

**STRATEGIC PLAN
FOR
F.R.E.S.H. START/
OKALOOSA COALITION ON THE HOMELESS, INC.**



A transitional housing facility for homeless children and families

8 Bobolink Street

Ft. Walton, Beach, FL

January 18, 2011

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Currently the **F.R.E.S.H. Start** program is officially named the Okaloosa Coalition on the Homeless, Inc. It is a 501© (3) non-profit organization that has been providing transitional housing and services for children and families that are homeless or about to be homeless. Since 1984, this organization has been providing shelter and resources for individuals who need a helping hand to get back on their feet and back into society. The acronym F.R.E.S.H. is derived from the vision of the organization, namely **F**reedom, **R**espect, **E**ducation, **S**afety, **H**ope, with the intent of providing a fresh start for children and families.

The Board President and Executive Director of **F.R.E.S.H. Start** asked the *Institute of Senior Professionals* (ISP) to aid in their recovery from funding shortfalls. They specifically asked that ISP help them in defining the current organization with an eye to improvements. The approach was to use an organizational model from a company called Corporate Systems Design© and to determine the **F.R.E.S.H. Start** characteristics in each category of the model. The model divides the characteristics that can be changed in an organization into those that provide focus and those that represent the operation of the company. This model was used in the multiple strategic planning sessions held and led by Jock Patterson and will be utilized in this presentation of this report which provides rationale for the components and subsequent plans/steps for the **F.R.E.S.H. Start** organization.

This document is prepared by *Institute For Senior Professionals* (ISP) members on January 18, 2011 in concurrence with Jim Fell, President of the **F.R.E.S.H. Start** Board of Directors, and Maryann Helfrich, Executive Director of **F.R.E.S.H. Start**. The ISP committee members included: Jock Patterson, Mack Gay, Don Bohler, Sam Mac Nulty, and Audrey Hains, Chair.

Background Information

F.R.E.S.H. Start is one of the organizations that provides shelter and services to the homeless of Okaloosa County under Florida Department of Children & Families (DCF) Office on Homelessness and the U.S. Department of Housing and Urban Development (HUD). This organization spearheaded the formation of the Okaloosa-Walton Continuum of Care, and at one time was the lead organization for local planning efforts to create homeless assistance continuum of care systems. The current lead agency is the

Okaloosa – Walton Continuum of Care (CoC) managed by Opportunity Inc., another 501© (3) organization.

The ISP team began the project by interviewing the Board President, Board member, and Executive Director of **F.R.E.S.H. Start**. Endeavoring to understand the organization of the CoC and the role that **F.R.E.S.H. Start** played in this continuum, we interviewed a number of service providers for the homeless and involved personnel. We also interviewed the Executive Director of *Community Development Corporation* (CDC) that writes the grants for the construction of the organization’s structures. This provided us with the basis of information with which to initiate the development of a strategic plan with **F.R.E.S.H. Start** leaders.

Quoting the *Florida Department of Children and Families* website, a model of Continuum of Care should contain these components:

1. “Outreach, intake, and assessment to link housing and services to the needs of those who are homeless.
2. Services and resources to prevent housed persons from becoming homeless or returning to homelessness.
3. Emergency sheltering as a safe alternative to living on the streets.
4. Transitional housing to move persons toward permanent housing solutions.
5. Permanent housing to end episodes of homelessness.
6. Supportive services designed to assist the person with necessary skills to secure and retain permanent housing.

The continuum of care model creates a framework for a comprehensive array of emergency, transitional and permanent housing, and supportive services to address the varying needs of the persons who are homeless or at risk of becoming homeless. The purpose of the local continuum of care is to help communities envision, plan, and implement coordinated, long-term solutions to address homelessness. **The development of a local continuum of care plan is a prerequisite to applying for federal housing grants through HUD and the state’s Challenge Grant and homeless Housing Assistance Grant.”**

Opportunity Inc. submits the annual plan for Okaloosa and Walton County to DCF, and, in addition to managing the Okaloosa – Walton Continuum of Care, provides emergency family housing and rehabilitative services. Any application for Challenge Grant funding for **F.R.E.S.H. Start** must be submitted through CoC’s strategic Plan. However, it appears as though **F.R.E.S.H. Start** is essentially self-dependent for funding.

