

**CDS FAMILY & BEHAVIORAL HEALTH SERVICES, INC.**

**FY 2024-2029 STRATEGIC IMPLEMENTATION PLAN**

Mission: *Empowering Youth & Building Strong Families for a Brighter Tomorrow*

Vision: *CDS’ core goal is to strive for family preservation. Towards that end:*

*CDS is a lifeline for families*

*CDS is a resource for the community*

*CDS is a place to get help*

Values: *CDS’ values are:*

*We are an ‘open door’ to all who come to us for assistance*

*Prevention of delinquency is a gateway to public safety*

*We work best when we work in partnership with the communities we serve*

*We are effective, efficient, and economical in our operations*

*We are respectful of our Clients’ individualities*

*We are accountable to our stakeholders*

Coordinated with CARF Child and Youth Standards Manual, Section 1(C)

Effective as of January 1, 2024

OBJECTIVE I – CDS shall maintain an ‘always-on’ audit-ready culture

Strategy A – CDS is and shall be mission-driven

Tactic 1 – CDS shall review its applicable key performance indicators (KPI’s)

Responsible parties: CEO and COO in collaboration with the EMT

Time-frame: Annually, each August

Outcomes: All KPI’s shall be renewed or updated

Monitoring: CEO and COO shall ensure that all KPI’s are applicable to CDS’ operations

Tactic 2 – In support of Tactic 2, CDS shall draw the KPI’s from the following sources (all as may be updated from time-to-time): (a) federal, state, and local laws, rules, regulations, and ordinances to which CDS is subject; (b) the contracts and grants to which CDS is subject; (c) Commission on Accreditation of Rehabilitation Facilities (CARF) requirements

Responsible parties: CEO, COO, Data Systems Manager, Human Resources Manager, and Chief Financial Officer (including with respect to tax compliance)

Time-frame: Annually, each August

Outcomes: All applicable statutes, rules, regulations, ordinances, contracts, and grants shall be analyzed

Monitoring: CEO and COO shall ensure that all KPI’s are up-to-date

Tactic 3 – In support of Tactics 1 and 2, CDS shall implement (a) best-in-class policies, practices, and procedures; (b) continuous improvement activities with respect to outputs and outcomes; (c) paperwork reduction to avoid redundancy, increase efficiency, and lower costs; and (d) sustainable operating practices.

Responsible parties: CEO and COO in collaboration with the EMT

Time-frame: Annually, each January

Outcomes: All applicable statutes, rules, regulations, ordinances, contracts, and grants shall be analyzed

Monitoring: CEO and COO shall ensure that all KPI’s are up-to-date

Strategy B – CDS shall operate ‘as if’ it is engaged in monitoring and audits by its government regulators and contract partners, including, but not limited to, the U.S. Administration for Children and Families, the Florida Network of Youth and Family Services (on behalf of the Florida Department of Juvenile Justice), Lutheran Family Services (on behalf of the U.S. Substance Abuse and Mental Health Services Administration), the Florida Department of Children and Families, CARF, the U.S Internal Revenue Service, and the Florida Department of Revenue.

Responsible parties: CEO, COO, Data Systems Manager, Human Resources Manager, and Chief Financial Officer

Time-frame: Effective immediately

Outcomes: EMT shall conduct mock audits at least once each year

Monitoring: COO shall ensure mock audits are conducted, with the findings applied to operations, and the operations adjusted as-needed

OBJECTIVE II – The Board of Directors shall be constituted to represent the communities CDS serves

Strategy A –Board shall endeavor to be diverse in its make-up, which shall consist of Title VII, regional, and professional elements, among other metrics

Responsible parties: Board with support of the CEO

Time-frame: Ongoing

Outcomes: The Board shall evaluate its membership demographics, and recruit prospective candidates in accordance with the findings

Monitoring: The Board Officers shall review the membership roll with support of the CEO

Strategy B – CDS’ Articles of Incorporation and Bylaws shall be maintained up-to-date pursuant to the applicable federal, state, and local statutes, rules, regulations, and ordinances, regulators, contracts, and grants requirements, and corporate needs from time-to-time

