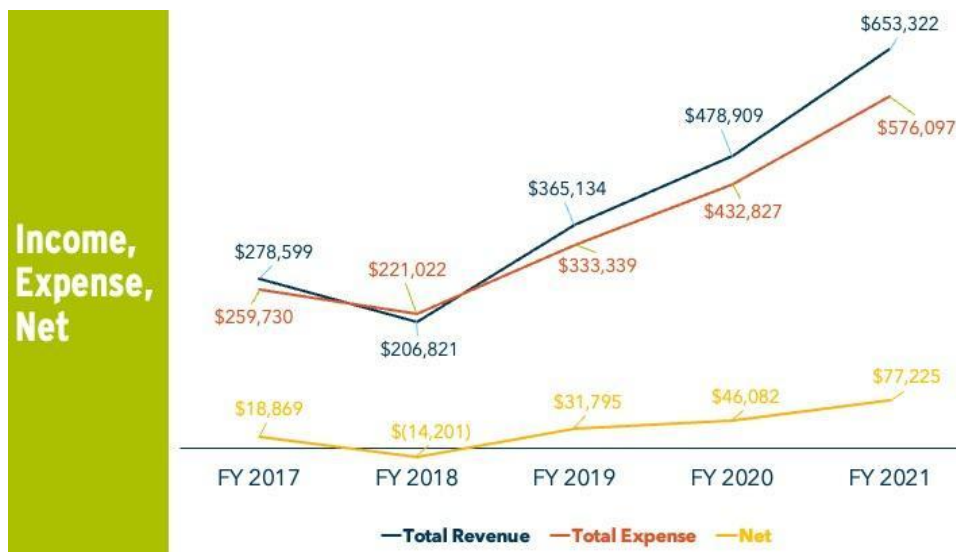


Figure A

The Work Group also reviewed ISDD’s end of year cash reserves (Figure B), which currently meets the Board’s goal of maintaining three to six months of reserves. Further examination revealed that excess funds have historically been restricted for specific program expenses.



Figure B

This has resulted in fewer funds available for organizational infrastructure, and a review of functional expenses (Figure C) also demonstrates this overemphasis on programming.

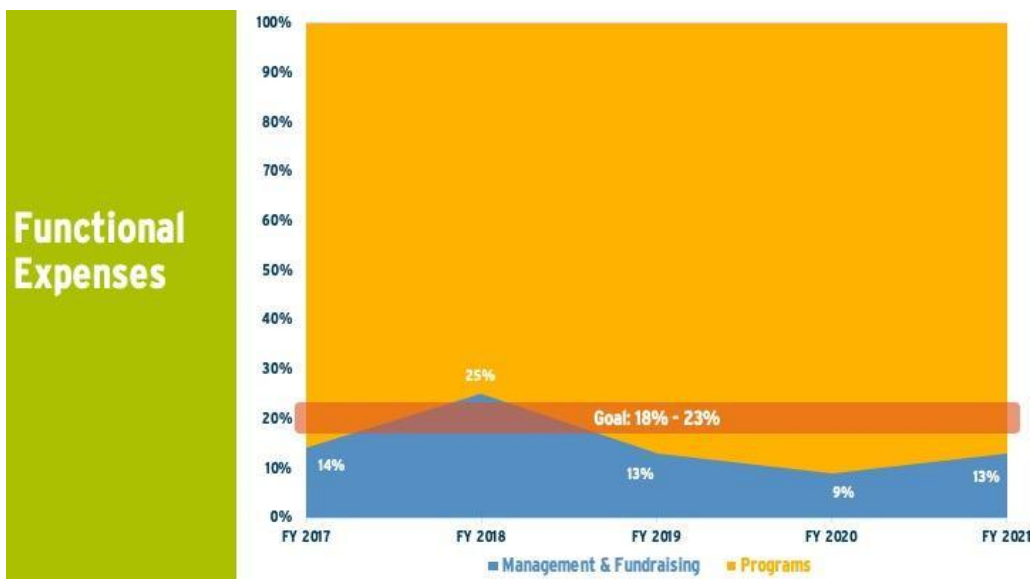


Figure C

While ISDD is proud to invest in programs and clients, appropriate funding must also be allocated to develop and maintain the organization’s internal capacity and support operations and growth. At the Board retreat, ISDD committed to increasing the total percentage of revenue available for management, finance, marketing, and fundraising efforts to 18% - 23%. This will support long-term growth and sustainability.

Finally, the Work Group explored ISDD’s revenue sources (Figure D). While government grants represent the majority of ISDD’s funding, this funding comes from multiple sources which ensures stability. This review identified individual philanthropy as a fundraising opportunity and therefore the Work Group recommends investing in donor cultivation, including hiring development staff.

