



# STRATEGIC PLAN

## Goal One: Funding Strengthen Finances to Enhance Operations and Improve Facilities

### OWNERSHIP

Board of Trustees Member: David Ashley

Daniel Staff Members: Madison Shelly, Julia Kalinski

**Objective 1:** Increase Restricted Funding as follows:

**Major Gifts:** Due to their long-term nature and sources, no dollar targets are set for major gifts. However, our development efforts will continue to lay a foundation for attracting major gifts to Daniel, given their strategic importance in fund raising.

**Project Specific Finance.** \$750,000 by FYE 2022 to support capital improvement of Creekside/Cedarwood cottage.

**Other Restricted Funding.** Throughout a fiscal year, unforeseen and untargeted gifts will present themselves to Daniel. Dollar targets have not been set for this category either, but we will account for them as part of our overall success in fundraising.

**Objective 2:** Increase Unrestricted Funding to support critical operational requirements and strategic initiatives:

Item	Fiscal Year	Target Amount
Unrestricted Funding	2021	\$ 325,000
Unrestricted Funding	2022	\$ 350,000
Unrestricted Funding	2023	\$400,000

# STRATEGIC PLAN

## DESIRED OUTCOMES

Daniel's ability to effectively deliver on its commitments to all its constituencies is a direct function of the financial resources it has at its disposal. Accordingly, we must manage our development initiatives and efforts on a strategic basis.

Daniel will always rely on outside programmatic revenue to fund its operations: revenue provided by public sector agencies and authorities and grant monies targeted to the specific programs managed by Daniel. However, Daniel must improve its financial strength so that it may become less reliant on these funding sources as they themselves evolve or discontinue. An over dependency on public-sector funding constitutes a strategic agency weakness, especially given our size, complexity and scale of operations.

We must expand our own resources through strategic fundraising efforts to strengthen our operating platforms and build our endowment. The more capable Daniel is of self-supporting its operations, funding capital project requirements, and building its endowment, the more sustainable the agency will be as it progresses into the future.

The development function at Daniel has been challenging in recent years. Its problems have only been exacerbated by the impact of COVID-19 in 2020. We will stabilize the development platform in order for it to achieve our funding goals. We have established a battery of effective, fully executable tactics that a well-run development organization utilizes to achieve targeted financial development goals, and we will develop, buildout and execute these tactics throughout the current 3-year planning cycle. We ultimately want to develop capacity to generate major gifts, other restricted gifts and targeted unrestricted funding deemed appropriate by Daniel.

## TACTICS

### Objective 1: Restricted Funding (Capital Improvements & Endowment)

- *Increase capital improvements fundraising with high net-worth donors through campus tours/meetings with prospective donors/lapsed donors – Individuals, Foundations, Corporations.*
- *Increase grant research and grant writing for capital improvements.*

#### **1. Enhance Identification/ Cultivation/Solicitation/Stewardship-Restricted**

Increase cultivation/solicitation/stewardship activities of prospective donors/current donors/lapsed donors.

- Personal/Group Meetings/Tours; Phone Calls/Texts; Emails; Letters (Three staff solicitors minimum/BOT/Volunteers) – 450 specific touches in 50 weeks. Additional

# STRATEGIC PLAN

- from board: 500 specific touches in 50 weeks (assumes 10 averaged active members at one call per 50 weeks).
- Mass Email Appeals (Holiday, “Giving Tuesday”, Spring, Seasonal GIK Drives) to prospective donors/current donors/entire data base constituency/purchased emails – add one new appeal.
  - Newsletter, 2 times yearly, Print and Email to entire database constituency.
  - Annual Report 1 time yearly, Print and Email to entire database constituency.
  - Corporate/Civic Speaking Engagements by Daniel staff, BOT/volunteers - 12 minimum per year ramping up from 2020-2023.

## Objective 2: Unrestricted Funding (General Purposes & Endowment)

### 1. Strengthen Daniel Database

- Maintain and Expand.
- Add lists to database:
  - Jacksonville Top Corporate Leaders.
  - Jacksonville 40 Under 40.
  - New geographical targets (e.g. expand Amelia Island, Ponte Vedra Beach, St. Johns County).

### 2. Enhance Identification/Cultivation/Solicitation/Stewardship

- Increase cultivation/solicitation/stewardship activities of prospective donors/current donors/lapsed donors (Individual, Foundation, and Corporate) per Bloomerang by solicitor and type.
- Personal/Group Meetings/Tours; Phone Calls/Texts; Emails; Letters (Three staff solicitors minimum/BOT/Volunteers) – 450 specific touches in 50 weeks. Additional from board: 500 specific touches in 50 weeks (assumes 10 averaged active members at one call per 50 weeks).
- Mass Email Appeals (Holiday, “Giving Tuesday”, Spring, Seasonal GIK Drives) to prospective donors/current donors/entire data base constituency/purchased emails – add one new appeal.
- Newsletter, 2 times yearly, Print and Email to entire database constituency.
- Annual Report 1 time yearly, Print and Email to entire database constituency.
- Corporate/Civic Speaking Engagements by Daniel staff, BOT/volunteers - 12 minimum per year ramping up from 2020-2023.

