

*Celebrating 75+ Years  
Of Exceptional Service!*

# Paso del Norte Children's Development Center Strategic Plan



**PdN Children's  
STRATEGIC THINKING/  
PLANNING INITIATIVE**

**JULY 2025**

Version 1.70

Prepared & Facilitated By:



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**1101 E Schuster Ave, El Paso, TX 79902**  
**Phone: (915) 544-8484**

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## **FOREWORD**

This **Paso del Norte Children's Development Center (PdN Children's) 5-Year Strategic Plan** document details the updated and refined strategic intent developed and proposed by the team of strategic thinkers comprised of key stakeholders (i.e., Board of Directors, administrative leadership, staff/ employees, etc.). This strategic thinking and planning (ST/SP) process is an integral part of the formal practice strategic thinking and planning undertaken by PdN Children's Leadership focused on building a **value-driven strategic roadmap for a "transformed" PdN Children's high-performing organization.**

For over 75 years, PdN Children's has been helping children with disabilities achieve their greatest potential by delivering various therapeutic interventions, specialized skills training, feeding and auditory-verbal therapy, case management, family support, inclusive early learning programs, and much more. Five divisions include Early Child Intervention (ECI), Pediatric Therapy Services, ABA, IELC, and CRC. Each division and program offers unsurpassed services in our community resulting in over 1000 children with disabilities and their families, receiving monthly interventions and support required to address their personal needs.

The approach undertaken by the team was to reflect, review, refine, and resolve its future strategic intent and direction by engaging in an innovative strategic thinking and planning (ST/SP) process driven with a strong vision and value commitment. The team of strategic thinkers was asked to engage on a four-stage process including a revisiting and refining of its vision, mission, and core values aligned with a newly defined PdN Children's value proposition profile. Defining a success template for future strategic initiatives must positively impact its growth, contributions, and value to the region it serves.

The specific premise for this **PdN Children's Strategic Planning Initiative** is as follows:

***"To collectively bring together the necessary forces for transformation in elevating and sustaining PdN Children's as a recognized leader in enriching the well-being and quality of lives for the children and families it serves. This entails defining / refining a "transformed" PdN Children's strategic plan with the intent to sustain its leadership role in serving the regional community through its innovative service delivery model."***

Using the most current organizational strategic thinking and planning tenets, this 'value-based' planning process was managed and facilitated by lead strategist Dr. Gilberto Moreno of Prestige Consulting Services. Special thanks to PdN Children's Board President, Richard Martinez, PdN Children's CEO, Al Velarde and their capable leadership team of strategic thinkers for their engagement and assistance in facilitating the definition of the PdN Children's strategic sandbox.

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# **STRATEGIC THINKERS**

## **STRATEGIC THINKING/ PLANNING WORKSHOPS**

*Discovery / Orientation Workshop #1 -- Conducted Onsite, November 5, 2024*  
*Situational Analytics Review Workshop #2 – Conducted Onsite, December 11, 2024*  
*Strategic Thinking Workshop #3 – Conducted Onsite, January 23, 2025*  
*Strategic Planning Workshop #4 – Conducted Onsite, February 12, 2025*  
*Leadership Report Card Planning Workshop #5 – Conducted Onsite, April 14, 2025*  
*SPC Team Report Card Planning Workshop #6 – Conducted Onsite, April 23, 2025*  
*SPC Team Report Card Planning Workshop #7 – Conducted Onsite, May 13, 2025*  
*SPC Team Final Draft Workshop #8 – Conducted Onsite, June 5, 2025*

*The following SPC team of strategic thinkers engaged in the various stages of the strategic planning process including workshops, pre- and post- workshop reviews, surveys, etc.*

### **STRATEGIC PLANNING COMMITTEE (SPC)**

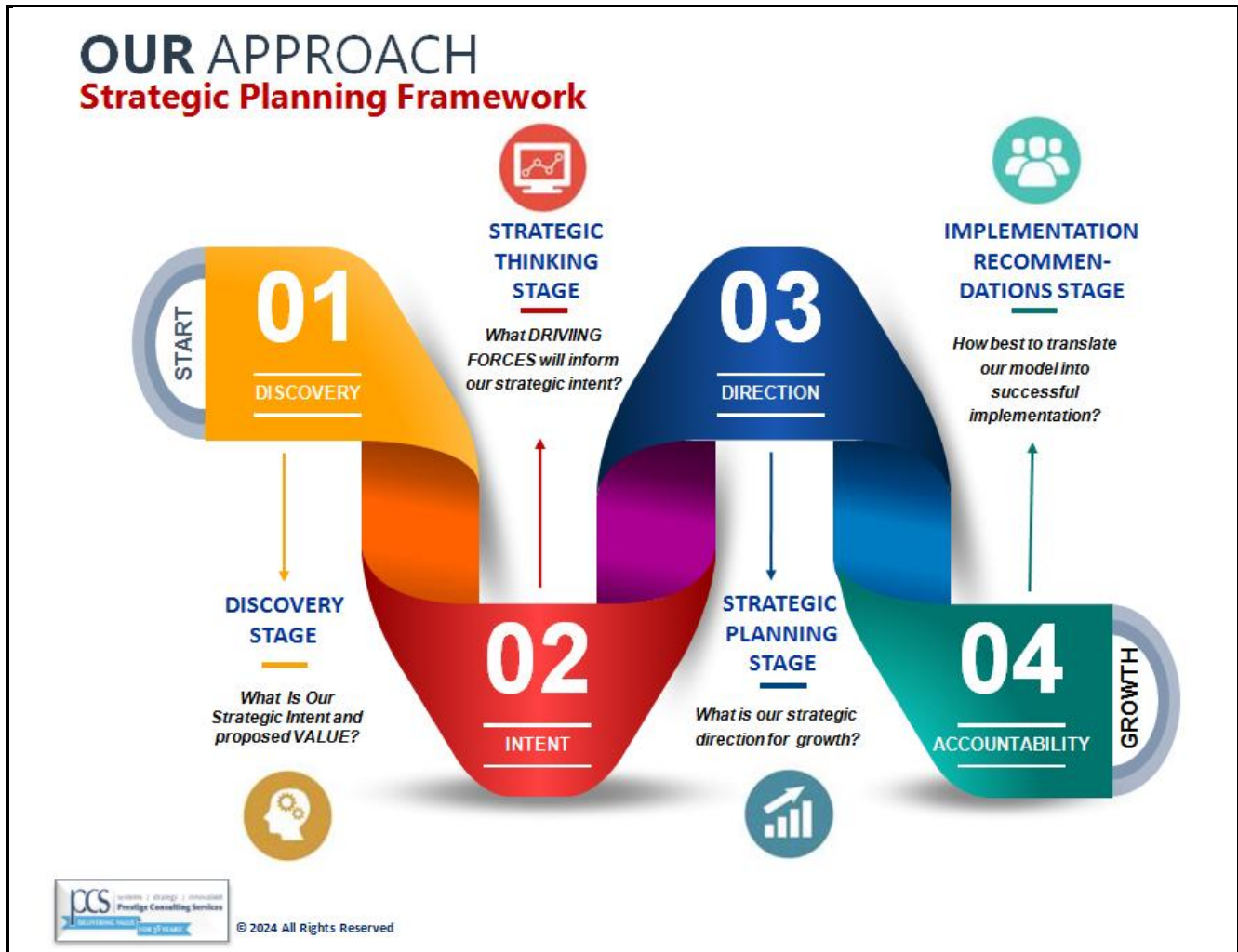
- **Lynne Boutwell, Director**
- **Mary Lou Camarena, Board Director**
- **Cesar Campa, Communications & Development**
- **Mary Ceglio, Supervisor**
- **Claudia Chavez, Director**
- **Gilda Gil, COO**
- **Sol Gonzalez, RBT**
- **Adriana Lopiccolo, Supervisor**
- **Richard Martinez, Board President**
- **Rocio Reyes, HMG Care Coordinator**
- **Grisel Rodriguez, EIC**
- **Lesley Rosa, IEIC**
- **Al Velarde, CEO**

**Strategist / Facilitator:**

**Dr. Gilberto Moreno – Prestige Consulting Services**

## PdN Children's ST/SP PLANNING FRAMEWORK

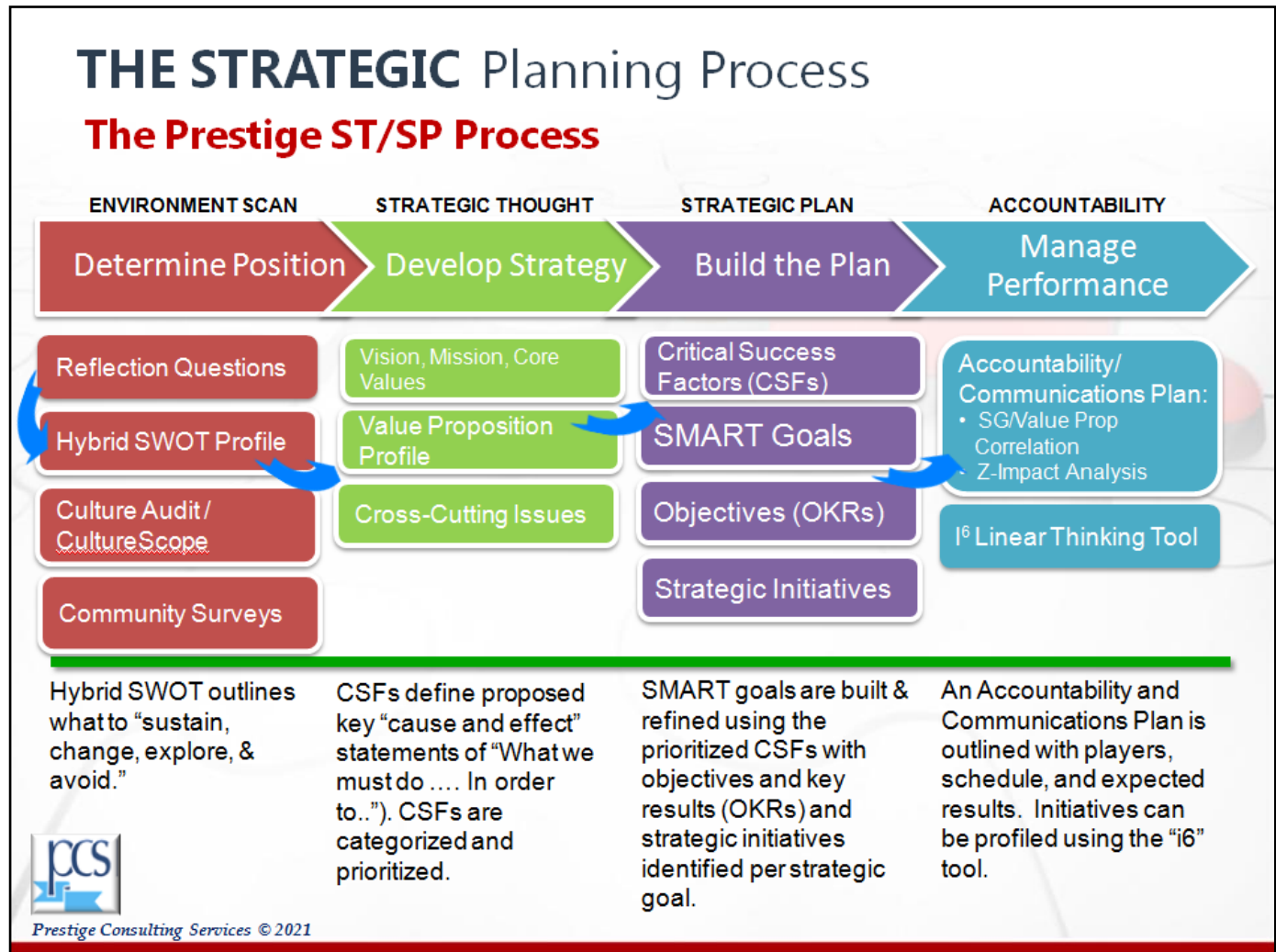
The diagram below describes the strategic thinking and planning (ST/SP) framework engaged by the PdN Children's team of strategic thinkers.