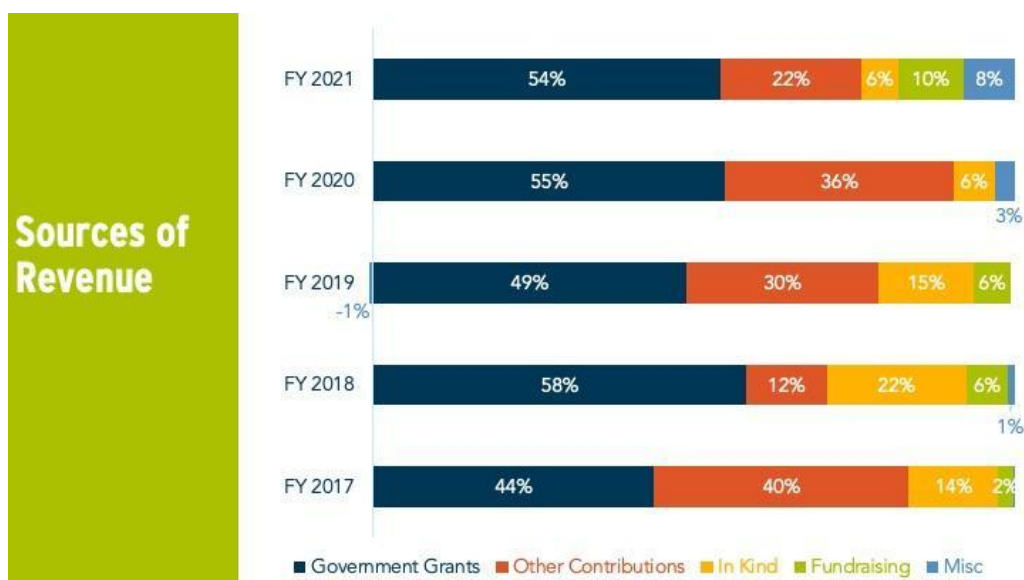


Figure D

Based on the results of the Financial Analysis, the Board retreat also discussed the creation of investment policies, including a windfall policy, and investing in ISDD’s fundraising capacity, especially individual donor cultivation

Program Analysis

The Work Group reviewed two to three years of data from the Georgia Department of Aging’s Kinship Survey. All kinship programs in Georgia, including ISDD, administer this client survey twice each year, with the exception of Spring 2020 due to COVID. Regularly reviewing this data is an opportunity for ISDD staff to understand community needs and modify programs as

necessary. For example, the Work Group used this data to identify program recommendations based on client demographics, needs, service satisfaction, and self-reported outcomes.



Figure E

Figure E provides an overview of ISDD’s client demographics in Calendar Year (CY) 2021. There are two significant changes from CY 2020 that potentially impact ISDD as presented in Figure F:

1. **Clients’ ages trended younger.** If this trend continues, changing client needs will require a modification of ISDD’s services. Furthermore, many of ISDD’s funding sources stipulate the funds must serve clients who are 55 years and older. While 71% of clients meet this requirement as of CY 2022, ISDD will need to expand its funding strategies to serve younger clients should this trend continue.
2. **Client household incomes are trending lower,** which correlates with clients self-reporting increased difficulty in meeting basic necessities (see the Stakeholder Analysis). While the Work Group believes this is due in part to COVID, members anticipate this will be an ongoing issue, especially with rising inflation. Therefore, Work Group members recommend building the capacity to offer ongoing financial assistance at levels that match or exceed those of CY 2021.

Clients are getting younger...		
	2020	2021
Less Than 55 yrs	15%	29%
56-64 yrs	45%	43%
65-74 yrs	35%	26%
75+ yrs	5%	2%

Clients' household incomes are decreasing...		
	2020	2021
Less than \$9,999	14%	31%
\$10,000 - \$19,000	27%	33%
\$20,000-\$29,000	37%	20%
\$30,00 - \$39,000	13%	5%
\$40,000-\$49,999	3%	2%
\$50,000 or more	3%	2%
Prefer not to say	3%	7%

Key
Demographic
Changes

Figure F

The Kinship Survey also tracks the community services clients access and their satisfaction with those services. This includes services offered by ISDD, as well as those offered by other organizations. Regardless, this data provides ISDD the opportunity to understand client needs of both the type of service and the quality of service.

The top three services clients accessed between CY 2019 and CY 2021 were food and nutrition; education; and mental health. These results suggest two key takeaways:

1. **Clients need a wide variety of services, some of which are beyond ISDD’s scope.** Therefore, ISDD must intentionally build partnerships with other organizations to provide clients access to all the services they need.
2. **Even though clients self-report housing as a significant unmet need (see the Stakeholder Analysis), this service was not often accessed.** The client survey indicated that a limited supply of affordable housing and housing vouchers make this service significantly less accessible. In fact, the number one unmet service need was “housing.” For this reason, ISDD will explore ways to provide short-term and long-term solutions to this housing crisis.