### 3. Events

- Annual “Hank Haynes Classic” Golf Tournament:



# STRATEGIC PLAN

YEAR	TARGETED TOTAL
FY 2021	• \$85,000
FY 2022	• \$100,000
FY 2023	• \$120,000

- Annual “Home that Daniel Built” Gala:

YEAR	TARGETED TOTAL
FY 2021	• \$70,000
FY 2022	• \$75,000
FT 2023	• \$80,000

- Annual 1884 Society Appreciation Gathering:

YEAR	TARGETED TOTAL
FY 2021	• \$5,000
FY 2022	• \$5,000
FT 2023	• \$5,000

#### 4. Create Broader Awareness

- Increase advertising budget, public relations efforts and social media presence in 2021 to create greater awareness and resulting success from increased identification/cultivation/solicitation/stewardship activities.

#### 5. Board of Trustees Participation

- Increase yearly BOT donations by 2023 to a minimum gift expected from every trustee. (\$2,500 is the current suggested amount, but it needs to be formally adopted).
- Increase Board advocacy activities: Introduce Daniel development officers to prospective donors, suggest and accompany their invitees on tours and at meetings/ join committees/solicit/volunteer for Daniel and Daniel events, participate in cultivation events and speaking engagements, identify/pursue prospective Board members.

# STRATEGIC PLAN

## Goal Two: Infrastructure Optimize and Currently Maintain Facilities

### OWNERSHIP

*Board of Trustees Member:* Matt England  
*Daniel Staff Members:* Lesley Wells and Rich Hitchcock

**Objective 1:** Rehab Creekside/Cedarwood building for use by a new program focused on residential treatment for children with special needs by FYE 2022.

**Objective 2:** Implement deferred maintenance reduction plan.

The plan will include a prioritization of all deferred maintenance items based upon critical needs with a projected schedule for eliminating deferred maintenance. Upon plan completion, initiate work efforts to reduce deferred maintenance plan annually by:

- \$150,000 by 2021
- \$250,000 by 2022
- \$300,000 by 2023

**Objective 3:** Rehab Woodcove cottage for existing residents by FYE 2022.

### DESIRED OUTCOMES

We must match our physical assets to our programs effectively, while optimizing the use of our existing facilities.

Success with this goal will enable us to place our staff in productive, attractive work space while providing clean, safe and attractive facilities for our clients.

While we understand that programs may come and go or be modified, we should maintain our facilities on a continuous basis, guard against superfluous space, and end this planning cycle without any deferred maintenance.

# STRATEGIC PLAN

## TACTICS

### Objective 1:

1. Select architect firm.
2. Develop design/building plan.
3. Develop projected budget.
4. Select construction/builder.
5. Begin construction.

### Objective 2:

1. Management/Properties Committee to meet quarterly to evaluate list and determine prioritization.
2. Development and management will work with trustees and other constituents to identify possible in-kind direct services and/or restricted gifts to fund identified projects.
3. During the budgeting process, management will budget capital expenditures in the respective years as required.

### Objective 3:

1. Develop and design building plan.
2. Develop budget.
3. Identify shortfall needed to fund project.
4. Select construction company.
5. Begin construction.



# STRATEGIC PLAN

## Goal Three: Brand Management Increase Awareness and Strengthen Image

### OWNERSHIP

*Board of Trustees Member:* Jennifer Emerson

*Daniel Staff Members:* Lesley Wells and Madison Shelly

**Objective 1:** Increase geographical and generational awareness of Daniel’s mission and programs with targeted outreach programs to the following geographic and generational market segments:

1. Traditional Jacksonville Market
2. Ponte Vedra and the Beaches
3. Other select Northeast Florida areas as opportunities permit

**Objective 2:** Review and refine overall messaging of the organization.

### DESIRED OUTCOMES

Daniel is the oldest child service agency in Florida, yet it is comparatively not well known in our operating space when compared to other marque 501(c)(3)’s, and its image should be perceived more highly. There are two strategic issues at play here: [1] image and [2] reach.

Daniel performs extraordinary work and service on behalf of its clients and this community, yet it does so without a proportionate amount of value being placed on its work by the community at large (i.e., is philanthropy more valued when it emphasizes cancer research and cures versus saving troubled children and families?). Daniel is respected for what it does, but not at the level it should be when you consider services being provided to over 3,000 children and families annually through multiple, well-structured programs.

Reach is about demographic (vertical through multiple generations) awareness and expanded geographic (horizontal through expanded territories) awareness. If we increase the depth and breadth of the prospective donor pool, we will enhance our odds for long-term success.

# STRATEGIC PLAN

## TACTICS

### Objective 1:

1. Speaking engagements.
  - a. Develop speaker's bureau.
  - b. Develop common presentation package.
  - c. Identify/schedule targeted speaking engagements.
2. Strategic geographical cocktail parties/receptions.
3. Strategic advertising.

