



STRATEGIC BUSINESS PLAN 2025 - 2028

TABLE OF CONTENTS:

EXECUTIVE SUMMARY	3
MISSION, Vision & Values	4-5
PLAN DEVELOPMENT PROCEDURES	5
COMMUNITY NEEDS HEALTH ASSESSMENT	6
STRENGTHS, WEAKNESSES, OPPORTUNITIES, & THREATS	7-9

STRATEGIC ACTION PLAN:

GOAL 1A: COMPLETE BUILDING EXPANSION AND RENOVATIONS (PHYSICAL)	11-12
GOAL 1B: COMPLETE BUILDING EXPANSION AND RENOVATIONS (FINANCIAL).....	16
GOAL 2: INCREASE MASTERS-LEVEL INTERNSHIP POSITIONS.....	15
GOAL 3: EXPAND SERVICE CENSUS	16-17
GOAL 4: OPTIMIZE DATA AND PRIOPRIETARY INFORMATION MANAGE AVAILABILITY, ACCURACY AND OPERATIONAL EFFICIENCY	18-20
GOAL 5: ENSURE FINANCIAL STABILITY	21-22

EXECUTIVE SUMMARY:

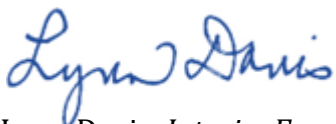
Carroll County Youth Service Bureau's (CCYSB) 2025-2028 Strategic Plan serves as our guide in expanding and improving the scope, impact, quality, and efficacy of our work in the mental health and substance-use treatment field. We created this plan by responding to current and anticipated community needs, changes in industry regulations, new treatment modalities, and by clearly defining our agency's financial goals, both by current metrics, but also by our future needs and aspirations.

CCYSB prepared this plan with broad involvement and approval from our community partners, funders, our Board of Directors, administrative team, committee chairs, staff members, and clients. This document provides a three-year working plan for our agency, guiding the growth and development of all aspects of the operation.

Our strategic planning concentrated on the organization's internal and external challenges and threats and opportunities, to guide our strategic direction. We then focused on our mission, vision, core operating values, industry challenges and changes, and financial considerations to arrive at our five main goals:

- Building Expansion and Renovations
- Increase the Number of Master's Level Interns
- Expand Service Census
- Optimize Data and Proprietary Information
- Ensure Financial Stability

Our sincere desire is that the plan we have created will guide us in providing excellent behavioral health care, the sensitivity to meet the needs of all clients, the care and keeping of our staff, responsiveness to our community, and the ability to maintain a fiscally sound and well-respected organization.



Lynn Davis, *Interim Executive Director*

MISSION:

We, Carroll County Youth Service Bureau, commit ourselves to provide a continuum of community based mental health and substance use services for children, adults, and families in Carroll County.

We use a multi-disciplinary approach to deliver prevention, intervention, and treatment services in the least restrictive and most cost-effective manner.

We will continue to be the foremost mental health provider for the families of Carroll County. In the true spirit of the helping profession, we are dedicated to excellence in service, innovation in programming, and responsiveness to our community.

VISION:

We will offer state-of-the-art treatment, while increasing the population we serve.

We will create innovative programs to serve the community and encourage diversification of job roles and promotion for our staff.

We will share our expertise through training, research, and continuing education.

We will be financially sound. We will maintain a joyous work environment through our respect and caring for each other.

VALUES:

Strengths Based: *Client-focused, Staff-focused, Solution-focused.*

Prevention, Intervention, and Treatment Services Through: *Education, Modeling to emphasize parenting skills, and clinical intervention.*

Commitment to Clients, Family, and Community: *Provision of service regardless of financial resources, Commitment to serve a diverse population, Maintain sensitivity and continued growth in all fields: cultural, sexual orientation, spiritual beliefs etc. Consumer-focused while demonstrating respect, courtesy, promptness, and accountability.*

Professionalism: *Maintain a level of professional expertise through ongoing staff development, training opportunities and supervision. Accountability of staff, including service delivery, reliability and follow-through. Strong work ethic, Positive agency image, teamwork, and stability of staff.*

Multi-Disciplinary Input: *Integration of treatment models (systems, modality, etc.), Integration of disciplines (psychiatry, social work, mental health counseling, and nursing.)*