When the ISP project was initiated in October, 2010, the mission of the program was “to promote awareness of homelessness in our communities and to provide transitional housing for children and families helping them reach their full potential and goal of self-sufficiency”. Criteria for admission to this housing included being employed and drug free/alcohol free. Those admitted may remain for 9 months during which time they pay 20% of their wages as a program fee and must put 10% of their wages into a trust account which is returned to them when they leave. There is a list of rules that they must adhere to such as: no smoking inside apartments and/or laundry facilities; no pets; no solicitors

or visitors allowed in units; prior approval for being gone overnight from the premises; check-in daily; keep units clean, neat, and orderly. There are success stories of people leaving to go into their own homes and better employment, but half of those admitted don't make it. During the time that they receive this housing, the program offers them classes on basic skills and parenting. An employed case worker provides guidance to each adult. The intent of this program is to "offer a safe haven and immediate help for those who one night find themselves homeless" and "help them get back on their feet".



Presently, they have a unit with 10 apartments (2 two bedroom; 8 three bedroom units) called Harbour Place (also referred to as "Step Up") and another building with 3 apartments called South Harbour Place. They have recently heard that a grant written in conjunction with *Community Development Corporation* (CDC) was okayed for South Harbour Place to be built, a new 10 apartment unit, and the existing "office" building to be refurbished. We toured one of the upper units and found it to be very comfortable and spacious.

It costs approximately \$9,500 a month to keep the program and units open. They get some funding from the *Continuum Of Care* (COC), some from United Way, some from churches, some from the doctors at Sacred Heart, and individual donations, but donations are down while the demand for assistance has tripled. They are in financial emergency status right now. The stated reason that they did not get funding from the State's Challenge Grant in 2010 was that they did not provide an acceptable leverage letter (source: 2010-2011 Challenge Grant Reviewer Results Summary). The fact that **F.R.E.S.H. Start** has not had an audit in the past three years (or money to pay for one) has prompted the Board to hire a book keeper that is now setting up an accounting process. Board members are in the process of developing a budget. They are lacking a data base of number of clientele served; number turned away; etc. With only 2 employees, they lack time and capability to gather this data.

Funding has always been a concern for the continuation and maintenance of **F.R.E.S.H. Start**. There have never been sufficient funds at **F.R.E.S.H. Start** to hire additional personnel. Repairs, maintenance, etc. are all done by staff and volunteers. Existence has been based on prayer; they have always had a financial struggle. There is a lack of community awareness of **F.R.E.S.H. Start** and its contributions to the community.

Endeavors such as United Way campaigns bring busload from Eglin and Hurlburt to view apartments. “Day of Caring” brings Gulf Power volunteers.

The current Board has been attempting to address their present situation with the following steps:

1. Discussed fundraisers.
2. Attempting to get additional Board members who are well rounded group of advocated in all professions and businesses
 - a. Board of Directors Review Committee: looking for geographical location and influence
 - b. Utilize in committee structure: administration, finance, fund raising, and asset management
3. Budget development

F.R.E.S.H. START ORGANIZATIONAL PLANNING

I. Focus

Senior leadership provides the focus in an organization. Focus is composed of the mission and vision, guiding principles, high level strategy, and goals and objectives. Focus provides a direction and boundaries to the entire organization. It is also useful in telling the **F.R.E.S.H. Start** story to the outside world. The **F.R.E.S.H. Start** vision statement is excellent:

“Renewing hope – Rebuilding Lives for Children and Families”

A. Mission

The planning team determined that the primary mission should follow the vision and focus on creating and executing an Individual Development Plan for each client that when implemented grows the family to becoming fully self sufficient. The following components of the mission support the development plans:

- Transitional housing
- Low cost housing (step-up)
- Services for non-resident homeless
- Living skills/educational services for transition residents
- Professional counseling for clients and potential clients
- Medical screening

The mission components listed above support 5 of the 6 components that the Florida Department of Children and Families (DCF) list in their continuum of care model.

