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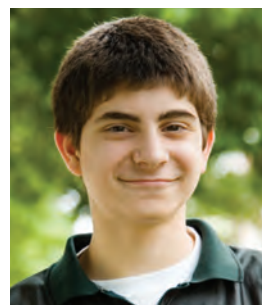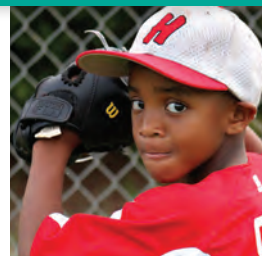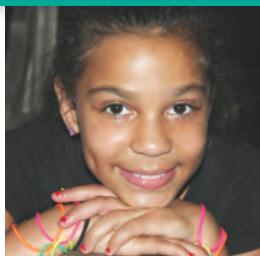### ALLIANCE

Growing Toward Generational Change

STRATEGIC PLAN
2020-2023

This strategic plan guides operational and support decisions for Children's Hope Alliance (CHA). The organization's vision, mission, core values, and goals identified in this document are touchstones toward lasting generational and community change.

Founded over 129 years ago, CHA has a long history of caring for children and families in crisis. The organization currently serves over two thousand of North Carolina's children and families each year. Children's Hope Alliance is the result of several nonprofit mergers over the last twenty years—the most significant included Barium Springs Home for Children and Grandfather Home for Children—each over 100 years old. The last decade has included program expansion, including foster care and adoption services, educational services and therapeutic services for children who have suffered complex trauma.

In the coming years, CHA seeks to expand service locations in multiple states, embrace whole person integrated care, increase the number of lives positively impacted, and ensure all growth is financially sustainable. CHA will hold firm in its focus on three key views for the next three years (2020-2023):

Our agency as a whole. Ensuring that we are above reproach in all we do. This means that we demonstrate efficient and effective stewardship of our abundant resources, and that we operate at all levels and in all ways with commitment to our core values.

Our services of today. Ensuring that we provide relevant, high quality services. These services will be associated with positive outcomes, excellent customer service, competent and well-trained caregivers/staff, and effective practice models.

Our vision for tomorrow. Ensuring that we leverage our strengths and resources and continuously move towards positively impacting more lives annually. To realize this vision, we must maintain our deep knowledge of: an ever-changing landscape, innovative business and service solutions, technology-based care, the integration of medical, behavioral and social services, changing payment and contract methodologies and other developments at the state and national levels. This knowledge will be used in the expansion of successful services, the creation of innovative new services, and the development of partnerships, which will allow the agency to impact the lives of thousands more children and families.

This strategic plan is ever-changing—ensuring that Children's Hope Alliance evolves alongside the needs of the children, families, and communities it serves.

VISION: By 2030, Children's Hope Alliance will be a multi-state leader in whole person integrated care with 20,000 positively impacted lives each year and $100 million in revenues annually that facilitates achievement of resilient families, communities, and sustainable services.

MISSION: Hope, Health, and Healing for Generations.

HOPE: Ability to envision a positive future

HEALTH: Skills to live a life of emotional, mental, physical, spiritual, and social wellness

HEALING: Having sufficient emotional, mental, physical, social, and financial resources to tackle life's challenges from a position of strength and resiliency

GENERATIONS: Creation of systemic change for the individual, extended family, and community by breaking the repetitive cycles of destructive behaviors, abuse, neglect, and system dependency

CORE VALUES:

- Commitment to Quality and Effectiveness
- Healthy Relationships
- Fully Integrated Technology Solutions
- Amplify Resource Impact
- Family-Centered
- Innovation
- Community Partnerships for Impact

Core Values driving us toward generational change:

Commitment to Quality and Effectiveness

- View all work with a value-based approach
- Begin with the end in mind
- Fully implement the Teaching-Family Model of Care
- Treatment approach and staff must demonstrate performance at or above industry standards
- Multi-focused approach inclusive of results and process
- Measure what truly matters
- Measure generational impacts of hope, health, and healing

Healthy Relationships

- Always value others including clients, caregivers, team members, agency staff
- Trauma informed approach
- Inclusive and respectful of diversity
- Provide consistent and meaningful service delivery
- Meet others where they are
- Consider and embrace multiple perspectives
- Provide and solicit thorough, timely, open and honest communication and feedback
- Take care of ourselves and maintain work/life balance so we bring our best selves to our work and our clients

Fully integrated Technology Solutions

- Adequate, easy to use, intuitive, effective and manageable resources
- Effective system to capture client care and outcomes.
- Maximize the use of technology to create efficient treatment resources for clients, staff, foster parents and community
- Support artificial intelligence

Amplify Resource Impact

- Maximize all resources for mission impact
- Equal focus on social and financial bottom lines
- Move over time to use fundraising and endowment for innovation and unique service supports
- Be effective in value-based arrangements
- Be excellent stewards of all resources, including time, talent and treasure

Family-Centered

- Whatever family means to the person...we will prioritize and promote family connections and natural supports
- Strengths-based and skills-based approach
- For children: prevent disruption as possible, and if out-of-home, promote return to family at earliest possible time
- Use Prudent Parenting
- Intergenerational approach