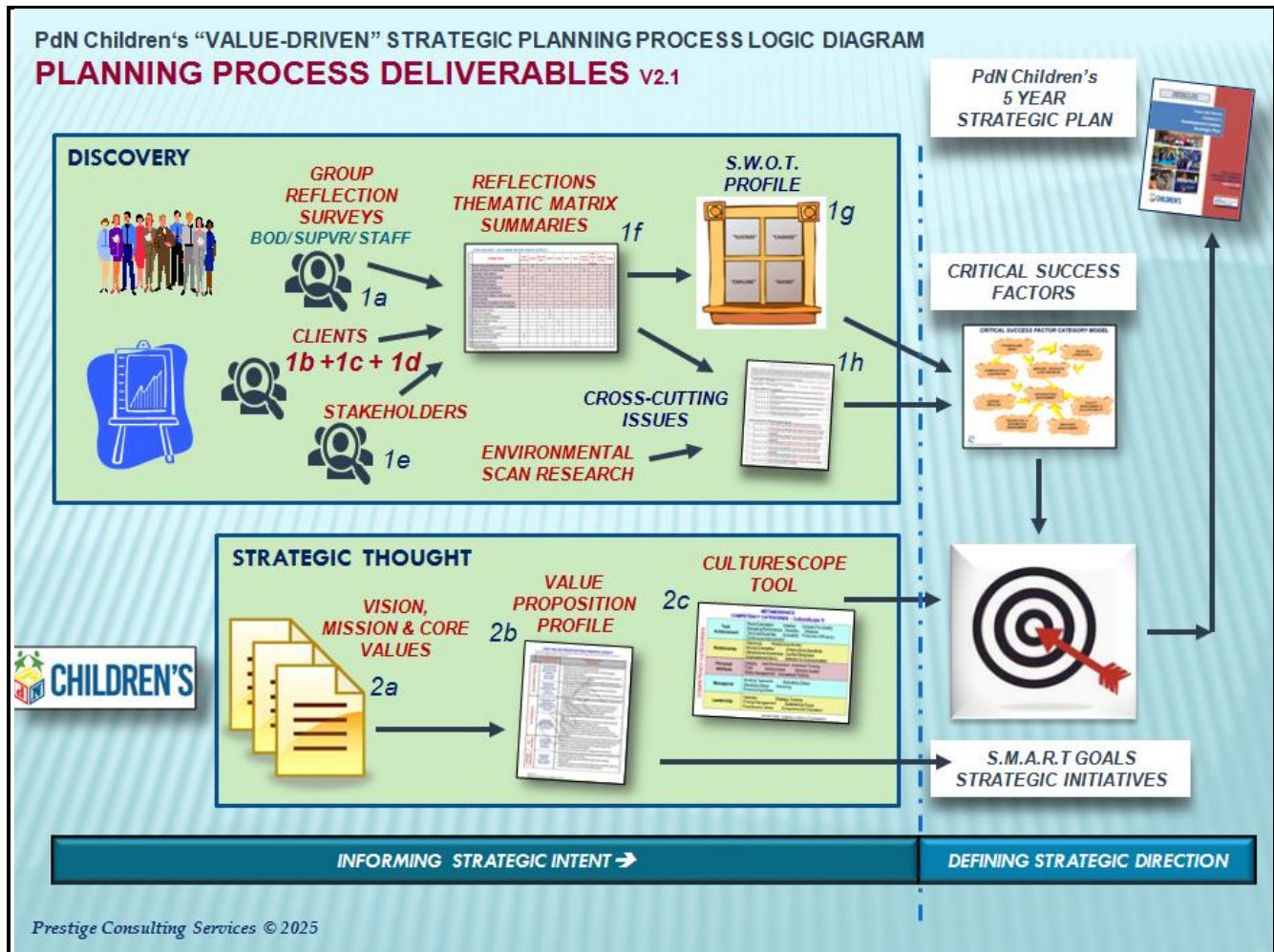
## **PdN Children's STRATEGIC PLANNING STAGES**

The diagram below outlines the stages including key components aligned with the strategic thinking and planning (ST/SP) framework engaged by the PdN Children's team of strategic thinkers



## PdN Children's STRATEGIC PLANNING PROCESS DELIVERABLES

The diagram below highlights the planning process and deliverables derived from the building block of tasks undertaken by the team of strategic thinkers. The process focused on two key thinking and planning drivers: a) informing PdN Children's strategic direction in order to b) define PdN Children's strategic intent.





## **PdN Children's REFLECTION SURVEY RESULTS**

As part of the first stage discovery process, online REFLECTION SURVEYS were conducted with three PdN Children's groups: 1) PdN Children's Board/ Staff/ Supervisors; 2) PdN Children's Clients (i.e., parents, guardians, family/ friends); and, 3) PdN Children's Community Stakeholders (i.e., community advocates, volunteers, service delivery partners). These surveys were conducted as part of the environmental scan to help inform the development of the PdN Children's 5-Year Strategic Plan. The survey analytics methodology is supportive of the innovative strategic planning process reinforcing PdN Children's commitment to providing innovative and high-quality social services with a customer-centric service delivery model.

These survey instruments contributed to the collection of environmental data, input, and recommendations for the development of the PdN Children's strategic intent and direction including informing the definition of the following planning components in the value-driven strategic planning process approach taken by the team of strategic thinkers:

1. *Refinement of the PdN Children's strategic thought and intent including refined mission, vision, and core values statements;*
2. *Development of the PdN Children's value proposition profile (VPP) specific to stakeholders;*
3. *Creation of the profile of strengths, weaknesses, opportunities, and threats (S.W.O.T. profile);*
4. *Identification of key "cross-cutting" issues to be addressed in the strategic planning process;*
5. *Profiling of the key critical success factors (CSFs) key to the PdN Children's future strategic direction; and,*
6. *Definition of an accountability plan for subsequent successful implementation.*

The objective of these reflection surveys is to profile the strengths, challenges, and opportunities via an assessment of current services through stakeholder input and opinion on key areas of significance. The survey included soliciting stakeholder input, comments, or recommendations for PdN Children's to consider in its strategic planning process. The following table outlines the levels of participation from the three groups.

<b>PdN Children's --STRATEGIC PLANNING INITIATIVE REFLECTION SURVEY TALLY</b>		
<b>As of January 20, 2025</b>		
<b>SURVEY GROUP</b>	<b>SURVEYS SUBMITTED</b>	<b>COMMENTS</b>
<b>PdN Children's Board/ Staff/ Supervisor Group</b>	<b>TOTAL = 58</b> <input type="checkbox"/> 8 Board Members <input type="checkbox"/> 35 Staff <input type="checkbox"/> 15 Supervisors	<b>Deadline Nov. 22</b>
<b>PdN Children's Clients</b>	<b>TOTAL = 34</b> <input type="checkbox"/> 28 Parents <input type="checkbox"/> 2 Guardians <input type="checkbox"/> 3 Relatives/ Friends <input type="checkbox"/> 1 Other	<b>Deadline Nov. 27 (Survey #1)</b> <b>Deadline Jan. 10 (Bilingual #2)</b>
<b>PdN Children's Stakeholders</b>	<b>TOTAL = 6</b> <input type="checkbox"/> 4 Advocates <input type="checkbox"/> 1 Volunteer <input type="checkbox"/> 1 Service Delivery Partner	<b>Deadline Nov. 27</b>
<b>TOTAL = 98 Surveys</b>		

The following pages outline the summary reports for each of the three groups surveyed culminating in the development of the THEMATIC MATRIX profile of key themes included in the subsequent strategic thinking and planning discourse.

## **A. BOARD/STAFF/SUPERVISOR REFLECTION SURVEY RESULTS**

### **Board – Supervisors – Staff**

PdN Children's has undertaken a comprehensive reflection from key stakeholders to help inform the development of its 5-Year strategic plan. This summary represents the substantive input from the Board of Directors, Supervisors, and Staff and is part of PdN Children's discipline of understanding the needs, challenges, and opportunities key to defining its future strategic direction. The survey sample size includes a total of 58 responses from the following participant profile:

- ☐ 8 PdN Children's Board of Directors
- ☐ 35 PdN Children's Staff Members
- ☐ 15 PdN Children's Supervisors/ Directors

**A. In its recent history, what do you consider to be the PdN Children's MAJOR SUCCESSES, VALUE AND CONTRIBUTIONS to the community and its stakeholders?**

#### **Major Successes**

##### **1. Program Expansion (16 mentions)**

- New eastside location construction and launch
- Growth of Applied Behavior Analysis (ABA) services
- Implementation of the Help Me Grow Program
- Expansion of pediatric therapy to over 3 years of age
- Addition of feeding clinic services
- Development of ADOS testing capabilities
- Enhancement of hearing screening services
- Creation of Community Resource Center (CRC)

##### **2. Community Impact (12 mentions)**

- Establishment as community leader in special needs services
- Development of comprehensive resource network
- Strong community partnerships
- Increased accessibility to services
- Recognition as trusted provider
- Enhanced community awareness
- Development of parent education programs

##### **3. Quality Service Delivery (8 mentions)**

- Implementation of evidence-based practices
- Development of specialized therapy programs
- Integration of multiple service types
- Family-centered approach
- Culturally competent care
- Professional expertise in specialized areas
- Success in meeting developmental milestones

**B. What do you LIKE BEST about the PdN Children's organization?**

**Best Aspects**

**1. Staff Quality (15 mentions)**

- High level of professional expertise
- Strong commitment to mission
- Passion for helping children
- Longevity of employment
- Professional development focus
- Client-centered approach
- Cultural competency
- Collaborative mindset

**2. Comprehensive Services (12 mentions)**

- Integration of multiple therapy types
- One-stop service model
- Variety of program offerings
- Coordinated care approach
- Family support services
- Resource coordination
- Educational programs
- Early intervention focus

**3. Work Environment (9 mentions)**

- Strong team collaboration
- Open communication channels
- Supportive leadership
- Professional growth opportunities
- Flexible scheduling
- Work-life balance
- Recognition programs
- Inclusive culture

**C. What do you WISH for the PdN Children's future?**

**Future Wishes**

**1. Growth & Expansion (18 mentions)**

- Additional facility locations
- Expanded service capacity
- New program development
- Increased therapy options
- Enhanced community presence
- Greater geographical reach
- Expanded age range coverage
- Additional specialty services

**2. Enhanced Resources (10 mentions)**

- Facility improvements
- Updated equipment
- Technology enhancements
- Additional funding sources
- Increased staffing levels
- Better infrastructure
- Modern therapy tools
- Enhanced training resources

**3. Staff Development (8 mentions)**

- Competitive compensation
- Career advancement opportunities
- Professional certification support
- Leadership development
- Specialized training programs
- Continuing education
- Skill enhancement
- Cross-training opportunities

**D. To what degree do you feel PdN Children's has been FAITHFUL TO ITS VISION, MISSION, AND VALUES? Why?**

**Mission Faithfulness**

**1. Strong Mission Alignment (20 mentions)**

- Consistent focus on children's development
- Family-centered service delivery
- Community needs responsiveness
- Inclusive service approach
- Mission-driven program development
- Values-based decision making
- Long-term commitment to vision
- Stakeholder engagement

**2. Quality Service Focus (8 mentions)**

- Evidence-based practices
- Professional service standards
- Comprehensive care delivery
- Family support integration
- Outcome-focused approach
- Quality monitoring systems
- Service excellence priority
- Client satisfaction focus

**3. Growth Challenges (4 mentions)**

- Resource allocation tensions
- Quality vs. quantity balance
- Staffing constraints impact
- Infrastructure limitations

**E. To what extent does the PdN Children's organizational **CULTURE** promote excellence and deliver value to those we serve? How so?**

**Organizational Culture**

**1. Service Excellence (16 mentions)**

- High professional standards
- Client-centered approach
- Quality service delivery
- Evidence-based practices
- Continuous improvement focus
- Performance accountability
- Service innovation
- Outcome measurement

**2. Employee Support (10 mentions)**

- Professional development opportunities
- Training program access
- Recognition initiatives
- Career advancement paths
- Skill development focus
- Mentorship programs
- Performance feedback
- Growth opportunities

**3. Cultural Values (8 mentions)**

- Inclusive environment
- Cultural competency
- Family-centered approach
- Team collaboration
- Ethical practices
- Diversity appreciation
- Community connection
- Mission-driven culture

**F. How effectively do PdN Children's internal people management skills and practices enable **SOUND LEADERSHIP** at all levels of our organization?**

**Leadership Effectiveness**

**1. Mixed Leadership Assessment (14 mentions)**

- Varied management effectiveness
- Inconsistent communication



- Department coordination challenges
- Decision-making processes
- Leadership style differences
- Accountability variations
- Policy implementation
- Support level differences

**2. Management Support (10 mentions)**

- Accessible leadership
- Clear guidance provision
- Problem-solving assistance
- Resource allocation
- Staff development focus
- Team building efforts
- Performance feedback
- Professional growth support

**3. Development Needs (8 mentions)**

- Leadership training requirements
- Communication improvement needs
- Consistency enhancement
- Management skill development
- Cross-department coordination
- Decision-making processes
- Policy implementation
- Performance management