Tactic 1 – The Articles of Incorporation and Bylaws shall be initially updated and then maintained

Responsible parties: Current Bylaws Committee Chair in consultation with the Board Officers and Members

Time-frame: Not later than July 1, 2024, to be reviewed and revised from time-to-time upon changes to the applicable federal, state, and local statutes, rules, regulations, and ordinances and corporate needs

Outcomes: Updated Articles of Incorporation and Bylaws will be finalized and approved by the Board

Monitoring: An ad hoc Bylaws Committee shall be appointed from time-to-time as prescribed by the Bylaws

Tactic 2 – CDS shall implement staged Board Member limits

Responsible parties: Board Officers and Members

Time-frame: Commencing July 1, 2024

Outcomes: The Board’s Members and Officers shall rotate on-and-off the Board from time-to-time as prescribed by the Articles of Incorporation and Bylaws

Monitoring: The Board Officers shall review the membership roll with support of the CEO

Tactic 3 – Consistent with Tactic 1 above, the initially updated Articles of Incorporation and Bylaws shall address such matters as Board membership expectations (such as ‘give-or-get’ donation requirements) and the creation of a junior/development board and a youth advisory board

Responsible parties: As described in Tactic 1 above

Time-frame: As described in Tactic 1 above

Outcomes: As described in Tactic 1 above

Monitoring: As described in Tactic 1 above

Strategy C – CDS’ policies and procedures (operational, administrative, human resources, fiscal, and otherwise as appropriate) shall be maintained up-to-date pursuant to the applicable federal, state, and local statutes, rules, regulations, and ordinances, regulators, contracts, and grants requirements, and corporate needs from time-to-time

Responsible parties: CEO, COO, CFO, DSM, HRM

Time-frame: Ongoing

Outcomes: Updated policies and procedures will be reviewed and approved by COO

Monitoring: The Bylaws Committee shall be principally responsible for approving policies and procedures

OBJECTIVE III – CDS shall take advantage itself of the available communications resources to fully and accurately tell its story, and, accordingly, implement outreach for service provision to communities within our catchment area which can benefit accordingly

Strategy A – The Board shall utilize the following communications resources: (a) website; (b) digital (including FaceBook, Instagram, Threads, TikTok, YouTube); (c) e-newsletter; (d) print and electronic advertising; and (e) facilities open houses

Responsible parties: Marketing Manager (upon engagement) and Community Outreach/Safe Place Specialists (upon engagement) in consultation with CEO, COO, and Board Development Committee

Time-frame: Effective upon engagement of the Marketing Manager and Community Outreach/Safe Place Specialists; ongoing by CEO in consultation with Board Development Committee

Outcomes: Increased objective familiarity with CDS’ history, programs, and plans

Monitoring: The CEO and COO shall cause annual surveys and other measurement tools (including customer/stakeholder surveys, community partner surveys, focus groups) to reviewed for penetration of communications used, and shall report the findings to the Board Development Committee

Strategy B – The Board shall maintain and increase stakeholder partnerships with applicable public and private stakeholders, including local, state, and national government authorities, law enforcement, school boards, and secondary education institutions, peer agencies, and businesses, all in support of CDS’ Mission, Vision, and Values, programs, and plans

Responsible parties: CEO

Time-frame: Ongoing

Outcomes: Increasingly and objectively improved involvement with CDS’ programs

Monitoring: The CEO, in consultation with the COO, Marketing Manager, Community Outreach Specialists shall identify, engage in, and maintain stakeholder partnerships to benefit CDS and its programs

Strategy C – Consistent with Strategy B above, CDS shall engage in cooperative service agreements with applicable public and private stakeholders, including local, state, and national government authorities, law enforcement, school boards, and secondary education institutions, peer agencies, and businesses, all in support of CDS’ Mission, Vision, and Values, programs, and plans

Responsible parties: COO

Time-frame: Ongoing

OBJECTIVE IV – CDS shall implement a well-rounded development and fundraising program

Strategy A – CDS shall apply for and maintain available public, private, business, institutional, estate, and planned giving opportunities

