



# Strategic Plan

MARCH 2021

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# Executive Summary

Crossroads was established in 2002 with a mission to provide individualized, comprehensive education and related services to students with autism between the ages of 3–22. The organization’s goal is to enhance the quality of their students’ lives, and also help them to reach their full potential. Recently, Crossroads was awarded a capacity building grant from the Doug Flutie Jr. Foundation to pursue a strategic planning project using the Civitas Strategies **Finding Your North Star™** strategic planning system.

The strategic planning process began with the Strategic Planning Team’s solicitation of stakeholder perspectives, as well as a review of local, state, and national trends across the autism services landscape. The Strategic Planning Team also assessed Crossroads’ successes and challenges, as well as its value to current, past, and future members across the communities served. The Strategic Planning Team then analyzed the collected data to identify key opportunities for mission-aligned, sustainable impact.



The Strategic Planning Team identified **3 high-impact goals** for Crossroads to pursue:

- 1 Become a multi-service, community-based agency** that provides supports and services for children, youth, and adults with autism and related disorders.
- 2 Retain and develop staff** through an assessment of development needs and pathways with a commitment to Diversity, Equity, and Inclusion; clarify organizational roles and align with branding.
- 3 Ensure the sustainability of the organization:**
  - **Diversification of revenue streams** — development of selected sustainable services
  - **Increased outreach** — development of the Board and individual fundraising
  - **Develop and strengthen reputation and recognition** — within the community to attract diverse clients and talent with a focus on ensuring an equitable and inclusive environment, as well as stand out against competitors.

These goals will be realized through the five high-impact strategies articulated in this plan. The Strategic Planning Team will continue to meet regularly to both review and reflect upon progress made, refining the plan as needed.

# Introduction

Crossroads was interested in the opportunity to expand into markets that are natural extensions of their school-based program and home-based services program. To move forward with this opportunity, Crossroads chose to assess the quality and effectiveness of their current work as well as to develop an understanding of overall community needs. Accordingly, Civitas Strategies, a management consulting firm, was engaged to develop and facilitate a strategic planning process, to 1) collect and analyze key data to inform Crossroads' efforts;

2) define Crossroads' strategic direction, including a detailed plan for execution; and 3) identify the actions necessary to ensure the smooth transition from planning to execution.

As the result of the strategic planning process and efforts to pursue the organization's goals, Crossroads was re-named Crossroads Continuum to reflect its status as a multi-service organization.



# Landscape Analysis

The development of the 2021 Crossroads Strategic Plan was conducted in three essential phases: Discovery (Phase One), Planning (Phase Two), and Finalization (Phase Three). In order to provide the Strategic Planning Team with the data needed to determine the programming priorities for its constituents and served communities, Crossroads Senior Management Team, with partner firm Civitas Strategies, engaged in a comprehensive analysis of the current state of Crossroads' programming, operations, and governance, as well as key opportunities to improve and expand.

Specifically, efforts of the Discovery Phase sought to develop comprehensive answers to the following key questions:

- What is Crossroads' critical value?
- What are Crossroads' greatest strengths and vulnerabilities?
- How is Crossroads School differentiated from other similar schools in the region, state, or nation?
- What are the relevant regional, state, and national ecosystem trends that could affect Crossroads' success and sustainability?
- Who are your prime customers and consumers?
- What are the greatest needs you currently serve or what are the most significant unmet needs you would like to serve?
- What is the greatest potential impact(s) the organization or initiative can have?
- How will impact be measured?
- What new resources are needed to achieve impact?
- How can existing resources evolve or be transformed to realize the desired impact on the community an organization serves?

During the Discovery Phase the following data was collected and reviewed:

- A variety of relevant documents (including Crossroads plans, data, reports, and key financial reports).
- One-on-one interviews with Crossroads Board members, Senior Management Team and Staff, external thought leaders, and partners.
- Surveys to collect data from parents and parents of alums, Crossroads Staff, and District Coordinators.

Upon collection, the data was analyzed by the Strategic Planning Team to identify opportunities for greatest impact and that were best aligned with Crossroads' Mission, core values, and current assets. As the result of this process, the following findings were discovered:

- **High-Quality Organization:** Crossroads was identified throughout the data collection process as a high-quality organization with compassionate, person-centered approach to care.
- **Potential for Organizational Growth:** Three areas were identified that present opportunities for earned revenue to sustain organizational growth: connection to early intervention, home-based services with Community Solutions, and adult services.
- **Potential for Board Growth and Development:** Stakeholders report there is opportunity to increase the overall size of the board and also board member engagement around entrepreneurial opportunities to generate additional revenue.
- **Consider Organizational Structure and Staffing Levels:** Stakeholders emphasized that to preserve program quality, leadership, should address organizational structure and staffing levels so that they align with growth.