Fiscally Sound: *Savings for unexpected emergencies, Reserve fund for building repairs and attrition, Ability to be competitive with salary and benefits.*

Excellence in Work Environment: *Healthy work environment, Happy and satisfied employees, valuing humor and fun.*

Linkage to Community Resources: *Partnership with schools and other agencies, Identification of ongoing needs or gaps in services, and Innovation in programming.*

Value all Roles and Departments Within Agency: *Open discussion of policy changes within the agency; Team approach administrative communication that is transparent, honest, and up-front; Board input, knowledge, direction, and approval.*

STRATEGIC PLAN DEVELOPMENT PROCEDURES:

- Carroll County Youth Service Bureau, Inc. obtained input by conducting annual feedback surveys from a variety of stakeholder groups. In addition to the information gained from the surveys, Carroll County Youth Service Bureau, Inc.'s annual reports from administrative and operation utilization data were employed to support the long-term strategic direction set in this plan.
- Information from outside resources helped direct the plan (Community Needs Health Assessment, community demographics, industry standards, community needs, etc.)
- A formal analysis of the Strengths, Weaknesses, Opportunities and Threats focused on Carroll County Youth Service Bureau, Inc.'s internal and external operating environment which informed the planning team's decisions related to key strategic issues and identified the long-term goals and objectives.
- The planning team also used technology to support efficient operations, effective service delivery, performance improvement, and information from the analysis of performance.
- The plan reflects the Carroll County Youth Service Bureau, Inc.'s financial position at the time the plan was written and at projected points in the future... with respect to allocating resources necessary to support accomplishment of the plan.
- The plan has set the goals for Carroll County Youth Service Bureau, Inc. and lists the priorities to be addressed.
- After the plan was implemented, it will both be reviewed annually for relevance and will be updated as needed.
- The Board of Directors was responsible for approving the 2025-2028 Strategic Plan.
- The Board of Directors and the Executive Director take the lead role in monitoring the progress of the Strategic Plan's goals.

COMMUNITY NEEDS HEALTH ASSESSMENT:

Carroll County Youth Service Bureau reviews The Partnership for a Healthier Carroll County's annual 'Community Needs Health Assessment Report' (CHNA) in consideration of constructing its Strategic Business Plan and the goals set forth, to better serve our community and the individuals and families receiving our services.

In the Final Consolidated CHNA Report for 2024, those surveyed within the Carroll County Maryland community conveyed that the top 5 most prioritized Social Determinants of Health that needed focus in our community were:

1. Affordable Housing
2. Employment Opportunities
3. A Tie Between:
 - a. Food Security
 - b. Job Skills
4. A Tie Between:
 - a. Early Childhood Development
 - b. Economic Success
5. A Tie Between:
 - a. Quality Healthcare
 - b. Social Support

A link to the final Community Needs Health Assessment Report may be found here: [2024 CHNA Final Report](#)

STRENGTHS, WEAKNESSES, OPPORTUNITIES & THREATS:

Guide: Carroll County Youth Service Bureau's (CCYSB) S.W.O.T. analysis was conducted by a group of staff, persons served, and stakeholders to identify areas of growth and risk mitigation tactics to maximize opportunity and minimize threats. During this S.W.O.T., the group identified key strategic goals and objectives for the organization to best serve our clients and the community.

KEY STRENGTHS:	KEY WEAKNESSES:
<ul style="list-style-type: none"> ○ In-Person Treatment: Strong emphasis on face-to-face therapeutic interventions. ○ Supervision and Consultation: Robust supervision and consultation processes. ○ Team Approach: Collaborative teamwork across all levels. ○ Intern Program: Well-regarded internship program. ○ Partnerships: Established partnerships with community organizations. ○ Program Flexibility: High adaptability in implementing programs. ○ Open Access: Accessibility of services. ○ Clinical Groups and Services: Comprehensive clinical offerings. ○ Local Representation: Active participation in local meetings and community events. ○ Data and Compliance Commitment: Strong focus on data collection and regulatory compliance. ○ School Treatment Programs: Specialized services at schools like Gateway. ○ Evidence-Based Treatments: Use of five evidence-based treatment methods. 	<ul style="list-style-type: none"> ○ Leadership Transition: Ongoing shift in leadership roles. ○ Diversity in Staff: Lack of diversity among staff members. ○ Salaries: Non-competitive salary levels. ○ Intern Availability: Limited access to Master's-level interns. ○ Turnover: High staff turnover within the first year. ○ Leadership Skills: Need for enhanced leadership skills and training. ○ Data Collection: Gaps in becoming a data-driven organization. ○ Pay Disparities: Pay-related dissatisfaction among staff. ○ Gatekeeping: Challenges in internal communication and processes. ○ Succession Planning: Lack of a clear succession plan. ○ Growth Management: Issues managing growth effectively. ○ Language Barriers: Limited access to translation services. ○ Workload: High staff workload. ○ Advocacy: Need for more advocacy efforts with organizations like BHA regarding billing. ○ Space Constraints: Limited physical space for programs and services. ○ Waitlists: Increasing waitlists for services.

