



Strategy Roadmap

February 2021



Amari Romero-Thomas
Melissa Mendes Campos
Mosaic Consulting and Coaching
mosaicconsulting@yahoo.com
408.466.0604

Table of Contents

- Executive Summary 2
- Vision, Mission, and Values 4
- Business Model 5
- Pandemic Pivot 6
- Data Collection and Analysis 7
- Competitive Advantage..... 8
- Trends 9
- Funding..... 9
- Strategy Screen (Decision-making Criteria)..... 10
- Big Questions (Strategic Issues)..... 11
- Organizational Strategies in Response 11
- Next Steps 13
- Additional Ideas for Staying on Track..... 13
- Closing Thoughts..... 14
- Appendix A: Consulting Process and Strategy Committee..... 15

Executive Summary

For over 75 years, Via Services (Via) has been dedicated to helping individuals with disabilities and special needs in the Bay Area and beyond achieve greater self-sufficiency and lead richer lives. We serve children and adults with diverse programs that offer something for everyone—and in doing so, we ultimately support the entire family.

Our mission, updated in the process of developing this Strategic Plan, is to empower people with disabilities and their families to grow, develop, and thrive by providing essential skill-building, therapeutic, and recreational programs.

This work contributes to a larger and more ambitious vision of an inclusive world in which individuals with disabilities and their families are living rich, joyful, and fulfilling lives, actively participating in the community, achieving their potential, and realizing their dreams.

While 2020 was a difficult year for Via and many other service organizations due to the impact of COVID-19, we used this necessary pause in in-person programming to engage in a thoughtful strategic planning process that will guide our work for years to come.

We are grateful to our committed Board, staff members, and key stakeholders—especially those serving on our Strategic Planning Committee—who have participated in this work to identify a solid direction for the future of the organization, clarify our strengths and challenges, agree on criteria for strategic decision making, and collectively explore ways to strengthen the organization and the quality of the programs we offer.

Our life-changing programs are at the heart of our key strengths. Via West provides a camp and respite experience that is unparalleled, and our First Step program stands out above the rest because of the quality, commitment, and responsiveness of our solutions-oriented staff. As an added value, our ability to accommodate a 1:1 client ratio (specific to Via West) provides a much-needed service that is hard to find elsewhere. The level of meaningful engagement provided in all our programs sets Via apart and nurtures our most precious strength: our connection with our community of participants and families.



We are focusing our organizational strategies on deepening these exiting strengths. We are building back Via West stronger than ever while ensuring the utmost levels of quality and safety. We are also strengthening our financial model by developing engaging new programming and cultivating community support. Finally, we are ensuring our success and longevity by developing our staffing and organizational infrastructure to support not only the organization we have become but the organization we strive to be.

Programs

We reaffirm our commitment to Via West and the strong work of First Step and our other services. We also recognize that for Via West to deliver a superlative experience, we must:

- invest in quality staff and training to ensure participant comfort and safety, and
- develop leadership and explore innovations to ensure that Via West's operations and programming are successful and sustainable.

We are excited to be working toward the launch of in-home respite and independent living skills training programs within the first year of this strategic plan. We plan to add Director-level program staff to ensure these activities are supported with the expertise and attention they deserve.

Financial Model

To build our capacity to strengthen our existing programs and develop new offerings, we will diversify our revenue model. This will be guided by a new Development Director and additional resources, working with the Board to create and implement a comprehensive fund development plan.

- We value our partnership with the San Andreas Regional Center and remain committed to providing services supported by public contract. However, we recognize that to innovate, we must explore earned income strategies as well.
- We will develop our ability to solidify and increase contributed income (fundraising) from new and existing individual donors, institutional funders, and corporate sponsors.

Visibility

All our strategies will be supported by enhancing our visibility in the community so that Via participants and families, high-quality employee candidates, community partners, donors, and funders can connect with us—and we are proactively connecting with them.

This strategic plan provides a clear blueprint for Via's future. At its core, the plan shows the way toward building on our strength as a trusted partner and leader in empowering individuals with disabilities and their families in living richer lives. It outlines a focused direction for maximizing our value to those we serve, increasing our financial strength and sustainability, and building organizational infrastructure to support quality services and future growth so that we can continue to deliver on our promise to the community.