Responsible parties: CEO and Marketing Manager (upon engagement)

Time-frame: Effective immediately

Outcomes: Increased unrestricted funding of CDS’ programs and operations

Monitoring: The CEO and Marketing Manager, in consultation with the Board Development Committee, shall review available public, private, business, institutional, estate, and planned giving funding sources

Strategy B – CDS shall create and maintain a business sponsorship program

Responsible parties: CEO and Marketing Manager

Time-frame: FY 2024/2025

Outcomes: Increased funding of CDS’ programs

Monitoring: The CEO and Marketing Manager, in consultation with the Board Development Committee, shall review the effectiveness of the business sponsorship program

Strategy C – CDS shall engage a Grant Writer (on-staff or contracted) apply for and maintain available and diverse public, private, business, and institutional grant opportunities

Responsible parties: CEO and Grant Writer, with support of Marketing Manager

Time-frame: FY 2025/2026

Outcomes: Increased funding of CDS’ programs and operations

Monitoring: The CEO and Grant Writer, in consultation with the Board Development Committee, shall review available public, private, business, and institutional grant sources

Strategy D – CDS shall create and maintain an estate and planned giving program

Responsible parties: CEO and Marketing Manager

Time-frame: FY 2025/2026

Outcomes: Increased funding of CDS’ programs

Monitoring: The CEO and Marketing Manager, in consultation with the Board Development Committee, shall review the effectiveness of the estate and planned giving program

Strategy E – CDS shall organize and conduct periodic and repeat fundraising events

Responsible parties: Marketing Manager

Time-frame: Effective immediately

Outcomes: Increased funding of CDS’ programs

Monitoring: The Marketing Manager, in consultation with the CEO and Board Development Committee, shall review the effectiveness, efficiency, and economy of the fundraising events

Strategy F – CDS shall organize and maintain a donor database (including of participant and family alumni)

Responsible parties: Marketing Manager

Time-frame: FY 2024/2025

Outcomes: Dedicated and repeat donor support

Monitoring: The Marketing Manager, in consultation with the CEO and Board Development Committee, shall prepare ‘thank you’ notes and review the donor database

Strategy G – The Board shall organize and maintain a Board Member donation program (‘give or get’ model)

Responsible parties: Board

Time-frame: Effective immediately

Outcomes: Increased funding of CDS’ programs

Monitoring: The Board shall review participation of the Board Member in the donation program

Strategy H – CDS shall organize and maintain an endowment for long-term funding stabilization (principal to be maintained, interest/returns may be utilized)

Responsible parties: CFO in collaboration with CEO, Board

Time-frame: FY 2026-2027

Outcomes: Long-term funding of CDS’ programs

Monitoring: The Board shall review the performance of the endowment fund and determine the use of its interest/returns

OBJECTIVE V – CDS shall implement a prudent and diligent fiscal management program, consistent with all applicable laws, rules, and regulations (including those related to account reconciliations, journal entries, record-keeping and retention, accounting and tax requirements and best practices, as well as per FASB, GAAP, GAAS, and IFRS), and fiduciary responsibilities

Strategy A – CDS shall implement state-of-the art fiscal policies, procedures, and practices (including Team training)

Responsible parties: CFO

Time-frame: Ongoing

Outcomes: Reliable and transparent fiscal activities

Monitoring: The Board Treasurer in collaboration with the Finance & Audit Committee shall review the quality of fiscal reporting across all CDS program areas

Strategy B – CDS shall implement effective goods and services cost management

Tactic 1 – CDS shall review its expenditures, together with revenue sources on a real time basis

Responsible parties: CFO and COO in collaboration with the EMT

Time-frame: Monthly

Outcomes: CDS shall remain cash-solvent at all times (have available cash to pay for all of its regular operating costs in the ordinary course)

Monitoring: The Board Treasurer in collaboration with the Finance & Audit Committee shall review CDS’ solvency

Tactic 2 – CDS shall implement proactive cost containment across all program areas