<ul style="list-style-type: none"> ○ Long-Term Staff: Experienced and committed staff members. ○ Reputation: Positive reputation within the community. ○ Donor Support: Loyal and supportive donor base. ○ Diverse Programs: Wide range of program offerings. ○ Board Leadership: Strong leadership from the Board of Directors. ○ Teamwork and Environment: Positive organizational culture and supportive environment. ○ Experience and Knowledge: Deep expertise and knowledge across the team. ○ Family-First Culture: Focus on family-oriented services. ○ Benefits Package: Competitive employee benefits. ○ Camaraderie and Training: Strong internal relationships and focus on staff training. ○ Diverse Funding Streams: Financial sustainability through varied funding sources. ○ Robust Website: Clear and well-maintained online presence. ○ Active Board: Engaged and active Board of Directors. ○ Facilities: Nice and well-maintained physical space. ○ Mission-Driven Leadership: Leadership aligned with the organization's mission. ○ Client-Centered Services: Focused on client needs and support. 	
--	--

KEY OPPORTUNITIES:	KEY THREATS:
<ul style="list-style-type: none"> ○ Organizational Restructure: New structure to enhance participation and decision-making. ○ Leadership: Appointment of a strong executive director. ○ Committee Restructure: Improved committee functionalities. ○ Facilities Expansion: New building expansions and upgrades. ○ Specialized Programs: Introduction of targeted case management, IOP for adolescents, and adventure diversion programs. ○ Marketing: Enhanced marketing for intern programs and organizational visibility. ○ Stipends: Increased stipends to attract high-quality interns. ○ Community Initiatives: Programs like mental health court, re-entry support, and TANF-related services. ○ Older Adults: Expanding services to cater to older adults. ○ Diverse Resources: Creating and promoting diverse resource lists. ○ Community Presentations: Raising awareness of services through community presentations. ○ Shared Village Program: Development of a shared village support program. ○ Life Skills: Expanding resources for life skills training. 	<ul style="list-style-type: none"> ○ Funding Challenges: Risks from inflation, rising costs, and competition for funding. ○ Private Practice Competition: Increasing competition with private practices. ○ Staff Turnover: High turnover and difficulty retaining employees. ○ Legislation Changes: Uncertainty due to changes in laws and regulations. ○ Field Recruitment: Declining numbers of people entering the field. ○ Budget Constraints: State budget limitations affecting salaries and resources. ○ Accreditation Threats: Potential risks to accreditation. ○ Reputation Management: Maintaining a strong and positive reputation amidst challenges. ○ Coordination Issues: Lack of coordination during staff and leadership changes. ○ Remote Work: Limited ability to offer teleworking options. ○ Space Shortages: Insufficient physical space for program expansion. ○ Retirements: Loss of institutional knowledge due to staff retirements.

STRATEGIC ACTION PLAN

Goal 1A: COMPLETE BUILDING EXPANSION AND RENOVATIONS: *PHYSICAL*

Objective:

Enhance employee and client experience by completing a building expansion and current renovations. These include a new building expansion, plus other necessary improvements to the existing building, such as a second-floor bathroom and hallway carpeting upgrades to be completed by August 2028.

Strategies:

1. **Building Expansion:** Outline and execute plans for the building expansion.
2. **Employee and Client Experience:** Identify and implement upgrades that enhance overall satisfaction.