**G. What should PdN Children's continue to focus and sustain as **STRENGTH(S)** key to its future success? Why?**

**Key Strengths**

**1. Service Quality (15 mentions)**

- Professional expertise
- Evidence-based practices
- Comprehensive care model
- Family-centered approach
- Service integration
- Quality standards
- Outcome focus
- Client satisfaction

**2. Staff Dedication (12 mentions)**

- Professional commitment
- Mission alignment
- Team collaboration

- Service excellence
- Client focus
- Continuous improvement
- Innovation mindset
- Cultural competency

**3. Community Focus (8 mentions)**

- Strong partnerships
- Resource networking
- Community engagement
- Outreach programs
- Stakeholder relationships
- Public awareness
- Service accessibility
- Community education

**H. What **CHANGE(S)** to PdN Children's are needed and warrant attention or rethinking to enable it to realize its future strategic success? Why? How would you suggest this be achieved?**

**Needed Changes**

**1. Staff Support (16 mentions)**

- Competitive compensation
- Professional development
- Work-life balance
- Career advancement
- Training opportunities
- Recognition programs
- Performance feedback
- Resource access

**2. Infrastructure Improvements (12 mentions)**

- Facility updates
- Technology enhancement
- Equipment modernization
- Space optimization
- Resource allocation
- Systems integration
- Process efficiency
- Support services

**3. Communication Enhancement (8 mentions)**

- Internal coordination
- Cross-department collaboration
- Information sharing
- Communication channels

- Meeting effectiveness
- Feedback systems
- Policy communication
- Change management

**I. What new **OPPORTUNITIES** should the PdN Children's explore that will enhance its sphere of influence and ability to accomplish its vision, purpose, and expansion? Why is this key?**

#### **New Opportunities**

**1. Service Expansion (14 mentions)**

- Program development
- Geographic expansion
- Service diversification
- Age range extension
- Specialty services
- Treatment options
- Service integration
- Care coordination

**2. Community Partnerships (10 mentions)**

- Collaboration development
- Resource sharing
- Joint programs
- Community engagement
- Stakeholder relationships
- Service networks
- Educational partnerships
- Research collaboration

**3. Marketing/Outreach (8 mentions)**

- Brand awareness
- Community presence
- Public relations
- Digital marketing
- Social media engagement
- Event participation
- Educational outreach
- Stakeholder communication

**J. What should PdN Children's **AVOID** as it moves forward towards realizing its strategic direction?**

#### **Things to Avoid**

**1. Operational Issues (12 mentions)**

- Resource overextension
- Growth without infrastructure
- Quality compromise
- Process inefficiency

- Planning inadequacy
- Support limitations
- System constraints
- Resource misallocation

**2. Staff Concerns (10 mentions)**

- Employee turnover
- Communication gaps
- Support inadequacy
- Morale issues
- Workload imbalance
- Recognition deficiency
- Development limitations
- Management inconsistency

**3. Mission Drift (8 mentions)**

- Focus deviation
- Value compromise
- Quality reduction
- Resource misalignment
- Priority confusion
- Strategic inconsistency
- Service fragmentation
- Goal displacement

**K. How can the PdN Children's improve its **COMMUNICATIONS AND COLLABORATION** with its stakeholders to enhance its organizational value?**

**Communication Improvement**

**1. Internal Communication (15 mentions)**

- Information sharing effectiveness
- Department coordination
- Message clarity
- Communication channels
- Policy distribution
- Change communication
- Feedback processes
- Meeting efficiency

**2. Collaboration Enhancement (10 mentions)**

- Team coordination
- Cross-functional work
- Project collaboration
- Resource sharing
- Knowledge transfer

- Joint planning
- Integrated services
- Partnership development

**3. Communication Tools (7 mentions)**

- Technology utilization
- Platform integration
- Channel optimization
- System efficiency
- Information access
- Communication methods
- Data sharing
- Resource distribution



## **B. CLIENT REFLECTION SURVEY RESULTS**

Client reflection surveys were distributed to three client stakeholder groups:

1. An initial **Client Reflection Survey #1** was distributed with 8 clients (i.e., all parents) responding online;
2. In an attempt to get more client input, a refined **Client Reflection Survey #2** was developed with some questions deleted and some added. This refined version was translated into Spanish with a QR code made available for respondent convenience. A total of 17 responses were captured online.
3. Using the same refined survey, a total of 9 additional **Client Reflection Survey #3** were filled out via paper documents.

### **B.1 Client Reflection Survey #1 Results**

#### **Clients Group – Survey #1**

This summary represents the substantive input from CLIENTS and is part of PdN Children's discipline of understanding the needs, challenges, and opportunities key to defining its future strategic direction. The survey sample size includes 8 responses from the PdN Children's client community.

#### **Key Statistical Findings**

1. Highest Consensus Themes (>75% agreement):
  - Staff Excellence (100%)
  - Strong Commitment (87.5%)
  - Service Excellence (87.5%)
  - Staff Quality & Approach (87.5%)
2. **Most Common Improvement Areas:**
  - Administrative Improvements
  - Program Expansion
  - Digital Enhancement
3. **Areas with Most Mixed Responses:**
  - Communication Systems
  - Service Experiences
4. **Strongest Positive Attributes:**
  - Staff quality (mentioned positively in all sections)
  - Personal attention to clients
  - Professional expertise

#### **A. What Clients Like Best**

1. **Staff Quality & Approach (7 Mentions)**
  - Patience with kids
  - One-on-one attention
  - Professional expertise
  - Energy and compassion
2. **Communication Systems (3 Mentions)**
  - App effectiveness
  - Check-in/out process
  - General communication
3. **Specific Services (3 Mentions)**
  - ABA therapy quality
  - Speech therapy

## **B. Future Wishes**

1. **Service Expansion (6 Mentions)**
  - More locations
  - Summer camps
  - After-school programs
  - Lunch program
2. **Enhanced Communication (4 Mentions)**
  - More teacher feedback
  - Weekly summaries
  - Regular updates
3. **Resource Development (3 Mentions)**
  - Continued support
  - More information sharing

## **C. Faithfulness to Vision/Mission/Values**

1. **Strong Commitment (7 Mentions)**
  - Exceeding expectations
  - Dedication to children
  - Community service
2. **Service Quality (5 Mentions)**
  - Professional care
  - Meeting individual needs
3. **Mixed Experiences (2 Mentions)**
  - Variation between departments
  - Administrative challenges

## **D. Organizational Culture**

1. **Excellence in Service (7 Mentions)**
  - Personal attention
  - Professional approach
  - Going above and beyond
2. **Family Engagement (5 Mentions)**
  - Family nights
  - Parent involvement
  - Community inclusion
3. **Progress Monitoring (4 Mentions)**
  - Regular updates
  - Achievement tracking

## **E. Strengths to Sustain**

1. **Staff Excellence (8 Mentions)**
  - Professional expertise
  - Dedication
  - Bonds with children
2. **Service Quality (5 Mentions)**
  - Personalized care
  - Consistent quality
3. **Program Structure (3 Mentions)**
  - Daily routines
  - Activity variety

## **F. Changes Needed**

1. **Administrative Improvements (6 Mentions)**
  - Better scheduling systems

- Digital platform needs
- Wait time reduction
- 2. **Staffing Needs (4 Mentions)**
  - More therapists
  - Better coverage
- 3. **Recognition Programs (2 Mentions)**
  - Graduation events
  - Achievement celebrations

#### **G. New Opportunities**

1. **Program Expansion (6 Mentions)**
  - Summer/break camps
  - After-school care
  - Special events
2. **Community Integration (4 Mentions)**
  - Family events
  - Donation drives
  - Social interaction
3. **Parent Support (3 Mentions)**
  - Support groups
  - Educational workshops

#### **H. Things to Avoid**

1. **Quality Concerns (4 Mentions)**
  - Service decline
  - Complacency
2. **Operational Issues (3 Mentions)**
  - Timing delays
  - Communication gaps
3. **No Specific Concerns (3 Mentions)**

#### **I. Communication Improvements**

1. **Digital Enhancement (6 Mentions)**
  - App utilization
  - Online portal
  - Digital updates
2. **Multi-Channel Approach (5 Mentions)**
  - Social media
  - Email/text combination
  - Various platforms
3. **Update Frequency (4 Mentions)**
  - Regular progress reports
  - Consistent updates

## **B.2 Client Reflection Survey #2 Results**

### **Clients Group – Survey #2**

PdN Children's CLIENT surveys include 8 responses in December (see Survey #1) and 17 responses in January using a refined survey instrument. Both survey analytics are correlated below.

#### **Respondent Demographics**

<b>Survey Question</b>	<b>December Survey Responses</b>	<b>January Survey Responses</b>
<b>Survey Client Roles</b>	Parent of Child Served = 8	Parent of Child Served = 13 Guardian of Child Served = 1 Relative of Friend of Child Served = 2 Other = 1
<b>A. Services Received</b>		ABA Therapy = 5 Pediatric Therapy = 2 Community Resource Center = 6 Inclusive Early Learning Center = 2 ECI = 1 Help Me Grow = 1
<b>B. Referral Sources</b>		Doctor's referral = 4 Community Referral = 5 School Reference = 2 Other Individual Referrals = 6
<b>D. ECI Referral Awareness</b>		Does not receive ECI Services = 8 No = 4 Yes = 5

#### **Key Statistical Findings**

<b>Survey Question</b>	<b>December Survey Responses</b>	<b>January Survey Responses</b>
<b>1. Highest Consensus Themes</b>	<ul style="list-style-type: none"> <li>Staff Excellence (8 mentions)</li> <li>Strong Commitment (7 mentions)</li> <li>Service Excellence (7 mentions)</li> <li>Staff Quality &amp; Approach (7 mentions)</li> </ul>	Staff Professionalism & Friendliness (14 mentions) Effective Communications (13 mentions) Service Quality (11 mentions) Therapy Services (10 mentions)
<b>2. Most Common Improvement Areas</b>	<ul style="list-style-type: none"> <li>Administrative Improvements</li> <li>Program Expansion</li> <li>Digital Enhancement</li> </ul>	Scheduling and Availability Location and Accessibility Communication Systems
<b>3. Areas with Most Mixed Responses</b>	<ul style="list-style-type: none"> <li>Communication Systems</li> <li>Service Experiences</li> </ul>	Communication Systems & Practices Service Scheduling Service Expansion/Additional Programs
<b>4. Strongest Positive Attributes</b>	<ul style="list-style-type: none"> <li>Staff Quality (mentioned positively in all sections)</li> <li>Personal Attention To Clients</li> <li>Professional Expertise</li> </ul>	Staff Quality & Professionalism Therapy Service Quality Communication with Parents/Families

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**What Clients Like Best**

Survey Question	December Survey Responses	January Survey Responses
<b>C. What Clients Like Best About The Program</b>	<b>Staff Quality &amp; Approach (7 Mentions)</b> Patience with kids One-on-one attention Professional expertise Energy and compassion <b>Communication Systems (3 Mentions)</b> App effectiveness Check-in/out process General communication <b>Specific Services (3 Mentions)</b> ABA therapy quality Speech therapy	Most frequently mentioned positives are staff professionalism and friendliness (13 Mentions) High satisfaction with therapy service quality (10 Mentions) Positive feedback about communication with families (9 Mentions) Appreciation for personalized attention (8 Mentions) Satisfaction with progress tracking and feedback systems (7 Mentions)

**Future Wishes**

Survey Question	December Survey Responses	January Survey Responses
<b>What Clients Wish For The Program</b>	<b>Service Expansion (6 Mentions)</b> More locations Summer camps After-school programs Lunch program <b>Enhanced Communication (4 Mentions)</b> More teacher feedback Weekly summaries Regular updates <b>Resource Development (3 Mentions)</b> Continued support More information sharing	Not in the January survey.

**Faithfulness to Vision/Mission/Values**

Survey Question	December Survey Responses	January Survey Responses
<b>Degree of Organization's Vision/ Mission Fidelity.</b>	<b>Strong Commitment (7 Mentions)</b> Exceeding expectations Dedication to children Community service <b>Service Quality (5 Mentions)</b> Professional care Meeting individual needs <b>Mixed Experiences (2 Mentions)</b> Variation between departments Administrative challenges	Not in the January survey.