The Work Group discovered that satisfaction with many services has declined since CY 2019 (Figure G). While the Work Group believes this is largely due to COVID’s impact on clients and service providers, members also anticipate high stress levels to continue in the community due to COVID, inflation, and greater polarization in society. This represents an opportunity for ISDD to use this data to guide strategic partnerships. For example, client satisfaction with

mental health decreased 13%. ISDD staff can share this information with current mental health partnerships and actively pursue new partnerships as needed.

Are you satisfied with the services you've received?		
	2019	2021
Legal	82%	86%
Financial	94%	91%
Housing	83%	85%
Mental Health	100%	87%
Food and Nutrition	95%	94%
Child Care	100%	88%
Medical	100%	94%
Educational	93%	96%
Leisure/Recreational	100%	95%

Services in green are the top 3 services accessed by clients

Satisfaction with Accessed Services

Figure G

Finally, the Kinship Survey includes self-reported client outcomes (Figure H), which are similarly declining. This is likely related to COVID's impact on client wellbeing and will be proactively addressed with a goal of 90% or higher for each self-reported outcome.

Since working with ISDD, I feel...

	2019	2020	2021
Better able to cope	97%	100%	91%
Less stressed	98%	89%	85%
I enjoy life more	95%	78%	84%
I can continue raising these kids	97%	100%	96%
My overall health and wellbeing has improved	94%	89%	91%

Client Self-Reported Outcomes

Figure H

Based on the results of the Program Analysis, opportunities for ISDD include:

- Implementing a system that tracks necessary data so ISDD can understand and respond to client needs
- Building the capacity necessary to provide ongoing financial assistance that matches or exceeds assistance provided in CY 2021
- Building strategic partnerships and strengthening the referral process to connect clients with necessary, high-quality services that are beyond ISDD's scope
- Exploring short-term and long-term solutions for safe, quality, affordable housing
- Achieving 90% or better on each self-reported outcome for clients completing the Kinship Survey

Stakeholder Analysis

The Stakeholder Analysis sought to gather useful perspectives about ISDD and engage those most impacted by the strategic plan in the planning process. The Work Group accomplished this by conducting six focus groups with a total of 39 stakeholders representing clients, staff, Board, partner organizations, and funders. These conversations' themes support additional findings, particularly the financial and program analyses.

ISDD is clients' primary source of support. This sentiment is embodied in this quote from a client: *"I support my kid, but no one except ISDD supports me."* Clients report this care primarily comes from regular Support Group meetings, as well as the close relationships clients develop with staff. Clients report this feeling of being supported --- and knowing they are not alone --- is the most important work ISDD does.

Clients' self-reported primary needs are (a) meeting basic necessities and (b) finding help for their grandchildren. Clients report struggling to provide their grandchildren with basic necessities, especially safe, affordable housing and food security. Inability to meet these basic, human needs makes providing grandchildren a high quality of life difficult, if not impossible. Unsurprisingly, clients also report difficulty accessing enrichment opportunities that enhance their grandchildren's lives and prepare them for future success. Finding appropriate male role models was of particular concern for those raising grandsons.

ISDD provides high-quality services worthy of scaling. Stakeholders praised the quality of ISDD’s staff and programs and would like services to expand and reach more families. Expanding services could enable ISDD to eliminate the waitlist and assist those in underserved communities.

There are communities ISDD is not reaching. Stakeholders noted communities that ISDD is not reaching, such as those living outside of Fulton and DeKalb counties, Indigenous People of Color, white families, and male caregivers. However, stakeholders also indicated they were not sure if these populations actually needed ISDD’s services and therefore recommended staff conduct a needs assessment. Clients also emphasized that their teenage grandchildren need additional support and services beyond what is currently being provided, especially their male grandchildren.

Staff are ISDD’s greatest asset. Not only were staff listed as ISDD’s “best kept secret,” but clients report that their relationships with staff and the skilled professionals ISDD employs are essential to feeling supported and meeting their needs.

Clients would like ISDD to engage in issue advocacy. Clients report many service providers do not understand the unique situation of kinship families. As a result, clients are often treated poorly or are ineligible for services other foster families access. Educating service providers and lawmakers on kinship families could help clients access high-quality services they need.

Based on the results of the Stakeholder Analysis, ISDD considered:

- Exploring short-term and long-term solutions for safe, quality, affordable housing
- Reinforcing existing partnerships and developing new collaborative relationships to connect clients with services beyond ISDD’s scope
- Building the capacity necessary to provide ongoing financial assistance that meets clients’ basic needs
- Strengthening internal capacity to scale ISDD’s services
- Eliminating the waitlist
- Investing in marketing and outreach that builds brand and service awareness among members of underserved communities, as well as current clients
- Reviewing case manager caseloads and modify as needed to avoid staff burnout and ensure effective case manager-client relationships
- Investing in staff recruitment and retention
- Exploring issue advocacy to educate the community, including service providers, on kinship families

Learning Journey

The Learning Journey is an opportunity to build a mentoring relationship with an organization that has successfully completed key goals ISDD hopes to achieve. ISDD considered two prospective partners and ultimately selected Bridge Meadows in Portland, Oregon.