Objective	Target/Projected Completion Date:	Projected Expenses:	Key Strategies:	Responsible Entities:
1. Complete Land Transfer Process with CCPS	June 2025	None	Submit all required documentation to CCPS and Board of Commissioners.	CCYSB Building Committee
2. Create Physical Sustainability for both Current and New Facility.	January 2025 and on-going April 2027	 \$15,000	a. Follow the Mason and Mason guidelines report and replenish current and future facilities in physical assets as needed. b. Renovation Plan: Develop a plan to renovate the 2 nd floor bathroom, 2 nd floor hallway carpet, and front office countertop.	Facility Manager/Safety and Security Officer, Finance Committee, and CCYSB Board of Directors
3. Begin Building Expansion Process	May 2025	\$TBD	a. Submit appropriate materials to CCPS for BOE approval. b. Attend pre-development meeting.	CCYSB Building Committee
4. Hire Owner's Rep	April 2025	\$ 385,000	Interview and hire a rep to protect CCYSB's technical interests and manage RFPs.	CCYSB Building Committee
5. Hire an Architect	June 2025	\$TBD	Interview and hire.	CCYSB Building Committee with Owner's Rep.

6. Determine Specific Program Services Offered in Facility Expansion	June 2025	None	Secure previous notes for building and work with current staff involved in new facility.	CCYSB Building Committee, Owner's Representatives, Clinical Director, and ACT, FP, CY, FEP, and Mobile Program Directors
7. Hire a Builder	September 2025	Amount included in total construction costs.	Interview and hire.	CCYSB Building Committee with Owner's Representatives
8. Groundbreaking Ceremony	November 2026	\$2,500	Plan and execute.	Executive Director, Director of Fundraising, Marketing, and Communications Department, CCYSB Building Committee and Major Gifts and Planned Giving Officer
8. Grand Opening Celebration	November 2027	\$ 4,000	Plan and execute.	Executive Director, Director of Fundraising, Marketing, and Communications Department, CCYSB Building Committee and Major Gifts and Planned Giving Officer
9. Occupy Building	November 2027	\$ TBD	Plan and execute.	Executive Director, Director of Fundraising, Marketing, and Communications Department Director of Fundraising Marketing CCYSB Building Committee Major Gifts and Planned Giving Officer

Goal 1B: COMPLETE BUILDING EXPANSION AND RENOVATIONS: *FINANCIAL*

Objective:

Enhance employee and client experience by completing building expansions and renovations, including a new building, second-floor bathroom upgrades, and other necessary improvements by August 2028.

Strategies:

1. **Building Expansion:** Outline and execute plans for the building expansion.
2. **Employee and Client Experience:** Identify and implement upgrades that enhance overall satisfaction.

Objective:	<u>Target/Projected Completion Date:</u>	<u>Projected Expenses:</u>	<u>Key Strategies:</u>	<u>Responsible Entities:</u>
Create Financial Sustainability for both Current and Building Expansion.	May 2026 and on-going.	None	1. Continue monitoring the income and expenses of the agency. 2. Create and execute financial plans.	Financial Committee, Executive Director, and Board of Directors
Obtain Programmatic Funding to Support the Opening of a Facility Expansion.	May 2026 and on-going.	None	1. Increase fees, grant-based, and major gift revenue. 2. Increase the earning power of the current funds saved to support the new facility. 3. Conduct Donor Feasibility Study (completed, October 2023)	Executive Director, Director of Fundraising, Marketing, and Communications Department, Grants Manager, Board of Directors, and Major Gifts and Planned Giving Officer
Establish Capital Campaign Committee	Fall 2026	None	a. On-board Committee Members b. Name Committee Chair	Executive Director, Director of Fundraising, Marketing, and Communications Department, Major Gifts and Planned Giving Officer and Philanthropy Committee