Innovation

- Data-informed, proactive and creative models to treat complex needs
- Individualized care
- Community based
- Capitated, risk share models
- Growth through emerging markets or in replication models

Community Partnerships for Impact

- Seek new partnerships and strengthen current partnerships – clients, families, stakeholders, corporate partners, legislators, local and state government
- Seek mutually beneficial joint ventures
- Consider experts as partners for new ventures
- Consider partnerships to maximize use of under-utilized assets

GOALS

Achieve Operational Excellence

▶ Create a Strategic Planning Document as a touchstone, living document

▶ Create effective compliance systems and culture

▶ Complete the HIPAA risk assessment and create the remediation plan

▶ Align performance expectations for departments and staff

▶ Engage the full agency workforce on enhancing Vision, Mission, Values

▶ Build workforce skills and capacities strategically to align with the needs of CHA

▶ Realign development with the new vision

Achieve Operational Excellence

Optimize Existing Services

Optimize Existing Services

▶ Create a technology and data implementation plan

▶ Integrate WPIC approach into services

▶ Expand Community Based Services

▶ Expand Transitional Living Services 3 phase model

▶ Expand Foster Care

▶ Optimize Residential effectiveness and financial viability

Develop New Business

▶ Complete a full needs and gap analysis in all current service contiguous counties

▶ Establish Physical Health Practice and/or Integration

▶ Establish a shortlist of potential mergers and acquisitions

▶ Evaluate all Requests for Proposals for service expansion or new service development

▶ Complete a full needs and gap analysis in all contiguous states to NC

▶ Expand into new revenues through leveraging current resources into micro-businesses

Develop New Business
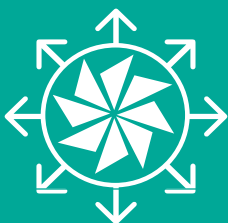
Expand Influence

▶ Craft a multi-state engagement/influence strategy

Expand Influence

VISION:

By 2030,
Children's Hope Alliance will be **a multi-state leader** in whole-person integrated care with

20,000 positively impacted lives each year and

$100 million in revenues annually

that facilitates the achievement of **resilient families, communities, and sustainable services**.

MISSION: Hope, Health, & Healing for Generations

CORE VALUES:

▶ Commitment to Quality and Effectiveness
▶ Healthy Relationships
▶ Fully Integrated Technology Solutions
▶ Amplify Resource Impact
▶ Family-Centered
▶ Innovation
▶ Community Partnerships for Impact

GOALS:
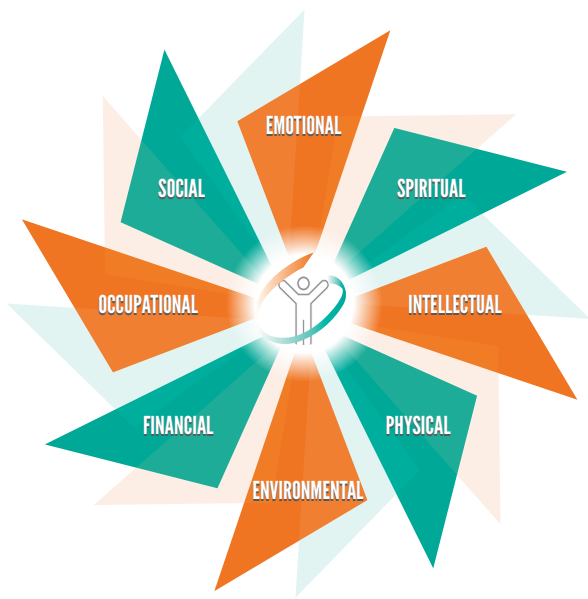
Achieve operational excellence

Optimize existing services

Develop new business

Expand influence

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ALLIANCE

More **effective** • More **convenient** • More **comprehensive**

WPIC | Whole Person Integrated Care

Improving health and reducing costs
through the coordination of
health, behavioral health, and social services

Whole-person care addresses all facets of a child's life
When a child or family has needs beyond CHA services, we connect them with others who can help.

▶ Organizations that address social determinants and connect consumers to services that meet their social needs could **reduce spending by approximately 11% within a year**

▶ Nearly 50 million people are food insecure and **food insecurity is associated with increased risks** of anemia, asthma, worse oral health, anxiety, depression, behavioral problems, and suicide ideation

▶ Health care services account for only 20% of health outcomes, while **health-related behaviors and socioeconomic factors—** housing, food, environment, employment **—can drive 80% of health outcomes**

Anticipated outcomes

▶ **WPIC will result in lower overall costs to providers and to persons served** - the degree of cost savings will be determined after initial data analysis

▶ **Rates of emergency department visits will decline by 25%** compared to a similar time frame from a previous year

▶ **Rates of hospitalizations will decline by 15%** compared to a similar time frame from a previous year

▶ **WPIC will improve the experience of care for 70% of persons served** through a focus on wellness and planning for family health