Bridge Meadows was founded in 2004 with the sole purpose of developing and providing intergenerational housing for seniors and youth. After three years of building capacity, Bridge Meadows began developing its first housing community. Today it owns and manages four housing communities in partnership with for-profit, nonprofit, and government entities.

Though it is a very different organization from ISDD, the long-term need for kinship housing solutions was the reason for selecting Bridge Meadows as a Learning Journey partner. Rainie Jueschke, Thindiwia Meredith, Nichelle Mitchell, and Dolph Goldenburg spent a full day on site with Bridge Meadows' Executive Director, Derenda Shubert, and members of her senior leadership team.

Bridge Meadows' housing communities were made possible by 9% low-income tax credits (LITC), long-term debt, and successful capital campaigns. The debt and fundraising enable the organization to build apartment complexes with better unit options and shared community amenities not typically funded through LITC. Under this model, the affordable rents allow Bridge Meadows to service construction debt, pay professional building management, and maintain the buildings and shared community amenities.

The Learning Journey participants gained the following key insights:

Transition to a housing-first model. The Environmental Scan has made it clear that clients need support to meet their basic needs, which includes housing. Without these basic needs met, ISDD's other services are less impactful. Therefore, transitioning to a housing-first model has the greatest long-term benefits for ISDD's clients. Hiring a Housing Navigator would support this model in the short- and long-term as ISDD moves toward opening a housing community.

Build ISDD's internal capacity. The first step toward a housing model is to build ISDD's internal capacity, especially its staff. Bridge Meadows has 12 staff members, and only three are engaged as case managers serving residents. The remainder of the team provide management and organizational support necessary to operate existing communities and continue building additional housing communities. These staff include a robust administration team with dedicated positions for fundraising and finance to support their

expanded financing needs. Additionally, staff oversee partners and contractors, and those contracting partners manage the properties and provide additional services to residents.

Build the Board’s capacity. Bridge Meadows’ Board is actively involved in all aspects of the organization, particularly in providing expertise and supporting fundraising. ISDD will need to expand the skill sets of Board members (for example, recruit expertise in multifamily construction, commercial lending, etc.) and emphasize an expanded Board role in fundraising. This will also require a larger Board.

Prepare to support clients who do not qualify for the housing community. Many of ISDD’s current clients will not qualify for LITC housing because of their extremely low household incomes. ISDD needs to explore ways to support these clients. One option is to find additional funding to make units affordable to these families. Another is recruiting housing navigators with expertise in metro Atlanta’s affordable housing options; ISDD may blend these two solutions.

Brand Analysis

ISDD has undergone significant program and service changes in the last few years and now anticipates expanding into housing as well. As a result, ISDD intended to explore rebranding as part of the strategic planning process, and the Environmental Scan reinforced this need. ISDD’s full name – Innovative Solutions for Disadvantage & Disability – is not well known and is not descriptive of the current programs or proposed mission. For this reason, ISDD explored engaging a rebranding agency to (a) facilitate a process that identifies a new name, logo, and style guide and (b) develop a new brand launch strategy to roll out the new brand.

Rebranding is an opportunity to educate the community about ISDD and its services, which the Environmental Scan identified as a need. Therefore, the rebranding process should take into consideration current communities served as well as those communities currently underserved.

Board Analysis

The consultants analyzed Board member participation in meetings, committees, and fundraising. They also facilitated a focus group with Board members to explore board service expectations, onboarding experiences, opportunities to strengthen the Board, and intentions

to remain on the Board. The results of this research indicate that ISDD has a high performing Board, and the process explored opportunities to continue strengthening Board governance:

The Board could benefit from a scorecard system to help Board members track individual fulfillment of expectations. ISDD's board has a strong attendance rate, with the average Board member attending at least 74% of meetings. The majority of Board members also make a personally significant gift and support fundraising efforts. A small percentage of Board members are not meeting these expectations. A periodically distributed scorecard could help Board members track their progress toward meeting expectations and also ensure the Board remains strong as it expands in size.

The Board could benefit from an annual recruitment campaign. Board recruitment and onboarding of new members was identified as a pain point among current members. An annual recruitment campaign can facilitate a more robust approach to identifying and screening new board members and also help Board leaders track terms and term limits. This system also enables the Board to focus resources to a single onboarding process each year. Furthermore, recruiting and onboarding new members in cohorts ensures new members build relationships and offers more support to help them become effective in their new role.

Board recruitment could benefit from a matrix that tracks skills, lived experiences, and terms. Skilled and passionate Board members is one of the notable strengths for ISDD. Developing a Board matrix to track current and prospective members' skills, geographical representation, and lived experiences will (a) build upon this strength, and (b) ensure additional skills are recruited to the board.