Vision, Mission, and Values

Guided by our Strategy Committee and with support from the Executive Director and our strategic planning consultants (Mosaic Consulting and Coaching), Via's Board of Directors engaged in visioning, reviewed the organization's mission, and reflected on its deepest-held values. Articulated below, these shared commitments provide a foundation for Via's strategic direction moving forward.

We envision an inclusive world in which individuals with disabilities and their families are living rich, joyful, and fulfilling lives, actively participating in the community, achieving their potential, and realizing their dreams.

We recognize that this vision is broad, ambitious, and larger than us. Via will not achieve this desired future alone, nor is it likely to come to fruition for many years. Still, we believe it a worthy dream to aspire to — and to be inspired by — as we pursue our mission.

Our mission is to empower people with disabilities and their families to grow, develop, and thrive by providing essential skill-building, therapeutic, and recreational programs.

Via is a deeply values-driven organization. Our core values are a powerful statement of who we are as an organization and our promise to our clients, families, and community.

Love: Love is the foundation of everything we do and is ever-present in our interactions with clients, our relationships with their families, and our engagement of our staff and the community.

Family: We form valued relationships with our families and their loved ones by understanding their needs and collaborating with each on their unique journeys of growth and development.

Trust: Your trust in us is essential; we strive to earn it every day by ensuring the safety and dignity of all those in our care.

Quality: We provide expertly designed, high-impact, life-changing programs and services.

Inclusion: We believe in, and actively promote, a community of diversity, equity, and inclusion that embraces all people and celebrates their differences.

Partnership: We actively seek innovative, value-added partnerships with other organizations to meet the needs of our clients, their families, and the community.

Business Model

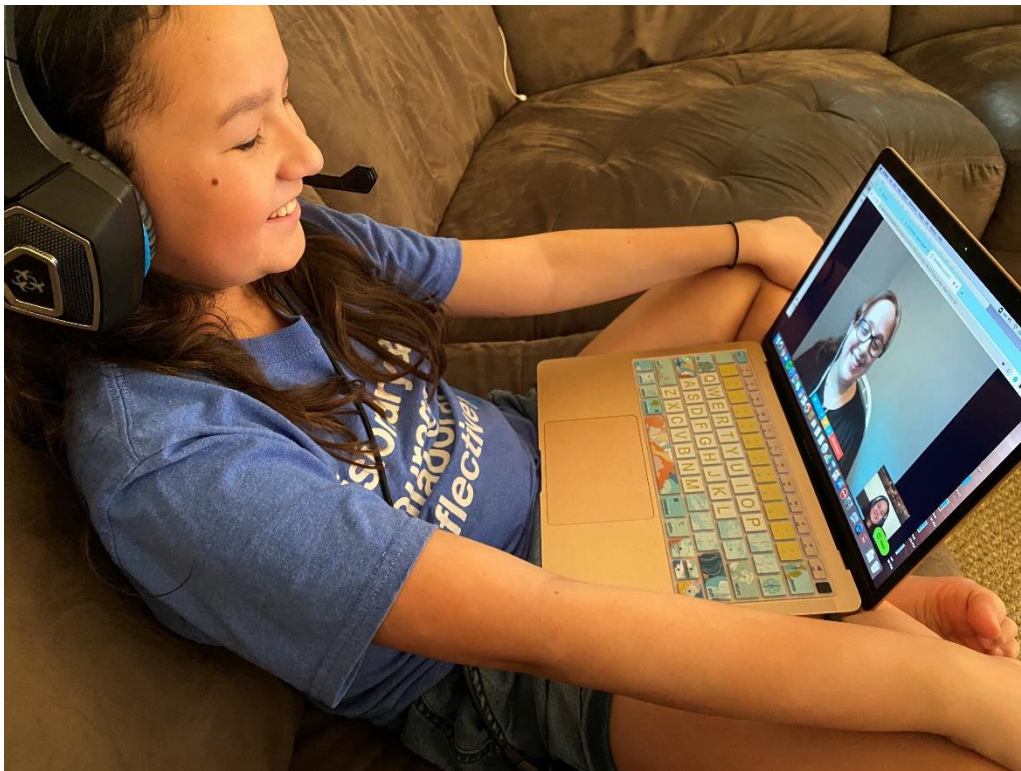
Every organization needs to be clear and aligned on the elements of their Business Model, a capsulized version of its core why, who, what, where, and how. This summarizes the current business model for Via Services.

