



FAMILIES FORWARD
C H A R L O T T E

2019-2022

STRATEGIC PLAN

FAMILIES FORWARD
CHARLOTTE

TABLE OF CONTENTS

I.	Message from the President.....	3
II.	Strategic Planning Committee	4
III.	Introduction.....	5
IV.	Overview of the Strategic Planning Process.....	6, 7, 8
	a. Planning Session Summaries.....	7, 8
V.	Overview of the 2019-2022 Strategic Plan.....	9, 10, 11
	a. Vision and Mission Statements.....	9
	b. Core Values Statements and Principles.....	10
	c. Organizational Environmental Scan (SWOT Analysis).....	10
VI.	Family Liaison Model.....	11
VII.	Future Organizational Structure.....	12
VIII.	Strategic Areas of Focus.....	13
IX.	Strategic Goals.....	14
X.	Strategic Priorities.....	15, 16, 17
	a. Year One.....	15
	b. Year Two.....	16
	c. Year Three.....	17
XI.	Implementation of the Strategic Plan.....	18
	a. Management System.....	19
XII.	Board Members.....	20
XIII.	Advisory Board Members.....	21
XIV.	Acknowledgements.....	22

MESSAGE FROM THE PRESIDENT

May 5, 2019

Dear Families Forward Charlotte friends,

Over the last two years, we have learned a great deal from the families we have served, our volunteer Family Liaisons, and the existing organizations and community leaders who share similar missions and values. As we outline in this report, we have had many successes, including:

- Connecting 35 impoverished families with a volunteer Family Liaison
- Helping families set life goals and create an action plan for their goals
- Hosting 9 workshops that were made accessible by providing transportation, childcare and meals
- Connecting families with existing resources in the community
- Providing 2000+ Weekend Food Packs to food-insecure families
- Supplying 100+ baskets filled with toiletries, cleaning supplies, seasonal items, and grocery gift cards
- Providing 7 families with a deposit to move into housing, paid for 2 certifications so parents can return to work, and funded \$15,000+ in other essentials needs.



The families in our program have been appreciative of the assistance, essential supplies, food packs, and gifts, but the most common thread in our surveys of families' reactions to our program is how thankful they are for simply having someone in their corner that cares about them. Many of the connections we have made will continue as we work to increase the social capital of local families. By connecting families with mentors, we have built bridges across both racial and socioeconomic segregation in Charlotte. Our volunteer Family Liaisons model exemplifies what it truly means to be a neighbor - the possibilities are endless.

We are grateful for the support of our community, our friends, our families, and everyone who has had a hand in making FFC a reality. But there is so much more to do! We are excited about what we can accomplish now that we have two years of experience and a greatly expanded network of community support. We have set a goal of extending our reach to 150 families over the next three years as well as tackling a major issue facing the Charlotte community which will be outlined in detail over the next year. With this in mind, we tasked our board to charter a committee to develop a comprehensive 2022 strategic plan. After months of intense exploration and honest assessment, our board voted in May 2019 on the final plan. I believe this plan defines an exciting next phase for Families Forward and provides a detailed roadmap for our agency as we endeavor to make significant contributions to our mission of improving economic mobility in our area.

Sincerely,

Carrie Christian

President/Founder

STRATEGIC PLANNING COMMITTEE



** NOT ALL PICTURED*

Rernard Allen, Assistant V.P. at Fifth Third Bank, Advisory Board

Wes Argabrite, Vice President at Bank of Tennessee (retired), Family Liaison and Advisory Board

Tracey Atkinson, Weekend Food Pack Chair

Latoya Brown, At-Large Board Member, Family Representative

Jennifer Byer, Events Co-Chair

Carrie Christian, Board President

Caroline Cox, Programming Chair, Realtor with Cottingham Chalk, Family Liaison

Karen Faulk-Brown, MSW, Family Liaison and Advisory Board

Monique Ferguson, Vice President, Business Initiatives Consultant at Wells Fargo, Family Liaison and Advisory Board

Telitha Hight, Community Partnerships Chair

Holly Huffman, Grants Chair, Guidance Counselor at Western Governors University, Family Liaison

Mandy Idol, Events Co-Chair, National Marketing Manager, KPMG

Allie Key, At-Large Board Member

Andy Krafft, Associate Wealth Advisor at Capstone Advisors, Family Liaison, Fundraising Chair

Chris Lacorata, Chief Operations Executive - Consumer & Industrial Manufacturing, Advisory Board

Victor Lisciani, COO of Donor Relations (retired) for United Way of Central Carolinas, Fundraising Committee

James Miller, Managing Director at Deloitte, Board Treasurer

Kiet Pham, Partner/Principal, Advisory Services at Ernst & Young, Advisory Board

Michelle Powers, Marketing & Operations Director, SVN | Percival Partners, Marketing/Communications Chair

Rose Smith, MSW, Charlotte-Mecklenburg Schools Social Worker, Advisory Board

Graham Stevens, CFO & COO at Alpha Theory, Advisory Board

Kim Stodghill, Associate Director of College Guidance at Providence Day School, Family Liaison and Advisory Board

Salem Suber, CCRC/Healthcare Foodservice Director, Advisory Board

INTRODUCTION

In November 2018, the FFC Board of Directors and Advisory Board decided that an updated and forward-thinking Strategic Plan was needed to provide a roadmap to guide priority focus and actions for FFC that are in line with its mission of easing the burdens of poverty on families in Mecklenburg County.