The Strategic Planning Team engaged in a series of planning sessions, working collaboratively with Civitas Strategies to first develop a list of Design Principles to guide the process (see the section below) and align with the Mission and Vision. Utilizing these frames, the team set goals and strategies for execution over the next three years.



# Mission, Vision & Principles of Design

To reflect the focus areas identified above and represent a multi-service, community-based organization, the Strategic Planning Team updated the Mission and Vision.

## Mission

Our mission is to enhance the quality of life for individuals with autism and related disorders from birth through adulthood.

## Vision

Our vision is to ensure people with autism and related disorders participate in their social communities and lead fulfilling lives.

## Principles of Design

The Strategic Planning Team determined that in the design of all systems, strategies, and supports contained within the 2021 Strategic Plan, they will adhere to the following principles, both in designing planned strategy and determining any emergent strategy that may arise in the future. Specifically, every strategy must:

- Continue to support the mission to improve outcomes for people with autism and related disorders using evidence-based approaches.
- Balance growth with maintaining quality services and positive organizational impact while continuing to meet the needs of all groups of stakeholders.
- Advance in a clear direction with narrow enough focus to remain true to the overall Mission and Vision.
- Be worth the time and effort invested without taxing available resources.
- Apply an equity lens as the organization continues to develop and expand; Crossroads' commitment to Diversity, Equity, and Inclusion (DEI) must be interwoven throughout the design of all strategies.



# Goals

Crossroads will realize its vision by focusing resources and efforts on three long-term goals, which are strategically aligned with our design principles and organizational mission, vision, and cause.

## Goal 1

### **Become a multi-service, community-based agency that provides supports and services for children, youth, and adults with autism.**

Crossroads provides supports and services to the community through its school-based and home-based services programming. However, there are significant unmet needs within the community that Crossroads can fulfill through organizational growth and restructuring. Accordingly, Crossroads will expand its services beyond its current offerings as part of a suite of birth-through-adulthood continuum of services including, potentially, multiple center-based sites across the region. This growth will also serve to solidify the overall sustainability of the organization through diversification of revenue streams as well as enhancing Crossroads' reputation in the community as a multi-service agency with expanded program offerings.

### **Measures of Success**

Crossroads will use the following metrics to measure progress made in regard to Goal 1 of this Strategic Plan.

- Addition of new funding sources secured.
- Increased number of children, youth, and adults served.
- Percentage of clients retained each year (adjusted for stage of life).
- Continued positive perception of services by referral sources.

### **Goal 1 Strategy**

Expand services throughout the region.

### **RATIONALE**

This will be a measured approach that will start by diversifying the revenue sources for services and then expanding home-based services to work synergistically with increasing the census of the school. This will be implemented through Community Solutions and other departments (which can be created, as needed).

### **YEAR 1 ACTIONS**

- Expand payer sources to have the ability to capture more revenue (registered provider for MassHealth, Children's Autism Waiver Program, DESE Program at MA DDS).
- Establish a separate staffing structure for Community Solutions, focused on home-based services, including a marketing effort to be more visible in the community and region and attract families with children 0-4 on the spectrum and those leaving the school.
- Begin planning to offer diagnostic services including creating a business model.

### **YEAR 2 ACTIONS**

- Add additional insurance company agreements and secure additional government funding as warranted.
- Build out additional school space and increase the school census.
- Expand vocational services to school students by catering to referrals received from School Districts for high school students who continue to require four years of vocational training.
- Continue to expand home-based services as warranted by demand and public and/or private insurance funding.
- Launch Community Solutions center-based services for the 1- to 4-year-old population, including a marketing effort to be more visible in the community and region.

### **YEAR 3 ACTIONS**

- Add additional insurance company agreements and secure additional government funding as warranted.
- Continue growing school vocational services.
- Complete an effort to increase the school census.
- Continue to expand home-based services as warranted by demand and public and/or private insurance funding.
- Expand center-based services to include youth and adults.
- Identify additional sites for center-based services and create a plan for launch.



