

Friedman Place Strategic Plan for Fiscal Years 16 -18

(July 1, 2015 – June 30, 2018)

Mission

The mission of Friedman Place is to provide housing and supportive services to adults who are blind or visually impaired.

Friedman Place emphasizes resident self-determination, independence, and interaction within the community.

Friedman Place strives to be a primary force among professional organizations serving adults who are blind or visually impaired.

Vision

We value an open, vibrant, and accessible community for our residents. We also engage other stakeholders and adult non-residents who are blind or visually impaired, and seek to enrich our programs and services utilizing community partners for the greatest benefit.

We support a self-directed person-centric model of care that provides for choice, engagement, and possibility.

STRATEGIC DIRECTION I

Friedman Place board and staff will build a governance infrastructure that is nimble, responsive, and prepares for the future needs of its residents, members of the community who are blind or visually impaired, and its diverse set of stakeholders.

Goal # 1: Build a governance model that reflects the current needs of the organization as well as the future needs of Friedman Place effectively transitioning to the new model by September, 2016.

Implementation Steps	By When
<ul style="list-style-type: none">• Establish Task Force (TF) on Governance• TF decides whether consultant is recommended for governance issues	<ul style="list-style-type: none">• September 15, 2015• October 15, 2015
<ul style="list-style-type: none">• If needed, define scope of work to engage Consultant• Issue RFP for governance consultant• Approve revised by-laws for Friedman Place & AJB	<ul style="list-style-type: none">• October 15, 2015
<ul style="list-style-type: none">• If needed, engage consultant through orientation and kick-off of project• Determine short-term priorities• ED will be oriented as part of TF upon hiring	<ul style="list-style-type: none">• November 15, 2015• November 15, 2015• TBD
<ul style="list-style-type: none">• Conduct research into best practices; identify possible models based on current and future needs of organization	<ul style="list-style-type: none">• December 15, 2015
<ul style="list-style-type: none">• Present interim report to Board of Directors• Board discusses recommendations and gives further direction to TF and	<ul style="list-style-type: none">• January 15, 2016

Consultant	
<ul style="list-style-type: none"> Board discusses possibility of interim steps (e.g., implementation of new meeting agendas; recruitment of 1-2 board members, etc. 	
<ul style="list-style-type: none"> Present final recommendations for new governance model to board 	<ul style="list-style-type: none"> March 1, 2016
<ul style="list-style-type: none"> Develop transitional implementation strategy (moving into new model) 	<ul style="list-style-type: none"> March 31, 2016
<ul style="list-style-type: none"> Add new board members prior to May 2016 	<ul style="list-style-type: none"> Ongoing

Goal # 2: Develop clear job profiles for board, senior executive, and other volunteers identified in the governance model.

Implementation Steps	By When
<ul style="list-style-type: none"> Collect descriptions for board, committees (charters), and senior executive; review for accuracy; best practices; overlap of duties, etc. 	<ul style="list-style-type: none"> November 1, 2015
<ul style="list-style-type: none"> Develop descriptions that are clear, accurate, detailed, and offer insight into connections between board members, other volunteers, and senior executive 	<ul style="list-style-type: none"> November 15, 2015
<ul style="list-style-type: none"> Present final drafts of descriptions to board 	<ul style="list-style-type: none"> November 30, 2015
<ul style="list-style-type: none"> Bi-annual review process is developed for ongoing review and update of job descriptions 	<ul style="list-style-type: none"> 6-month review – March, 2016
<ul style="list-style-type: none"> Current volunteers are identified and critical data is collected on each volunteer; volunteer profile/opportunities are developed 	<ul style="list-style-type: none"> November 1, 2015

Goal # 3: Create tools and processes for board development, performance criteria, succession planning, etc.

Implementation Steps	By When
<ul style="list-style-type: none"> Create development plan for board using best practices, articles, tools, and other resources 	<ul style="list-style-type: none"> November 30, 2015
<ul style="list-style-type: none"> Board activities will follow governance guidelines (goals #1 and #2) – minutes, agenda, decision making models, etc. 	<ul style="list-style-type: none"> November 30, 2015
<ul style="list-style-type: none"> Governance processes will be reviewed and updated as needed on a regular basis (e.g., by-laws, board orientation, etc.) 	<ul style="list-style-type: none"> January 1, 2016

Goal # 4: Hire and orient a permanent Executive Director. Support ongoing development of senior team.