B. High Level Strategy

The high level strategy discussions led to the decision that **F.R.E.S.H. Start** should concentrate on preventing and eradicating homelessness in families with children as a primary focus. Transitional housing and low cost housing are important supporting functions, but they are not the primary focus. The primary qualifications for transitional housing clients will be:

- “Family unit” in need of our services
- Employed (desired), employable (possible)
- Substance free
- Willingness/desire to rebuild life and become self supportive

The **F.R.E.S.H. Start** Board and Executive Director have the flexibility to extend assistance to others in need if the situation and resources warrant.

Low cost housing qualifications are designed to support a family oriented community. Residents will be substance free. The rent will be based on the size of the apartment and 30% of income of which 10% will be put in a savings account for the family.

The planning team determined that it is essential to have a large Board with hands-on working support from the Board members, because there are important tasks that current funding cannot support with salaried workers. Important among the tasks is an initiative to establish an army of volunteers with task captains finding, training, equipping, and scheduling volunteers to accomplish their tasks.

C. Goals

The planning team laid out many goals. Senior leadership will need to prioritize these measureable goals. Progress toward these goals should be evaluated periodically to make sure they are still relevant, reachable, or in need of extension or expansion.

1. General

Measure clients’ progress against their development plan and recognize effort and results

Increase Board to 25 members

Use Board members to fill staff needs

Establish volunteer army w/task captains

Connect with military bases

Budget to pay for client utilities

Establish foundation for education/vocational training scholarships

Minimize Red Tape

2. Transition housing

Build new building

Budget and get funding to accomplish the mission

Start accepting employable clients

Improve success rate for achieving full independence to 85%

3. Low Cost Housing

Increase awareness of housing veterans and disabled

Build children's playground with new building

Assess laundry facility needs with new building and plan adequate facilities

4. Non-resident services

Network with other not-for-profit agencies to fill gaps

5. Life Skills education for residents

Seek motivational speakers

Continue plans to conduct computer classes

Find a life skills coach

Supplement Jobs Plus employment opportunities with own jobs network

II. Alignment

The Corporate Systems Design© model divides the internal workings of an organization into six systems: Work Processes, Structure, Information, People, Reward, and Renewal. Alignment and improvement of the six internal organizational systems is best accomplished by a working group with fairly broad membership. The systems' contribution to the organization's culture and results should be analyzed on a periodic basis. Recommendations for improvement are presented to the Board and Executive Director for approval and implementation. In the time available the planning team was able to define the more important Work Processes, lay out the Structure, and identify the Information Systems. The People, Reward, and Renewal systems remain to be addressed when the time is appropriate.

A. Work Process System

Work Processes have inputs and outputs. The steps in processes are meaningful, chronological, and have rationale for spending the time. It is useful to have a single person/position responsible for each process and process team. The best organizations measure process results and have periodic process reviews to see if changes are necessary and warranted.

The planning team did a cursory analysis of processes 1-4 (which follow below) and indicated the responsible position in parentheses. It is understood that the Executive Director (ED) and her assistant accomplish the Rebuilding Families Program and Housing Process in an integrated manner. When more people are available it may be more efficient to have a separate housing team that works closely with the Executive Director, but frees up some of her time for other duties. At some point it will be useful to analyze the remaining processes and define their steps.

1. Rebuilding Families Program (ED)

This process reflects the primary mission of **F.R.E.S.H. Start**, facilitating the growth of families to fully independent status. The evaluation step is a consolidation of all the early steps in taking on new clients except the admission to transitional or low cost housing.

Input: Potential clients Output: Fully independent family

Initial application—evaluate (employed, drug free, police screen, interview, required housing)—verify paperwork—approve—assign case worker—build Individual Development Plan—monitor progress—graduate

2. Transitional and Low Cost Housing (ED)

The planning team separated this process from the previous to show that the emphasis should be on structured training and education with a housing element instead of transitional housing with an education element.