Based on the results of the Board Analysis, the Board considered:

- Implementing a scorecard system to track attendance (for Board and committee meetings) and philanthropy
- Developing a board matrix to assess needed skills, connections, representation, and lived experiences
- Implementing an annual, committee-led Board recruitment campaign
- Relaunching an orientation that informs, inspires, and initiates new Board members

Mission, Vision, and Values

ISDD reviewed and revised its mission, vision, and values prior to engaging Successful Nonprofits®. These updated statements are reflected on the first page of this plan.

Big Bold Goal

As part of the strategic planning process, ISDD also crafted a Big Bold Goal, included on the first page of this plan. While ISDD hopes to achieve this Big Bold Goal within five years, it also understands that the successful application for LITC might require a longer timeframe of six to eight years.

Five-Year Strategic Goals

- Implement a system to better respond to client needs
 - Improve data collection and analysis
 - Offer short-term solutions to clients' housing needs
 - Pursue strategic partnerships and strengthen the referral process
 - Reduce case managers' client caseloads while eliminating the wait list
- Raise funds for and develop a housing community for low-income grand-families
 - Construct and open a housing community
 - Adopt a housing-first model
- Build internal capacity
 - Update policies to invest in internal infrastructure
 - Strengthen internal infrastructure
 - Move to a new office to support expanded programs and staff
- Invest in marketing and branding
 - Rebrand
 - Educate clients and the community on ISDD services
- Prioritize client needs through advocacy and collaboration
 - Identify resources that meet clients' unique needs

- Engage in issue advocacy to expand programs, services, and equitable opportunities for kinship families
- Prioritize working with staff, Board members, partners, consultants, and contractors with varying lived experiences
- Enhance Board capacity to support ISDD's growth
 - Expand the Board size to accommodate additional skills, expertise, and lived experiences
 - Refocus Board recruitment to a single, robust annual recruitment campaign
 - Create a more experiential onboarding process for new members
 - Support fulfillment of Board expectations

Impact Metrics

Measured baseline data and outcome targets for FY 2023 through FY 2027 is below.

Key Performance Indicator	Baseline (FY 21/22)	CY 23	CY 24	CY 25	CY 26	CY 27
# of unduplicated households in case management annually	89	75 ¹	75	75	100	125
# of housing navigation households entering stable housing	2	8	20	30	40	40
# of households receiving assistance to maintain stable housing	30	15 ²	15	20	25	30
% of clients who feel they can continue raising their relative children	96%	98%	100%	100%	100%	100%
# of counties served	9	8 ³	9	10	11	12
# of Board members at year end	12	14	16	18	TBD	TBD

¹ The number of households in case management will initially decline as ISDD adjusts caseloads to 25 households per case manager

² The number of households receiving assistance will initially decline due to the expiration of COVID-related funding

³ The number of counties served will initially decline as a special project concludes

Annual Objectives

5 Year Strategic Goals	Calendar Year 2022/2023 Objectives	Calendar Year 2024 Objectives	Calendar Year 2025 Objectives	Calendar Year 2026 Objectives	Calendar Year 2027 Objectives
Respond to client needs	<p>Complete client database build-out</p> <p>Provide emergency financial assistance as able</p> <p>Review Kinship Survey data and modify programs as appropriate and able</p> <p>Build relationships with affordable behavioral health providers</p> <p>Eliminate wait list while reducing Case Managers' workload</p> <p>Recruit Housing Navigator</p> <p>Add additional Case Managers as designated funding is secured</p> <p>Evaluate self-reported client outcomes and modify services as necessary to achieve 90% or higher</p>	<p>Create specialized Case Manager roles, while maintaining assigned Case Managers</p> <p>Build relationships with job training providers, teen male mentorship providers</p> <p>Add additional Case Managers as designated funding is secured</p> <p>Provide emergency financial assistance as able</p> <p>Review Kinship Survey data and modify programs as appropriate and able</p> <p>Evaluate self-reported client outcomes and modify services as necessary to achieve 90% or higher</p>	<p>Add additional Case Managers as designated funding is secured</p> <p>Provide emergency financial assistance as able</p> <p>Review Kinship Survey data and modify programs as appropriate and able</p> <p>Evaluate self-reported client outcomes and modify services as necessary to achieve 90% or higher</p>	<p>Build relationships with affordable dental care providers</p> <p>Add additional Case Managers as designated funding is secured</p> <p>Provide emergency financial assistance as able</p> <p>Review Kinship Survey data and modify programs as appropriate and able</p> <p>Evaluate self-reported client outcomes and modify services as necessary to achieve 90% or higher</p>	<p>Prepare for and recruit case managers necessary to meet the needs of residents in the new housing community</p> <p>Provide emergency financial assistance as able</p> <p>Review Kinship Survey data and modify programs as appropriate and able</p> <p>Evaluate self-reported client outcomes and modify services as necessary to achieve 90% or higher</p>