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**Organizational Culture**

Survey Question	December Survey Responses	January Survey Responses
<b>Fostering A Strong Culture</b>	<b>Excellence in Service (7 Mentions)</b> Personal attention Professional approach Going above and beyond <b>Family Engagement (5 Mentions)</b> Family nights Parent involvement Community inclusion <b>Progress Monitoring (4 Mentions)</b> Regular updates Achievement tracking	<b>Not in the January survey.</b>

**Strengths to Sustain**

Survey Question	December Survey Responses	January Survey Responses
<b>Strengths To Sustain</b>	<b>Staff Excellence (8 Mentions)</b> Professional expertise Dedication Bonds with children <b>Service Quality (5 Mentions)</b> Personalized care Consistent quality <b>Program Structure (3 Mentions)</b> Daily routines Activity variety	<b>Staff professionalism and friendliness (12 mentions)</b> <b>Quality of therapy services (9 mentions)</b> <b>Communication and feedback (7 mentions)</b>

**Changes Needed**

Survey Question	December Survey Responses	January Survey Responses
<b>Changes To Be Made</b>	<b>Administrative Improvements (6 Mentions)</b> Better scheduling systems Digital platform needs Wait time reduction <b>Staffing Needs (4 Mentions)</b> More therapists Better coverage <b>Recognition Programs (2 Mentions)</b> Graduation events Achievement celebrations	<b>Scheduling flexibility (6 mentions)</b> <b>Additional locations/accessibility (5 mentions)</b> <b>Expanded services (4 mentions)</b>

**(Continued)**

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**New Opportunities**

<b>Survey Question</b>	<b>December Survey Responses</b>	<b>January Survey Responses</b>
<b>What New Opportunities To Explore</b>	<b>Program Expansion (6 Mentions)</b> Summer/break camps After-school care Special events <b>Community Integration (4 Mentions)</b> Family events Donation drives Social interaction <b>Parent Support (3 Mentions)</b> Support groups Educational workshops	<b>Additional therapy services (7 mentions)</b> <b>Community outreach (5 mentions)</b> <b>Parent education programs (4 mentions)</b>

**Things to Avoid**

<b>Survey Question</b>	<b>December Survey Responses</b>	<b>January Survey Responses</b>
<b>What Things To Avoid</b>	<b>Quality Concerns (4 Mentions)</b> Service decline Complacency <b>Operational Issues (3 Mentions)</b> Timing delays Communication gaps	<b>Reducing service quality (8 mentions)</b> <b>Communication gaps (6 mentions)</b> <b>Staff turnover (4 mentions)</b>

**Communication Improvements**

<b>Survey Question</b>	<b>December Survey Responses</b>	<b>January Survey Responses</b>
<b>Enhancing Communications Effectiveness</b>	<b>Digital Enhancement (6 Mentions)</b> App utilization Online portal Digital updates <b>Multi-Channel Approach (5 Mentions)</b> Social media Email/text combination Various platforms <b>Update Frequency (4 Mentions)</b> Regular progress reports Consistent updates	<b>Regular progress updates (9 mentions)</b> <b>Multiple communication channels (7 mentions)</b> <b>Bilingual services (5 mentions)</b>

## **B.3 Client Reflection Survey #3 Results**

### **Clients Group – Survey #3**

PdN Children's CLIENT surveys include 9 responses in January using a refined survey instrument and submitted via paper. These surveys were submitted post Survey #1 and #2 deadlines, but the analytics are presented below for this sample of 9 surveys.

#### **Respondent Demographics**

<b>Survey Question</b>	<b>January Survey Responses</b>
<b>Survey Client Roles</b>	Parent of Child Served = 7 Guardian of Child Served = 1 Relative of Friend of Child Served = 1
<b>A. Services Received</b>	ABA Therapy = 4 Pediatric Therapy = 5
<b>B. Referral Sources</b>	Therapist Referral = 4 Doctor's referral = 3 Community Referral = 1 Other Individual Referrals = 1
<b>D. ECI Referral Awareness</b>	Does not receive ECI Services = 6 No = 2 Yes = 1

#### **Likes/Strengths:**

- Staff/Therapists Expertise & Approach (4 mentions)
- Quality of Service (2 mentions)
- Care Quality (1 mention)

#### **Suggested Changes:**

- Staff-related (2 mentions)
- Communication (1 mention)
- Quality of Service (1 mention)

#### **Opportunities:**

- More family/ parent opportunities for community involvement (2 mentions)
- Accessibility (1 mention)
- Kids meeting other kids (1 mention)
- Access to having better therapy resources (1 mention)

#### **Things to Avoid:**

- Communication issues (1 mention)
- Not tracking progress (1 mention)

#### **Communication Improvements:**

- Communication methods/systems (4 mentions)
- Staff interactions (1 mention)
- Service quality (1 mention)

## **C. STAKEHOLDERS REFLECTION SURVEY RESULTS**

### **Stakeholder Group**

PdN Children's CLIENT surveys include 6 responses in December using an online reflection survey instrument. The analytics are presented below for this sample of 6 surveys.

#### **Top Thematic Findings**

- 1. Highest Consensus Areas (>65%):**
  - Mission faithfulness (100%)
  - Service expansion desires (83%)
  - Quality service delivery (67%)
  - Partnership development (67%)
  - Marketing enhancement needs (67%)
- 2. Major Improvement Areas:**
  - Community visibility
  - Geographic expansion
  - Partnership development
  - Communication strategies
- 3. Notable Strengths:**
  - Mission alignment
  - Service quality
  - Staff dedication
  - Community responsiveness
- 4. Primary Concerns:**
  - Organizational overextension
  - Staff well-being
  - Community awareness

#### **A. What Stakeholders Like Best**

- 1. Quality Service Delivery (4 Mentions)**
  - Quality care for children with disabilities
  - Growing service offerings
  - Necessary community service
- 2. Organizational Values (2 Mentions)**
  - Equity and inclusivity
  - Mission-driven approach

#### **B. Future Wishes**

- 1. Service Expansion (5 Mentions)**
  - Geographic expansion
  - Expanded service offerings
  - Increased reach
- 2. Community Partnership (2 Mentions)**
  - Enhanced collaboration
  - Organizational partnerships

#### **C. Faithfulness to Vision/Mission/Values**

- 1. Strong Mission Alignment (6 Mentions)**
  - Consistent service delivery
  - Mission-driven approach
  - Demonstrated through actions
- 2. Needs Identification (3 Mentions)**
  - Proactive problem-solving

- Community responsiveness

#### **D. Organizational Culture**

- 1. Staff Quality and Dedication (4 Mentions)**
  - Caring employees
  - Heart-driven service
  - Supportive leadership
- 2. Service Excellence (3 Mentions)**
  - Quality delivery
  - Customer service focus
- 3. Community Engagement (2 Mentions)**
  - Collaborative experiences
  - Inclusive approach

#### **E. Strengths to Sustain**

- 1. Service Quality (4 Mentions)**
  - Core services
  - Program effectiveness
- 2. Staff Investment (3 Mentions)**
  - Employee support
  - Internal culture
- 3. Revenue Diversification (2 Mentions)**
  - Sustainable programs
  - Diverse funding streams

#### **F. Changes Needed**

- 1. Visibility Enhancement (3 Mentions)**
  - Community awareness
  - Marketing presence
- 2. No Changes Needed (2 Mentions)**
- 3. Measurement Systems (1 Mention)**
  - Internal benchmarks
  - Progress tracking

#### **G. New Opportunities**

- 1. Partnership Development (4 Mentions)**
  - Community collaborations
  - Academic institutions
  - School partnerships
- 2. Service Expansion (3 Mentions)**
  - Geographic reach
  - Program offerings
- 3. Impact Measurement (2 Mentions)**
  - Results tracking
  - Efficacy demonstration

#### **H. Things to Avoid**

- 1. Organizational Focus (3 Mentions)**
  - Avoiding overextension
  - Maintaining core mission
- 2. Employee Care (2 Mentions)**
  - Staff well-being
  - Internal support
- 3. Political Bias (1 Mention)**

## **I. Communication Improvements**

### **1. Marketing Enhancement (4 Mentions)**

- Increased visibility
- Promotional campaigns
- Social media presence

### **2. Community Events (3 Mentions)**

- Collaborative events
- Partnership activities

### **3. Digital Communication (2 Mentions)**

- Newsletters
- Online presence

## ***PdN Children's THEMATIC MATRIX***

Using the comprehensive input from the REFLECTION SURVEYs, the following major themes surfaced as key components to be considered in the strategic thinking and planning process.

REFLECTION SURVEY

THEMATIC MATRIX SUMMARY

PdN Children's QUESTIONNAIRE RESPONSE THEMATIC MATRIX V1.5														November 2024		Board, Staff and Supervisors						
Cross-Cutting #	#	Strategic Theme		MAJOR SUCCESSES	LIKE BEST	WHAT WE WISH	FAITHFUL TO VISION	CULTURE	LEADERSHIP	SUSTAIN	CHANGE	EXPLORE	AVOID	COMMUN. / COLLAB.	TOTAL							
A	1	Expanded Impact/Growth of Quality Programs and Comprehensive Services		16	12	18				15		14			75							
B	4	Continued Focus on Service Quality and Innovation Tied To Mission		8			28	16					8		60							
C	5	Leadership Effectiveness & People Management Support Systems						10	24						34							
D	2	Quality Staff Talent With Strong Competencies & Staff Development													31							
C	7	A Workplace Culture Embracing Teamwork, Excellence, Value, & Respect												10	31							
E	16	Internal & External Communications Effectiveness (Social Media)												22	30							
F	12	Resources, Facilities, Space and Infrastructure Capacity With Expansion													8							
E	3	Expanded Community Outreach/Advocacy Building Strong Regional Recognition													0							
D	18	Staff Wellness, Compensation and Support													0							
E	6	PdN Children's Becoming a Greater Force in the Community/Region													0							
F	9	Attraction of Sustained Funding and Resources (Grants)													0							
E	8	Increased Significant Partnerships With Reciprocal Relationships													0							
F	17	Organizational Planning, Program Structure and Operational Issues													0							
B	13	Development of Continuous Improvement Mindset and Discipline													0							



## **PdN Children's S.W.O.T. PROFILE**

The following SWOT Profile was derived from the REFLECTION SURVEY input provided by the team of strategic thinkers.

<p align="center"><b>PdN Children's Development Center Strategic Planning</b>  <b>SWOT WINDOW PROFILE</b>  December 2024 Version 1.00</p>	
<p align="center"><b>STRENGTHS</b>  <i>"what should we sustain?"</i></p> <ul style="list-style-type: none"> <li>▪ Reputation/ legacy of service, care and voice for children with special needs as recognized by the community</li> <li>▪ Dedicated professional staff committed to its mission of service excellence</li> <li>▪ Strong, sustained staff retention</li> <li>▪ Evidence-based integrated service delivery with a client and family centered approach and practices</li> <li>▪ Comprehensive care model with outcome focused standards and accessible services</li> <li>▪ An organizational culture fostering a collaborative, team-oriented work environment enabled with servant leadership</li> <li>▪ Sustained mindset of self-development, continuous improvement and innovation</li> <li>▪ Strong community partnerships, relationships, and education with engaged stakeholders</li> <li>▪ Effective outreach and public awareness of the PdN value proposition</li> <li>▪ Commitment to staff development aligned to cultural norms and competencies</li> </ul>	<p align="center"><b>WEAKNESSES / NEEDS</b>  <i>"what should we change or address?"</i></p> <ul style="list-style-type: none"> <li>▪ Need for enhanced staff support with competitive compensation</li> <li>▪ Increase staff opportunities for professional development, career advancement, training, and access to resources</li> <li>▪ Bring improved work-life and workload balance</li> <li>▪ Formalize performance feedback systems supported with improved recognition programs</li> <li>▪ Need for more effective internal inter- and –intra departmental communications</li> <li>▪ Need for more infrastructure improvements including facilities, space optimization, equipment modernization, and technology, etc. to fill functional and growing needs</li> <li>▪ Improve systems integration leading to process efficiency</li> <li>▪ Enhance internal coordination with cross-departmental collaboration facilitating information sharing</li> <li>▪ Need for improved management and staff communication channels with improved meeting effectiveness, policy communications, and consistent feedback</li> <li>▪ Introduce more formal change management needed</li> </ul>
<p align="center"><b>OPPORTUNITIES</b>  <i>"what should we explore?"</i></p> <ul style="list-style-type: none"> <li>▪ Care coordination with service integration and diversification focus</li> <li>▪ Program development with specialty services and treatment options</li> <li>▪ Age range service extension</li> <li>▪ Service geographic expansion</li> <li>▪ Community partnerships nurturing stakeholder relationships and increased community engagement</li> <li>▪ Partnerships focused on education and research</li> <li>▪ Development of collaborative service networks with resource sharing of joint programs</li> <li>▪ Leveraged digital marketing and social media channels</li> <li>▪ Enhanced brand awareness with stronger public relations program</li> <li>▪ Increased community presence with expanded event participation, educational outreach, and stakeholder communication</li> <li>▪ Expanded focus on staff development and leadership development</li> <li>▪ Sustained return on investments with internal continuous process improvements</li> </ul>	<p align="center"><b>THREATS</b>  <i>"what should we avoid?"</i></p> <ul style="list-style-type: none"> <li>▪ Not addressing operational issues that contribute to process inefficiency, system constraints, compromise to quality, or service fragmentation</li> <li>▪ Allowing resource overextension or misallocation for growth without sufficient infrastructure</li> <li>▪ Inadequate or untimely planning leading to support limitations</li> <li>▪ Not addressing staff concerns that lead to employee turnover, morale issues, etc.</li> <li>▪ Staff support inadequacies leading to workload imbalance</li> <li>▪ Not addressing communication gaps at all levels</li> <li>▪ Inconsistent management performance feedback coupled with deficient recognition</li> <li>▪ Placing obstacles to ensuring effective staff development</li> <li>▪ Allowing mission drift and focus away from strategic goals and intent</li> <li>▪ Making value compromises that reduce service quality and excellence</li> <li>▪ Strategic inconsistency producing priority confusion</li> </ul>

Prepared by Prestige Consulting Services



## PdN Children's "CROSS-CUTTING" ISSUES

As a result of the collective stakeholder input from the reflection surveys, as well as, the results of the analytics presented in the Thematic Matrix, the Strategic Planning Team (SPC) identified the following key issues, opportunities, and/or challenges to be considered in the strategic planning process. These were then converted to critical success factors that were part of the overarching goal definition process.