The FFC board tasked a cross-functional group of board members to develop a planning framework for the development of a 2022 Strategic Plan that expands the reach of the Agency to a 2022 target of 150 families. This plan is to be completed and ready for full board ratification by May 2019. A sub-committee was chartered to research and develop meaningful metrics and measures to monitor Agency effectiveness and continue to build tacit knowledge as subject matter experts on poverty in Mecklenburg County.

This process was to be highly collaborative pulling upon the strengths and diverse professional experience of its members while providing the appropriate time to conduct an honest and comprehensive assessment of the Agency, its family services model, and effectiveness of delivery of services. A SWOT analysis was to be performed as both an internal and external environmental scan to ensure all forces and strengths are considered. Learning's from other successful nonprofits were to be included to build intelligence.

The committee was to glean important lessons from all exercises while distilling down succinct year-by-year priorities, metrics and a sequenced plan of action that ensures continuous improvement in expanding FFC's reach.

The following information captures the committee's efforts and final plan that is to provide a roadmap for the Agency to 2022.

OVERVIEW OF THE STRATEGIC PLANNING PROCESS

The process adopted by the FFC Board of Directors in collaboration with the FFC Advisory Board in the development of a three-year Strategic Plan for implementation from 2019-2022 included five phases and sessions.

<p>Session I: Planning and Prework</p>	<ul style="list-style-type: none"> • Review and Agreement on Strategic Planning Process • Key Issues Development • Committee Meeting Commitments • Planning Timeline and Session Roadmap
<p>Session II: SWOT Analysis</p>	<ul style="list-style-type: none"> • Conduct a SWOT Analysis (Strengths, Weaknesses, Opportunities, Threats) – Internal and External • Lessons from Family Survey Assessment • Family Service Model Assessment/Adjustments – Lessons from External Case Studies of Like Organizations • Audit/Alignment of FFC Vision, Mission and Values
<p>Session III: 2022 Goals and Priorities</p>	<ul style="list-style-type: none"> • Set 2022 Organizational Target for Number of Families Served • Gain Alignment on FFC Contribution to Improve Economic Mobility in Mecklenburg County • Top 3-5 Priority Initiatives for Years 1-2-3, Deployment Plan of Agreed Upon Services • Set Goals, Targets and Measures by Year
<p>Session IV: Organizational Structure and Resource Plan</p>	<ul style="list-style-type: none"> • Create Draft Organizational Structure for Years 1-2-3 • Reassign Roles and Responsibilities of Existing Chairs and Volunteers • Identify Current and Future Resource Planning Needs • Draft Executive Director, Fulltime Resource Roles for Years 1-2-3
<p>Session V: Final Draft and Governance</p>	<ul style="list-style-type: none"> • Final Draft of Strategic Plan • Process for Strategic Plan Enactment, Review and Refinement • Framework for Overall FFC Organizational Management Process • Board Governance – Schedules, Procedures, Agendas, Metrics • Final Board Vote to Ratify The Strategic Plan

PLANNING SESSION SUMMARIES

Planning Session I

This first session included the formation of the Strategic Planning Committee. It was used as a kick off point to gain consensus and alignment on a strategic plan process. Members first agreed on a formal set of “commitments” and procedures to effectively manage session debates and discussions. A formal list was developed on plan expectations and key components. A brainstorming exercise was conducted to determine the top issues facing the organization today to use as a reference throughout proceedings along with a list of strategic questions to be answered throughout this process. The committee reviewed and approved a framework for a formal FFC Strategic Planning Process, proposed format and timeline.

Planning Session II

This session was focused on providing the committee with vital information and a rigorous, internal assessment to gain consensus on FFC's current effectiveness and that of the larger family challenge. Data and reports were reviewed regarding poverty in Mecklenburg along with findings from Charlotte-Mecklenburg Opportunity Task Force that cited key themes of early care, education, college and career readiness, child and family stability along with two factors that cut across all three determinants – (1) the impact of segregation and (2) social capital, the relationships that people have that can connect them to opportunities. The committee endeavored to cross reference these findings with that of the basic model of services from FFC. An assessment was conducted of FFC's Vision, Mission and Stated Values. Individual family assessment feedback was reviewed for key trends. A host family representative attended to provide additional feedback and clarity. A scoring assessment was developed to measure the committee's view on the effectiveness of FFC's family service model. Finally, a SWOT analysis exercise was conducted as an environmental scan of the Agency's strengths, weaknesses, opportunities and threats with the objective of enabling the committee to thoughtfully move to session III.