## Goal 2

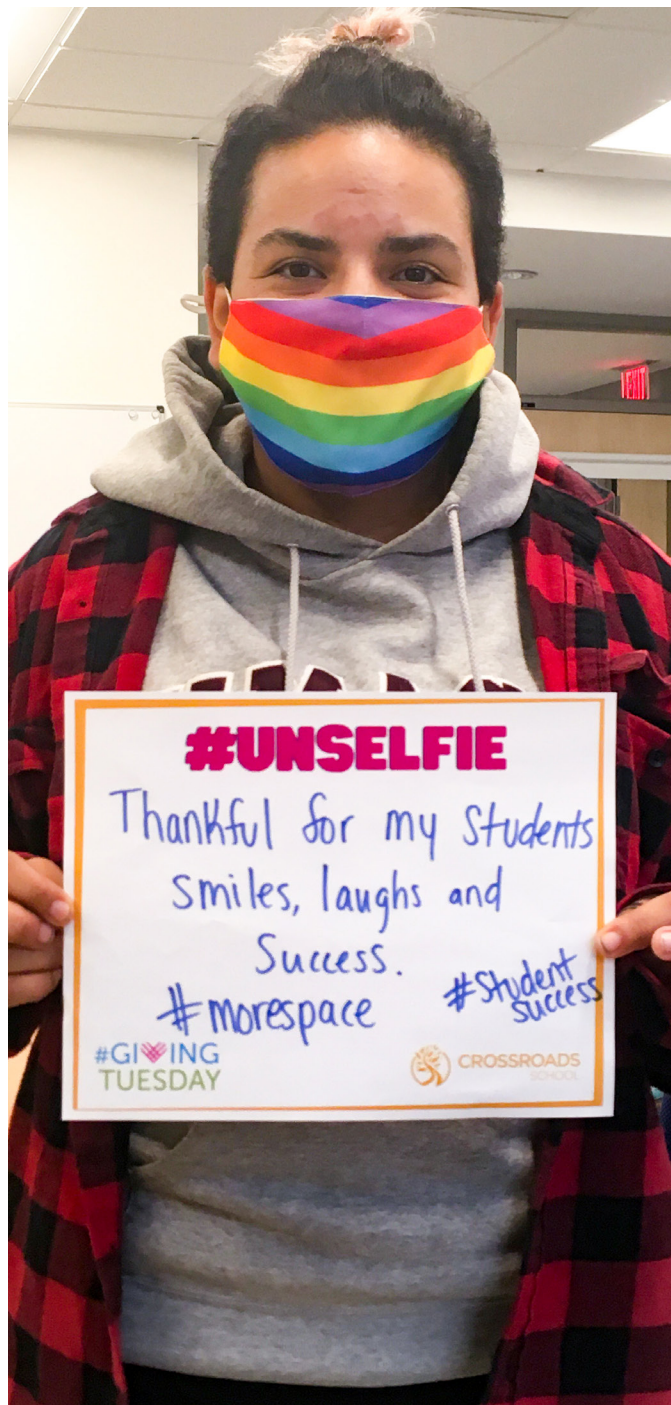
### Retain and develop the staff needed to provide high-quality, effective services for children, youth, and adults.

Crossroads has earned a reputation for providing high quality, impactful services for children, youth, adults, and families. At the heart of the organization's success are Crossroads Staff members. As Crossroads continues to expand as an organization, there is a need to continue attracting top talent, investing in the development of staff, and retaining employees in order to ensure Crossroads Programs are recognized as programs of Choice for individuals with autism based on the strengths of their clinical team. As part of this endeavor, Crossroads will revamp its organizational structure and hiring processes through an assessment of development needs and pathways with a commitment to DEI. Not only will this effort help to clarify organizational roles and increase operational efficiency, but it will also serve to improve the overall workplace culture and climate by implementing strategies to improve diversity and inclusion measures and increase staff satisfaction.

### Measures of Success

Crossroads will use the following metrics to measure progress made in regard to Goal 2 of this Strategic Plan.

- Time to hire.
- Annual retention rate of staff by position.
- Increase in average tenure year over year.
- Staff feedback surveys confirm staff satisfaction.
- Staff performance review data shows growth and improvement year over year.
- Parent, District, and other stakeholder surveys demonstrate satisfaction with quality of staff.
- DEI Survey reflects an improvement with diversity and inclusion measures.
- Outcomes for those served reflect strength of clinical programs.





## Goal 2 Strategy

Strengthen our talent recruitment and management.