Create Marketing Plan and prepare Materials for Building Expansion/Capital Campaign	July 2026	\$7,500	<ol style="list-style-type: none"> 1. Draft marketing plan w/timeline and approximate costs 2. Update website page(s) 3. Design logo, campaign brochure, social media post templates, etc. 4. Decide on naming opportunities and prepare 5. Print materials as needed <p><i>Note: will need building plans & project renderings. Take photos as construction progresses.</i></p>	Fundraising, Marketing, and Communications Department Director with input from Capital Campaign Committee
Prepare For and Initiate Capital Campaign	January 2027	\$TBD	<ol style="list-style-type: none"> 1. Create a campaign budget. 2. Determine campaign timelines and goals. 3. Write case for support. 4. Draft donor recognition plan (<i>including naming opportunities</i>) 5. Solicit leadership pledges. 6. Initiate the public phase of the campaign, including an event with press and media coverage. 7. Start Donor recognition, e.g. naming opportunities. 	Executive Director, Capital Campaign Committee, Fundraising, Marketing, and Communications Department, Director Major Gifts and Planned Giving Officer, and Philanthropy Committee
Complete Capital Campaign	November 2027	\$20,000	<ol style="list-style-type: none"> 1. Acknowledge all donors, including on website 2. Issue all awards, naming opportunities etc. 3. Complete Donor Recognition Wall within building expansion 	Fundraising, Marketing, and Communications Department Director, Major Gifts and Planned Giving Officer and Philanthropy Committee

GOAL 2: INCREASE MASTERS-LEVEL INTERNSHIP POSITIONS

Objective:

Increase Masters-level internship positions year-over-year by 2 expansional positions, with a maximum of six positions starting in August 2025.

Strategies:

1. **Create a Marketing Committee:** Establish a committee to develop marketing strategies targeting potential interns.
2. **Develop a Marketing Plan:** Task an identified team to create a detailed plan to promote internships.
3. **Recruitment Efforts:** Perform targeted marketing and recruitment efforts at current and new universities.
4. **Stipend Increase:** Offer competitive stipends to attract and retain high-quality talent.

Objective:	Target/Projected Completion Date:	Projected Expenses:	Key Strategies:	Responsible Entities:
Increase Masters-level internship positions year over year by 2 expansional positions, with a maximum of six positions starting in August 2025.	August 2027	None	1. Task an identified team to create a detailed marketing plan to promote CCYSB internships.	Intern Program Director, Clinical Team, Administrative Team, and the Director of Fundraising, Marketing, and Communications Department
	January 2026	\$1,000	2. Perform targeted marketing and recruitment efforts at current and new universities.	Intern Program Director, Clinical Team, Administrative Team, and Director of Fundraising, Marketing, and Communications Department
	August 2025	\$4,000	3. Offer competitive stipends to attract and retain high-quality talent.	Intern Program Director, Administrative Team, and Executive Director Director of Finance

GOAL 3: EXPAND SERVICE CENSUS

Objective:

Serve a broader census by increasing the population served by, including an increased focus on ESL persons.

Strategies:

1. **Census Analysis:** Identify internal and external census data to determine the need for ESL services and expansional resources.
2. **Bilingual Staffing:** Identify the need for and recruit staff who are bilingual to meet ESL client needs.
3. **Waitlist Reduction:** Transition individuals on the waitlist to intake and develop marketing strategies to inform the community about wait times and availability.

Objective:	Target/Projected Completion Date:	Projected Expenses:	Key Strategies:	Responsible Entities:
Serve a broader census by increasing the population served by a specific percentage, including an increased focus on ESL persons.	September 2026	None	1. Identify internal and external census data to determine the need for expansion of ESL services and resources	Administrative Team and Clinical Team
	June 2027	None	2. Identify the need for and recruit staff who are bilingual to meet ESL client needs.	Administrative Team, Clinical Team and Human Resources Manager
	September 2025		3. Develop marketing strategies to inform the community about wait times and availability.	Clinical Team, Administrative Team, and the Director of Fundraising, Marketing, and Communications Department

	April 2026		4. Consider partnership with Spanish Speaking Community of Maryland, Inc.	Executive Director and Clinical Team
	April 2026		5. Research and consider a contractual agreement with a Spanish language translator.	Clinical Team, Administrative Team and Human Resources Manager
	July 2025		6. Re-vamp productivity accountability for clinicians and initiate the new system.	Clinical Team, Administrative Team and Quality and Compliance Officer

GOAL 4: OPTIMIZE DATA AND PROPRIETARY INFORMATION MANAGEMENT AVAILABILITY, ACCURACY AND OPERATIONAL EFFICIENCY

Objective:

Ensure access, maintenance, use, accuracy, efficiency and ownership of all data and proprietary information

Strategies:

1. **Server Transition:** Collapse Provider server upon completion of migration.
2. **Project Identification:** Identify internal and external data reporting needs. Identify where data integrations would enhance clinical and business process efficiencies and accuracies.
3. **Prioritization and Costing:** Prioritize projects and determine associated costs.
4. **Team Allocation:** Create implementation teams to implement projects.
5. **Staff Training:** Train all staff on any new systems.