Planning Session III

With the base of information and outcomes from Planning Session II, the committee moved to begin the forward-thinking process and the possibilities for FFC in the future. Further expansion was agreed upon as a logical next step to advance the reach of FFC against the mission. A future target was set for 2022 with a goal of 150 families serviced as a building off point. A year-by-year progression of targets was developed. Ideas and possibilities were debated for expanding services, the corresponding organizational impact by increasing the number of support families, as well as targeting other geographic zones. The session moved to sub-team break out exercises. Each team followed a process to draft a set of priorities by year out to 2022. Proposed priorities were to be developed with an aim toward progressive and sequential steps that closed the gaps to achieve the 2022 goals. Organizational structure, resources, fund raising, recruitment, education, training and program development were all part of the scope. Team presentations were conducted with the full committee for feedback.

Planning Session IV

During this session, the committee transitioned to multi-voting down a set of sequential priorities that build out the FFC organization to 2022. A "future" organizational structure was crafted to define functional area roles and responsibilities and to aid in the distribution of resources. This new structure would also be used for future assigning of priorities as place holders. The committee moved to defining the most vital recruitment hires in line with executing on the strategic plan.

Planning Session V

The final draft of the Strategic Plan was reviewed and approved to send for a full board vote. The plan was unanimously approved and ratified by the board in this session. A framework for a strategic plan management process was approved to embed the plan into normal board governance. This process was also adopted to provide a standard uniform cadence of ongoing plan reviews to ensure progress and actions against the stated priorities.

OVERVIEW OF THE 2019-2022 STRATEGIC PLAN

A. Vision and Mission Statements

The board and founder adopted the FFC vision and mission statement in 2017 that was to guide the Agency's work over the coming years. During this strategic planning process, the committee deemed it important to revisit these statements to ensure relevancy and organizational alignment of new strategic priorities. Unanimously, the planning committee felt the statements were accurate, highly relevant and provided appropriate direction and guidance.

OUR VISION

We envision our city's children and families living free of the challenges of poverty.

OUR MISSION

Families Forward Charlotte partners with families living in poverty in Mecklenburg County, NC. We provide individualized mentoring, educational opportunities and essential support as we walk alongside each family on their journey toward long-term stability and economic mobility.

WHY DO WE EXIST?

Our Vision keeps us mindful of what our efforts and those of other agencies and groups can bring about.

Our Mission articulates our reason for being and provides the inspiration and direction for doing the work of helping families in need in the county.

B. Core Values Statements and Principles

OUR CORE VALUES

The Principles that Guide Us

COMMUNITY

We are proud of our city and recognize that real leadership is derived by service to others and to all future generations.

EMPATHY

Our true passion is to help reduce the impact of poverty on our neighbors.

INTEGRITY

We believe in openness and accountability. This approach will enhance our relationships with clients and donors.

C. Organizational Environmental Scan (SWOT)

The strategic planning process included a detailed assessment of the Agency's strengths, weaknesses, opportunities and threats (SWOT). The findings and outputs from this exercise were synthesized into key themes and issues to be addressed through development of strategic priorities. Strengths included our innovative Family Liaison Model, dedicated volunteers, and strong networks. Areas of opportunity included time and resources, corporate partnerships, outreach programs, metrics, and organizational design needed to meet the goal of 150 families by 2022.

