

Company X

Strategic Plan

January 2005

Mission

Company X, Inc. a community-based, Healthy Carolinian, advocacy group of volunteer agencies and individual community members, is working to improve the quality of health for all residents of Jackson County through improved health services, increased, efficient utilization of health resources, and community empowerment.

Vision

Our vision is that all Jackson County residents are empowered to improve their own health through access to healthcare, education, and community programs.

Our vision for CHL is to be self-sustaining, well recognized in the community, and respected by other agencies, organizations, and individuals. We will provide support to other organizations monetarily, through leadership, and through expertise.

Core Values

All residents of Jackson County have the right to good health.
It's better Together! Collaboration in everything.
A genuine concern for individuals and groups with health disparities.
We succeed by empowering other organizations and individuals.

Strengths in the Community

What Is Our Passion

- Human need, Health improvement
- Access to Health Care
- Asthma/Air Quality
- Childhood Obesity
- Substance Abuse/Violence
- Dental Care

Funding

- Primarily grant funded.
- We rely on outside sources for all funds.

Purpose

- Organizing and motivating the community around an issue.
- Finding solutions to community problems.
- Partnering with agencies and individuals to improve health.
- Find innovative and collaborative means to improve community health status.
- We are in the business of creating and implementing programs that improve health.

What Sets Us Apart?

- We do not compete with other agencies.
- We facilitate their success with joint programs.
- We have great assessment skills, unifying capabilities and support from every agency. We have the respect of the community.
- Other organizations depend on CHL to facilitate good ideas and convene stakeholders around the issue/idea.

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Financial Objective 1

To become self sustaining.

<u>Financial Goals</u>	<u>Target 2005/2006</u>	<u>Measure</u>
Develop a local financial campaign.	34,600.00	2005/2006
CHL will increase county contribution.	20,000.00	2005/2006
CHL will develop for profit income.	1,000.00	By Dec. 2005
General Membership Donations	2,000.00	2005/2006
Agency Donations	5,000.00	2005/2006
Board Donations	1,600.00	2005/2006
General Resident Fundraising	5,000.00	2005/2006

Financial Objective 2

To support other organizations that work toward our mission and goals.

<u>Financial Goals</u>	<u>Target</u>	<u>Measure</u>
CHL will collaborate with the Canary Coalition to raise funds for both agencies.	1,000.00	2005/2007
CHL will seek funding to provide community health mini grants.	10,000.00	2005/2007

Financial Strategic Objectives

- Develop a for profit business to support CHL.**
- Develop a donor base in Jackson County.**
- Locate new private and public foundations.**

Company X
2004 - 2005 Budget (Not including HRSA Grant)

Income		Local Funds Include	
DSS Payroll	\$8,083.00		
Kate B. Reynolds	\$15,000.00	General Membership	
Sisters of Mercy	\$10,000.00		
Jackson County	\$10,000.00	Agency Donations	
Local	0.00	Board Donations	
Sales Tax reimbursement	\$60.00		
Fund Balance	\$24,980.00	General Residents	
State		For Profit	
Grant Funds			
Total	\$68,123.00	Total	\$0.00

Expenses		Local expenses include	
Salaries	\$45,061.00		
Fringes	\$11,901.00		
Travel	\$900.00	Annual Meeting	
Membership Dues	\$50.00		
Local		Member Cards	
Board Expense	\$1,500.00	Member Promotional	
Programmatic	\$3,500.00	Staff Training	
Misc.	\$5,211.00	Board Retreat	\$1,500.00
		Newsletter	
		Web Page	
Total	\$68,123.00	Total	\$1,500.00

Company X
2005 - 2006 Budget (Not including HRSA Grant)

Income		Local Funds Include	
DSS Payroll	\$8,325.00		
Kate B. Reynolds	\$10,000.00	General Membership	\$2,000.00
Jackson County	\$20,000.00	Agency Donations	\$5,000.00
Local	<i>\$14,600.00</i>	Board Donations	\$1,600.00
Expected Fund			
Balance	\$5,877.00	General Residents	\$5,000.00
State	\$10,000.00	For Profit	\$1,000.00
Grant Funds	\$10,000.00		
Mini-Grant Funds	\$10,000.00		
Total	\$78,802.00	Total	\$14,600.00

