



# Three-Year Strategic Plan 2024-2026



# The New Normal

CAP Tulsa begins the next strategic plan having been forever transformed by the coronavirus pandemic. Over the past three years, long-held assumptions were turned on their head – about how the organization could operate, about the community’s ability to adapt, and about the resilience of families with young children.

Remote work, virtual interactions, health and safety protocols, social disconnection, lost learning, trauma... Yet, CAP emerges from this unprecedented time not simply having persevered, but battle-tested and ready to march into the new normal of what it means now to support the whole child through a two-generation approach.

Fundamentally, the agency’s Strategic Framework remains intact, the vision of success still clear – a future in which all children served by CAP reach their full developmental potential by the end of third grade.



The new normal hasn’t altered CAP’s *Pillars of Success*, or changed *Priority Areas of Focus*:

- Increase child outcomes across a range of risks and abilities
- Collaborate with families to develop programs that best accommodate their needs
- Build a continuum of community services that reinforce early learning and care systems
- Achieve optimal balance between highest possible outcomes and lowest recurring costs

The organizational hallmarks that defined CAP’s past will be even more vital in the years ahead – continuous improvement, innovation, human-centered design, data-driven decision making, performance-based partnerships, diverse funding streams, an inclusive, great place to work... and willingness to change.

This new strategic plan describes the near-term future, a destination reachable by the end of 2026, and summarizes opportunities to make substantial progress toward the ultimate vision of child success.

One need only look back to the recent past to see how much is possible in the next three years...



# Representative Achievements from the 2021-23 Strategic Plan

## Child Success

- Advanced trauma-informed practices across all school staff and school support teams
- Added Social-Emotional Learning Coach to assist with overall student success
- Emphasized trainings on autism awareness and inclusive classroom environments
- Improved systems for identifying and initiating special needs services at beginning of enrollment
- Expanded dual language assessment for Spanish-speaking children
- Resumed Professional Learning Communities to facilitate teacher collaboration and use of child data
- Expanded supplemental social-emotional curriculum promoting children’s self-regulation
- Piloted restorative coaching opportunities to support educator wellness and energy
- Completed Equity Series through New Teacher Center and integrated equitable teaching practices

## Family Success

- Provided over \$1M in pandemic relief emergency assistance for rent, utilities, and groceries
- Transitioned one-time eviction prevention funding into an ongoing housing stability program
- Operated virtual home visits, parenting classes, group social events, and family enrollment meetings
- Piloted virtual alternative to in-person English as a Second Language course
- Expanded scope of qualitative family engagement survey to a representative sample size
- Added postnatal questionnaire to screen for and support mothers who experience postpartum depression
- Offered a home-to-school connection app with online learning activities for parents to use with children
- Expanded communications to families through use of texts, QR codes, and multiple languages
- Served Afghan refugees by accommodating specific cultural and language needs
- Designated portion of home visiting program to serving pregnant women
- Improved tracking and reporting of referrals to other providers for wrap-around support services

## Community Success

- Launched alumni service supporting cohorts of families throughout their child’s kindergarten year
- Enhanced partnership with public libraries to introduce onsite bookmobiles and free book club
- Routed pandemic relief through partners addressing evictions, hunger, employment, and financial capability
- Started committee to advocate for policies and programs that benefit families with young children
- Established closed-looped referral partnership to receive prospective applicants from other organizations
- Expanded data sharing agreements to spotlight public health and housing information across agencies
- Created a professional development tier to add partners to the Oklahoma Early Childhood Program

## Organization Success

- Changed scope of operations to match staffing availability, community needs, and recurring revenue
- Increased minimum wage and pay scales to remain competitive in the education and non-profit sectors
- Added DEI Director, supplier diversity, inclusion statement, land acknowledgement, and Juneteenth holiday
- Improved benefits including Paid Family Leave, paid time off accrual, tuition assistance, and bereavement
- Implemented new people success platform to refine how agency surveys for employee voice
- Introduced personalized mental health and wellness care platform, and benefits plan navigation dashboard
- Retooled Aspiring Leader Program to better meet the needs of participants and the organization
- Collaborated with colleges to provide internships for students seeking careers in child development
- Redesigned intranet and external website to improve functionality for staff and accessibility for families
- Completed facility safety and security modifications, and playground enhancements at multiple schools
- Developed Business Continuity Plan to operate during an emergency with minimal disruptions
- Updated virtual private network, firewall security, and wide area network architecture