### KEY PdN Children's "CROSS-CUTTING" ISSUES – PIVOT POINTS

- D. Building on its 75+ year legacy of delivering value to children and their families, PdN Children's must sustain its practice of attracting, retaining, and developing QUALITY STAFF TALENT with strong competencies and commitment to deliver value to children and their families resulting in IMPROVED STAFF WELLNESS, COMPENSATION, SUPPORT, AND SUSTAINED MORALE. (9 Votes)
- F. Need to attract SUSTAINED FUNDING AND RESOURCES to invest in IMPROVED INFRASTRUCTURE (i.e., additional resources, facilities, space, enhanced service delivery model, talent, partnerships, etc.) This will enable the building of LONG-TERM INTERNAL CAPACITY that is realistic, planned, sustainable and supportive of PdN Children's staff and their service operational needs. (9 Votes)
- C. Need to rethink, develop, and practice stronger PdN Children's SERVANT LEADERSHIP AND PEOPLE MANAGEMENT EFFECTIVENESS cemented with a RICH PDN Children's CULTURE that embraces change, teamwork, excellence, value and respect. (8 Votes)
- B. Must ensure PdN Children's CONTINUED FOCUS ON SERVICE QUALITY (vs. quantity) AND INNOVATION aligned with its mission and strategic intent. This includes sustaining a CONTINUOUS IMPROVEMENT MINDSET AND DISCIPLINE embraced by a system-wide commitment to an outcome-based programmatic assessment process fostering improvements. (6 Votes)
- E. As part of its growth strategy, the need to increase PdN Children's influence as a GREATER FORCE IN THE REGION. This includes the need for EXPANDED OUTREACH AND ADVOCACY with an effective internal/external communications system resulting in building strong recognition of PdN Children's value through increased COLLABORATIVE PARTNERSHIPS AND STAKEHOLDERS. (5 Votes)
- A. Desire and need for EXPANDED IMPACT AND GROWTH OF QUALITY PdN Children's PROGRAMS AND COMPREHENSIVE SERVICES (both current and new) continuously serving the needs of children with its strong family inclusion focus. (2 Votes)

WHAT IS CRITICAL FOR SUCCESS?  
WHAT ARE THE PRIORITIES?

## **“WHAT DO YOU VALUE MOST IN OTHERS?”**

The team of strategic thinkers reflected on what they value most about PdN Children's players.

### **WHAT WE VALUE IN OTHERS.....**



- **HONESTY ✓**
- **PATIENCE**
- **TRANSPARENCY**
- **HARDWORK**
- **EFFORT**
- **INTEGRITY**
- **EMPATHY**
- **ACHIEVEMENT**
- **EFFECTIVE COMMUNICATIONS (Listening)**
- **LOVE AND PASSION**
- **PERSISTENCE**
- **DEDICATION**



## **THE PdN Children's "NEW" SHARED VISION, MISSION, & CORE VALUES**

The team of strategic thinkers reviewed and refined the following vision statement, mission statement, and core value statements.

<b>VISION</b>	<i><b>PdN Children's – contributing to an inclusive world for all to flourish.</b></i>	<b>MISSION</b>	<i><b>PdN Children's purpose is to develop the full potential of children with a full range of abilities and needs recognizing their talents and differences.</b></i>
<b>CORE VALUES</b>	<p>We believe in...</p> <div> <input type="checkbox"/> Our Clients         <input type="checkbox"/> Financial Stewardship       </div> <div> <input type="checkbox"/> Acceptance and Appreciation         <input type="checkbox"/> Delivering Quality Service Value       </div> <div> <input type="checkbox"/> Being Change Agents         <input type="checkbox"/> The Family As Essential Part of the Team       </div> <div> <input type="checkbox"/> A Customized Care Work Culture         <input type="checkbox"/> Ethical Standards       </div>		
<b>VALUE PROPOSITIONS</b>	<div> <input type="checkbox"/> TRANSFORMING CHILDREN'S DEVELOPMENT THROUGH INNOVATIVE SERVICES         <input type="checkbox"/> SUSTAINING CLIENT ENGAGEMENT &amp; SATISFACTION WITH THEIR SERVICE EXPERIENCE         <input type="checkbox"/> LEVERAGING STAFF EXPERTISE &amp; DEDICATION TO POSITIVELY IMPACT CLIENT QUALITY OF LIVES         <input type="checkbox"/> SUSTAINING ORGANIZATIONAL EXCELLENCE AND LEADERSHIP         <input type="checkbox"/> CEMENTING COLLABORATIVE RELATIONSHIPS SHARING TALENT, EXPERTISE AND RESOURCES         <input type="checkbox"/> COMMUNITY RECOGNIZING PdN Children's AS A PROVEN LEADER AND COMMUNITY TREASURE       </div>		



## INTERPRETATION OF PdN Children's CORE VALUES

### INTERPRETATION OF PdN Children's CORE VALUES

*The following descriptions further amplify the meaning of each core value:*

#### We believe in...

<input type="checkbox"/> Our Clients	Treating our clients with respect and dignity.
<input type="checkbox"/> Acceptance and Appreciation	Advocating as community leaders by acting as the driving force for innovation and a higher quality of life.
<input type="checkbox"/> Being Change Agents	Continuously identifying new services and ways to support our children and families meeting them where they are in their journey for growth.
<input type="checkbox"/> A Customized Care Work Culture	Ensuring that every decision and interaction follows the strictest and highest expectation in ethics, rule, and regulation with regard to the work we pursue each day. Our positive work environment and culture translates to impactful care.
<input type="checkbox"/> Financial Stewardship	Embracing the financial stewardship of every dollar and resource we receive with a donor-driven philosophy of financial compliance as well as gratitude.
<input type="checkbox"/> Delivering Quality Service Value	Delivering quality client service value is enabled with an energized, passionate, and competent team of staff, Board, partners, and volunteers.
<input type="checkbox"/> The Family As Key Team Player	The timely engaging of family members in the PdN Children's care delivered is essential for their children's effective development.
<input type="checkbox"/> Ethical Standards	Delivering all PdN Children's services, operations, and organizational decision-making with the non-negotiation practice of ethical standards in everything we do.

Version 1.1



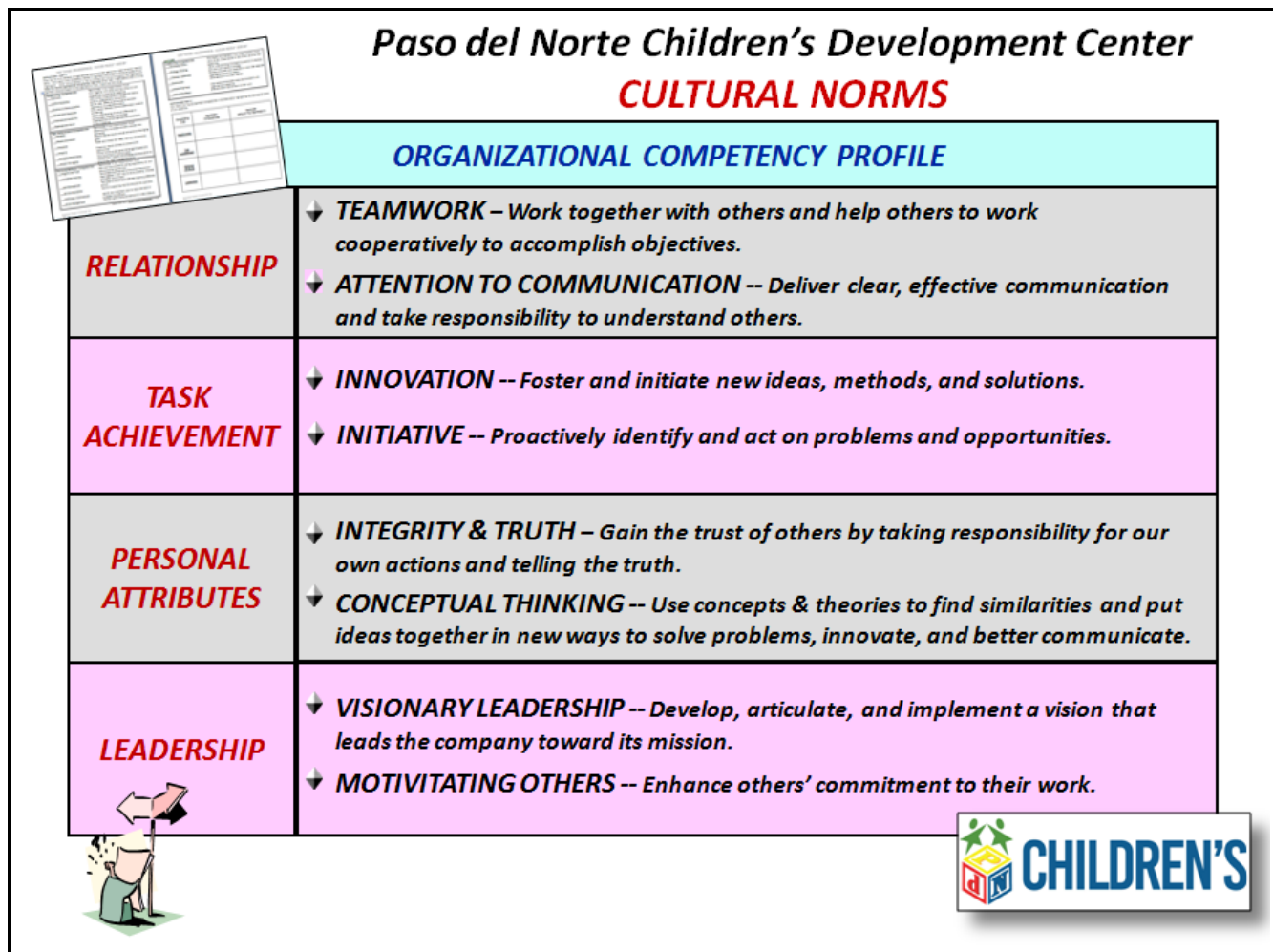
## **THE PdN Children's VALUE PROPOSITION PROFILE**

This Value Proposition Profile (VPP) was developed using key information and input provided by the PdN Children's staff and team of strategic thinkers.