SWOT ANALYSIS SUMMARY



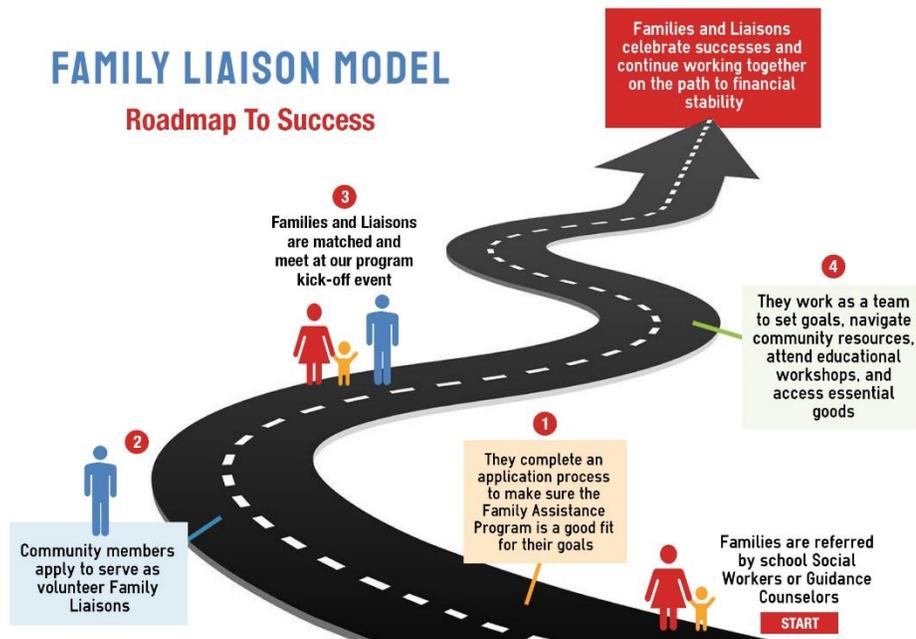
FAMILY LIAISON MODEL

The FFC Liaison Model was identified as a strong factor in the Agency's success and is modeled around direct family interaction for maximum impact.

Family Liaisons are individuals, families, or small teams of local community volunteers who make a direct impact on Charlotte through cultivating relationships with families who demonstrate a strong need for change. Through this volunteer role, Family Liaisons support families by helping them set life goals and guiding them through their journey toward long-term stability.

Institutionalizing the Liaison model for wider implementation was viewed by the committee as a distinct advantage to join forces with other local agencies to improve the Charlotte area's economic mobility standing in the U.S.

To meet the Agency's long-term goal of 150 families by 2022, this core family function will be targeted for additional program development, recruitment and training efforts.



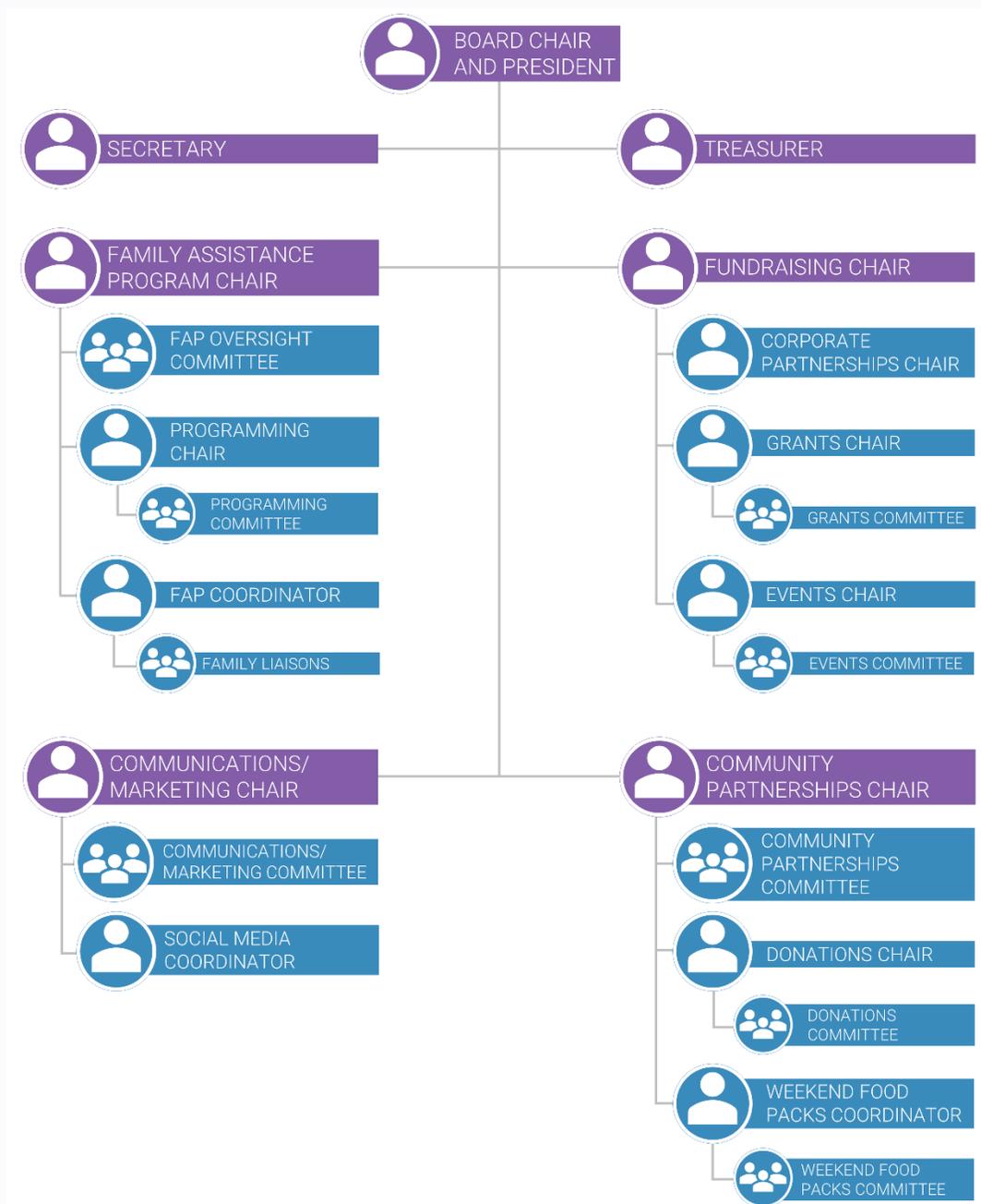
“Families Forward Charlotte is creating real change in the community for families living in poverty. By investing in people, building authentic relationships, and practicing compassionate accountability, FFC can help transform the city into a place where everybody has the opportunity to flourish.”