# Assessment & Planning Process

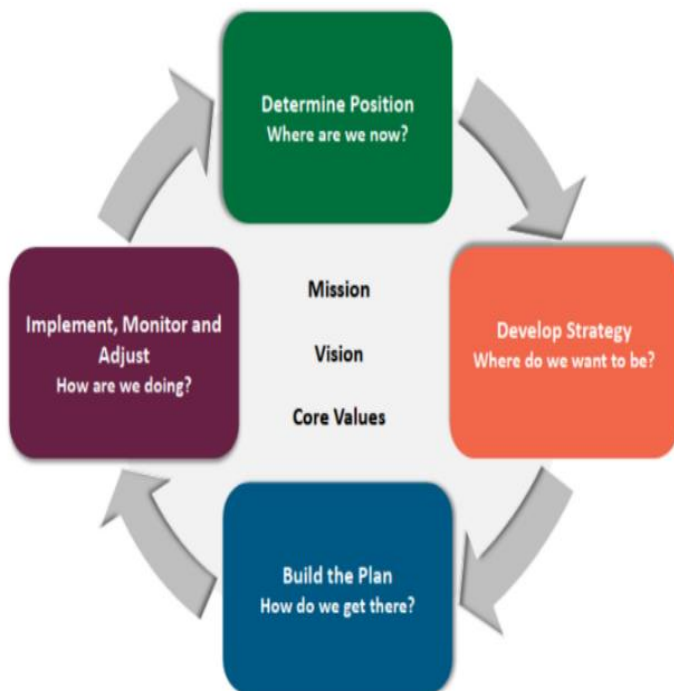
By the start of 2023, reality of the new normal had set in and began shaping CAP Tulsa’s strategic planning considerably. During the prior two years, the agency struggled to fill vacant staff openings, needing as many as 70 teachers at times. Classrooms of 4-year-olds operated at less than full enrollment as families selected new and expanded pre-kindergarten options across the community. Combined with historic inflation, expiring pandemic relief for staff retention stipends, and the desire to pay wages competitive with the private sector and public schools – CAP decided once again to make a change...

In mid-2023, CAP submitted a ‘Change in Scope’ request to the Office of Head Start, the agency’s largest public funder. The modification right-sized preschool capacity and increased long-term sustainability by reducing the number of children to be enrolled and repurposing those funds instead to staff compensation and benefits. Heading into the 2023-24 school year, CAP is now positioned to reestablish before and after care for working parents, resume more flexible scheduling options for school staff, restore classroom coverage to minimize stress on teachers and better support children exhibiting disruptive behaviors and other high needs after the pandemic.

Change, however, is difficult and the Change in Scope required reassignment of many teaching staff and reductions in some support services. These adjustments were made after great deliberation in hopes of better positioning CAP for both the near-term, and the years ahead when opportunity to add back capacity returns.



Strategic planning at CAP Tulsa is anchored in assessment of community needs and evaluation of agency performance. Parent satisfaction surveys and focus groups, along with perspectives from partners and funders, provide valuable viewpoints to inform organizational improvements, uncover themes, and consider changing circumstances and service gaps. This ongoing process affirms CAP’s current position while highlighting possible alternate paths that could warrant changes to future strategic plans.



Assessment and planning for the 2024-2026 Strategic Plan commenced in fall 2022 during a Leadership Retreat to review the agency’s Strategic Framework, performance dashboard, and SWOT analysis, while inviting new ideas for strategies. A working group then met around each *Pillar of Success* to generate a first draft of *Desired Future States*, which was reviewed at another Leadership Retreat in early 2023. By spring, a Board Strategic Planning Committee was reconstituted to provide feedback, as the Parent Policy Council also gave input. Directors spent summer 2023 building aim statements, leading indicators, and change plan milestones to complete the Strategic Plan for Board review and consideration in fall 2023.