Stakeholder Group	VALUE PROPOSITION SUMMARY AREA	CONTRIBUTING VALUE PROPOSITIONS
<b>PdN CHILDREN &amp; FAMILIES</b>	<b>TRANSFORMING CHILDREN'S DEVELOPMENT THROUGH INNOVATIVE SERVICES</b>	<ul style="list-style-type: none"> <li>Sustained positive impact serving the special needs of children with continuously improved portfolio of PdN Children's comprehensive programs and services</li> <li>Excellence in family-based portfolio of quality services with particular concern for those underserved or underrepresented in the community</li> <li>Expert professional care delivered in an atmosphere of teamwork, excellence, collaboration and respect</li> <li>Effective and efficient service delivery model with a holistic approach supported with a strong case management framework</li> </ul>
	<b>SUSTAINING CLIENTS/ FAMILIES ENGAGEMENT &amp; SATISFACTION WITH THEIR SERVICE EXPERIENCE</b>	<ul style="list-style-type: none"> <li>Family friendly, welcoming environment supported with flexible, adaptable, and value-enriched services</li> <li>Consistent focus on a family-inclusion strategy to enhance service effectiveness</li> <li>Streamlined and consistent client access to innovative, affordable, and continuous programs and services resulting in sustained client satisfaction and loyalty</li> <li>PdN Children's clients embracing their role and responsibility for improving the development and well-being of their children and those that care for them</li> </ul>
<b>PdN Children's STAFF</b>	<b>LEVERAGING STAFF EXPERTISE &amp; DEDICATION TO POSITIVELY IMPACT CLIENT QUALITY OF LIVES</b>	<ul style="list-style-type: none"> <li>Great, positive working environment conducive to the successful performance, safety, and growth of PdN Children's employees</li> <li>Sustained positive employee morale, motivation and teamwork to serve</li> <li>Nurtured team-based approach with client-centric service focus</li> <li>Increased capacity and competency across the organization by attracting, retaining, and developing the best talent</li> <li>Evidence of achieved service sustainability with prudent funding and resource commitments aligned with community needs</li> </ul>
	<b>SUSTAINING ORGANIZATIONAL EXCELLENCE AND LEADERSHIP</b>	<ul style="list-style-type: none"> <li>Staff dedication and fidelity to PdN Children's vision and mission and with a strong servant leadership approach</li> <li>Demonstrated commitment and a genuine willingness to adapt in taking on the challenges that address the needs of PdN Children's clients and families</li> <li>Nurturing the organizational culture of making a difference, moving forward, and refusing to turn anyone away</li> <li>Leveraging industry best practices and technology with innovative applications to deliver efficient and cost-effective services</li> <li>Sustained organizational focus of continuous improvement with evidence-based best practices and standard-driven accountability</li> </ul>
<b>PdN Children's PARTNERS</b>	<b>COLLABORATIVE RELATIONSHIPS SHARING TALENT, EXPERTISE AND RESOURCES</b>	<ul style="list-style-type: none"> <li>Reliable partner relationships with other agencies leading to expanded service opportunities and sharing of resources and expertise</li> <li>Collaboration with community partners expanding additional access and added-value for PdN Children's clients impacting quality of lives</li> <li>Adaptation of proven partnership research and professional best-practices in delivering innovative and cost-effective programs</li> <li>Expanded donor engagement program expanding the value to those served</li> <li>Partnership awareness of the PdN Children's value optimizing service delivery</li> </ul>
<b>REGIONAL COMMUNITY</b>	<b>COMMUNITY RECOGNIZING PdN Children's AS A PROVEN LEADER AND COMMUNITY TREASURE</b>	<ul style="list-style-type: none"> <li>Voice in the region for significantly improving the well-being and quality of lives for the children and families with special needs</li> <li>Increased community awareness of PdN Children's valued services with strong branding and aggressive marketing of the center's value</li> <li>Collaboration with civic and political leadership to positively impact the quality of lives in the entire region</li> <li>Recognition of PdN Children's leadership role in addressing regional client challenges and needs with creative, cost-effective services</li> <li>Contributions to building trust with the community given its 75+ year legacy of sustained community support and collaboration</li> </ul>

# THE PdN Children's ORGANIZATIONAL COMPETENCY PROFILE

The team was asked to prioritize the key organizational competencies using the CultureScope tool as it implements the new strategic plan.



## **PdN Children's CRITICAL SUCCESS FACTORS (CSFs)**

Critical success factors (CSFs) were defined as important to the transformation and future success of the organization. These areas were categorized and prioritized into the major themes of CSF domain categories and used to define the Overarching strategic goals.

<b>CRITICAL SUCCESS FACTORS</b>	<b>Votes</b>	<b>Domain Category</b>
1. We must sustain PdN Children's practice of attracting, retaining, and developing quality staff talent with improved staff wellness, compensation, support, and sustained morale in order to <b>deliver VALUE to children and their families underscored with strong staff competencies and commitment.</b>	10	Resource Management
2. We must attract sustained funding and resources to invest in improved infrastructure in order to <b>build long-term internal capacity that is realistic, planned, sustainable and supportive of PdN Children's staff and their service operational needs.</b>	12	Funding & Resources
3. We must rethink, develop, and practice stronger PdN Children's servant leadership and people management effectiveness in order to <b>cement a rich PdN Children's culture that embraces change, teamwork, excellence, value and respect.</b>	2	Organizational Management
4. We must sustain a continuous improvement mindset and discipline embraced by a system-wide commitment to outcome-based programmatic assessment in order to <b>ensure PdN Children's continued focus on service quality and innovation aligned with its mission and strategic intent.</b>	4	Quality Management & Accountability
5. As part of our growth strategy, we must <b>expand outreach and advocacy with an effective internal/ external communications system</b> in order to <b>increase PdN Children's influence as a greater force in the region that recognizes PdN Children's value driving increased partnerships and collaborative stakeholders.</b>	11	Communications/ Marketing
6. We must <b>expand the impact and growth of quality PdN Children's programs and comprehensive services (both current and new) in order to continuously serve the needs of children with PdN Children's strong family inclusion focus.</b>	7	Services/ Products/ Deliverables
7. We must <b>listen to our clients and stakeholders in order to evolve into what is relevant and meaningful to them.</b>	4	Stakeholder Needs
8. We must <b>support our community and public efforts by participating in community initiatives, meetings, and trainings in order to build relevance with and among the community and beyond our walls.</b>	3	Stakeholder Needs

(Continued)

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<b>CRITICAL SUCCESS FACTORS</b>	<b>Votes</b>	<b>Domain Category</b>
9. We must <b>stay ahead in technology</b> , especially with IT, <b>in order</b> to <b>better serve the stakeholders productively and efficiently.</b>	<b>4</b>	<b>Technology &amp; Information Management</b>
10. We must <b>continuously evaluate</b> what we are delivering <b>in order</b> to <b>stay ahead and change/ adapt to meet future demands.</b>  <b>NOTE: Similar theme as CSF #11</b>	<b>8</b>	<b>Services/ Products/ Deliverables</b>
11. We must <b>increase our ability to adapt and compete with new offerings</b> <b>in order</b> to <b>stay competitive and current.</b>  <b>NOTE: Similar theme as CSF #10</b>	<b>See #10</b>	<b>Services/ Products/ Deliverables</b>



## **CRITICAL SUCCESS FACTOR SUMMARY PROFILE**

Critical success factors (CSF) selected by the team of strategic thinkers as high priority are bolded and shaded. The subscript represents the number of votes. Similar themes were combined.

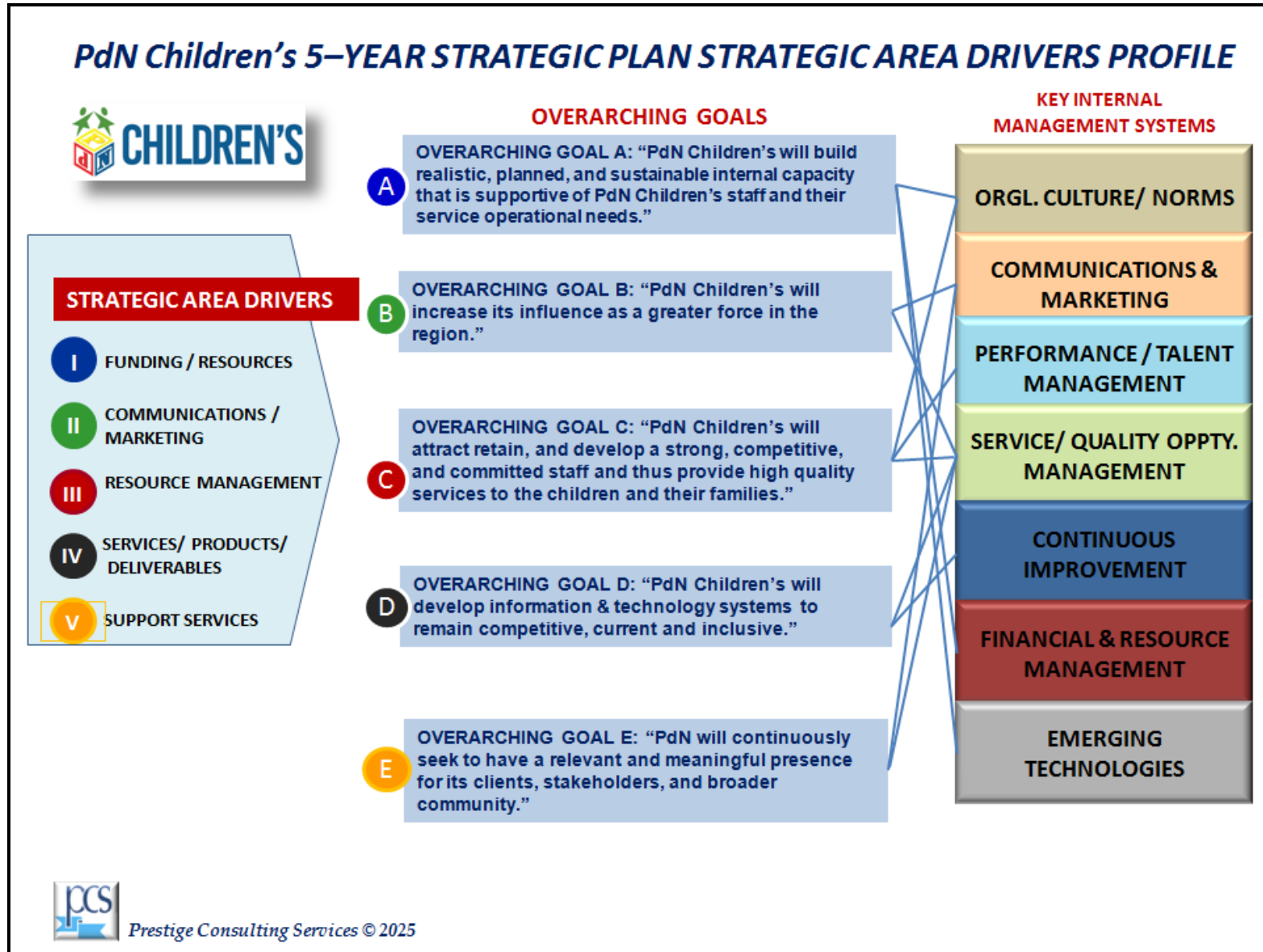
<b>KEY STRATEGIC AREAS</b>	<b>CSF #</b>
<b><i>I. FUNDING RESOURCES</i></b>	<b>2<sub>12</sub></b>
<b><i>II. COMMUNICATIONS/ MARKETING</i></b>	<b>5<sub>11</sub></b>
<b><i>III. RESOURCE MANAGEMENT</i></b>	<b>1<sub>10</sub></b>
<b><i>IV. SERVICES/ PRODUCTS/ DELIVERABLES</i></b>	<b>6<sub>7</sub> 10&amp;11<sub>8</sub></b>
<b><i>V. STAKEHOLDER NEEDS</i></b>	<b>7<sub>4</sub> 8<sub>3</sub></b>
<b><i>VI. QUALITY MANAGEMENT/ ACCOUNTABILITY</i></b>	<b>4<sub>4</sub></b>
<b><i>VII. TECHNOLOGY/ INFORMATION MANAGEMENT</i></b>	<b>9<sub>4</sub></b>
<b><i>VIII. ORGANIZATION MANAGEMENT</i></b>	<b>3<sub>2</sub></b>

## ***PdN Children's OVERARCHING GOALS SUMMARY***

	<p><b>OVERARCHING GOAL A:</b> “PdN Children’s will build realistic, planned, and sustainable internal capacity that is supportive of PdN Children’s staff and their service operational needs.”</p> <p><b>Strategic Intent:</b> Attraction of sustained funding and resources to invest in improved infrastructure.</p>
	<p><b>OVERARCHING GOAL B:</b> “PdN Children’s will increase its influence as a greater force in the region that recognizes PdN Children’s value.”</p> <p><b>Strategic Intent:</b> Expanded outreach and advocacy with an effective internal/ external communications system that fosters partnerships and collaboration.</p>
	<p><b>OVERARCHING GOAL C:</b> “PdN Children’s will deliver VALUE to children and their families attracting, retaining, and developing a strong, competent, and committed staff.”</p> <p><b>Strategic Intent:</b> Investments in improved staff wellness, compensation, support, and sustained morale.</p>
	<p><b>OVERARCHING GOAL D:</b> “PdN Children’s will remain competitive, current, and inclusive in continuously serving the changing needs of children and families.”</p> <p><b>Strategic Intent:</b> Expansion and evaluation of the impact, growth, and quality of all PdN Children’s programs and services.</p>
	<p><b>OVERARCHING GOAL E:</b> “PdN Children’s will evolve into what is relevant and meaningful to its clients, stakeholders, and the community.”</p> <p><b>Strategic Intent:</b> Listening and supporting beyond our walls our community with engagement in public effort initiatives, meetings, and trainings.</p>



## PdN Children's STRATEGIC AREA DRIVERS PROFILE



## **STRATEGIC KPI'S AND OBJECTIVES FOR OVERARCHING GOALS**

**OVERARCHING GOAL A: PdN Children's will build realistic, planned and sustainable internal capacity that is supportive of PdN Children's staff and their service operational needs.**

*Strategic Intent: Attraction of sustained funding and resources to invest in improved infrastructure and operational needs*

Functional Owner – CEO, COO, Communications and Development Office, Billing Office

**KPI:**

**A-1 Funding**

A.1.0. PdN Children's will demonstrate marked improvements by closing measuring annual revenues by type to include developing annual revenue and fund development plans that include measuring the following SMART objectives;

A.1.0.1 Revenue Plan – An annual revenue plan will be developed in conjunction with the annual budget. The 2026 budget will establish baseline funding for all agency programs and administrative needs. Revenue plans will be developed to fully fund all needs and generate a 3% to 5% overall increase in agency revenue, annually, which will be used to calculate the development of next year's annual budget. Achievement will be measured with the development of the succeeding year's budget.