### RATIONALE

As Crossroads grows, talent will take on an even more crucial role in ensuring the delivery of high-quality, effective services. Accordingly, Crossroads will need to bolster talent recruitment and performance management systems. The effort will start with revising the organizational structure to ensure clear reporting lines and support increased levels of service. Recruitment will be systematized and proactive in seeking out talent. Staff culture and satisfaction will be monitored, and efforts will be taken to increase staff retention. Most critically, efforts will be made to increase the diversity of staff and develop a work culture and climate that encourages frank, inclusive conversations addressing issues of inequity. An assessment of existing capacities will be undertaken, and additional staff or contractors will be secured to lead and manage talent functions for this strategy.

### YEAR 1 ACTIONS

- Assess talent staffing needs and current capacities and create a plan to hire or contract for services as needed.
- To reflect the new strategic direction, Crossroads will change the organizational chart and position descriptions, as needed.
- The DEI Committee will be established to evaluate systems, policies, and resources to improve inclusivity and equitability at Crossroads.
- Training will be held with the Senior Management Team and then the staff to bring a DEI lens to Crossroads' work and increase receptivity to talking about anti-racism.
- Improve the recruitment system, identify upcoming staffing needs, and proactively recruit for anticipated vacancies.
- Perform a full review of staff satisfaction and create an action plan, as needed.
- Review the exit interview process and share with supervisors and analyze data bi-annually for the Senior Management Team.
- Refine and launch a performance management system with management and then staff that will help the Senior Management Team assess performance.
- Develop a more organization-wide onboarding process and training at hire.

### YEAR 2 ACTIONS

- Review staffing needs at least quarterly and continue proactively recruiting for anticipated vacancies.
- Review staff satisfaction metrics and create an action plan, as needed.
- Refine and launch performance management system with management and then staff that will help managers assess performance.
- Explore the potential of Senior Management Team mentoring.
- Create a succession plan for key roles.
- Examine the feasibility of an incentive structure and launch, if approved.
- Continued trainings on topics related to DEI.

### YEAR 3 ACTIONS

- Review staffing needs at least quarterly and continue proactively recruiting for anticipated vacancies.
- Refine performance management system as needed to help managers assess performance and create a development plan for each employee including on-the-job and formal learning opportunities.
- Review staff satisfaction metrics and create an action plan, as needed.





## Goal 3

### Ensure the sustainability of the organization.

Through multiple avenues, Crossroads is continuing to grow and expand as an organization. Sustainability must be built into this expansion to provide the necessary framework and structure that the organization will need for successful growth over the long term. Crossroads will undertake measures to ensure this sustainability by driving an increase in funds raised, enhancing the effectiveness of key areas of support, and building its reputation in the community. A Board Development Plan geared toward the recruitment of high-impact members will be introduced alongside a new annual agreement and onboarding process. The Development Department will be clearly defined with new positions added as needed to support the needs of a growing organization. Additionally, a marketing and rebranding effort will be initiated to ensure Crossroads is seen as the multi-service agency into which it is evolving. Through these efforts, expansion and sustainability will symbiotically provide the foundation for Crossroads to reach its potential as a leader in the community.

### Measures of Success

Crossroads will use the following metrics to measure progress made in regard to Goal 3 of this Strategic Plan.

- Donor retention rate increasing year over year.
- Increase in qualified prospects with cultivation plans.
- Increase total funds raised annually.
- Increase the number of Board Members.
- Board giving remains at 100%, but annual increases in amount.
- Increased brand awareness and perceived positive reputation through internal and external surveys.
- Number of external partnerships.
- Increase in government contract dollars.
- Increase in insurance dollars.



## Goal 3 Strategies

### Strategy One:

Expand Crossroads' donor base and secure regular avenues of fundraising.

#### RATIONALE

Increasing individual donor engagement will become even more relevant as Crossroads continues to grow. Crossroads will engage its Board of Trustees and Development Department to support this growth. The Board of Trustees will serve as ambassadors of the organization and directly connect Crossroads to additional donors which will impact both funds raised as well as Crossroads' reputation in the community. Additionally, Crossroads will work to develop a Major Gifts Program and grow events such as the 5K and Golf Tournament to increase their fundraising baseline. In order to ensure that the Development Department has adequate resources to meet the fundraising needs of a growing organization with a Major Gifts Program, designated roles to support strategy and development will be defined and created.

#### YEAR 1 ACTIONS

- Identify connections that can be made through members of the Board.
- Develop a Case for Support to be developed and approved by the Board.
- Create and implement a Major Gifts Program to encourage an increase in regular donations.
- Expand the Development Department to meet the needs of a growing organization with a Major Gifts Program and a marketing plan.

#### YEAR 2 ACTIONS

- Continue higher level individual engagement and corporate development.