## **Mission**

To help young children in lower-income families grow up and achieve economic success

## **Ten-Year Vision**

All children served by CAP Tulsa reach their full developmental potential by the end of third grade

## **Theory of Change**

Combine high-quality early education for young children with supports that promote nurturing parenting and family financial stability to ensure that children reach their full developmental potential by the end of third grade

## **Ten-Year Strategic Objectives**

### Child Success

Children receive high-quality education and care services from birth through third grade

### Family Success

Partner with families to create a nurturing and secure environment for their children

### Community Success

Work collectively with other organizations to improve the broader system supporting child and family success

### Organization Success

Optimize process management and resource stewardship while providing a great place to work

# Desired Future States by the End of 2026

## What Success Looks Like in Three Years

### Child Success

Ensure children receive high-quality education and care services from birth through third grade



- **High-Quality Classrooms** – Promoting each child’s growth through developmentally appropriate practice in equitable learning environments
- **Professional Development** – Growing the knowledge and skills of early childhood teams to build capacity and a high-performance culture
- **Responsive Caregiving** – Supporting families to maintain healthy routines that promote children’s social-emotional, physical, language, and cognitive development

### Family Success

Partner with families to create a nurturing and secure environment for their children



- **Health & Wellness** – Equipping families with knowledge and services to help them be mentally and physically healthy
- **Language Proficiency** – Supporting multilingual families to effectively communicate and engage in their children’s education
- **Social Connectedness** – Creating welcoming school environments where families interact with other families through trusting relationships
- **Economic Empowerment** – Referring and tracking families’ receipt of education, employment, and housing services that advance their financial well-being

### Community Success

Work collectively with other organizations to improve the broader system supporting child and family success



- **School Transitions** – Supporting every family to have their child enter school ready to learn and grow
- **Advocacy** – Raising awareness through media and elected officials of the value of programs supporting families with young children
- **Oklahoma Early Childhood Program** – Improving the quality of early care and education providers statewide to promote public support and reinvestment

### Organization Success

Optimize process management and resource stewardship while providing a great place to work



- **Staff Well-Being** – Responding to the needs of employees for physical, mental, and emotional health supports through enhanced services and benefits
- **Top Talent** – Attracting, retaining, and developing employees committed to professional growth and high performance
- **Diversity, Equity, & Inclusion** – Achieving an agency culture, policies, and practices in which employees, the families, and the children served feel connected, respected and a sense of belonging
- **Business Intelligence** – Providing broad access to data integration tools that drive decision making and promote a culture of innovation
- **Financial Sustainability** – Maximizing public and private resources to respond to community needs while increasing solvency and positioning for growth opportunities

# Aims, Indicators, & Milestones

## *How Progress Toward Desired Future States is Measured*

Following are Aim Statements, Leading Indicators, and Change Plan Milestones that lay the foundation of CAP's Tulsa's *Strategic and Operational Performance Dashboard*, and summarize the detailed planning and work ahead.

- ❖ Aim Statements are measurable descriptions of desired success
- ❖ Leading Indicators are more frequent, recurring measures of progress toward each Aim
- ❖ Change Plan Milestones represent key steps presumed necessary to make progress

Strategic planning at CAP is intended to be ongoing, nimble enough to pivot, yet clear enough to shape a path forward. This Three-Year Strategic Plan (2024-2026) represents a set of choices that have been made about the work coming next – the gaps to be closed, the competencies added, the priorities, targets, and required resources which, collectively, operationalize the overarching Framework into functional strategies.

Implementing this plan is a shared responsibility across all departments and individual employees, along with agency partners, to help accomplish. Achieving even better outcomes for more children and their families will require an unrelenting resolve and willingness to embrace the hard work of change – future success depends on it.

