



## **Strategic Plan 2021 – 2023**

### **Three-year Strategic Initiatives**

#1: Recruit and retain high-performing individuals

– *Employer of Choice*

#2: Provide high quality, impactful services to clients and families

– *Provider of Choice*

#3: Develop and implement an AzCA brand profile to improve visibility statewide

– *Community Partner of Choice*

#4: Achieve financial sustainability

– *Ongoing Operating Surplus*

## #1: Recruit and retain high-performing individuals – Become the employer of choice

1. Utilize the agency annual engagement survey to discover what current staff need to support their success	WHO	WHEN	STATUS
a. Review the findings from the current engagement survey and develop an action plan.	CHRO	<del>February 14, 2022,</del> May 31, 2022	Completed
b. Implement the steps from the action plan.	CHRO	June 30, 2022	Completed
c. Reevaluate the areas addressed to determine success in achieving staff needs.	CHRO	September 30, 2022	Completed
2. Evaluate the efficacy of current staffing patterns, schedules and pay statuses (PT/FT/OC)			
a. Gather current data on schedules versus client needs and revenue production	CHRO, CIO	<del>February 28, 2022</del> April 30, 2022	Completed
b. Review information and develop recommendations on any changes to staffing patterns, schedules and pay statuses.	CHRO, CCWO, CBHO	<del>April 30, 2022</del> July 31, 2022	Completed
c. Implement any approved recommendations.	CHRO	October 1, 2022	Unable to fully implement at this time – but we do have a plan in place when resources become available.
3. Review and update the agency's interview questions			

a. Obtain and review all current versions of the agency's interview questions	CHRO	May 31, 2022	Completed
b. Develop and finalize consistent, legally authorized interview questions	CHRO	July 31, 2022	Completed
c. Roll-out updated interview questions and interview processes agency-wide	CHRO	September 30, 2022	Pending final review

## #2: Provide high quality, impactful services to clients and families – Provider of choice

<b>1. Provide staff with tools to become data informed</b>	<b>WHO</b>	<b>WHEN</b>	<b>STATUS</b>
a. Review current data reports to see what is available	CCQO	May 31, 2022	Completed
b. Identify the data elements staff need to be successful	CBHO, CCWO	July 31, 2022	Completed
c. Create and provide tools and processes to staff with the data they need to be successful	CCQO, CIO	September 30, 2022	Initial tools completed and ongoing
d. Update advanced training processes for staff on use of the tools and importance of the data in their success	CHRO, CCQO	November 30, 2022	Initial trainings completed and ongoing
<b>2. Determine the impact of services we provide</b>			
a. Review KPIs for all new contracts to determine if they accurately measure what is required	CCQO	June 30, 2022	Completed
b. Evaluate options to enhance/improve clinical oversight and quality review for higher need clients and families	CBHO, CCWO	March 31, 2022	Options have been reviewed for BH – assigning clinical sups for HN, tracking SI attempts for staffing,

			review options for clinical chart review. CW has developed a strategic plan for each program area.
c. Select and implement options for enhancing/improving clinical oversight and quality review for higher need clients and families	CBHO, CCWO	May 31, 2022	HCHU meeting started for BH. Developing a plan to address this in light of clinical supervisory shortages. Working with management team for planning. For CW – MJ created a plan and it is now in place.

**#3: Develop and implement an AzCA brand profile to improve visibility statewide**  
 – Community partner of choice

<b>1. Create and implement a consistent brand profile (tagline, logo, etc.)</b>	<b>WHO</b>	<b>WHEN</b>	<b>STATUS</b>
a. Develop messaging and talking points for AzCA brand and distribute to Board and staff	CDO	<del>May 31, 2022</del> October 31, 2022	Drafted
b. Communicate updated branding and messaging to internal stakeholders	CDO	<del>September 30, 2022</del> November 30, 2022	

c. Finalize our external website	CDO, CIO	<del>March 31,</del> 2022 November 30, 2022	
<b>2. Provide key staff and board members with opportunities to increase community visibility</b>			
a. Offer media training for key staff and board members to improve presentation skills with media partners	CDO	<del>May 31,</del> 2022 December 15, 2022	
b. Create a system to encourage staff communication with Development Department on success stories to share with external partners and communities	CDO	<del>June 30,</del> 2022 July 31, 2022	Completed – included in monthly newsletter

#### #4: Achieve financial sustainability – Ongoing operating surplus

<b>1. Manage existing programs towards sustainability</b>	<b>WHO</b>	<b>WHEN</b>	<b>STATUS</b>
a. Set and hold staff accountable to productivity goals	CCWO, CBHO	January 31, 2022	Completed – assessing progress
b. Develop and implement accountability standards for productivity for supervisors and site/program administrators	CCWO, CBHO	<del>April 30,</del> 2022 May 31, 2022	Completed – process in place
c. Develop reports and processes to make productivity data readily available for staff at all levels	CFO, CIO	May 31, 2022	Completed
d. Create a method for reviewing each program and location for financial sustainability	CEO	May 31, 2022	Greg has developed all new tools in

			development of the annual budget and cash flow projections.
<b>2. Explore additional business opportunities</b>			
a. Upon finalization of the updates regulations, increase co-location opportunities in markets where there is a need	CEO	December 31, 2022	May be ending
b. Explore opportunities for mergers and acquisitions	CEO	Ongoing	Share updates
<b>3. Increase total giving revenue to \$1,800,000 in FY 22</b>			
a. Create and implement a plan to increase donor retention	CDO	March 31, 2022	Completed
b. Develop and implement a plan to increase corporate sponsorship and support through a return to events	CDO	February 28, 2022	Completed
c. Set regional fundraising goals and develop a timeline for meeting these goals	CDO	March 31, 2022	Completed