5 Year Strategic Goals	Calendar Year 2022/2023 Objectives	Calendar Year 2024 Objectives	Calendar Year 2025 Objectives	Calendar Year 2026 Objectives	Calendar Year 2027 Objectives
Develop a housing community	<ul style="list-style-type: none"> Build relationships with developers, funders, & lenders Research 9% LITC Raise initial funds necessary to apply for tax credits Create a Board Housing Committee Identify potential low- or no-cost land for a housing community 	<ul style="list-style-type: none"> Determine whether this goal remains the best direction for ISDD Obtain site control of land Identify developer Apply for tax credits 	<ul style="list-style-type: none"> Plan and launch capital campaign Determine communication plan for current clients Alternate: Review lessons learned and apply for tax credits if not awarded in prior year 	<ul style="list-style-type: none"> Construction begins Alternate: Review lessons learned and apply for tax credits if not awarded in prior year 	<ul style="list-style-type: none"> Community opens Adopt a housing first model Alternate: Review lessons learned and apply for tax credits if not awarded in prior year
Build internal capacity	<ul style="list-style-type: none"> Recruit Resource Development Director (RDD) and Administrative Assistant Increase staff accountant hours Create Development Plan Review and update financial policies Move to larger office space 	<ul style="list-style-type: none"> Recruit Finance, Operations, & HR Director Increase staff accountant hours to 55/month 	<ul style="list-style-type: none"> Develop staff retention plan Draft staff development plan 		<ul style="list-style-type: none"> Review staffing structure prior to opening of new housing community
Invest in marketing and branding	<ul style="list-style-type: none"> Identify Board member to partner with Executive Director Research and select rebrand consultant Identify goals for new brand Launch new name and brand materials Launch new website 	<ul style="list-style-type: none"> Develop and implement a marketing plan to educate current clients on services Measure new brand's achievement of identified goals 	<ul style="list-style-type: none"> Develop a marketing plan for underserved communities Evaluate effectiveness of client marketing Measure new brand's achievement of identified goals 	<ul style="list-style-type: none"> Evaluate effectiveness of marketing plans for clients and underserved communities Measure brand's achievement of identified goals 	<ul style="list-style-type: none"> Engage consultant to promote new housing community Evaluate effectiveness of marketing plans for clients and underserved communities

5 Year Strategic Goals	Calendar Year 2022/2023 Objectives	Calendar Year 2024 Objectives	Calendar Year 2025 Objectives	Calendar Year 2026 Objectives	Calendar Year 2027 Objectives
Prioritize Client Needs through Advocacy & Collaboration	<p>Prioritize varying lived experience in Board and staff recruitment</p> <p>Prioritize working with partners that have varied lived experiences, expertise in the communities served, and are disadvantaged business enterprises (DBE)</p> <p>Review referral resources through a client focus lens to ensure client needs are met</p> <p>Engage in issue advocacy</p> <p>Engage a diverse group of stakeholders in the rebranding process⁴</p>	<p>Ensure brand and marketing plans support client needs</p> <p>Review the branding and marketing plans through a client focused lens</p> <p>Determine underserved communities who could benefit from ISDD’s services and prioritize outreach</p> <p>Evaluate and update processes for recruiting staff, Board, and partners with varying lived experiences</p> <p>Continue engaging in issue advocacy</p>	<p>Review the outreach plan through a client focus lens</p> <p>Evaluate and update processes for recruiting staff, Board, and partners with varying lived experiences</p> <p>Continue engaging in issue advocacy</p>	<p>Include client needs metrics and practices in Board development plan and program implementation</p> <p>Revise staff development plan with client focus lens</p> <p>Evaluate and update processes for recruiting staff, Board, and partners with varying lived experiences</p> <p>Continue engaging in issue advocacy</p>	<p>Review the housing marketing plan through a client needs lens</p> <p>Evaluate and update processes for recruiting staff, Board, and partners with varying lived experiences</p> <p>Continue engaging in issue advocacy</p>
Enhance Board capacity	<p>Identify expectations</p> <p>Create system for tracking & supporting progress toward achieving expectations</p> <p>Develop a Board matrix</p> <p>Develop and implement an annual recruitment campaign</p> <p>Review and update Board orientation</p> <p>Increase board size to 14</p>	<p>Review and update Board matrix</p> <p>Update and implement annual recruitment campaign</p> <p>Review and update Board orientation as needed</p> <p>Increase board size to 16</p>	<p>Review and update Board matrix</p> <p>Update and implement annual recruitment campaign</p> <p>Review and update Board orientation as needed</p> <p>Increase board size to 18</p>	<p>Review and update Board matrix</p> <p>Update and implement annual recruitment campaign</p> <p>Review and update Board orientation as needed</p> <p>Board evaluation</p>	<p>Review and update Board matrix</p> <p>Update and implement annual recruitment campaign</p> <p>Review and update Board orientation as needed</p>