Andy Krafft – FFC Fundraising Chair and Family Liaison

FUTURE ORGANIZATIONAL STRUCTURE

The planning committee created a futuristic organizational design to provide the appropriate organized structure to coordinate and focus all Agency work streams for increased efficiencies. Resources will be added in alignment with the Strategic Plan requirements and added talent is included in Family Assistance, Fundraising, Communications/Marketing and Community Partnerships.

2019 ORGANIZATIONAL DESIGN



STRATEGIC AREAS OF FOCUS

The findings, assessment of Vision, Mission and Values, case studies, and family surveys/interviews were analyzed to narrow the focus of strategic issues facing FFC. The organization wide SWOT analysis and scored audit assessment of the FFC service model revealed key dynamics that can impact the Agency's ability to execute its mission with sustainable community impact. As a result, the committee identified five core areas for the development of Strategic Priorities to meet its long-term goals.

TOP 5 STRATEGIC FOCUS AREAS

1. Reorganization/Restructure and Realignment
2. Institutionalizing of the Family Liaison Model
3. Recruitment, Training, Orientation of Family Liaisons
4. Full-Time Staffing, Resources, and Leadership
5. Advance Sponsorship and Fundraising Programs

STRATEGIC GOALS

To organize and focus the FFC organization on achieving its future mission, the committee conducted an exercise to define specific goals to achieve by 2022. These important goals will act as forward-thinking guide posts the Agency can use to navigate and assess progress.

With 2022 goals set, the next work session was organized into breakout team exercises. The task was to consider all information shared in the process and begin to define the top 3-5 Strategic Priorities to span the next three years. Team presentations were conducted for full committee debate and agreement. A final draft of Strategic Priorities by year was reached by the committee.

Planning Session 4 was organized to conduct one final review and edit of priorities by year to ensure progressive alignment to the 2022 agency goals. Each priority was reviewed and assigned to a functional group based on the "future" organizational structure.

2019-2022 STRATEGIC GOALS

By 2022, we endeavor to:

Goal #1:

Expand Agency impact and reach over 150 families in Mecklenburg County.

Goal #2:

Continue school partnerships with Hornets Nest Elementary School and Oakhurst STEAM Academy while expanding school partnerships to include Rama Road Elementary, Ranson Middle School, and other Northlake-area schools.

Goal #3:

Become a strong, recognized voice on community poverty.

Goal #4:

Build a strong network of corporate and community partners.

STRATEGIC PRIORITIES: YEAR ONE

JULY 2019 TO JUNE 2020

Goal: Serve a total of 30 families, including five families at Oakhurst STEAM Academy, five families at Rama Road Elementary, and twenty families at Northlake-area schools

PRIORITY AREA	DELIVERABLE	GROUP ASSIGNED
Analysis and Definition of Operating Structure	a. Determine functions needed	Strategic Planning Committee
	b. Determine capabilities needed	Strategic Planning Committee
	c. Map current resources to new structure	Strategic Planning Committee
	d. Define hiring or recruitment gaps	Strategic Planning Committee
	e. Hire ED plan of attack	President, Board of Directors
	f. Chart a subcommittee to develop agency metrics for internal and external environments	Strategic Planning Committee
External Service Model	a. Create marketing tools for corporate partnerships	Fundraising Chair
	b. Create marketing tools for nonprofit organization partnerships	Communications/Marketing Chair
	c. Create marketing tools for community partnerships	Community Partnerships Chair
Internal Service Model	a. Playbooks, Subject Matter Expert (SME) Liaison	FAP Chair
	b. Family Liaison Development, including recruiting, vetting, training, manuals	FAP Committee
	c. Defining metrics for family success, effectiveness of implementation training, Family Liaison engagement	Metrics Committee
	d. Evaluate all sources for Weekend Food Packs	Community Partnership Chair, Weekend Food Packs Chair
Ideas and Innovation	a. New Innovation Idea	Innovation Committee

STRATEGIC PRIORITIES: YEAR TWO

JULY 2020 TO JUNE 2021

Year two of the Strategic Plan marks a significant milestone for FFC as the first round of full-time staffing is planned. An experienced Executive Director will be necessary at this stage. This individual will be charged with overall daily responsibilities of the Agency and will be tasked to ensure the achievement of all the Strategic Plan Priorities.