#### YEAR 3 ACTIONS

- Growing the events and increased profits from 5K and Golf Tournament
- Continue higher level individual engagement and corporate development.
- Plan for endowment.

### Strategy Two:

Re-develop the role, function, and policies of Crossroads Board of Trustees to maximize efficiency and effectiveness in alignment with organizational growth.

#### RATIONALE

Crossroads has shifted and continued to grow as an organization. To maximize efficiency and effectiveness, the role and function of the Board of Trustees must continue to adapt to meet the current needs of the organization. As part of this effort, Crossroads will create a Board Development Plan designed to recruit members to fill high-priority needs. The development plan will include a detailed onboarding process, training specific to Crossroads and nonprofit governance, and an Annual Board Agreement. This will result in a Board of Trustees that is better suited to support a multi-service agency.

#### YEAR 1 ACTIONS

- Create and implement a Board Development Plan.
- Board recruitment — determine highest priority needs of the organization to guide recruitment of new Board members.
- Board training — develop governance basics, create onboarding, support the ambassador role, training for nonprofits geared toward Board members.
- Develop Board "Give-Get" Policy and Annual Board Agreement.

#### YEAR 2 ACTIONS

- Revise Board Development Plan.
- Continue Board recruitment, examine highest needs of the organization, recruit members to fit highest-priority needs.
- Implement Board training.
- Implement Board Agreement.

#### YEAR 3 ACTIONS

- Continue implementation of onboarding process.
- Continue implementation of annual agreement.
- Board continues to manage its own growth.



### Strategy Three:

Develop a marketing and branding plan to support the growth and expansion of the organization beyond the day school.

#### RATIONALE

The current marketing and branding of Crossroads must be updated to match the level of growth expected as the organization continues to expand beyond the school. As such, Crossroads will undergo a marketing and rebranding effort, crafted to support and promote the expansion of services and populations served. As a first step, Crossroads will work on rebranding to ensure that their reputation in the community is reflective and inclusive of Crossroads School, Community Solutions, and other lines of services to be offered. A market analysis of the areas, locations, and populations in need of services will be conducted to ensure adequate reach into the community. Efforts will be taken to establish ties with local schools and other organizations to enhance programming and referrals. After establishing Crossroads' new image, a marketing campaign designed toward developing and defining outreach goals for Crossroads School, Community Solutions, and other programs will be created and implemented. To support this effort, staff will be trained to serve as ambassadors of organization.

#### YEAR 1 ACTIONS

- ✓ **Develop a rebranding plan and seek approval from the Board.**
- Conduct market analysis of areas/locations/populations in need of services and type of services to help develop a marketing plan.
- Develop organizational communications strategy which would be inclusive of recruitment of new talent.
- Implement staff training on "elevator pitch" to serve as ambassadors of the organization.

#### YEAR 2 ACTIONS

- Market analysis results — outreach/advertisements/awareness in those communities.
- Marketing campaign — develop and define outreach goals for Crossroads School, Community Solutions, and new lines of service.
- Develop relationships with pediatricians, attorneys, schools, and state government to grow Community Solutions.

#### YEAR 3 ACTIONS

- Continue to refine the Marketing and Communications plan.



# Implementation & Institutionalization

The new Strategic Plan will need to permeate every level of the organization and activity undertaken by Crossroads Staff. The move from strategic planning to execution requires the facilitation of three distinct phases: Design, Launch, and Implementation.

The **Design Phase** was completed as part of this plan development. In this phase, key internal and external actors were engaged in the planning to ensure buy-in, relevance, and practicality. Specifically, this was achieved by:

- Collecting and assessing information on the state of the organization and the landscape from a cross-section of leadership, staff, external thought leaders, partners, and clients;
- Engaging selected leadership and staff in the planning effort; and
- Engaging the Board of Trustees in the final review and approval of the plan.

Once the Strategic Plan is completed, the next phase — the initial **Launch** — will be implemented within 30 days of finalization. In this phase, the President and CEO will review the plan and its implications with:

- All employees;
- Families; and
- Selected external partners.

During the **Implementation Phase**, the President and CEO will track plan progress at least quarterly with the Senior Management Team. These sessions will review progress on implementation, evaluate the indicators of success, and identify and problem-solve implementation risks and challenges. The Senior Management Team will be required to consider the Strategic Plan when making any major organizational decisions and to incorporate plan objectives into professional development goals at *all* levels. Finally, the President and CEO will provide an update on implementation to the Board of Trustees every six months.