Implementation Steps	By When
<ul style="list-style-type: none"> Develop search process for Executive Director; create timelines, detailed activities, etc. 	<ul style="list-style-type: none"> April 20, 2015
<ul style="list-style-type: none"> Search for Executive Director begins; Executive Director is hired 	<ul style="list-style-type: none"> September 1, 2015
<ul style="list-style-type: none"> Orientation process for Executive Director is drafted and executed 	<ul style="list-style-type: none"> November 1, 2015
<ul style="list-style-type: none"> ED and Board will determine respective roles and responsibilities 	<ul style="list-style-type: none"> November 1, 2015
<ul style="list-style-type: none"> Support ED in continuing to develop senior team (e.g., identifying board/staff activities; additional professional development; resources, etc. 	<ul style="list-style-type: none"> December 1, 2015

Goal # 5: Develop a short- and long- term resource development strategy with a focus on providing continued organizational stability and the ability to expand sustainable services and programs in response to community need.

Implementation Steps (What)	By When
<ul style="list-style-type: none"> • Meet with the Board of Directors to discuss current giving patterns; current donors, supporters, and sponsors • Discuss current funding streams and potential opportunities 	<ul style="list-style-type: none"> • July 31, 2015
<ul style="list-style-type: none"> • Create Resource Development Committee • Appoint Chair of Committee and staff liaison 	<ul style="list-style-type: none"> • November 1, 2015 • November 1, 2015
<ul style="list-style-type: none"> • Develop a 2-year Resource Development Plan that is formally adopted by the Board 	<ul style="list-style-type: none"> • December 15, 2015

STRATEGIC DIRECTION II

Friedman Place will provide accessible, relevant, and high-quality programs and services to its residents and others in the community of blind and visually impaired people.

Goal #1: Friedman Place will evaluate all current programs and services and develop metrics based on the mission and vision of the organization.

Implementation Steps	By When
<ul style="list-style-type: none"> • Create Program & Services Committee • Appoint Chair of Committee (board member) and staff liaison 	<ul style="list-style-type: none"> • November 1, 2015
<ul style="list-style-type: none"> • Develop measurement criteria for each program and service; tie criteria directly to mission/vision 	<ul style="list-style-type: none"> • November 1, 2015 and ongoing
<ul style="list-style-type: none"> • Measurement criteria is presented to board for discussion and approval 	<ul style="list-style-type: none"> • November 15, 2015
<ul style="list-style-type: none"> • Gather data 	<ul style="list-style-type: none"> • January 15, 2016 and ongoing
<ul style="list-style-type: none"> • Analyze data – identify gaps and opportunities for improvement 	<ul style="list-style-type: none"> • March 15, 2016
<ul style="list-style-type: none"> • Identify critical opportunities and feed this information into next goal 	<ul style="list-style-type: none"> • April 15, 2016

Goal #2: Friedman Place and/or its partners will develop and deliver new programs and services to meet the needs of adults who are blind or visually impaired.

Implementation Steps	By When
<ul style="list-style-type: none"> • Survey board members, volunteers, stakeholders, donors, etc. to determine possible clients for programs and services 	<ul style="list-style-type: none"> • April 1, 2016
<ul style="list-style-type: none"> • Develop framework for needs assessment – What is needed? What can we do best – either alone or with others? 	<ul style="list-style-type: none"> • June 1, 2016
<ul style="list-style-type: none"> • Data is collected and analyzed 	<ul style="list-style-type: none"> • October 1, 2016

• Develop new program/services staffing and resource plan	• October 15, 2016
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Goal #3: Develop activities and experiences within the David Herman Learning Center that drive the strategic directions of Friedman Place.

Implementation Steps	By When
• Project plan will be developed for David Herman Learning Center (DHLC) that will focus on technology, education, and vocation	• November 1, 2015
• ED will work with senior staff to identify 1-2 “pilot” programs/services	• December 31, 2015

STRATEGIC DIRECTION III

To strengthen and enhance relationships within our residential community, the external community we serve, and the broader community of persons with disabilities.

Goal #1: Enhance engagement of residents, employees and volunteers.

Implementation Steps	By When
• Identify and set metrics and goals for resident engagement (including use of Satisfaction Survey) and develop multi-year plan to meet goals that will be adopted by the Board.	• November 1, 2015
• Identify and set metrics and goals for employee engagement (e.g., satisfaction, retention, etc.) and develop multi-year plan to meet goals that will be adopted by the Board.	• December 1, 2015
• Identify and set metrics and goals for volunteer engagement (including use of Satisfaction Survey) and develop 1-year plan to meet goals adopted by the Board.	• January 1, 2016

Goal # 2: Engage external partners in strategic and systemic way.

Implementation Steps	By When
• Maintain current list of partners (partners defined in very broad sense.	• September 1, 2015
• Identify the criteria by which FP will select and evaluate these partnerships?	• October 1, 2015

Goal # 3: Identify opportunities to participate in the larger disability community.

Implementation Steps	By When
• Continue current level of participation in external forums	Ongoing

This Strategic Plan was adopted by Adopted by the Board of Directors on July 21, 2015