Goal: Serve a total of 50 families throughout areas of high poverty in Mecklenburg County

PRIORITY AREA	DELIVERABLE	GROUP ASSIGNED
Hire Two Key Staff Members	a. Hire Executive Director	Board of Directors/Hiring Committee
	b. Hire administrative resources	Board of Directors, Executive Director
Secure Corporate Sponsors and Grants	a. Secure corporate sponsors (\$100K)	Fundraising Chair
	b. Secure individual funding and grants (\$200K)	Fundraising Chair
Family Liaison Recruitment	a. Determine leadership roles	FAP Committee
Ideas and Innovation	b. TBD	TBD

STRATEGIC PRIORITIES: YEAR THREE

JULY 2021 TO JUNE 2022

Allocation of a dedicated physical space is a major milestone planned for year three. The committee envisions this space being multi-functional and serving as the office and administration space, while also providing substantial training capabilities for a much larger liaison volunteer base. Additionally, we anticipate that this site will be a flexible community space to conduct panels and family services work. This may be an endeavor of FFC alone, or in conjunction with another community partner.

The committee envisions a final important milestone in year three as FFC emerges as a demonstrated expert on issues and dynamics of poverty in the Queen City derived through front-line family experiences.

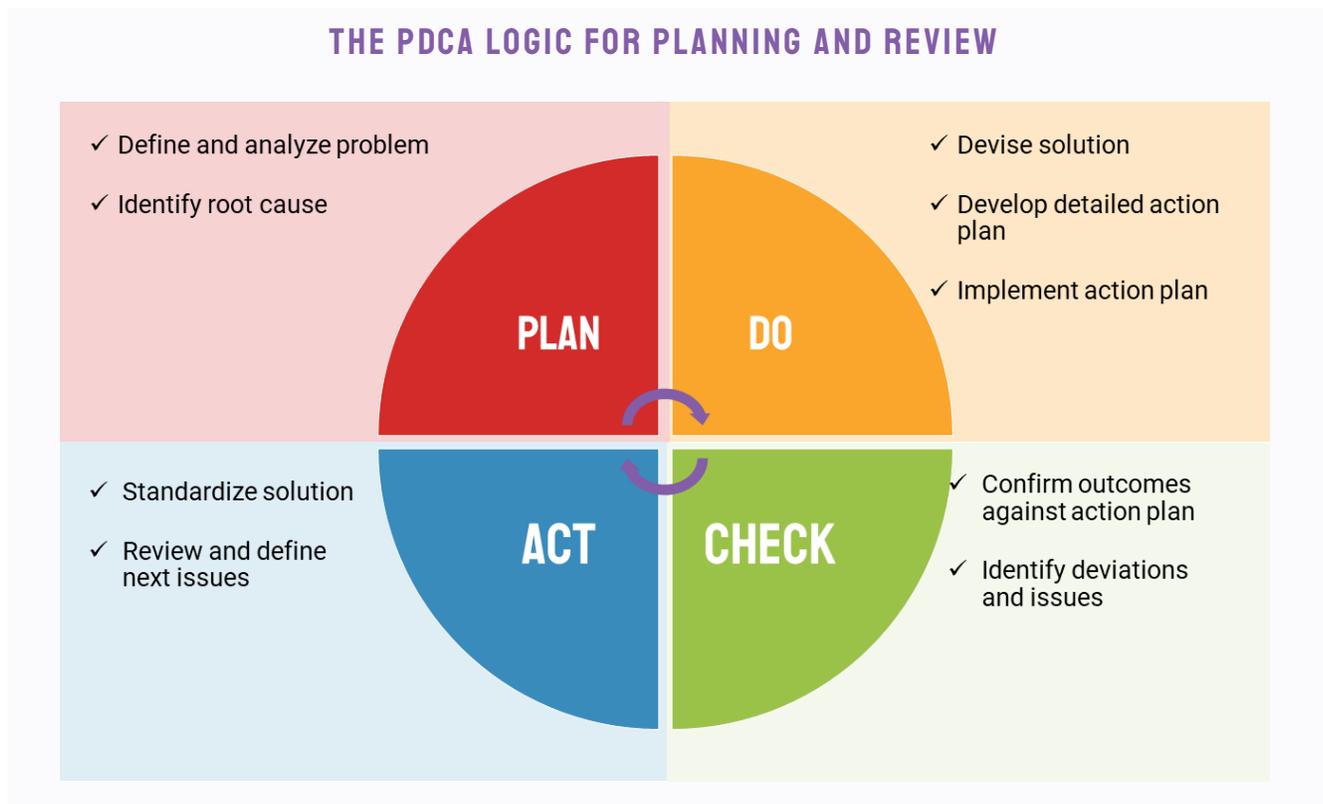
Goal: Serve a total of 70 families throughout areas of high poverty in Mecklenburg County

