

Gilead Community Services

Strategic Planning Executive Summary

FY16-18

Executive Summary

Our Strategic Plan for FY16-18 recognizes the need for an expanding role in the community and a broadened base of financial support. Working collaboratively with community partners, we plan to employ innovative solutions to fill existing gaps in mental health care. We plan to increase our fiscal stability through funding from diverse sources including for-profit enterprises, private individuals, local businesses, corporations, and foundations, as well as local and state agencies. We will continue to develop a stable, committed, fairly-compensated staff which exemplifies excellence, dedication, compassion, and innovation.

Introduction

Purpose of the Plan. The purpose of this strategic plan is to articulate the major strategic issues confronting Gilead at the present time, and to shape 3-year goals and objectives to effectively address these issues.

Process Development. Traditionally, Gilead has done strategic planning in 3-year cycles. The plans were generated by the Executive and Administration staff during a one-day retreat. In 2014 the agency had a new CEO, an increasingly active Board, and new challenges facing the organization. There were signs that we needed to expand our scope of services and move in new directions. We recognized that we needed a careful and thoughtful process that would help us identify the critical strategic issues facing the agency, and craft bold and creative strategies to address those issues.

In the face of these new circumstances, we decided to re-evaluate our strategic planning process. We considered utilization of an outside consultant, but because of the uniqueness of the organization and needs of the agency, we opted to develop our own strategic planning process.

A Strategic Planning Committee (SPC) was formed to develop a process for creating a strategic plan for Gilead. It included representatives from a cross section of the agency.

This committee conceptualized a planning process that would incorporate input from all Gilead stakeholders. This would include the entire staff as well as representatives from clients, families, community collaborators, and donors. Extending the planning process to all stakeholders was expected to have the dual benefits of strengthening the plan as well as creating a broad sense of ownership in the implementation of the final product. A tagline was adopted for this process that “Every Voice Counts.”

The SPC also took care to distinguish between strategic and operational issues, emphasizing that although both were important, this process was to focus in strategic

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Strategic Planning Executive Summary

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issues. Any operational issues that surfaced would be identified and referred to the appropriate program.

The SPC developed the following documents to guide the strategic planning process. These documents are included in the appendix of this plan.

- Strategic Planning Pyramid (Building Blocks of Strategic Planning)
- Steps in the Strategic Planning Process
- Gilead Strategic Planning Flow Chart
- Participant Matrix (to help identify stakeholder input in the process)
- Strategic Planning Timeline
- An Outline for the Final Plan
- Membership of the Strategic Planning Team (SPT) – with representation from all identified stakeholder groups.

Strategic Planning Process

In January of 2015 the official strategic planning process was launched with a presentation at the All Agency meeting to the entire staff, and the Strategic Planning Team (SPT) began meeting to initiate the process. Separate retreats were held by the Board and the Administration/Executive staff to conduct an environmental analysis and identify strategic issues. The SPT integrated the ideas from these two retreats into a single list of four strategic issues, each with several sub-issues (later to be defined as strategic goals).

Once the Strategic Issue and Sub Issues were developed, 12 sub-committees were formed based on the “Participant Matrix” that was developed by the Strategic Planning Committee. The Strategic Planning sub-committees included:

- Executive Committee
- Administrative Committee
- Funders
- Donors
- Community Partners
- Program Participants
- Family Members
- All Program Staff
- Apartment Leadership Team
- Community Leadership Team
- Residential Leadership Team

Gilead Community Services

Strategic Planning Executive Summary

FY16-18

Each sub-committee met individually (led by a member of the SPT that also represented that particular stakeholder group) and was tasked with completing a worksheet that solicited feedback on the four strategic issues and sub-issues that had been developed during the board and administrative leadership retreats. This comprehensive feedback from the various stakeholder groups was then organized into a master document that the SPT consolidated into the initial draft document of the strategic plan. This document was sent back and forth from the SPT to the sub-committees for review and comment until the final version of the strategic plan was completed and approved.