Whom we serve	Children and adults with disabilities and their families
Where we work	Greater San Francisco Bay Area
What we do	<ul style="list-style-type: none"> ○ Early Assessments – by referral from SARC (First Step) ○ Childhood Therapy – speech and occupational (First Step) ○ Camp/Respite Experiences – year-round and seasonal (Altitude and Via West) ○ In-home respite (planned for 2021) ○ Life skills training (planned for second half 2021)
Our desired impact	<ul style="list-style-type: none"> ○ First Step: Therapy clients demonstrate measurable progress toward speech and occupational development goals. Families receive qualified assessments that provide key information necessary to assist with an early childhood development plan. ○ Via West: Safe, fun, and productive (growth in life, personal and other skills) experiences; Rest, recharging and peace of mind for families and caregivers. Participants develop social-emotional, behavioral, and other life skills through engaging programs, positive experiences, and fun activities. ○ Altitude: Demonstrable social, emotional, behavioral, and life skills growth for a successful transition from teens to adulthood. Participants receive training and support in activities of daily living to experience greater independence and self-sufficiency. ○ Through our respite programs, families experience a chance to recharge and receive some well-deserved rest.
How we fund it	<ul style="list-style-type: none"> ○ Public Funding (San Andreas Regional Center) ○ Program Fees (earned income) ○ Fundraising and Grants (contributed income)

Pandemic Pivot

In March 2020, the COVID-19 pandemic had an immediate and devastating impact on Via Services. Because our services rely on direct, in-person contact with clients, our programs and services were effectively shut down. Fortunately, for our First Step speech and occupational therapy services, we were able to transition quickly to virtual or “teletherapy” services to continue serving our clients.

That summer, as we undertook this comprehensive strategic planning effort, there was still great uncertainty about when we could resume our flagship programs, particularly respite, Altitude, and summer camps at Via West. However, one thing was crystal clear: in order to protect against future crises and retain the ability to serve our clients, we will need to diversify our programs and revenue. We believe this “pandemic pivot,” which is reflected in our new strategy roadmap, will not only create a financially stronger, more sustainable Via, but also expand our reach and impact.



Data Collection and Analysis

The Mosaic consultants interviewed eight external stakeholders identified by Via to elicit their views on the organization’s key strengths, challenges, and opportunities. Interviewees represented Via parents, donors, and community partners. Online research was used to develop a landscape scan of eight competitor/collaborator organizations to understand Via’s market position and assess opportunities and threats in its external operating environment; the scan was supplemented by interviews with three of the organizations’ executive leaders.

Together, this information was used to develop a summary highlighting several of Via’s strengths, weaknesses, opportunities, and threats.

<p style="text-align: center;"><i>Strengths</i></p> <ul style="list-style-type: none"> ○ Breadth of programs serving multiple age groups, some over a lifetime ○ Life-changing respite for parents ○ Engaging activities for participants ○ 1:1 ratio of services that is hard to find ○ Strong brand, reputation, high level of community trust, networks ○ Relationship with Regional Center, plays a key role in the service ecosystem 	<p style="text-align: center;"><i>Weaknesses</i></p> <ul style="list-style-type: none"> ○ Staff turnover and transitions created disruptions in consistency ○ Concerns about diminished quality, safety, organizational culture ○ Financial model not diversified enough ○ Lack of strategic focus, seen as pursuing too many ideas at once ○ Board not reflecting the full diversity of the community
<p style="text-align: center;"><i>Opportunities</i></p> <ul style="list-style-type: none"> ○ Use COVID experience to offer more services virtually, in-home, become expert in doing in-person safely ○ Merge or partner to leverage complementary strengths ○ Collaborate with others to advocate for families, be their political voice ○ Offer programs to new populations ○ Facility rental as income opportunity 	<p style="text-align: center;"><i>Threats</i></p> <ul style="list-style-type: none"> ○ Risk of cuts, rollbacks in public funding, especially in the wake of COVID ○ Workforce pipeline is weak, hard to get and keep the right people for this work ○ Competition from others who are quicker to offer virtual programming ○ Challenge of balancing mission with money—doing this work well and keeping it funded, put families first

In addition, Via developed and conducted surveys of our current and former clients and staff members, yielding valuable feedback about our organizational culture and values, existing programs, and new opportunities that directly informed strategy development. The survey results corroborated many of the strengths and weaknesses surfaced in the SWOT analysis, above.