Input: Qualified client Output: Family ready for next level (low cost housing, independent)

Review qualifications—determine type housing—move-in—monitor rules compliance—exit interview

3. Fund Raising (Board)

Input: Budget Output: Funds

Identify sources/activities—establish priorities—build plan—implement plan—review results for lessons learned

4. Public Relations (Board)

Input: “Focus Items” Output: Awareness

Establish Brand—identify promoter—build plan of attack—build presentation—implement plan—review for lessons learned- feedback to community

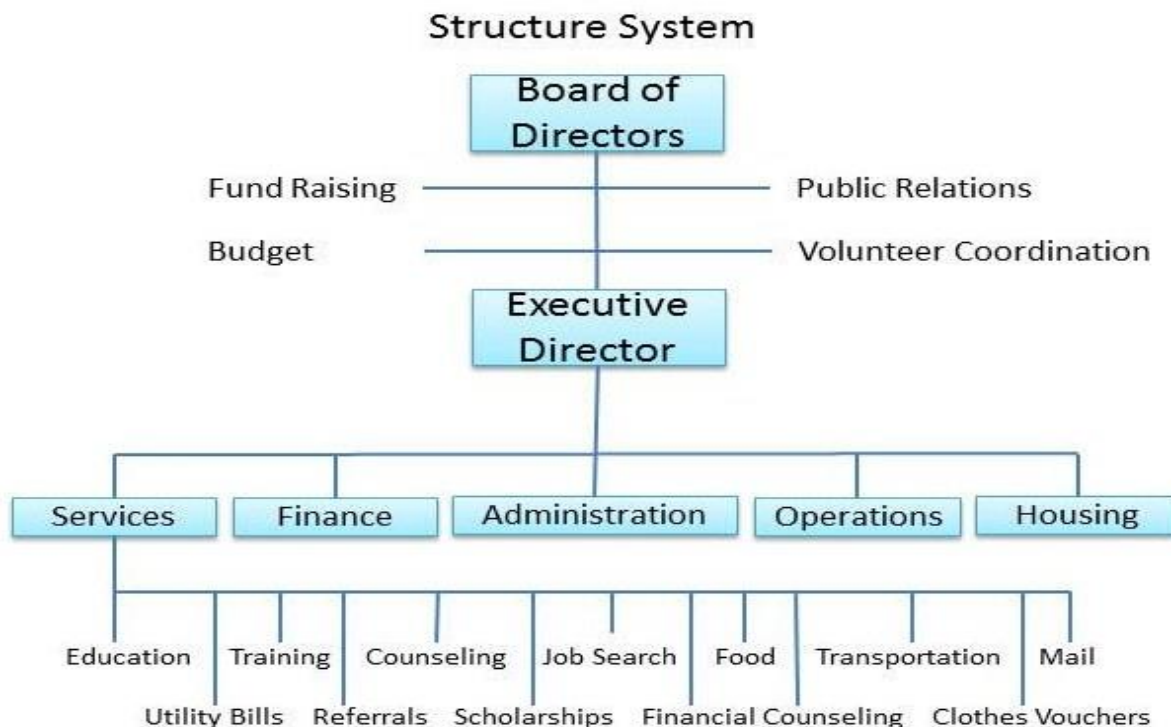
5. **Finance**
6. **Services**
7. **Facilities Maintenance**
8. **Administration**
9. **Volunteer Coordination**

B. Structure System

This system describes how the organization's positions and responsibilities are laid out. When the positions are aligned with work processes the actual responsibilities become easier to see. The organizational chart should show what position reports to whom and what position the subordinate responsibilities are delegated to. It is useful to have job descriptions on file for each position including Board members.

The planning team determined that the positions responsible for fund raising, public relations, and coordination of volunteers will report directly to the Board and free up the Executive Director to run the daily operation. These positions will still have to coordinate closely with the Executive Director on a daily basis, but she will not have to supervise them. The remaining positions fall under the Executive Director to support the primary mission. Currently the Executive Director (ED) and her assistant perform most of these tasks themselves. As more workers become available, these positions can be filled and take the pressure off the ED.

Consider hiring one of the clients to serve as part-time building service manager by offering reduction on rental costs. Carefully screen the applicant to determine ability to provide the tasks being requested. This will alleviate some of the tasks now required of the ED.



C. Information System

The information system is the hardware and software that is used in the conduct of daily operations. It should support the mission and all the other organizational systems by providing for the smooth transfer of information up, down, and laterally. The system should also keep a history on the conduct and results of the organization overall and each process. Regular backup of the data is essential.

Almost all internal and external communications is currently accomplished by e-mail. The software directed by the Florida Department of Children and Families is Homeless Management Information System (HMIS). **F.R.E.S.H. Start** ED office people are in the process of having it installed and getting training. It will improve record keeping at a minimum and in all indications aid in the daily operations supporting the homeless. The current information system needs better data management and when HMIS is in service there should be improvement.