Responsible parties: CFO and COO in collaboration with the EMT

Time-frame: Ongoing

Outcomes: CDS shall engage in expenditures in an effective, efficient, and economical manner, on a ‘just in time’ basis, and with a focus on minimizing stocks of excess stored food, beverages, materials, supplies, and other expendable goods

Monitoring: The CFO and COO shall review CDS’ purchasing patterns and vendor sources (on a competitive basis when required or appropriate)

Tactic 3 – Consistent with Tactic 2 above, CDS shall utilize a single-point vendor for ordinary course items (food, beverages, materials, supplies, expendable goods)

Responsible parties: COO and CEO

Time-frame: FY 25/26

Outcomes: As described in Tactic 2 above

Monitoring: As described in Tactic 2 above

Strategy C – CDS shall implement state-of-the art federal, state, and local tax management policies, procedures, and practices (corporate, payroll, property, non-ad valorem)

Responsible parties: CFO in collaboration with external auditor

Time-frame: Ongoing

Outcomes: Reliable and transparent tax activities

Monitoring: The Board Treasurer in collaboration with the Finance & Audit Committee shall review the quality of tax reporting across all CDS program areas

Strategy D – CDS shall implement state-of-the art investment management policies, procedures, and practices (from available cash, securities, other property, restricted donations, windfall donations)

Tactic 1 – CDS shall implement prudent investment protocols

Responsible parties: CFO in collaboration with the CEO, Board

Time-frame: FY 25/26

Outcomes: CDS shall benefit from the prudent allocation of available assets to provide for the continuous availability of additional operational funds

Monitoring: The Board Treasurer in collaboration with the Finance & Audit Committee shall review CDS’ solvency

Tactic 2 – In support of Tactic 1, CDS shall engage a licensed independent financial advisor

Responsible parties: As described in tactic 1 above

Time-frame: As described in tactic 1 above

Outcomes: As described in tactic 1 above

Monitoring: As described in tactic 1 above

OBJECTIVE VI – CDS shall maintain a person-centered human culture

Strategy A – CDS shall maintain state-of-the human resources management policies, procedures, and practices

Responsible parties: HRM, COO in collaboration with CEO

Time-frame: Ongoing

Outcomes: Consistent recruitment, retention, compensation, discipline of all Team Members

Monitoring: Board Personnel Committee

Strategy B – In support of Strategy A, CDS shall maintain engagement of an independent human resources attorney

Responsible parties: HRM, CEO

Time-frame: Ongoing

Outcomes: Compliant human resources management policies, practices, and procedures

Monitoring: Board Personnel Committee

Strategy C – CDS shall improve employee retention

Tactic 1 – CDS shall administer, analyze employee satisfaction surveys, exit interviews

Responsible parties: HRM

Time-frame: Ongoing (annual)

Outcomes: Accurate understanding of employee needs and desires

Monitoring: CEO, COO, in collaboration with Board Personnel Committee

Tactic 2 – CDS shall implement field-competitive compensation (COLAs/equivalent, bonuses, pay cycles [e.g., weekly]), leave, benefits

Responsible parties: CEO, COO, HRM

Time-frame: Effective immediately (subject to available resources)

Outcomes: Competitive recruitment, retention, compensation of all Team Members

Monitoring: Board Personnel Committee

Tactic 3 – CDS shall implement a 403(b) match or equivalent contribution

Responsible parties: CEO, HRM

Time-frame: FY 26/27

Outcomes: Competitive recruitment, retention, compensation of all Team Members

Monitoring: Board Personnel Committee

Tactic 4 – CDS shall implement consistent workweek schedules, overtime, flex-time

Responsible parties: HRM, COO in collaboration with EMT

Time-frame: FY 25/26

Outcomes: Consistent recruitment, retention, compensation of all Team Members

Monitoring: Board Personnel Committee

Tactic 5 – CDS shall implement career advancement structure (including related trainings)

Responsible parties: HRM

Time-frame: FY 25/26

Outcomes: Competitive recruitment, retention, compensation of all Team Members

Monitoring: Board Personnel Committee

Tactic 6 – CDS shall implement Team retreats and appreciation/recognitions

Responsible parties: HRM, CEO, COO in collaboration with EMT

Time-frame: Ongoing

Outcomes: Consistent recruitment, retention, compensation of all Team Members

Monitoring: Board Personnel Committee

Tactic 7 – CDS shall implement mindfulness, well-being, work-life balance activities