Monitoring/Evaluating Implementation: On-Going check-in on protocols.

Objective:	Target/Projected Completion Date:	Projected Expenses:	Key Strategies:	Responsible Entities:
Migrate Medical Records from Legacy EHR to SharePoint Site.	March 31, 2025	None	Save all electronic medical records documents stored in Provider to the established SharePoint Site.	IT Support Team, Front Office and Quality & Compliance Officer
	March 31, 2025	None	Conduct a sample of audits to ensure documents are available in Provider Medical Records SharePoint Site.	IT Support Team
	March 31, 2025	None	Train Front Office staff on how to utilize the SharePoint Site to locate medical records.	IT Support Team and Front Office

	March 31, 2025	None	Server Transition: Collapse old servers upon completion of migration and training.	IT Support, Kite tech
Identify agency data and reporting needs/unmet needs, frequencies, data sources, data fields, etc.	April 30, 2025	None	Create a data inventory spreadsheet that captures structured information.	Quality & Compliance Officer, Grants Manager and Program Directors
	May 31, 2025	None	Internal stakeholders to provide information for the data inventory spreadsheet.	Grants Manager, HR Manager, Quality & Compliance Officer, Director of Finance, Director of Fundraising, Marketing, and Communications Department, Program Directors, Executive Director
Research and evaluate potential data management products/solutions that can be integrated with myEVOLV and meet the needs identified in the data inventory	September 30, 2025	Netsmart KPI dashboard \$26,208 annually myEVOLV Reporting Server \$18,000 annually	Establish a team to research options and evaluate potential products. (Greenspace integration, Netsmart KPI Dashboard, Kite's Power BI reporting, Relias Compliance Manager, others)	Admin Team, Kite Tech, Grants Manager and HR Manager
	February 28, 2026	None	View demos from viable solutions and obtain associated cost information	Grants Manager, HR Manager, Quality & Compliance Officer, Director of Finance, Director of Fundraising, Marketing, and Communications Department, Program Directors, Executive Director
	March 31, 2026	None	Select and prioritize projects/solutions and submit for budgeting process	Grants Manager, HR Manager, Quality & Compliance Officer, Director of Finance, Director of Fundraising, Marketing, and Communications Department,

				Program Directors and Executive Director
	April 30, 2026	None	Admin. approve of projects/solutions	Administrative Team
	August 31, 2026	None	Budget or funding sources identified for approved projects/solutions	Finance Director, Finance Committee
	January 31, 2027	None	Project workplan developed for each approved project	Grants Manager, HR Manager, Quality & Compliance Officer, Director of Finance, Director of Fundraising, Marketing, and Communications Department, Program Directors and Executive Director
	July 31, 2027	None	Team Allocation: Create teams to implement new projects or enhancements	Administrative Team and Project Managers
	January 31, 2028	TBD – could be included in the software install	Staff Training: Train staff on the new systems, as appropriate	Administrative Team and Project Managers
	July 31, 2028	None	Monitor success of implementation by collecting data on key metrics	Administrative Team and Project Managers

Migrate Medical Records from Legacy EHR to SharePoint Site.	March 31, 2025	None		IT Support Team, Front Office and Quality & Compliance Officer
	March 31, 2025	None		IT Support Team
	March 31, 2025	None		IT Support Team and Front Office
	March 31, 2025	None	Server Transition: Collapse old servers upon completion of migration and training.	IT Support, Kite tech
Identify agency data and reporting needs/unmet needs, frequencies, data sources, data fields, etc.	April 30, 2025	None	Create a data inventory spreadsheet that captures structured information.	Quality & Compliance Officer, Grants Manager and Program Directors
	May 31, 2025	None	Internal stakeholders to provide information for the data inventory spreadsheet.	Grants Manager, HR Manager, Quality & Compliance Officer, Director of Finance, Director of Fundraising, Marketing, and Communications Department, Program Directors, Executive Director