Competitive Advantage

The concept of competitive advantage may seem foreign to nonprofits, yet the reality is that all nonprofits compete every day for resources and attention. Those with strengths that differentiate them are often better positioned to attract these supports.

We define a competitive advantage as the ability to produce social value (have impact, make a difference) by:

- ✓ *Using a unique asset* (such as a strength that no other similar organization in your geographic area has) and/or
- ✓ *Having outstanding execution* (such as being faster or less expensive or having a better service than other similar organizations in your geographic area)

Via Assets

- Via West camp/respite experience is unmatched and irreplaceable
- First Step therapists are the best in consistency, quality, and responsiveness
- Via West campus is used for camp (services) and can be rented to others (income)
- Strong relationships, connections, reputation
- Via West staff have expertise that can be leveraged for new programs

Via Execution

- Our ability and willingness to handle a 1:1 client ratio
- The quality of services and meaningful participant engagement we offer
- Our culture/history of hiring exceptionally dedicated staff
- The way we do assessment is unmatched due to strong staff
- Speech and occupational therapy offered in one location
- Our connection to families, providing holistic support with love leading the way
- Intake contract and relationship with San Andreas Regional Center

Often, an organization's competitors are also potential collaborators. While Via provides specialized programs and services in an environment with few direct competitors, its work intersects with agencies that provide similar or adjacent services to individuals with disabilities, such as AbilityPath, AchieveKids, Easter Seals Camp Harmon, and Camp Krem (currently in rebuild phase after severe fire damage). These are also organizations with which Via has already, continues to, and/or could potentially partner toward mutual goals.

Whether competing or collaborating, understanding our competitive advantage will help Via determine how to leverage our unique strengths in relationship to others in the field.

Trends

High-level trends shaping Via’s current and future operating environment include:

- The population we serve and the demand for programs and services are increasing. Changes in defining the spectrum of learning and behavioral differences, as well as providers’ shift to earlier detection and intervention, are contributing to increases.
- The state budget is hurting, and the regional economy has worsened due to COVID but should begin improving.
- The political/policy environment is unstable, but recent social justice movement is helping shift the social climate toward inclusion.
- Available funding for our programs is holding at about the same levels but still falls short of what is required.

Funding

This strategic plan prioritizes efforts to decrease our reliance on State funding by increasing opportunities for private pay and corporate sponsorships, growing scholarships and other grants, and leveraging use group contracts. This will be detailed in a comprehensive fund development plan. While we anticipate that a thorough operational review may reveal new efficiencies, we will also be adding new staff positions to support our key strategies. This is an investment in our future, and it is one we hope will engage our community partners and attract new and continuing donor/funder support.

Via’s typical revenue mix to date is outlined below, and reflects a combination of public contracts, program fees, and other earned revenue, supplemented by contributed income.

<i>Funding Source</i>	<i>Percentage of Total</i>
Public – State funding provided through Regional Centers: <ul style="list-style-type: none"> ○ Via West programs ○ First Step therapy services ○ Intake assessments for San Andreas Regional Center 	44%
Fee-for-Service – Non-State funding through clients: <ul style="list-style-type: none"> ○ First Step and Via West private pay clients ○ Use group facility rentals 	38%
Fundraising: <ul style="list-style-type: none"> ○ Via Ball and other events ○ Grants ○ Individual donors 	17%
Other: <ul style="list-style-type: none"> ○ Investment income, etc. 	1%

Strategy Screen (Decision-making Criteria)

One of the most important decisions any organization makes is how to address a strategic opportunity or a challenge in a quickly changing landscape. Costly errors of money, time, and reputation occur when there is no solid basis for such decision making. With a strategy screen — a set of criteria against which new ideas and opportunities can be vetted — Via can ensure that its most important decisions are consistent and rational. The screen is not designed to stop new ideas or to easily reject all new opportunities, but rather to focus the discussion of opportunities in a way that satisfies key criteria and documents thoughtful deliberation by the Board and staff.