First Year Tactical Milestones

Performance Milestones Calendar Year 2022/2023	Tactics Quarter 1 Fall 2022	Tactics Quarter 2 Winter 2023	Tactics Quarter 3 Spring 2023	Tactics Quarter 4 Summer 2023	Tactics Quarter 5 Fall 2023	Lead
Respond to client needs	<p>Identify database consultants to finish database build-out ?</p> <p>Invite waitlisted clients to attend support groups and parenting classes ?</p> <p>Evaluate Case Managers' workload ?</p> <p>Review Kinship Survey data and determine any program modifications ?</p> <p>Identify and approach funders to support client financial & housing assistance ??</p>	<p>Create database SOP and train staff ?</p> <p>Draft criteria for continuing in CM and a communication plan for clients; Implement ?</p> <p>Outline resource manual for clients ?</p> <p>Evaluate Case Manager's workload and enroll clients from waitlist as able ?</p> <p>Audit behavioral health relationships ?</p> <p>Identify and approach funders to support client financial & housing assistance ??</p>	<p>Recruit Housing Navigator ?</p> <p>Complete resource manual for clients' households ?</p> <p>Transition clients who are no longer eligible for CM ?</p> <p>Evaluate Case Manager's workload and enroll clients from waitlist as able ?</p> <p>Build relationships with at least 2 behavioral health resources ?</p> <p>Identify and approach funders to support client financial & housing assistance ▲?</p>	<p>Onboard Housing Navigator ?</p> <p>Assess staff accuracy with database and retrain as necessary ?</p> <p>Evaluate Case Manager's workload and enroll clients from waitlist as able ?</p> <p>Build relationships with at least 2 behavioral health resources?</p> <p>Identify and approach funders to support client financial & housing assistance ▲?</p>	<p>Survey clients no longer eligible for CM and analyze results ?</p> <p>Evaluate Case Manager's workload and enroll clients from waitlist as able?</p> <p>Build relationships with at least 2 behavioral health resources?</p> <p>Review Kinship Survey data and determine any program modifications ?</p> <p>Identify and approach funders to support client financial & housing assistance ▲?</p>	<p>Executive Director ?</p> <p>RDD ▲</p> <p>Program Director ?</p>

Performance Milestones Calendar Year 2022/2023	Tactics Quarter 1 Fall 2022	Tactics Quarter 2 Winter 2023	Tactics Quarter 3 Spring 2023	Tactics Quarter 4 Summer 2023	Tactics Quarter 5 Fall 2023	Lead
Develop a housing community	<ul style="list-style-type: none"> Identify potential low- or no-cost land for a housing community ☐ Create list of prospective developers, funders, and lenders ☐ Identify and register for seminar on 9% LITC ☐ Draft Board Housing Committee charter and identify members ☐ 	<ul style="list-style-type: none"> Meet with developers, funders, and lenders ☐ Seek advice from funders ☐ Launch Board Housing Committee ☐ 	<ul style="list-style-type: none"> Begin fundraising and grant solicitations ☐ Continue meeting developers, funders, and lenders as needed ☐ 	<ul style="list-style-type: none"> Continue fundraising and grant solicitations ▲ Continue meeting developers, funders, and lenders as needed ☐ 	<ul style="list-style-type: none"> Complete raising initial funds necessary for LITC application ▲ Continue meeting developers, funders, and lenders as needed ☐ 	<ul style="list-style-type: none"> Executive Director ☐ RDD ▲ Board Chair ☐ Board Housing Committee Chair ☐
Build internal capacity	<ul style="list-style-type: none"> Raise funds for RDD position ☐ Recruit and onboard Administrative Assistant ☐ Engage realtor ☐ Recruit RDD ☐ 	<ul style="list-style-type: none"> Onboard RDD ☐ Increase staff Accountant hours ☐ Contract for new office space ☐ Move to new office space ☐ 	<ul style="list-style-type: none"> Increase staff accountant hours ☐ 	<ul style="list-style-type: none"> Draft Development Plan ▲ 	<ul style="list-style-type: none"> Review and update policies to support investing in internal infrastructure ☆ Draft Windfall Policy ☆ 	<ul style="list-style-type: none"> Executive Director ☐ RDD ▲ Finance Committee Chair ☆