Less than 20% of Expenses

Expenses		Local expenses include	
Salaries	\$46,578.00		
Fringes	\$12,258.00		
Travel	\$1,200.00	Annual Meeting	\$400.00
Local	<i>\$3,725.00</i>	Member Cards	\$100.00
Board Expense	\$2,000.00	Member Promotional	\$200.00
Programmatic	\$5,000.00	Staff Training	\$500.00
Contingency	\$8,041.00	Board Retreat	\$2,000.00
Mini-Grants	\$10,000.00	Newsletter	\$500.00
		Web Page	\$25.00
Total	\$78,802.00	Total	\$3,725.00

Individual Members

Profile

- Our members live in Jackson County.
- They want to be healthy.
- They want their families and children to be healthy.
- They want to give back to their community.
- We provide them opportunities to serve the community.
- We facilitate member needs to improve community health.
- Provide members with accurate information regarding the health of the community.
- We inform members of current programs, community needs, and successes.
- We educate our members regarding personal health and safety issues.

Positioning

CHL makes a real difference in Jackson County by listening to the needs of residents and agencies and by developing programs and projects to meet those needs.

Strategy

To develop stronger ties to our membership to strengthen our position in the community.

<u>Individual Member Strategic Goals</u>	<u>Measure</u>
CHL will provide regular newsletters to CHL membership. (Postage & printing)	Six per year
CHL will utilize the membership data base to contact individuals regarding their particular interest.	Monthly and when a current project meets member's criteria.
CHL will increase general membership.	50 in year 1

<u>Individual Member Action Items</u>	<u>Responsibility</u>	<u>Measure</u>
Hire part time admin assistant.	Executive Director	1/31/2005*
Set date for 2005 Annual meeting.	Staff & Board	2/15/2005
Feature one member in each newsletter.	Staff	2/21/2005
Create newspaper article about active CHL members.	Executive Director	1/31/2005
Send Christmas Card to membership.	Staff	12/17/2004*
Send keychain/whistle to each member.	Staff	12/17/2005

Jackson County Agencies and Organizations

Profile

All organizations are under funded and short staffed.
 All organizations care deeply about the populations they serve.
 They are willing to collaborate for the benefit of the public.
 We provide expertise on data management, grant writing, and community assessment.
 We facilitate the design and development of programs that the organizations could not do alone.
 We serve on individual agency committees and boards.
 We respond to requests for community programs.
 We publicly highlight the contribution of each agency.

Positioning

Organizations want to be partners of CHL because CHL will get the job done well and it will benefit their clients. Creating a program with CHL will increase the likelihood that the program will succeed.

Strategy

Operational Excellence

<u>Agencies and Organizations Strategic Goals</u>	<u>Measure</u>
CHL will provide regular newsletters.	Six per year
CHL will ensure agencies receive notes or minutes.	For every meeting they attend.

<u>Action Items</u>	<u>Responsibility</u>	<u>Measure</u>
Hire part time admin assistant.	Executive Director	1/31/2005
Write letter to agency directors thanking them for the work of their employees.	Executive Director	3/31/2005
Continue to follow-through with program excellence.	Staff	on-going

Board of Directors

Profile

Board members are committed to the community served by CHL.
Each board member brings a unique perspective to board activities.
Members are willing to give their time and attention to CHL.
Members all want CHL to be financially and programmatically successful.
We provide an opportunity for individuals to serve the entire community.
We provide regular accurate information regarding programs, projects, affiliations.
We respond to requests for reports, data, and financial status.
We participate and serve on committees and boards for board member organizations.

Positioning

Board members believe they make a difference by working with CHL.
They are proud to serve as board members of CHL.
They are willing to serve on programmatic and operational committees.

Strategy

Strengthened relationships

Board Strategic Goals

Measure

CHL will provide regular newsletters.

Six per year

CHL will provide opportunities to serve on action teams, special projects, and committees.

When a current need meets board members expertise or interest.

Board Action Items

Responsibility

Measure

Meet with individual board members to discuss their particular interests and needs.

Executive Director

4/30/2005

Feature a Board member story in each newsletter.

Staff

2/28/2005

Hold Board self-evaluation retreat.

Staff & Board

1/13/2005*

General Residents of Jackson County

Profile

Residents live in Jackson County and are all ages, races and religions.
They all want to be self sufficient and healthy.
They want to have a say in the programs that affect their health.
We provide free health care to low income residents.

We provide an opportunity for physicians and community leaders to serve.
 We provide referrals to other county agencies and organizations.
 We provide individual health information to parents of school children.
 We offer collaborative programs that enhance community health and safety.