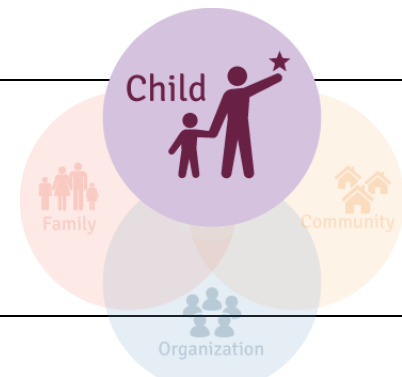




## Child Success

Desired State	<b>High-Quality Classrooms</b> – Promoting each child’s growth through developmentally appropriate practice in equitable learning environments
Aim Statement	By May of 2026, 80% of preschool children ( <i>up from 70% now</i> ) will, dependent on fall performance within the applied subtests of the Early Learning Quick Assessment, either 1) meet or exceed 85% of age-appropriate expected growth using spring benchmarks, 2) meet age-appropriate winter benchmarks, or 3) be successfully connected with behavioral health and/or inclusion services ( <i>excluded from growth analysis</i> ).
Leading Indicators	<ul style="list-style-type: none"> <li>• Early Learning Quick Assessment</li> <li>• Child Achievement Research Partnership</li> <li>• Implementation Guide</li> </ul>
Change Plan Milestones	<ul style="list-style-type: none"> <li>✓ Advance training opportunities tied to inclusion, behavioral health services, and developmentally appropriate practice</li> <li>✓ Expand use of dual language assessments</li> <li>✓ Use ‘Focus On’ meetings for literacy and numeracy promotion</li> <li>✓ Refine Professional Learning Communities based on implementation analysis to promote collaboration and use of data</li> <li>✓ Develop strategy to improve placements of children into classrooms most suited to support well-being</li> </ul>

Desired State	<b>Professional Development</b> – Growing the knowledge and skills of early childhood teams to build capacity and a high-performance culture
Aim Statement	By June of 2026, effective instructional leadership support is in place for all classroom staff as measured by 100% of Instructional Coaches and School Leaders ( <i>onboarded for at least 1 year</i> ) will have completed their role-relevant training series.
Leading Indicators	<ul style="list-style-type: none"> <li>• Attendance at trainings in Professional Development Plan</li> <li>• School Leader pre/post assessment growth</li> <li>• Certifications in Practice-Based Coaching Model</li> </ul>
Change Plan Milestones	<ul style="list-style-type: none"> <li>✓ Begin Practice-Based Coaching Model training consultation</li> <li>✓ Complete School Leader professional learning engagement</li> <li>✓ Develop plan to train new Instructional Coaches and School Leaders with fidelity to models</li> <li>✓ Continue Professional Learning Communities</li> <li>✓ Expand restorative coaching offerings</li> <li>✓ Start new cohort of Aspiring Leaders Program</li> </ul>





## Family Success

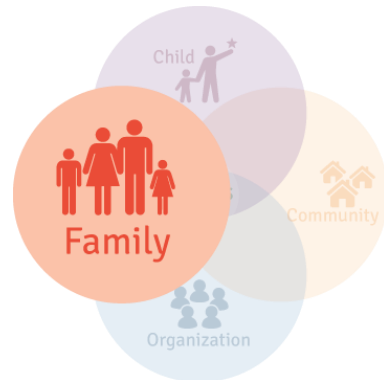
Desired State	<b>Responsive Caregiving</b> – Supporting families to maintain healthy routines that promote children’s social-emotional, physical, language, and cognitive development
Aim Statement	By December of 2026, parenting scores will increase by 0.3 from the average 4.2 on Parent Gauge question <i>“The program helped me create daily routines with my child,”</i> and by 0.3 from the average 4.15 on question <i>“The program has helped me gain new knowledge and skills about parenting.”</i>
Leading Indicators	<ul style="list-style-type: none"> <li>• Child attendance</li> <li>• Participation in Storytime Tuesdays and other events helping parents model routines</li> <li>• Utilization of educational resources for home environments</li> <li>• # parents setting goals around child development and learning</li> <li>• Visitation completion rates and health screening data from home-based program</li> </ul>
Change Plan Milestones	<ul style="list-style-type: none"> <li>✓ Increase # of families participating in Parent Gauge from smallest schools to provide more location-specific data</li> <li>✓ Analyze the various activities linked to routines from classrooms, family engagement, health, and home-based divisions</li> <li>✓ Expand pilots working directly with parents such as family literacy and social-emotional development workshops</li> <li>✓ Leverage social connectedness strategies to create opportunities for parents to learn from one another</li> </ul>

Desired State	<b>Health &amp; Wellness</b> – Equipping families with knowledge and services to help them be mentally and physically healthy
Aim Statement	By December of 2026, the average % of parents that flag on the Patient Health Questionnaire-2 assessment and accept appropriate services from Behavioral Health Specialists will increase from 45% to at least 60%; and the family health and nutrition score will increase by 0.3 from the average 3.67 on Parent Gauge question <i>“The program has affected our healthy habits.”</i>
Leading Indicators	<ul style="list-style-type: none"> <li>• Physical and mental health components and community resources added to parent connection activities</li> <li>• Screenings conducted vs. receipt of behavioral health services data</li> <li>• Family risk identifications and referrals to community services in monthly report from partner provider</li> </ul>
Change Plan Milestones	<ul style="list-style-type: none"> <li>✓ Analyze and coordinate the various health and wellness experiences being provided across the system</li> <li>✓ Plan to increase visibility by parents of healthy routines happening daily within the Early Childhood Program</li> <li>✓ Review local providers engaging bilingual and underserved populations to increase access to health and wellness supports</li> <li>✓ Continue review of options to link parents to health insurance coverage through community navigators</li> </ul>