Research and evaluate potential data management products/solutions that can be integrated with myEVOLV and meet the needs identified in the data inventory	September 30, 2025	Netsmart KPI dashboard \$26,208 annually myEVOLV Reporting Server \$18,000 annually	Establish a team to research options and evaluate potential products. (Greenspace integration, Netsmart KPI Dashboard, Kite's Power BI reporting, Relias Compliance Manager, others)	Admin Team, Kite Tech, Grants Manager and HR Manager
	February 28, 2026	None	View demos from viable solutions and obtain associated cost information	Grants Manager, HR Manager, Quality & Compliance Officer, Director of Finance, Director of Fundraising, Marketing, and Communications Department, Program Directors, Executive Director
	March 31, 2026	None	Select and prioritize projects/solutions and submit for budgeting process	Grants Manager, HR Manager, Quality & Compliance Officer Director of Finance, Director of Fundraising, Marketing, and Communications Department, Program Directors and Executive Director
	April 30, 2026	None	Admin. approve of projects/solutions	Administrative Team
	August 31, 2026	None	Budget or funding sources identified for approved projects/solutions	Finance Director, Finance Committee
	January 31, 2027	None	Project workplan developed for each approved project	Grants Manager, HR Manager, Quality & Compliance Officer, Director of Finance, Director of Fundraising, Marketing, and Communications Department,

				Program Directors and Executive Director
	July 31, 2027	None	Team Allocation: Create teams to implement new projects or enhancements	Administrative Team and Project Managers
	January 31, 2028	TBD – could be included in the software install	Staff Training: Train staff on the new systems, as appropriate	Administrative Team and Project Managers
	July 31, 2028	None	Monitor success of implementation by collecting data on key metrics	Administrative Team and Project Managers

GOAL 5: ENSURE FINANCIAL SUSTAINABILITY

Objective:

Add or increase three funding sources to support organizational sustainability and prepare for the occupation of the new facility. Develop strategies for the investment of current savings.

Strategies:

1. **Funding Research:** Collect data on available funding resources and industry trends.
2. **Mission Alignment:** Align potential funding streams with the organization's mission, including internship funding.
3. **Grant Applications:** Apply for grants and funding opportunities for programmatic and capital projects.
4. **Corporate and Planned Giving:** Increase corporate funding and planned giving.
5. **Fundraising Plan:** Develop and execute a comprehensive fundraising plan with actionable steps.

	<u>Target/Projected Completion</u>	<u>Projected Expenses</u>	<u>Key Strategies</u>	<u>Responsible Entities</u>
Protect invested capital from the erosive effects of inflation, provide income to support the organization's mission, and grow invested capital by relevant benchmarks over a full market cycle.	06/2025 Review annually.	None	1. Develop and execute Investment Policy	Finance Committee Executive Director CCYSB Board
Add or increase three funding sources by June 2027 to support organizational sustainability and new building expansion.	June 2027	None	1. Apply for programmatic grants that align with the organization's mission.	Executive Director Clinical Director Grants Manager
	June 2026	None	2. Seek support from diverse funding sources, including private foundations, corporations,	Executive Director Major Gifts and Planned Giving Officer

			government agencies, workplace giving programs, etc.	Fundraising, Marketing, and Communications Director CCYSB Board.
Increase donor capacity	October 2025	None	<p>3. Develop and execute a comprehensive fundraising plan with actionable steps:</p> <p>a. Increase corporate and planned giving.</p> <p>b. Collaborate with financial advisors, CPAs, and law offices to secure estate giving.</p> <p>c. Strengthen Community Outreach, e.g., reconnect with lapsed donors, create recurring donors.</p> <p>d. Use social media, LinkedIn, and Facebook to increase agency recognition.</p> <p>e. Plan and execute an additional fundraising event that would attract community involvement.</p>	Director of Fundraising, Marketing, and Communications Department; Major Gifts and Planned Giving Officer Philanthropy Committee CCYSB Board
Establish Capital campaign committee/prepare and initiate a capital campaign	September 2026	\$ 3,000	Create a committee, establish goals, begin the campaign, and provide follow-up and closure to the campaign.	Director of Fundraising, Marketing, and Communications Department and Major Gifts and Planned Giving Officer Philanthropy Committee CCYSB Board

2025-2028 CCYSB Strategic Plan

Establishment Date: January 01, 2025

CCYSB Board Approval Date: April 10, 2025

Date of Last Revision: May 30, 2025