Positioning

Residents appreciate CHL and what they do for the community.
 Resident health has improved because of the work of CHL.
 Residents know what CHL is and what they do in the community.

General Resident Strategy Community and Service Leadership

<u>Strategic Goals</u>	<u>Measure</u>
CHL will activate the Web page.	Six months.
CHL will write newspaper articles.	Monthly

<u>Action Items</u>	<u>Responsibility</u>	<u>Measure</u>
Hire part time admin. assistant.	Executive Director	1/31/2005*
CHL Front Page article.	Staff & Board	1/31/2005
Create follow-up program for methamphetamine education with Sheriff's Office.	Executive Director Admin. Assistant	1/31/2005

**Internal and External Assessment
(SWOT: Strengths, Weaknesses, Opportunities, Threats)**

Internal

External

Strengths

- Maximizing cash flow.
- Improving member relations.
- Improving quality of programs and projects
- Engaging current members.
- Attracting new members.
- Achieving member satisfaction.
- Minimizing problems/errors in projects/services.
- Achieving employee satisfaction.
- Retaining current employees.
- Improving employee productivity.
- Attracting and hiring new, qualified employees.
- Collaborating to work on new community issues.
- Launching new projects/services.
- Improving new project/service success rates.
- Increasing level of innovation in projects/service.

Opportunities

- Other agencies will collaborate on projects
- We are independent and can make decisions without state approval.
- Grants not yet written.
- Jackson County donors and contributors.
- Fundraisers
- Gaps in health services
- Resident needs not yet met.
- The need for community involvement
- Health behaviors are currently seen as important by community.
- Collaboration with Health Department provides free housing for CHL.
- Our priorities are aligned with those of the state and nation.

Weaknesses

- Maximizing revenue and donations.
- Improving fund balance.
- Optimizing revenue sources.
- Improving CHL image or reputation.
- Capturing profitable donor opportunities.

Threats

- Other agencies are competing for the same grant money and local donors.
- Other agencies receive state support.
- Lack of funds
- Insufficient staff
- Failure of collaboration
- The need for Board involvement
- The need for community involvement
- There will be little money from North Carolina government. It's broke!
- A high proportion of Jackson County residents are low income.
- We have a rapidly growing senior population with great needs and few resources.
- A large proportion of jobs are service positions with low pay and no benefits.

Internal/Operational Objective 1

To provide all employees with challenging and rewarding work, satisfying work conditions and opportunities for personal development, advancement, and competitive compensation.

<u>Internal/Operational Goals</u>	<u>Measure</u>
CHL will provide work enhancement training to each employee.	Annually
CHL will evaluate each employees work.	Annually
CHL will hold staff meetings.	At least bi-weekly

<u>Internal Action Items</u>	<u>Responsibility</u>	<u>Measure</u>
Determine with staff members what training would best suit their work needs and locate classes.	Staff & Board	4/30/2005
Conduct employee evaluations.	Executive Director	Employee Anniversary
Hold weekly staff meetings whenever possible.	Executive Director	11/30/2004*

Internal/Operational Objective 2

Develop and maintain detailed databases of donors, members, public and private foundations.

<u>Internal/Operational Goals</u>	<u>Measure</u>
CHL will create databases for donors and private foundations.	Six months

<u>Action Items</u>	<u>Responsibility</u>	<u>Measure</u>
Hire part time admin. assistant.	Executive Director	1/31/2005*

Innovation/Learning Objective 1

Provide staff with adequate training to develop and support a for-profit business.

Innovation/Learning Goals

Measure

CHL will provide learning opportunities through classes or in house trainings. Six months

Action Items

Responsibility

Measure

Research needs and opportunities for a supporting non-profit business.

Executive Director

1/31/2005

Innovation/Learning Objective 2

To provide all training necessary for staff to perform successfully.

Innovation/Learning Goals

Measure

CHL will provide on-the-job work training.
CHL will provide opportunities for staff to express needs and to receive additional training necessary to perform duties.

Daily
As needed.

Action Items

Responsibility

Measure

Determine with staff members what training would best suit their work needs and locate classes.

Executive Director

4/30/2005

Innovation/Learning Objective 3

Provide opportunities for staff and Board to generate ideas and contribute expertise.

Innovation/Learning Goals

Measure

CHL will provide access to conferences and workshops for Executive Director and staff

As appropriate

CHL will hold a retreat.

Annually

CHL will perform a Board self evaluation.

Annually