PRIORITY AREA	DELIVERABLE	GROUP ASSIGNED
Hire FAP Manager	a. Recruit FAP Manager	Executive Director
	b. Assess need for additional contractors, including marketing and social media	Board of Directors, Executive Director
Secure Office Space	a. Define appropriate working space for full-time staff, training, and volunteer use	Board of Directors, Executive Director
	b. Identify Family Liaison training space needs and technology needs	Board of Directors, Executive Director, FAP Manager
Become an Expert Voice on Charlotte-area Poverty	a. Develop key messaging	Executive Director, Communications/Marketing Chair
	b. Define and maintain agency metrics	Executive Director, FAP Manager
	c. Participate in speaking engagements	Board of Directors, Executive Director, FAP Manager
	d. Host and participate in panel discussions	Board of Directors, Executive Director
Implement a New Innovation idea or Expand on Idea from Year Two	a. TBD	TBD

IMPLEMENTATION OF THE STRATEGIC PLAN

The overall objective of this Strategic Plan is to chart the future course of FFC enabling the Agency to achieve its mission. This plan is to be used as a roadmap for continuous forward progression, breathing life into a formal approach for sustained actions derived from the best thinking and intelligence of its members. Agency leadership is to use this information to steer and direct the organization to the fulfillment of its mission.

In order to ensure efficiency of all planning functions, a structured cadence of formal performance reviews is proposed. This formal calendared system has a foundation in time tested continuous improvement methodologies. A simple **Plan-Do-Check-Act** logic is built into the Agency planning, reviewing and action planning.