▶ Preventive care will become more routine for those served – **50% served will increase involvement in preventative care** related to diabetes, breast cancer, arthritis, hypertension, weight, activity and tobacco use

▶ Health-related social needs have been shown to affect individuals' health outcomes to a large extent.[1]

▶ **Only about 20 percent of health outcomes are determined by clinical care**, yet clinical care accounts for most health care investments.[2]

▶ In the US, as well as globally, many people are not as healthy as they could be, and **social needs play a big role**.[3]

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[1] Robert Wood Johnson Foundation, "Why we need a culture of health," March 2016
[2] 2017 County Health Rankings
[3] Paul D. Loprinzi, Adam Branscum, June Hanks, and Ellen Smit, "Healthy lifestyle characteristics and their joint association with cardiovascular disease biomarkers in US adults," Mayo Clinic Proceedings, 2016

WPIC
Whole Person Integrated Care

Whole-person care addresses all facets of a child's life
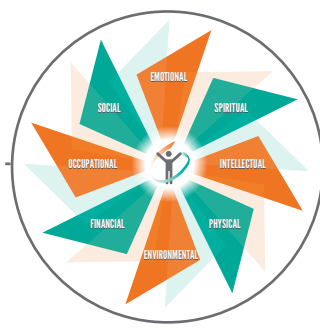When a child or family has needs beyond CHA services, we connect them with others who can help.

Integrated care coordination **assesses** all of a child's needs, **follows** them through a continuum of care, **connects** them and their families to social supports, and **tracks** interventions and outcomes. Ideally, regular screenings inform clinical decision-making. The end result is a coordinated effort as information is exchanged among all providers and supports, **enabling all needs to be met** seamlessly.

Children and families from all walks of life seek help with mental, emotional, behavioral, and other problems. **Their journey starts here**.

However a child and family enters the doors to services – whether it's through mental health, social services, or a community provider — their situation is assessed to find the **best solution for them:** A solution that offers hope, health, and healing on their journey.

Through the lens of Whole Person Integrated Care (WPIC), **services are identified for their needs**. When a child or family has needs in addition to our services, we connect them with others who can help.

Our main objective is to ensure children have a safe home and their family is thriving within their community.

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Foster Care & Adoption
- Family Foster Care
- Therapeutic Foster Care
- Intensive Alternative Family Treatment
- Post-Adoption Services

Family-Based Services
- Family Preservation
- Intensive In-Home Services
- Catawba Valley Healthy Families
- Family Reunification
- Alternatives to Commitment
- Treatment Alternatives for Sexualized Kids
- Child-Focused Assertive Community Treatment Teams

Community-Based Services
- Outpatient Therapy
- Day Treatment Services (provided in schools)

Campus-Based Services
- Psychiatric Residential Treatment
- Transitional Living for Young Adults (18-21)

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Glossary of Terms

STRATEGIC PLAN GLOSSARY OF TERMS

1. **Strategic Plan** — Document with core elements that outline CHA's Executive Summary, Vision, Mission, Core Values, Goals, Objectives, Strategies, Milestones, and Performance Measures. This Strategic Plan is the fundamental tool in guiding our vision.

2. **Vision** — Statement of where the organization is going in the future and how we intend to get there.

3. **Mission** — A formal summary of the organizations aims and values. It is the "why" we exist statement.

4. **Impact Statement** — Summary of agency's intent in achieving its mission

5. **Core Value** — Guiding beliefs and principles of the organization that influence all decisions in the organization

6. **Goal** — High level outcomes we intend to achieve

7. **Objective** — Actions taken to achieve goals

8. **Strategy** — Describe how the objectives will be achieved.

9. **Description** — Provides rationales for how strategy is tied to core values. Identifies needed resources to achieve objective.

10. **Milestone** — A planned activity or event, also called a stepping stone, that is necessary to make progress. Signified by a yes/no answer.

11. **Performance Measure** — A quantification that provides objective evidence of the degree to which a performance result is occurring over time.

WORK PLAN GLOSSARY OF TERMS

1. **Initiative** — Organizational change effort that meets the following criteria at minimum:

   a. Furthers the advancement of the CHA mission; with preference given to emergent solutions and those activities that support elements of the strategic vision

   b. Has a justifiable value to cost across multiple bottom lines, including financial, social, and environmental or also known as people, planet, profit

   c. Accomplishment involves three or more functional areas such as programs, support departments

2. **Project** — Any work product which does not meet the criteria to be deemed an initiative

3. **Determinants of Health** — The range of personal, social, economic, and environmental factors that influence health status. Generally organized into five broad categories:

   a. Genetics

   b. Behavior

   c. Environmental and Physical Influences

   d. Medical Care

   e. Social Factors

4. **WPIC (Whole-Person Integrated Care)** — WHOLE PERSON + INTEGRATED CARE + COMMUNITY HEALTH; includes health and wellness promotion that builds each person's resiliency, as well as prevention so that health concerns are identified and addressed early. Not only focused on physical health, but on the well-being of the whole person (emotional, financial, social, spiritual, occupational, and physical health).