The following decision-making criteria have been used to evaluate the strategies reflected in this strategic plan and will be used on an ongoing basis to evaluate opportunities and challenges as they emerge.

Strategy Screen

- How does it help us advance our **mission**?
- How does it align with/support our **values**?
- How does it leverage our **competitive advantage**?
- Is there a **need/demand** for this service?
- How will we fund it? Is it **sustainable**?
- Do we have the **capacity** (staff, expertise, infrastructure) to execute?
- Is there a partner we could **collaborate** with to do it?
- Does it improve our reputation, make Via more **visible**?



Big Questions (Strategic Issues)

Big questions are those opportunities or challenges to which an organization must respond. After an assessment of Via's internal strengths and weaknesses as well as the opportunities and threats in its external environment, the Strategy Committee recommended that the Board consider four Big Questions:

How do we make Via West viable and sustainable (operationally & financially)?

How do we evolve our funding model, especially to increase earned income?

How do we evolve our funding model, especially to increase contributed income?

How do we enhance our infrastructure and operations to support programs, with a special focus on quality and safety?

Organizational Strategies in Response

With the focus on the above Big Questions, the following strategies were identified and tested. Even though actions will be taken on all strategies over the next 18-36 months, some actions will need to be phased in over time. Those details will be identified in the implementation plan to be created later.

Via West Strategies

- Ensure quality, availability, consistency, and retention of staff.
- Elevate the amount/type of training, support, safety protocols, behavior management, reporting, etc.
- Explore alternative structures of camp leadership, staffing, scheduling, durations, programmatic offerings, participant/staff ratios, etc.
 - Additionally, consider rentals/use groups, revisit rates, number of groups, durations, etc. to help cover the costs of camp.

Earned Income Strategies

- Identify potential new programs that fit with our mission, values, and competitive advantages.
- Identify alternative funding sources for programs (e.g., private pay).
 - Additionally, reevaluate fee structures and funding sources for existing programs, expand their reach, etc.
- Enhance Via's visibility in the community: (see note below).

Contributed Income Strategies

- Increase development resources, including hiring a new Director with expertise in major gifts and/or corporate donations and develop a fund development plan.
- Clarify the fundraising role and build the fundraising capacity of the Board.
- Enhance Via's visibility in the community: (see note below).

Infrastructure Strategies

- Hire talented Program Director and Via West Director, focusing on staffing, management, and culture.
- Develop staff onboarding and ongoing training and education program supported by clear policies and practices (e.g., transparent communication, etc.).

Additional Overall Strategy

- Enhance Via's visibility in the community.
 - This strategy cuts across all Big Questions, enhancing workforce recruitment for Via West and other programs (existing and new) as well as supporting fund development efforts to increase earned and contributed income. It is a core component of organizational capacity that is tied to IT and marketing communications capacity, such as SEO, social media, etc.



Next Steps

Strategic direction and priorities only tell the first part of the story. A solid and clear process for implementation and monitoring is equally necessary. The following outlines key steps necessary to implement the strategies highlighted in this document.

- ✓ ***Create an implementation plan.*** Via has done a very good job at deciding on its organizational direction and strategies. However, an implementation plan to support the organizational strategies still needs to be developed. This would include specific goals related to each strategy, timeline, and responsible party.
- ✓ ***Develop a process to conduct periodic check-ins.*** A quarterly check-in with the Board is recommended to keep them apprised of successes, challenges, and specific requests for action.
- ✓ ***Communicate back to external stakeholders.*** Throughout the research process of interviews and surveys, stakeholders expressed real interest and investment in Via's success. Providing opportunities for these stakeholders to hear key highlights of this plan would be a way to recognize their input and keep them engaged in Via's continued success.