A.1.0.1.2 Fund Development Plan – As a function of the revenue plan, the Fund Development Plan will be created prior to annual budget and utilize the previous year's revenue plan in order to support the agency growth identified in A.1.0.1. The Fund Development Plan will include measures to track grants, donor contributions, event revenue and other fund development efforts that are identified with each annual Fund Development Plan. The following objectives and KPI's are:

Government & Private Contractual Sources – Annually achieve full funding for all programs receiving contractual government and primary private foundation funding (ECI, Autism Services Grant, CRC & HMG, etc.,)

Programmatic Grant Writing for Supportive Funding- Annually achieve full funding from sources that have funded PdN Children's programs continuously over the past 3-years (at-least). Increase funding by securing new private foundation funding with the goal of achieving \$150,000 in funding by the end of FY-26 and increasing by 3% to 5% annually for the life of the strategic plan.

Donor and Individual Contributions – Annual Donor contributions are Major Gift donors, whereas individual contributions are gifts of any monetary value coming from the general community, such as El Paso Giving Day and other efforts, solicited or unsolicited. For FY 26, the Center will succeed with securing 3 to 5 major gift donors who collectively contribute at-least \$75,000 and raising another \$25,000 from individual donors. PdN Children's will increase the number

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of major donors and individual donors at a rate that by FY 2030, fund development plans shall achieve \$350,000 to \$500,000 from total fund development efforts.

Planned Giving and Legacy Gifts – The Center will establish planned giving agreements with 1 to 2 donors annually and secure a minimum of 6 legacy gifts by the conclusion of this strategic plan.

An annual Fundraising Event strategy will be created to support fund development efforts towards annual budgetary goals that ensures a return on investment of at least 45%.

**A.2 Billing Efficiency**

A.2.0 Enhanced Billing System improvements shall be implemented by the end of the 2<sup>nd</sup> quarter of FY26. The CFO in partnership with the Billing Department will identify a baseline of parameters to be put in place for the implementation of improvements. The parameters will include the negotiation of efficient authorization methods and rates. The improvements will result with:

A.2.0.1 A 10% annual decrease in write-offs to be measured in agency financials and annual budget for the life of this strategic plan

A.2.0.2 Increase collections to achieve an annual collection rate of 70% up from the current 60% rate to be achieved in the 3<sup>rd</sup> quarter of FY26 and to be sustained or increased for the life of the strategic plan.

A.3 Program Evaluation Model – In order to ensure agency relevance; achieve the greatest returns on program investment; effectively adapt and improve existing programs; make informed decisions regarding program longevity; and avoid future discontinuance of funding, the CEO, COO and program staff will annually lead at least one full program evaluation. In the first quarter of FY26, the Executive Team will identify a program for evaluation and complete the evaluation in the 3<sup>rd</sup> quarter of the fiscal year. This process will be repeated annually for the duration of this strategic plan.

A.4 Infrastructure Adequacy Stakeholder Satisfaction – It is important that agency infrastructure is improved and maintained to ensure PdN Children's facilities are always adequate to deliver all services. Infrastructure to be evaluated will include facilities, technology systems, security systems and other infrastructure. Commencing with the adoption of this strategic plan, administration will identify different infrastructure to be regularly evaluated and develop a survey method to gain stakeholder feedback. It is the goal to achieve a minimum 80% positive feedback from the surveys and maintain that level through the duration of the plan. Should surveys fall below the 80% minimum, agency administration will use the surveys to identify weaknesses and subject to financial capacity, correct weaknesses in order to sustain the 80% established goals. The following will apply:

Staff will be surveyed at the end of each fiscal year, and it is the goal of the agency to achieve 80% satisfaction.

Clients will be surveyed bi-annually commencing with the development of the survey document and it is the goal to achieve 80% satisfaction.

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- A.5 Program Utilization Adequacy – Assess annual stakeholder satisfaction level with program utilization. Effective with the implementation of this plan and no later than October, 2025, all programs will implement satisfaction surveys to establish a baseline data for all programs and services. A survey will be prepared for clients, staff and collaborating partners. Each survey will be specific to the program and the baseline will be different for each. However, it is expected that satisfaction levels achieve scores of 95% or more satisfaction. Satisfaction that falls below the 95% satisfaction level from any of the stakeholder groups will require supervisory evaluation to determine and bring forth improvements that will assist in obtaining and sustaining the 95% goal. Surveys will be collected as follows:
- Client surveys – Pre and post surveys will be requested from parents and children 5-years and older (exceptions will be made for some children as appropriate). For clients receiving long term services, satisfaction surveys will be delivered quarterly. Surveys will be administered to clients who choose to discontinue services in order to identify the reasons for their decision to leave.
- Partners and collaborators – To determine the agencies abilities to work closely with other agencies, exit surveys will be solicited upon the completion of a collaborative effort that is led by PdN Children's. It is expected that surveys will indicate a minimum of 95% satisfaction.
- A.6 PdN Children's Growth Plan – This strategic plan has been developed as a 5-year plan. However, it is understood that strong organizations regularly revisit their plans, adjust as needed and continuously prepare for the future. In order to determine agency effectiveness in achieving this plan and to prepare the agency to embark in the next strategic planning process, PdN Children's will hire an independent consultant to evaluate this plan in preparation for the development of the next. The consultant will be hired in the fifth year of this plan, (September of 2031) and complete the analysis 3 months in order to develop recommendations for the direction the next 5-year strategic plan will take.

**OVERARCHING GOAL B: PdN Children's will increase its influence as a greater force in the region.**

*Strategic Intent: Expanded outreach and advocacy with an effective internal/external communications system that fosters agency recognition, client growth, service expansion, financial growth, donor and fund development, partnerships and collaboration.*

Functional Owner: External Communications and Outreach Supervisor/Staff, CEO

**KPI:**

- B.1. Marketing and Communications Plan – PdN Children's will expand its efforts to increase its media and public presence in the region by developing a multi-faceted marketing, communications and outreach plan with the intent to increase brand recognition, client growth, service expansion, financial growth, donor and fund development, partnerships and collaboration. Plan development will commence immediately upon board approval of this strategic plan. A final approved 5-year marketing, communications and outreach plan that includes an annual plan, will be developed by January 31, 2026. The annual component will be submitted for board approval with the annual FY budget. The plan will consider the following:
- B.1.1 PdN Children's will create an External Communications and Development Dept. whose purpose is to communicate information externally and create community awareness of all services provided by the center. The agency will promote/advertise various efforts of the agency to include direct services, agency awareness, donor solicitation, support agency growth, outreach and various promotion activities. The Department will be formed with the approval of the FY26 annual budget and will consist of a supervisor and two additional personnel to implement of department's efforts.
  - B.1.2. The team will immediately embark on an empirical assessment of communications, marketing and outreach effectiveness to identify priority communications efforts. Included in the assessment will be an evaluation of current social media and public relations data, evaluation of consistency of messaging, appraisal of outreach activities, identify program funding needs and evaluate other efforts pertaining to agency external communication and development. This assessment will be concluded by 11/1/25.
  - B.1.3. The Marketing, Communications and Outreach Plan will be implemented on the first day of the Fiscal Year for the next 5-years.
- B.2. Effectiveness of the Marketing, Communications and Outreach Plan will be evaluated annually. The plan may be modified and/or changed in order to meet unforeseen challenges. The following key performance measures will be utilized:
- B.2.1. All social media content will be measured for effectiveness. Each campaign will be measured according to the metrics established at the commencement of a campaign but social media efforts will generally result with at least a:
    - A 15% annual increase in organizational and/or programmatic awareness as measured by the metrics of the media utilized for the effort.

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- A private individual donor acquisition effort will demonstrate a 30% increase in the number of PdN Children's donors, from the baseline established in the analysis, by the end of 2026, and a 15% increase annually thereafter for the duration of the plan.
- Program utilization will increase annually by 10% unless programs are at capacity, evaluation of interest list growth will serve to identify effectiveness of the effort.
- After assessment of program need, private foundation funding will increase by acquisition of at-least one new private foundation or corporate donor/program annually for the duration of the plan and a minimum of \$10K in new program funding is achieved annually for the duration of the plan.
- Development of a PdN Children's content system for the internal repository, design development and management of PdN Children's content.

B.3. Formal Internship & Volunteer Program – PdN Children's will formalize its internship and volunteer program and manage efforts of participants through the department with the support of Human Resources and Direct Program services. Each program director will identify the internship and volunteer needs of the department, develop the required job descriptions and work closely with the External Communications, Marketing and Outreach team to effectively recruit participants into the program. This effort will be developed and implemented by the 4<sup>th</sup> quarter of 2027. Implementation will commence in the 1<sup>st</sup> quarter of 2028 and each department will develop measures to track according to the internship/volunteer effort required.



**OVERARCHING GOAL C: PdN Children's will attract, retain, and develop a strong, competitive and committed staff and thus provide high quality services to children and their families.**

*Strategic Intent: Investments in improved staff wellness, compensation, support, and sustained morale.*

Functional Owner: Human Resources Director, COO, CEO

**KPI:**

- C.1 Comprehensive Staff Retention Program – In the 4<sup>th</sup> quarter of FY 26, the HR Office will develop an annual comprehensive staff retention plan. The overall goal of the plan is to reduce staff turnover by 15% by the end of the annual plan. The development of an annual plan will continue annually thereafter and will annually identify the turnover reduction goals and achieve an overall turnover rate of less than 6% by the conclusion of this strategic plan in 2013. The annual staff retention plan will be developed in connection with the annual budget to ensure funding needs are met. The annual staff retention plan will review the following:
  - C.1.1 Training – The initial plan will develop a document for supervisors to track staff training. In connection with agency supervisors, training requirements will be provided to each employee with their annual evaluations. A KPI will be that in the aggregate, 90% of all employees will achieve 100% of their annual training goals and will be an evaluation assessment on an employee's annual evaluation.
  - C.1.2 Program Performance in Service Delivery and Quality of Care – In the development of the annual Staff Retention Plan, a series of assessment questions will be developed and will be included in any client survey of services in order to assess quality of care and staff performance. The section will be assessed separately from the primary service survey to establish individual staff performance. It is the goal that in the aggregate, 95% of clients will state they are satisfied or highly satisfied with service delivery.
  - C.1.3. Employee Opportunities for Internal External Activities – All Directors and administrative personnel will collaborate with the development of the staff retention plan and identify opportunities for staff to become engaged with internal and external activities. The KPI for this statement will be that at least 30% of agency staff will engage with an internal/external activity that annually. A tracking metric can be developed with the training documentation and included in that document for documentation purposes.
  - C.1.4. Staff Cross Training – The plan will ensure that 100% of all staff will receive periodic training of all programs delivered by PdN Children's. The intent is to ensure all staff have a general awareness of all the activities conducted by PdN Children's in order to help staff better appreciate the organization they are a part of.
- C.2. Employee Advisory Council – The CEO, COO and EAC will meet to conduct an overall assessment of the EAC in order to evaluate its effectiveness. To be included with the evaluation, a survey of staff will be conducted to assess their overall opinion regarding EAC effectiveness. The assessment will commence in the 1<sup>st</sup> quarter of 2027 and be concluded in the 2<sup>nd</sup> quarter of the same year. The goal is to decide how to strengthen EAC effectiveness and strengthen procedures that provide guidance to the EAC.