Desired State	<b>Language Proficiency</b> – Supporting multilingual families to effectively communicate and engage in their children’s education
Aim Statement	By December of 2026, the % each semester of participating parents/caregivers who achieve a language acquisition gain will increase from 79% to 85% as measured by the TABE CLAS-E assessment.
Leading Indicators	<ul style="list-style-type: none"> <li>• % enrollment slots filled each semester for in-person and virtual offerings</li> <li>• % participants start and complete a semester-long course</li> <li>• % participants complete a course making a gain in English language acquisition</li> </ul>
Change Plan Milestones	<ul style="list-style-type: none"> <li>✓ Complete pilot of virtual ESL and recommendation for permanent offering including outcome measures and goals</li> <li>✓ Explore options for bringing in-person ESL in-house</li> <li>✓ Align staffing capacity to match demand of enrollment</li> <li>✓ Develop participation impact survey to measure gains beyond language acquisition</li> </ul>

Desired State	<b>Social Connectedness</b> – Creating welcoming school environments where families interact with other families through trusting relationships
Aim Statement	By December of 2026, family connection scores will increase by 0.5 from the average 3.56 on Parent Gauge question “ <i>The program has given me opportunities to connect with other parents and adults.</i> ”
Leading Indicators	<ul style="list-style-type: none"> <li>• Attendance at center- and home-based group social events, including # of repeat attendees</li> <li>• Post-event surveys</li> <li>• Unified calendar across partners of all events during school year</li> <li>• Family Surveys</li> </ul>
Change Plan Milestones	<ul style="list-style-type: none"> <li>✓ Align scheduling and co-promotion of social activities across school, family support, and family advancement teams</li> <li>✓ Develop recommendations for making physical spaces at schools more welcoming</li> <li>✓ Respond to family feedback from post-event surveys regarding quality and content</li> <li>✓ Implement electronic attendance tracking for group social events</li> <li>✓ Staff training on facilitation of successful group social events, including linking to learning experiences</li> </ul>

Desired State	<b>Economic Empowerment</b> – Referring and tracking families’ receipt of education, employment, and housing services that advance their financial well-being
Aim Statement	By December of 2026, at least 1 closed-loop referral will be established with community-based organizations capable of providing families of children enrolled at CAP with education, employment, and housing services.
Leading Indicators	<ul style="list-style-type: none"> <li>• # partner providers linked and responsive to referrals on a common platform</li> <li>• # families referred to and accepted by selected partner providers</li> <li>• Outcomes of referrals made, including change in status of financial well-being</li> </ul>
Change Plan Milestones	<ul style="list-style-type: none"> <li>✓ Document existing inbound and outbound referral processes to recommend refinements necessary for expansion</li> <li>✓ Conduct landscape analysis of providers participating in community’s largest closed-loop platform</li> <li>✓ Engage prospective partners addressing education, employment, and housing needs</li> <li>✓ Assign and train staff to pilot outbound referrals to selected partner(s)</li> </ul>



## Community Success

Desired State	<b>School Transitions</b> – Supporting every family to have their child enter school ready to learn and grow
Aim Statement	By June of 2026, 100% of families of four-year-olds ( <i>baseline to be established</i> ) in their final month of enrollment at CAP Tulsa report via exit survey that their child is enrolled in kindergarten for the next school year and they feel equipped to support them.
Leading Indicators	<ul style="list-style-type: none"> <li>• # participating and persisting in alumni offerings</li> <li>• End-of-year feedback from pilot cohorts</li> <li>• Family Surveys</li> </ul>
Change Plan Milestones	<ul style="list-style-type: none"> <li>✓ Expand transition activities to recur throughout entire year as build up to pre-established last day of school</li> <li>✓ Develop exit survey to capture point-in-time data</li> <li>✓ Add capacity sufficient to opt-in all families of four-year-olds</li> <li>✓ Add partners providing supportive services to families into and throughout kindergarten</li> <li>✓ Integrate inclusion services to advance supports for exiting families of children with special needs</li> <li>✓ Align internal transitions from home- to center-based, Early Head Start to Head Start, and Head Start to PreK</li> </ul>