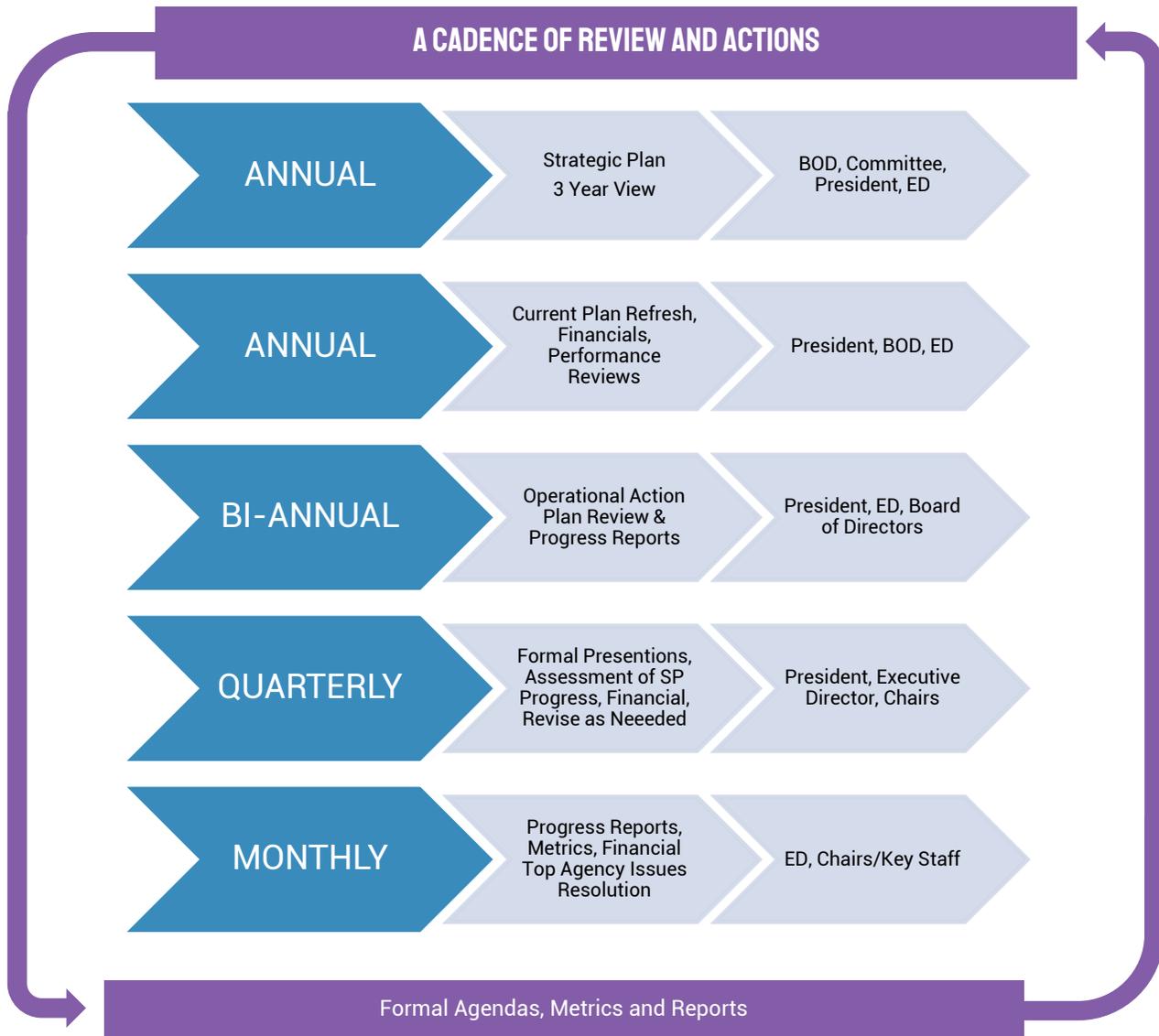


“The impact that Families Forward Charlotte has had in making families feel supported and capable is invaluable. It has been amazing to be part of an organization that knows the value of meeting families where they are and providing support so these families know they are not going at it alone in trying to tackle the obstacles of poverty.”

Caroline Cox – FFC Programming Chair and Family Liaison

THE MANAGEMENT SYSTEM

HIGH-LEVEL VIEW



This formal management process is to be managed by the BOD's and Executive Director. This gives the Agency a constant view of overall performance to define current issues for immediate actions, assess the progress of the Strategic Plan, and provides for redirection as needed.

In May 2019, the Board voted to ratify and implement the Strategic Plan as defined in this document.

BOARD MEMBERS

Carrie Christian
Board President

Tracey Atkinson
Weekend Food Pack Chair

Latoya Brown
At-Large Board Member, Family Representative

Jennifer Byer
Events Co-Chair

Caroline Cox
Programming Chair, Realtor with Cottingham Chalk, Family Liaison

Dena Graziano
Educator, Board Secretary

Telitha Hight
Community Partnerships Chair

Holly Huffman
Grants Chair, Guidance Counselor at Western Governors University, Family Liaison

Mandy Idol
Events Co-Chair, National Marketing Manager, KPMG

Allie Key
At-Large Board Member

Andy Krafft
Associate Wealth Advisor at Capstone Advisors, Family Liaison, Fundraising Chair

James Miller
Managing Director at Deloitte, Board Treasurer, Family Liaison

Michelle Powers
Marketing & Operations Director, SVN | Percival Partners, Marketing/Communications Chair

ADVISORY BOARD MEMBERS

Rernard Allen

Assistant V.P. at Fifth Third Bank, Advisory Board

Beth Argabrite

Family Liaison and Advisory Board

Wes Argabrite

Vice President at Bank of Tennessee (retired), Advisory Board

Karen Faulk-Brown, MSW

Family Liaison and Advisory Board

Monique Ferguson

Vice President, Business Initiatives Consultant at Wells Fargo

Chris Lacorata

Chief Operations Executive - Consumer & Industrial Manufacturing, Advisory Board

Rhonda Lacorata

Advisory Board

Will Jones

CEO of Thompson Child and Family Focus, Advisory Board

Kiet Pham

Partner/Principal, Advisory Services at Ernst & Young, Advisory Board

Rose Smith, MSW

Charlotte-Mecklenburg Schools Social Worker, Advisory Board

Graham Stevens

CFO & COO at Alpha Theory, Advisory Board

Cecil Stodghill

Director of Admissions and Enrollment Management at Providence Day School, Advisory Board

Kim Stodghill

Associate Director of College Guidance at PDS, Advisory Board

Salem Suber

CCRC/Healthcare Foodservice Director, Advisory Board

ACKNOWLEDGMENTS

The Families Forward Charlotte President and Board of Directors would like to thank Sardis Presbyterian Church for allowing us the use of meeting space through this process. We sincerely thank the members of the Strategic Planning Committee for their commitment to take part of this process along with the months of hard work in weekend sessions. We would like to recognize their dedication and willingness to embrace this most difficult challenge and bring fresh ideas, as well as new commitments to take action to help families in need in Mecklenburg County. We also recognize the leadership of Chris Lacorata in this intense process and are grateful for his time, talents and expertise.

It was truly an impressive effort and outstanding result!

“As a School Social Worker I’ve researched numerous organizations that could help guide families forward. FFC is literally a dream come true. I’ve seen complete transformations with many of our families. During carpool today one father ran up to me smiling so hard and thanked me for connecting him with FFC. He said my life changed because of you... I just received my citizenship. I had to hold my tears back to finish communicating with him about his hard work and dedication and how his life changed because he utilized the resources and support presented to him. I don’t know where many of our families would be without FFC... myself included.”

Rose Smith, MSW – 2019 CMS Social Worker of the Year/Advisory Board