**OVERARCHING GOAL D: PdN Children's will develop an integrated information & technology system to remain competitive and current.**

*Strategic Intent: Expansion and evaluation of the impact, growth, and quality of all PdN Children's programs and services.*

Functional Owner: Director of Facilities, CEO, COO, Communications and Development Office

**KPI:**

- D.1 IT System Needs Assessment -- In the first quarter of 2026, the CEO will form a committee of executive staff, directors & supervisors and specific qualified direct staff to conduct a thorough assessment of existing IT systems. Prior to the end of the 4<sup>th</sup> quarter of 2026, the committee will present a report to the CEO identifying the various system components and ideas for integration to include:
- Integration with billing & finance
  - Collection of data to develop unduplicated client information between services
  - Single data entry point for all services
  - Identify various gaps and needs
  - Inclusion of a "parent portal" and website integration
  - Develop alternative solutions for consideration
- D.2 Integrated IT System Design -- The committee will move to the next step and identify 3 to 5 potential IT developers with the experience and capacity to develop an integrated IT system that can meet the needs identified in D.1. This step will begin in the 1<sup>st</sup> quarter of 2027. The purpose is to fully understand how IT integration might happen and identify estimated costs of for the development of the system. This step will conclude at the end of the 3<sup>rd</sup> quarter of 2028 and the final report will be the foundation for a future procurement of services.
- D.3 IT System Funding -- In the first quarter of 2027, the committee will commence raising funds for the purchase and implementation of a fully integrated IT system by launching an IT Capital Campaign. The committee will identify, as best as possible, a solution that will be documented in narrative. The External Communications and Development office will search for and submit applications to various foundations and funders using the narrative that has been developed and the metrics to be evaluated will be success towards raising 100% of the identified estimate cost for system purchase, development and annual maintenance. The IT Capital Campaign will commence in the 1<sup>st</sup> quarter of 2027 and the goal is to conclude at the end of the 4<sup>th</sup> quarter of 2028.
- D.4. Integrated IT System Procurement -- It is a goal to commence procurement of an integrated IT system in the 1<sup>st</sup> quarter of 2029 and select an IT Development provider by November 30th, 2029. Thereafter, the following will be achieved:
- D.4.1 It is estimated that it will take 3 to 6 months for an IT Developer to build a complete integrated system.

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- D.4.2. It is estimated that it will take at least 30 days to ensure all data is transitioned effectively, thereafter, dual system implementation will commence for an additional 60 days.
- D.4.3. The committee in collaboration with the contracted IT Developer will coordinate staff training to occur simultaneously with the dual system implementation. All staff will be trained to utilize the integrated system, where applicable, prior to bringing a system online.
- D.5 IT System Implementation -- If estimated goals, objectives and KPI's are met, a fully integrated IT system will be implemented with the beginning of FY30, on 1/1/29.

**Overarching Goal E: PdN Children's will continuously seek to have a relevant and meaningful presence for its clients, stakeholders and broader community**

*Strategic Intent: Expanded outreach and advocacy with an effective internal/external communications system that fosters partnerships and collaboration.*

Functional Owners: CEO, COO, External Communications & Development Supervisor

**KPI:**

- E.1 Expanded Reputation for Expertise -- PdN Children's will demonstrate growth of internal professional expertise across all levels contributing to PdN Children's expanding reputation as a trusted expert, as evidenced by increased opportunities to provide testimony, insights, and recommendations in public and professional forums by:
  - E.1.1 Asking for 100% of Executive Staff to become a board/committee member of a State/Local government body that works in the same industry/environment of PdN Children's services in representation of PdN Children's and the El Paso community by the 4<sup>th</sup> quarter of the 1<sup>st</sup> year of the plan and will maintain membership for the life of the plan.
  - E.1.2 The CEO, COO, and at least 50% of program leadership will provide at least one public speaking engagement and deliver on relevant topics within their expertise, at conferences, public meetings, government workshops etc. by the 4<sup>th</sup> quarter of the 1<sup>st</sup> year of the plan and continuing annually for the duration of the plan thereby resulting with at least 30 speaking engagements, locally, state and nationally by the end of the plan.
- E.2 Strong Recognizable Brand -- PdN Children's will build a strong, recognizable brand and be seen as a relevant and valued institution locally and across Texas by actively pursuing its strategic goals listed in 1 and 2 above and expanding its public relations and outreach efforts that will lead to a clearer identity and broader recognition of the value of its services by:
  - E.2.1 Establishing an annual budget of public and media relations of at least \$30,000 for year one of this plan and increasing by at least 20% annually for the duration of this plan to fund an annual plan developed by the External Communications and Development Office and approved by the CEO.
  - E.2.2 The plan will quantify certain promotional efforts to ensure at least 1 donor outreach campaign is held, quarterly campaigns to promote programs are conducted, an annual PR effort is conducted in the month of April which is the month of the Child.
  - E.2.3 The External Outreach and Development Office will establish strong relationships with local media outlets and promote that PdN Children's staff are identified by the media as experts resulting with media calling on PdN Children's to provide staff interviews on relevant topics within agency expertise. The goal for PdN Children's staff is to be invited to speak or interview at least 5 times annually including 2 to 4 interviews during the month of April.

## OVERARCHING STRATEGIC GOALS VS. VALUE ALIGNMENT CORRELATION

<b><i>PdN Children's OVERARCHING GOALS : VALUE ALIGNMENT CORRELATION</i></b>							
<i>Version 1.3</i>							
<b><u>PdN Children's OVERARCHING STRATEGIC GOALS</u></b>	<b>PdN CHILDREN &amp; FAMILIES</b>		<b>PdN CHILDREN'S STAFF</b>		<b>PdN CHILDREN'S PARTNERS</b>	<b>REGIONAL COMMUNITY</b>	<b>COMMENTS</b>
	TRANSFORMING CHILDREN'S DEVELOPMENT THROUGH INNOVATIVE SERVICES	SUSTAINING CLIENTS/ FAMILIES ENGAGEMENT & SATISFACTION WITH THEIR SERVICE EXPERIENCE	LEVERAGING STAFF EXPERTISE & DEDICATION TO POSITIVELY IMPACT CLIENT QUALITY OF LIVES	SUSTAINING ORGANIZATIONAL EXCELLENCE AND LEADERSHIP	COLLABORATIVE RELATIONSHIPS SHARING TALENT, EXPERTISE AND RESOURCES	COMMUNITY RECOGNIZING PdN Children's AS A PROVEN LEADER AND COMMUNITY TREASURE	
<i>OVERARCHING GOAL A: PdN Children's will build realistic, planned and sustainable internal capacity that is supportive of PdN Children's staff and their service operational needs.</i>	<b>H</b>	<b>H</b>	<b>H</b>	<b>H</b>	<b>M</b>	<b>H</b>	
<i>OVERARCHING GOAL B: "PdN Children's will increase its influence as a greater force in the region that recognizes PdN Children's value."</i>	<b>H</b>	<b>H</b>	<b>H</b>	<b>H</b>	<b>H</b>	<b>H</b>	
<i>OVERARCHING GOAL C: "PdN Children's will deliver VALUE to children and their families attracting, retaining, and developing a strong, competent, and committed staff."</i>	<b>M-H</b>	<b>H</b>	<b>H</b>	<b>H</b>	<b>M</b>	<b>H</b>	
<i>OVERARCHING GOAL D: "PdN Children's will remain competitive, current, and inclusive in continuously serving the changing needs of children and families."</i>	<b>H</b>	<b>H</b>	<b>H</b>	<b>M-H</b>	<b>H</b>	<b>H</b>	
<i>OVERARCHING GOAL E: "PdN Children's will evolve into what is relevant and meaningful to its clients, stakeholders, and the community."</i>	<b>M</b>	<b>H</b>	<b>H</b>	<b>H</b>	<b>H</b>	<b>H</b>	

*H = High Impact; M = Medium Impact; L = Low Impact*

# **THE PdN Children's SP ACCOUNTABILITY / COMMUNICATIONS PLAN**

Updated by the PdN Children's Team of strategic thinkers.

WHAT	WHO	WHEN
1. Document the V1.3 draft of Strategic Plan (SP)	PCS- Gilbert Moreno (GM) → Al Velarde (AV)	4/8/25
2. PdN Children's Leadership Team <ul style="list-style-type: none"> <li>▪ profile report card process using pilot goal as a model</li> <li>▪ Assign each goal to department(s)</li> </ul>	Leadership Team/ PCS	4/14/25
3. SPC Team edits Strategic Plan V1.5	SPC Team → AV → GM	Up to 4/23/25
4. SPC Team Workshop to refine report card/KPIs for the (4) Overarching Goals – do SMART test	SPC Team/ PCS	By June 5 SPC Workshop
5. Finalize the final draft document deliverables	PCS	By June 5 SPC Workshop
6. Final SPC Team Workshop to review final documentation deliverables	SPC Team/ PCS	Week of June 5
7. Present the Strategic Plan and Accountability Plan For Board Approval	AV PdN Children's Board	June Board Meeting
8. Name the Strategic Area Owners	Leadership Team → SAOs	June 2025
9. Share the SP with stakeholders: <ul style="list-style-type: none"> <li>a. PdN Children's Board</li> <li>b. PdN Children's Staff</li> <li>c. Agencies/ Partners</li> <li>d. Policy Makers</li> <li>e. Funders/ Donors</li> <li>f. Community At-Large</li> </ul>	AV	Start June 2025 and ongoing
10. Load SP summary on the PdN Children's website	TBD	June 2025
11. Name the players per overarching strategic goal aligned with the report card per goal	SAOs	TBD
12. Each SP Committee starts reporting progress to the Leadership and Board	SAOs	Start 3rd Quarter
13. Annual 4Rs (reflect, review, refine, and resolve) update of the SP	Team of Strategic Thinkers (4-6 Hr. Session)	Typically every 12 months

## **APPENDIX A. GLOSSARY OF TERMS**

The following terms apply to the PdN Children's strategic plan development.

<b>TERMS</b>	<b>DEFINITION</b>
<b>4Rs</b>	The Prestige Consulting © process of “reflecting, reviewing, refining, and resolving” an issue, challenge, or opportunity.
<b>Core Values</b>	The guiding principles or organizational values that guide the decision-making process in the organization. The inherent behaviors nurtured in the culture.
<b>“Cross-cutting” Issues</b>	Driving forces impacting the entire organization and paramount to address.
<b>CSF</b>	Critical success factors (CSFs) key to attaining strategic success. Defined as cause and effect statements.
<b>Ground rules</b>	Rules of engagement to guide all strategic thinkers in the planning process.
<b>Í Linear Thinking Tool</b>	An effective tool to characterize strategic initiatives profiling the initiative, issues, intent, innovation, investment, and impact.
<b>Key Performance Indicators (KPIs)</b>	Measurable outcomes or targets intended for each strategic goal or initiative.
<b>Mission</b>	The purpose of why an organization exists. The key steps needed to attain the future vision.
<b>Non-Negotiables</b>	The absolute necessities for organizational success not subject to negotiation.
<b>Overarching Strategic Goals</b>	An action verb driven statement of strategic intent and direction.
<b>Reflection Questions</b>	Key areas for stakeholders to ponder and think about the implications of future strategic direction. Helps to inform the strategic thinking required to develop a strategic plan.
<b>Stakeholders</b>	Any party with a “stake” in the success in the organization.
<b>Strategic Initiative</b>	Any commitment of time, energy, and resources intended to produce VALUE.
<b>ST/ SP</b>	Refers to the dual process of strategic thinking/ strategic planning.
<b>S.M.A.R.T.</b>	A practical filter to test the realistic nature of pursuing a strategic goal or initiative: specific, measurable, actionable, realistic, time activated.
<b>S.W.O.T.</b>	Organizational profile of strengths, weaknesses, opportunities, and threats. A hybrid version focuses on what to sustain, change, explore and avoid.
<b>Truth Card</b>	Four indicators of how well an organization balances strategic direction, opportunities, human assets, and support systems to create a competitive advantage.
<b>Value</b>	Comes in two flavors: value as a principle (core value) or value as an outcome. The desired outcome or benefit of a goal or initiative.
<b>Value Proposition Profile</b>	The proposed impact, end-result, or benefit to be realized for each key stakeholder group.
<b>Vision</b>	The desired future state or environment for the organization.