Desired State	<b>Advocacy</b> – Raising awareness through media and elected officials of the value of programs supporting families with young children
Aim Statement	By December of 2026, CAP leadership will contact press and policymakers at least biannually to draw attention to issues connected to the agency’s mission.
Leading Indicators	<ul style="list-style-type: none"> <li>• Issues supported through various news outlets, events, and direct contacts with stakeholders</li> <li>• Partnerships with research and public policy organizations to showcase impact of high-quality early learning programs</li> <li>• Events to create awareness of key barriers and opportunities among families, staff, and community at large</li> </ul>
Change Plan Milestones	<ul style="list-style-type: none"> <li>✓ Create recurring opportunities for Board members to inform when and how the agency should advocate</li> <li>✓ Maintain a rolling policy agenda to articulate top issues impacting the agency and wider sector</li> <li>✓ Meet routinely with special interest representatives and organizations capable of influencing public policy</li> </ul>

Desired State	<b>Oklahoma Early Childhood Program</b> – Improving the quality of early care and education providers statewide to promote public support and reinvestment
Aim Statement	By June of 2024, CAP Tulsa is renewing a multi-year contract with Oklahoma State Department of Education to operate the Oklahoma Early Childhood Program, and by December of 2026, the OECP has increased the number of providers impacted.
Leading Indicators	<ul style="list-style-type: none"> <li>• # providers, classrooms, enrollment, trainings, and staff credentials</li> <li>• Classroom quality and child outcome evaluations</li> <li>• Public and private funding amounts</li> </ul>
Change Plan Milestones	<ul style="list-style-type: none"> <li>✓ Submit all required reports and deliverables to OKSDE</li> <li>✓ Apply to renew administration of OECP</li> <li>✓ Launch new partner portal for reporting and communications</li> <li>✓ Complete external evaluations annually to document impact on childcare quality</li> <li>✓ Adapt technical visits and trainings to reflect quality assurance and evaluation data</li> <li>✓ Facilitate professional development training opportunities for additional childcare providers statewide</li> <li>✓ Pursue new stakeholders to build wider base of support for annual refunding approval</li> </ul>



## Organization Success

Desired State	<b>Staff Well-Being</b> – Responding to the needs of employees for physical, mental, and emotional health supports through enhanced services and benefits
Aim Statement	By December of 2026, employee engagement scores from the Glint survey will increase an average of 2% cumulatively from 79% on the question, <i>“I believe that CAP Tulsa benefits support my physical and mental well-being,”</i> and from 71% on the question, <i>“CAP Tulsa takes a genuine interest in employees’ well-being.”</i>
Leading Indicators	<ul style="list-style-type: none"> <li>• # benefit additions and enhancements resulting from employee feedback and needs</li> <li>• Scores from other Glint survey questions about value and affordability of employer health benefits</li> <li>• # unique users for Modern Health’s self-directed resources, therapists, and coaches</li> </ul>
Change Plan Milestones	<ul style="list-style-type: none"> <li>✓ Monitor resources most useful to employees through targeted promotions, and review other employers’ benefits</li> <li>✓ Refine benefits using employee feedback, usage data, interactions with HROD staff, and persona analysis</li> <li>✓ Campaign to break down stigma in seeking help for mental health, particularly in various subpopulations</li> <li>✓ Search for additions to support employees’ physical and mental health, and balance ROI against costs of the plan</li> </ul>

Desired State	<b>Top Talent</b> – Attracting, retaining, and developing employees committed to professional growth and high performance
Aim Statement	By December of 2026, CAP Tulsa’s annual overall staff retention rate increases from 88% to 90%, the retention rate for all teaching positions remains at 85% or greater, and open positions (TII and above) are filled by internal applicants at a rate of at least 60% or greater.
Leading Indicators	<ul style="list-style-type: none"> <li>• Turnover rates by position, in Early Childhood Program, and overall, with comparison year-over-year</li> <li>• % vacancies filled by internal candidates, from subs moving into TII roles through supervisory promotions</li> <li>• % teachers obtaining early childhood credential in-house agreeing program prepared them for classroom success</li> </ul>
Change Plan Milestones	<ul style="list-style-type: none"> <li>✓ Maintain competitiveness in wages and benefit enhancements</li> <li>✓ Respond to issues flagged in quarterly employee engagement surveys</li> <li>✓ Enhance approaches to internal leader development and cultivation, including exploration of apprenticeship models</li> <li>✓ Drive staff development through performance tools, and internal/external trainings for supervisors and school leaders</li> <li>✓ Contextualize early childhood credentialing process to CAP’s classroom practices</li> </ul>