Responsible parties: HRM, COO in collaboration with EMT

Time-frame: Ongoing

Outcomes: Consistent recruitment, retention of all Team Members

Monitoring: Board Personnel Committee

Strategy D – CDS shall maintain succession planning (at all Team levels), consistent with existing Succession Plan

Responsible parties: HRM, CEO, COO

Time-frame: Ongoing

Outcomes: Consistent recruitment, retention of all Team Members

Monitoring: Board Personnel Committee

OBJECTIVE VII – CDS shall implement a robust (accurate, scalable, secure, backed-up/redundant, energy efficient) information technology system (hardware, software, inquiry management)

Strategy A – CDS shall obtain and maintain state of the art information hardware, software

Responsible parties: DSM

Time-frame: Ongoing (subject to available resources)

Outcomes: Effective, efficient, economical HR documents access, retention

Monitoring: CEO

Strategy B – CDS shall digitize all operational and administrative documents (programs, data, capture, human resources, fiscal, insurance/risk management)

Responsible parties: DSM

Time-frame: FY 25/26

Outcomes: Effective, efficient, economical documents access, retention, storage

Monitoring: CEO

Strategy C – CDS shall evolve its legacy/backbone system to include programmatic handhelds, single-point data warehouse (SharePoint)

Responsible parties: DSM

Time-frame: FY 25/26

Outcomes: Effective, efficient, economical HR documents access, retention

Monitoring: CEO

Strategy D – CDS shall create an maintain a recurring calendar (SharePoint)

Tactic 1 – Administrative functions: contracts/grants renewals, reporting/audit/ monitorings cycles

Responsible parties: COO, DSM, HRM, CFO

Time-frame: Ongoing

Outcomes: Predictable business cycles

Monitoring: COO

Tactic 2 – Known events (to be updated)

January: MLKjr Day, National Human Trafficking Prevention Month, National Mentoring Month

February: Black History Month, National Parent Leadership Month, National Teen Dating Violence Awareness Month, International Random Acts of Kindness Day

March: Self Injury/Harm Awareness Day, Women’s History Month

April: Amazing Give, Autism Acceptance/World Autism Month, National Child Abuse Prevention Month

May: Asian-Pacific History Month, Children’s Mental Health Week, No Place for Hate Day

June: Juneteenth, Pride Month

July

August

September: Hispanic Heritage Month (9/15-10/15), UF Campaign for Charities (through October)

October: ADHD Awareness Month, Red Ribbon Week – Drug & Alcohol Awareness/Prevention

November: Annual Meeting & Celebration, Friendsgiving, National Domestic Violence Prevention Month, National Runaway Prevention Month,

December

OBJECTIVE VIII – CDS shall utilize its real and personal property assets to maintain or increase their utility and value

Strategy A – CDS shall inventory its real property (owned, leased; including the new Gainesville CINS/FINS shelter) and personal property (owned, leased; vehicles, equipment, materials, supplies) in accordance with CDS policy

Responsible parties: CFO, COO in collaboration with EMT

Time-frame: Ongoing

Outcomes: Real-time knowledge of all assets, locations, conditions

Monitoring: CEO

Strategy B – CDS shall maintain its inventory its assets through the use of checklists and schedules

Responsible parties: CFO, COO in collaboration with EMT

Time-frame: Ongoing

Outcomes: Preserving or improving asset value (e.g., real property curb appeal)

Monitoring: CEO

Strategy C – CDS shall operate its assets in a sustainable manner

Responsible parties: CFO, COO in collaboration with EMT

Time-frame: Ongoing

Outcomes: Preserving or improving asset value as good stewards to the communities we serve

Monitoring: CEO

OBJECTIVE IX – CDS shall engage in a full range of risk management regarding its programs, operations, and assets in accordance with the CDS Risk Management Plan