Software	Hardware
HMIS	3 old computers w/internet
MS Office	2 client computers (1 laptop)
	2 color printers
	2 B&W printers

D. People System

How do we get the people to work in our organization? How do we identify, attract, hire, orient, train, keep happy, and let go? At some point it will be useful to develop a policy and plan for this system, and the Volunteer Coordinator would seem to have the Human Resources responsibility to organize the **F.R.E.S.H. Start** approach. The Board President and Executive Director can provide important inputs to the formulation of this policy and plan.

E. Rewards System

The rewards system addresses how we compensate our people and how we recognize superior performance. For our purposes the senior leadership at some point should address what positions should be compensated, how much, and whether it is intrinsic or extrinsic compensation.

Primarily, volunteer organizations probably need to recognize good effort as well as good work. Human beings need to feel that their work is appreciated. Positive feedback given when extra effort is seen can go a long way.

F. Renewal System

The renewal system is aimed at preventing stagnation and encouraging continuous improvement. The intent is to measure the important processes and goal accomplishments. It is critical to have measureable data to support analysis and necessary changes in the operation processes.

The recommendation is to conduct periodic review of the key operational results and to review the strategic plan at least annually to confirm that the “Focus” is clear and the organizational systems are productive and aligned.



A family serviced by F.R.E.S.H. Start

Recommendations:

Immediate Goals

❖ **“Set Yourself Apart”:**

- Define your mission more clearly: “Renewing Hope – Rebuilding Lives for Children and Families” Mission is transitional housing for the homeless families and is not to serve as a “coalition”.
- The main thrust is “education and training” to get families self-sufficient, with “housing” as a tool to support that goal.
- Rewrite By-Laws to reflect this newly focused mission. This should include an official name change. This would support the “branding” of **F.R.E.S.H. Start** within our community.

❖ **Strengthen Board Membership:**

- Recruit well connected, energized, and involved members of the community.
- Assign specific responsibilities to each member. These would include fund raising, public awareness, financial integrity, operations support, volunteer recruitment, etc..
- Provide training of Board members responsibilities.

❖ **Develop a Realistic Budget:**

- This establishes what income must be generated from clients, fund raising, grants, etc.
- Put your financial house in order. Get help from the Board and volunteers. As soon as financially feasible, get an audit accomplished.

- Get the Homeless Management Information System (HMIS) up and operating.
- ❖ **Evaluate Alternative Business Models:**
 - Based on current facilities and the planned new facilities, what mix of “step-up” housing clients and “transitional” homeless clients make the most business sense? This must be viewed from a short term and long term view.
 - Look at serving “employable” in addition to “employed” homeless clients. Explore community funded scholarships to support this segment.
 - Prioritize the mission elements and goals because current resources will not cover them all.
- ❖ **Execute an Aggressive Public Awareness and Fund Raising Campaign:**
 - The Board must step up their responsibility for developing and executing a coordinated and aggressive PR and fund raising strategy.
 - Public awareness and fund raising are the two sides of the same issue.
 - Put a face on the clients being served. Couch resources needed in terms of people’s needs rather than things.
 - Find strong advocates in churches, civic organizations and businesses. The faith community is the best source of sustained support.
 - Establish a grant writing committee to pursue both public and private grants.
 - Establish an army of volunteers with Task Captains for finding, training, equipping and scheduling volunteers.

Longer Range Goals

- ❖ Give the Board and Executive Director the flexibility to extend assistance to “others in need” if the situation and resources warrant.
 - Review the categories of this organizational plan at least annually to see if changes are necessary and/or warranted.
 - Be innovative in the business model. Think outside the box – change service requirements.
 - Analyze the processes for Finance, Services, Facility Maintenance, Administration and Volunteer Coordination and adjust to changing situations.
- ❖ The financial function is currently accomplished by a part time book-keeper and there is no Treasurer. Consider getting an accountant on the Board and having the treasurer and/or entire finance position directly under the Board’s jurisdiction. This will take pressure off the Executive Director.

Respectfully submitted:

Audrey Hains, Chair
 Don Bohler
 Mack Gay
 Sam Mac Nulty
 Jock Patterson