Additional Ideas for Staying on Track

Strategic planning should not be just a “once every 3 or 5 years” activity or only an annual off-site retreat. Strategy is built upon an organization's business model, market awareness, and competitive advantage, each of which will most likely shift over time. A strategy can be enduring but may need to change when it is no longer the best way to advance the mission. Therefore, it is important to constantly monitor the environment and the effectiveness of different strategies.

Via should consider the following ongoing practices to help stay current on its strategic and implementation plans:

- ✓ ***Continue engaging the Board in strategic conversations.*** This roadmap should be reviewed in its entirety by the board on a quarterly or at least bi-annual basis to track progress and identify any necessary adaptations. Additionally, it can be used as a tool in every Board meeting to focus on one of the core components in greater depth, depending on where board education and/or input is needed.

- ✓ **Consider other methods of community input.** One of Via's key strengths is its community of families and other stakeholders. Offering convenient ways to offer timely feedback will help Via stay updated and responsive especially as it pursues improvements and new programs. These could include short program evaluations, brief surveys, family forums, and simple one-on-one conversations with clients, donors, funders, and partners.
- ✓ **Develop and use an organizational dashboard.** A dashboard provides an ongoing record of tasks and progress towards accomplishing those tasks identified in the implementation plan. A word of caution: the dashboard should be easy to read and not burdened with so many metrics that the data is overwhelming. Ask yourself, what are the top 3-5 items we want to absolutely make sure we are on track with?

Closing Thoughts



The strategic planning process never really ends. The dips and curves of organizational life require that the Board and staff remain attentive to the changing landscape. The strategic thinking and planning that comes out of thoughtful and productive discussion will make the organization and mission stronger.

It has been our honor to be your thought partner and cheerleader for these many months. Wishing you all the best and tons of success!

Amari Romero-Thomas
CEO/Principal Consultant
Mosaic Consulting and Coaching

Melissa Mendes Campos
Senior Consultant
Mosaic Consulting and Coaching

Appendix A: Consulting Process and Strategy Committee

Consulting Process

The Real-Time Strategic Process involved critical new approaches to traditional strategic planning. The process was guided by a Strategic Planning Committee comprised of Board and staff members and a parent representative. This group met six times from August 2020 thru February 2021 to plan and review the collection of external data (including phone interviews and client/staff surveys), to have generative discussions, and to advance and advise on the overall process.

The full Board was convened in November and December for special sessions to review research data and for mission, vision, and values development. These sessions allowed for thoughtful and in-depth conversations around key topics that would not normally be able to be completed in a one-day retreat.

The Strategy Committee and Board then met in two half-day retreat Zoom sessions in January to affirm the big questions and key strategies to answer them.

The next step will be a presentation to the Board on March 8, 2021, and a recommendation from the Strategy Committee to approve the strategy roadmap.

Strategy Committee

The Strategy Committee is composed of five representatives from the Board of Directors, two staff, a Via Parent, and the Executive Director.

- Jack Easterbrook, Board Member and Via Parent
- Brad Hoge, Board Member
- Jim Toby, Board Chair
- Steve Noia, Via Parent
- Jen Baird, Staff Member
- Leslie Davis, Staff Member
- Sandi Conniff, Board Member
- Marc McGeever, Board Vice Chair and Via Parent
- Matt Bell, Executive Director

The Committee met over a seven-month period and provided leadership throughout the strategy formation process. They worked through the content from the retreat and helped refine the final strategy roadmap.

Strategic Planning Retreat

The Board of Directors met for virtual retreat carried out in two sessions via Zoom on January 21 and 23, 2021. In addition to the Board members, Matt Bell (Executive Director), Leslie Davis (Vice President), Jen Baird (Director, First Step), Julie Kling (Controller), Joan Ryan (Director, Human Resources), and Steve Noia (Via Parent) were in attendance.

An important part of the retreat discussions about future strategies was in the context of the market landscape and trends.

Post-Retreat Testing

After the retreat, the Strategy Committee continued to refine the results of the key elements of the strategy roadmap. The Mosaic consultants interviewed four stakeholders to test the final strategies. Feedback was supportive and helped refine the final strategies.

Note: Detailed information on the work of the Committee and the Strategic Planning retreat and materials available upon request.