Desired State	<b>Diversity, Equity, &amp; Inclusion</b> – Achieving an agency culture, policies, and practices in which employees, the families, and the children served feel connected, respected and a sense of belonging
Aim Statement	By December of 2026, CAP Tulsa employees and families feel connected, respected, and a sense of belonging, as measured by the Glint Q4 Survey with <i>Staff Connection</i> increasing from 70% to 75%, and <i>Expression of Opinion</i> increasing from 61% to 65%; the Parent Gauge Survey with <i>Parents Feel Connected to Other Parents</i> increasing from 64% to 75% ( <i>average score converted to %</i> ); and the Family Satisfaction Survey with <i>Parent Connection to Staff</i> increasing from 79% to 85%; furthermore, People of Color in leadership will increase from 34% to 40%.
Leading Indicators	<ul style="list-style-type: none"> <li>• Employee engagement surveys</li> <li>• Family surveys</li> <li>• Demographic reports of talent pipeline and representation in management</li> <li>• School goals attainment</li> <li>• Anti-racism trainings and resources</li> </ul>
Change Plan Milestones	<ul style="list-style-type: none"> <li>✓ Create awareness and training opportunities to advance as a culturally effective and racial learning organization</li> <li>✓ Offer robust career development options to increase diversity of talent pipeline and representation in management</li> <li>✓ Improve recruitment efforts to increase racial/ethnic diversity within the applicant pool</li> <li>✓ Emphasize DEI expectations of managers with respect to performance appraisals</li> <li>✓ Develop individual school goals around connecting with and being responsive to parents’ perspectives</li> </ul>

Desired State	<b>Business Intelligence</b> – Providing broad access to data integration tools that drive decision making and promote a culture of innovation
Aim Statement	By December of 2026, CAP will have both departmental and organizational performance measures derived from a fully automated data process, and accessible to employees through complete and accurate dashboards.
Leading Indicators	<ul style="list-style-type: none"> <li>• Business Intelligence partnerships developing strategic and technical plans</li> <li>• Test case to load data from departmental system into central repository and generate automated reporting</li> <li>• Additional test cases incorporating child and classroom data to build dashboards</li> <li>• Develop organizational performance indicators, automate data extractions from multiple systems to support dashboard</li> </ul>
Change Plan Milestones	<ul style="list-style-type: none"> <li>✓ Complete design of centralized data repository for structured and unstructured data</li> <li>✓ Build automated reports from first test case do ensure accuracy and completeness</li> <li>✓ Identify and assign full-time staff member for data science and analytics</li> <li>✓ Build additional automated reports, test, and implement departmental dashboard to measure performance</li> <li>✓ Build organization-level dashboard displaying fully-automated indicators that align with top organizational goals</li> </ul>



Desired State	<b>Financial Sustainability</b> – Maximizing public and private resources to respond to community needs while increasing solvency and positioning for growth opportunities
Aim Statement	By December of 2026, the Board receives a balanced budget reflecting full capacity operations using only recurring revenue, creating opportunity to pursue new funding for sustainable expansion.
Leading Indicators	<ul style="list-style-type: none"> <li>• Financial ratios including revenue-to-expense, administrative-to-total expense, assets-to-liabilities, and debt-to-net assets</li> <li>• New recurring revenue</li> <li>• Operating reserve of at least 4 months</li> <li>• Endowment fund growth and contribution to planned annual revenue</li> </ul>
Change Plan Milestones	<ul style="list-style-type: none"> <li>✓ Manage operational and administrative expenses to match revenues year-over-year</li> <li>✓ Secure incremental and additional funding from a blend of public and private sources</li> <li>✓ Advance efforts to increase available human capital and demand for services</li> <li>✓ Determine feasibility and financing required to increase capacity</li> </ul>