Performance Milestones Calendar Year 2022/2023	Tactics Quarter 1 Fall 2022	Tactics Quarter 2 Winter 2023	Tactics Quarter 3 Spring 2023	Tactics Quarter 4 Summer 2023	Tactics Quarter 5 Fall 2023	Lead
Invest in marketing and branding	<p>Identify Board leader to partner with Executive Director ☒</p> <p>Research consultant to lead the rebranding process ☒</p>	<p>Select and engage consultant ☒</p>	<p>Identify goals for the new brand ☒</p> <p>Implement rebranding process ☒</p>	<p>Finish rebranding process ☒</p>	<p>Launch new brand materials (name, logo, print, website, etc.) ☒</p>	<p>Executive Director ☒</p> <p>Board Chair ☒</p>
Prioritize Client Needs through Advocacy & Collaboration	<p>Meet with Fulton County commissioners individually ☒</p> <p>Participate in Grand Families United Council ☒</p>	<p>Meet with Dekalb County commissioners individually ☒</p> <p>Meet with state legislators ☒</p> <p>Participate in Grand Families United Council ☒</p>	<p>Meet with Gwinnett County commissioners individually ☒</p> <p>Participate in Grand Families United Council ☒</p> <p>Draft partner and staff dashboard that includes lived experiences and expertise in communities served ☒</p>	<p>Meet with Cobb County commissioners individually ☒</p> <p>Participate in Grand Families United Council ☒</p>	<p>Meet with Fulton County commissioners individually ☒</p> <p>Participate in Grand Families United Council ☒</p>	<p>Executive Director ☒</p> <p>Program Director ☒</p>
Enhance Board capacity	<p>Review Board service expectations ☒</p> <p>Create system for tracking & supporting achievement of expectations ☒</p> <p>Develop a Board matrix ☒</p> <p>Plan recruitment campaign ☒</p>	<p>Implement recruitment campaign ☒</p> <p>Plan onboarding process ☒</p> <p>Design Board member scorecard system ☒</p>	<p>Appoint new board members (increase board size to 14) ☒</p> <p>Begin onboarding process ☒</p>	<p>Complete onboarding process ☒</p> <p>Implement Board member scorecard system ☒</p>		<p>Board Governance Committee Chair ☒</p>

Staffing Plan

This staffing chart is for planning purposes only and is designed as a projection tool for the budgeting process, fundraising planning, and strategy discussions. The staffing chart represents the full-time equivalent of each position. The baseline includes current vacant and filled positions.

Position	Baseline (FY 2021)	CY 2022	CY 2023	CY 2024	CY 2025	CY 2026	CY 2027
Executive Director	1	1	1	1	1	1	1
Program Director	1	1	1	1	1	1	1
Program Assistant	1	1	1	1	1	1	1
Lead Case Manager	1	1	1	1	1	1	1
Case Manager	2	2	3	3	3	4	5
Bookkeeper	0.2	0.2	0.4	0.5	0.5*	0.5*	0.5*
Administrative Assistant	0	.25	1	1	1	1	1
Resource Development Director	0	0	1	1	1	1	1
Housing Navigator	0	0	.5	1	1	1	1
Finance, Operations, & HR Director	0	0	0	.5	1	1	1
Total Full Time Equivalent	6.2	6.45	9.9	11	11	12	13

**Re-evaluate role of Bookkeeper based on need and capacity*

Pro Forma Revenue & Expense Projections

This Pro Forma is for planning purposes only and is not a board-approved budget. The Pro Forma is designed as a projection tool to be used in the budgeting process, fundraising planning, and strategy discussions.

Revenue	FYE 6/30/2023	FYE 6/30/2024	FYE 6/30/2025	FYE 6/30/2026	FYE 6/30/2027
Foundation Grants	\$463,497	\$358,284	\$291,224	\$312,477	\$377,345
Government Grants	\$370,973	\$447,284	\$527,909	\$604,909	\$628,784
Corporate Contributions	\$60,000	\$70,000	\$80,000	\$90,000	\$100,000
Golf Tournament (net)	\$35,671	\$60,000	\$65,000	\$70,000	\$75,000
United Way Grant	\$45,000	\$60,000	\$65,000	\$65,000	\$75,000
Board Contributions	\$5,000	\$10,000	\$17,500	\$24,500	\$30,625
Investment Income	\$1,600	\$6,397	\$5,000	\$5,000	\$5,000
Individual Contributions	\$35,000	\$102,500	\$150,000	\$190,000	\$220,000
Total Revenue:	\$1,016,741	\$1,114,465	\$1,201,633	\$1,361,886	\$1,511,754
Expense	FYE 6/30/2023	FYE 6/30/2024	FYE 6/30/2025	FYE 6/30/2026	FYE 6/30/2027
Payroll	\$461,990	\$621,657	\$731,524	\$788,855	\$878,797
Other ERE	\$74,164	\$102,885	\$129,878	\$150,080	\$169,181
Consultants / Contractors	\$49,275	\$42,365	\$72,984	\$71,263	\$48,113
Programs	\$123,949	\$134,484	\$141,209	\$166,063	\$212,462
Marketing and Advertising	\$43,250	\$2,788	\$3,327	\$3,368	\$3,412
Facility	\$48,055	\$62,672	\$64,869	\$69,104	\$71,436
LITC Application	\$77,500	\$122,594	\$0	\$0	\$0
Miscellaneous	\$18,628	\$24,657	\$27,605	\$29,982	\$33,229
Total Expense	\$896,811	\$1,114,102	\$1,171,394	\$1,278,715	\$1,416,630
Net	\$119,929	\$363	\$30,239	\$83,170	\$95,125