### Objective 2:

1. Evaluate current public relations firm.
2. Evaluate all current electronic platforms (website, Instagram, Facebook, etc.).
3. Evaluate all agency marketing/advertising materials.





# STRATEGIC PLAN

## Goal Four: Human Resources

### Become the “Employer of Choice” SS Employer in the Region

#### OWNERSHIP

*Board of Trustees Member: Vada Rosen*

*Daniel Staff Members: Doug Standard and Lesley Wells*

**Objective 1:** Pursue strategies to ensure a controllable retention rate of 80% for professional staff (degree-required, ex: therapist, family services counselor, etc.) and a 65% retention rate for paraprofessional staff (non-degree, ex: residential counselor, admin support, etc.) by enhancing employee benefits and strengthening compensation.

**Objective 2:** Pursue opportunities to build staff morale and commitment to the agency.

**Objective 3:** Support a strong positive *work culture* image of Daniel via the branding strategy.

#### DESIRED OUTCOMES

The biggest impediment to our recruitment/retention of personnel appears to be our benefits package; most specifically, our health insurance plans. We must explore new plans and how to best tailor a more effective plan to our employee population.

With proper compensation and benefits plans in place, and with effective training programs in place to support career development, Daniel will become more effective in attracting and retaining the best social services workers available in our market. Best people. Reduced turnover. Controlled risk.

#### TACTICS

**Objective 1:**

**Overall Tactics:**

- Complete 2018 TO Report, including analysis
- Identify incentives that are meaningful and explore methods to reward tenure and performance

## STRATEGIC PLAN

- Empower Employee Relations Committee and other employer groups to implement recognition efforts of a non-monetary nature
- Conduct supervisory training to more effectively lead and work with modern workforce
- Address hiring strategies to increase retention of new hires beyond first year of service

### **Benefits Plan Tactics:**

Daniel will focus on developing a comprehensive employee benefit plan that is affordable and offers employees choices and alternatives by 2020 via the following tactics:

- RFP Broker role.
- Survey/Focus Groups for employees on preferences.
- Benchmark options – cafeteria plan, high deductible.
- Explore other benefits – Vision, changes to retirement, etc.
- Establish formal EAP.
- Re-invigorate Wellness Committee.

### **Compensation Plan Tactics:**

Daniel will focus on strengthening the starting and existing compensation packages for select direct service positions so that they evolve to represent the lead in the sector by 2021 via the following tactics:

- Benchmark “sister” agencies – full compensation, i.e., salaries, benefits, etc.
- Analyze starting/existing salaries for direct care positions to identify gaps/opportunities.
- Conduct formal analysis of starting salaries / salary structure for certain positions, namely therapist and case manager.

### **Objective 2 Tactics:**

- Birthday acknowledgements for employees.
- Quarterly staff “get together”.

### **Objective 3 Tactics:**

- Features on employees.
- Media exposure for Daniel of success stories.



# STRATEGIC PLAN

## **Goal Five: Board Development & Engagement** **Enlist Impactful Trustees in Region to Better Achieve Plan Results**

### OWNERSHIP

*Board of Trustees Member:* Lewis Hunter  
*Daniel Staff Member:* Lesley Wells

- Objective 1:** Develop a succession plan for officers and committee chairs to ensure expertise and commitment to roles.
- Objective 2:** Develop a list that identifies key individuals in the community based on determined needs of the agency to include diverse experience and backgrounds and then pursue candidates based upon needs.
- Objective 3:** Develop and implement a formal onboarding and orientation plan for new trustees and officers.
- Objective 4:** Establish a culture where trustees are fully and actively engaged and responsive to calls to participate and act.

### DESIRED OUTCOMES

The stronger our Board of Trustees, the better positioned Daniel will be to raise funding and strengthen its brand in the community.

We must target leading corporate and philanthropic community leaders for inclusion on our Board of Trustees. This may constitute a longer-term build, but the composition of our Board of Trustees should be examined for where it stands now in terms of influence and resources and where we must lead it.

Here again is an opportunity to also think in terms of coverage with respect to generational segments and geographical reach.

Success with this goal means building a board that can simply accomplish key strategic goals, with a primary focus on building the agency’s financial strength and ensuring that its physical assets are properly aligned and well maintained.

# STRATEGIC PLAN

## TACTICS

### Objective 1

1. Create operating guidelines for the Board that address succession planning.

### Objective 2:

1. Develop a prospective trustee and/or committee member database comprised of:
  - a. A list/profile of CEO's in Northeast Florida.
  - b. Top 40 at 40.
  - c. Current City of Jacksonville public service sector employees.
2. Trusteeship committee will evaluate the database and prioritize the list of the top individuals that have the capacity, interest and expertise needed for board membership.
3. Assign contact strategies for the identified prospects to include: one-on-one meetings, cocktail receptions, tours, etc.

### Objective 3:

1. Develop operating guidelines
2. Assign board mentors to newly recruited trustees

### Objective 4:

1. Develop a menu/calendar for Board participation opportunities
2. Commit BOD to those opportunities
3. Build and utilize a tracking system for activity engagement