Strategy A – CDS shall engage in best practice proactive risk management

Responsible parties: CEO CFO, COO in collaboration with EMT

Time-frame: Ongoing

Outcomes: Prevention of harm, damage, and other losses to CDS’ Clients, Team Members, and assets

Monitoring: CEO

Strategy B – CDS shall engage in best practice reactive risk management

Tactic 1 – CDS shall be promptly responsive to damage and other losses to its Clients, Team Members, and assets in accordance with applicable laws, rules, regulations, ordinances, contracts, grants, and CARF requirements to which it is subject including the CDS Emergency Plans

Responsible parties: CFO, COO in collaboration with EMT

Time-frame: Ongoing

Outcomes: Prevention harm, damage, and other losses to CDS’ Clients, Team, and assets

Monitoring: CEO

Tactic 2 – CDS shall add risk management means, measures, and methods garnered from reactive risk management experience to its proactive risk management knowledge base

Responsible parties: CFO, COO in collaboration with EMT

Time-frame: Effective immediately

Outcomes: Prevention harm, damage, and other losses to CDS’ Clients, Team, and assets

Monitoring: CEO

Strategy C – CDS shall maintain insurance relative to the personal, property, professional, and liability risks it faces

Tactic 1 – CDS shall obtain adequate insurance policies

Responsible parties: CEO, in collaboration with COO, CFO

Time-frame: Ongoing

Outcomes: Ongoing protection against risk incidents

Monitoring: CEO, Board

Tactic 2 – CDS shall put out its insurance policies to bid at least every three years, or as deemed necessary or appropriate by the Board from time-to-time

Responsible parties: CEO, Board

Time-frame: Effective immediately

Outcomes: Effective, efficient, and economical insurance coverages

Monitoring: Board

OBJECTIVE X – CDS shall pursue to following administrative, operational, and programmatic activities, consistent with CDS’ Mission, and all subject to funding and Board approval

Strategy A – CDS shall implement: (a) nimble, agile, resilient operations; (b) internal/external stakeholder inquiries/surveys; (c) SWOT analyses (including assets/needs); (d) sustainability

Responsible parties: CEO, COO in collaboration with EMT

Time-frame: Ongoing

Outcomes: Promotion of person-centered culture, consistent with Objective VI

Monitoring: CEO, Board

Strategy B – CDS’ shelters shall create enhanced shelter summer and holiday programs

Responsible parties: COO in collaboration with EMT

Time-frame: Ongoing

Outcomes: Increased service delivery to cohort populations

Monitoring: CEO, COO

Strategy C – CDS’ SNAP programs shall create food/supplies, informational library

Responsible parties: SNAP Supervisors

Time-frame: FY 24/25

Outcomes: Increased service delivery to SNAP population

Monitoring: COO

Strategy D – CDS’ shall enhance service/education focus on vaping, social media overuse

Responsible parties: COO in collaboration with EMT

Time-frame: FY 25/26

Outcomes: Increased/enhanced service delivery to cohort populations

Monitoring: CEO, Board

Strategy E – CDS’ shall develop substance abuse/mental health diagnosis/treatment programs

Responsible parties: CEO, COO, DSM, HRM, CFO

Time-frame: FY 27/28

Outcomes: Increased/enhanced service delivery to cohort populations

Monitoring: Board

Strategy F – CDS’ shall sell the Bivens property

Tactic 1 – Administration shall relocate to a smaller footprint, with limited permanent and shared/remote workspaces

Responsible parties: CEO, COO, DSM, HRM, CFO

Time-frame: FY 28/29

Outcomes: Operating efficiencies, cost management

Monitoring: Board

Tactic 2 – Family Action Program and SNAP shall relocate to a venue with increased public transit access

Responsible parties: CEO, COO, DSM, HRM, CFO

Time-frame: FY 28/29

Outcomes: Accessible/increased service delivery to cohort populations

Monitoring: Board

Strategy G – CDS’ shall develop respite (residential) programs for young adults (18 years +)

Responsible parties: CEO, COO, DSM, HRM, CFO

Time-frame: FY 28/29

Outcomes: Increased/enhanced service delivery to cohort populations

Monitoring: Board