

I. Introduction:

The Masonic Home for Children at Oxford is a world-class child welfare agency that has stood firm on a foundation of caring for children and young people for more than 150 years. For decades MHCO has weathered challenges and embraced new opportunities to provide a stable and nurturing environment where children are given every chance to thrive. It is commonly said that Oxford is a “great place to be a kid” and the storied history is evidence of that fact.

From the moment you enter onto the historic campus, the weight of the work that takes place here is palpable. The oak trees stand stoically like the many men and women who paved the way before us. We embrace our history and look forward expectantly to the future.

That is exactly where this strategic plan lands; at a time when the child welfare landscape is changing and there is ample opportunity to impact the lives of North Carolina’s children and families. MHCO must lean into what the future holds and be a pioneer in the field. We must be All In for children. The number of children involved in the child welfare system in North Carolina continues to increase while the options for intervention have been leveling off. The Masonic Home for Children at Oxford will continue the good work that it has started.

Executive Summary:

The Masonic Home for Children at Oxford stands on a firm foundation that centers on caring for children and young people for more than 150 years. Since opening in 1872, the focus has been on providing a stable and nurturing environment to children in an effort to preserve families through the use of traditional values and morals. This plan seeks to build upon that foundation while simultaneously creating conditions for the Home to remain relevant in today’s child welfare landscape.

This plan was developed using a collaborative process that utilized an organizational assessment conducted by Armstrong and McGuire, survey data collected from employees, youth, and other stakeholders, examination of both local and national data, a current child welfare provider landscape scan, and a three day strategic planning retreat attended by more than 40 board members, key staff, and community stakeholders.

Throughout that process key concepts were identified that challenge the work of MHCO and the agency’s ability to meet the mission it has established for itself. Lengthy effort was also placed upon identifying strategies and ideas to further the mission of MHCO. As a

result of that process, MHCO has identified key priorities to address over the next five years:

- Reaching Children and families
- Telling the Story
- Creating Stability
- Creating Efficiencies

II. Organizational Profile and History

History of MHCO

The Masonic Home for Children at Oxford, Inc. (MHCO) is the oldest Masonic home for children in the country still in its original location and one of few left in operation. MHCO is also the oldest children's home in the state of North Carolina. Since its founding in 1872, MHCO has offered distressed children a balanced home program of traditional values and morals. Originally opened as an orphanage in 1873, MHCO has gone through an evolutionary transition from orphanage to its present state as a residential childcare facility offering social services to children and their families. Over 11,000 children have been served by MHCO. Graduates of the former John Nichols School at MHCO and alumni can be found in every walk of life and in every profession. A large and active alumni association and Masons across the state contribute to the care and keeping of our large family.

Description of Programs and Services

The Masonic Home for Children at Oxford offers the following services:

- Cottage Homes for Children
- Independent Living Cottages for youth that are approaching or have aged out of foster care.
- Aftercare Case Management
- Coordination of Community Resources through the Community Support Center

Description of Service Population

The services at MHCO directly impact people who are part of the following populations:

- Foster Care
- Adoption
- At-risk youth
- At-risk adults and families

Mission Statement

Providing a safe, nurturing home for children and young adults in need with opportunities to maximize their potential

Vision Statement

Children and young adults develop and flourish here and beyond

MHCO is committed to high quality care for children and young adults in need through: highly qualified personnel, continuously evolving evidence informed model of care, and active engagement with community and stakeholders.

Tagline

Growing hearts, brighter futures

Organizational Mandates:

MHCO will engage in its mission while adhering to the requirements of the Council on Accreditation, Social Current, and the various state licensing requirements of our programs.

MHCO will keep in compliance with all applicable local, state and federal laws and regulations.

III. Critical Issues and Challenges

Strengths:

Organizational Strengths

Child-Centered Excellence

- Child-centered care delivering stability, safety, and opportunity
- Safe, nurturing environment
- Caring, knowledgeable, skilled staff

Residential Program Strength

- Strong DC, ILP/TLC, and CSC programs
- Long-term, structured model
- Life & social skills, academic & vocational supports
- 2025 residential census highest in 7 years

Community Support Center (CSC)

- Systems-Level Innovation
- Historic expansion beyond residential care
- Co-located partners under one roof: real-time collaboration & streamlined crisis support, reduced duplication & transportation barriers, efficient, equitable access point
- 2025 Growth: reach tripled vs. 2024
- Grants provide monetary emergency support for families

Reputation & Stewardship

Legacy & Trust

- 153 years of service
- Strong reputation within the local and statewide community
- Beautiful, well-maintained campus

Governance & Financial Health

- Robust Masonic, alumni, and agency partnerships
- Strong financial oversight
- Significant investments, operating reserves above benchmarks
- Large, dedicated donor base
- Diverse Board of Directors with relevant experience and expertise

WEAKNESSES:

Organizational Weaknesses

Program & Service Gaps

- Family engagement varies
- Reunification dependent on family stability
- Occasional poor program fit due to incomplete admission info received at intake
- Limited diversification of services

Facilities

- Underutilized buildings
- Repairs & remodeling needed

Internal Systems

Organizational Alignment

- Functional silos: strong departmental work but not always aligned
- Limited cross-team planning time
- Internal communication gaps

Technology & Messaging

- Lack of strong technology use for workflow & collaboration
- Broader staff tech training needed
- Messaging gap: residential emphasized over CSC/community supports

OPPORTUNITIES:

Partnerships & Programming

- Complementary services (daycare, tutoring)
- Programming for ILP; skill building, expanded job training
- Stronger inclusion with schools & agencies
- Before/after school programs
- Diversified learning environments
- Youth sports initiatives

Workforce & Culture

Staff Retention & Engagement

- Staff recognition initiatives
- Team building investments
- Retention strategy development
- Training and supervision

Financial Development

- Communications, brand, and voice standards
- Annual strategy
- Reporting mechanisms
- Leveraging existing resources to create funding streams
- Grant writing
- Planned Giving

THREATS:

External Threats: Sector & Economic Pressures

Sector Challenges

- Preference for non-residential placements, FFPSA
- Congregate care classification impact on referrals, IV E Funding
- Staffing competition with higher pay/benefits providers

Macroeconomic Factors

- Inflation, tariffs, global conflicts
- Increased operational costs
- Reduced donor & grant capacity

External Threats: Policy & Funding

Federal Policy Impacts

- SNAP reductions increasing food insecurity
- Medicaid & ACA eligibility changes increasing uninsured population
- Increased burden on local safety nets

Housing Instability

- Federal housing policy shifts
- Budget constraints increasing family instability

Donor Base

- Economic Uncertainty
- Masonic Fraternity health
- Competition from other Children's Homes and child welfare agencies

IV. Strategic Goals and Objectives

Strategic Goal 1: Reaching Children and Families

Strengthen current residential program offerings, while evaluating the possibility of expanding into new programs that support children, families, and communities.

Objective 1A: Implement a trauma-informed model of care across the entire agency of MHCO.

An evidence-based, trauma-informed model of care that is successfully implemented across all arms of the organization will allow us to approach care in a congruent and efficient way.

Objective 1B: Explore ways to increase the reach of the Community Support Center into the local community through partnerships, outreach, and programming.

Currently, the CSC coordinates services of six partner agencies through shared space and the collaboration of resources. There are opportunities for MHCO to broaden the reach through the implementation of a larger network of partners, shared systems, and resource allocation.

Objective 1C: Evaluate opportunities to broaden child and family services including, but not limited to, family foster care, early childhood education, summer programs, and support for single mothers.

MHCO is limited in the number of children it can serve by the physical footprint of our campus and the staffing limitations that are related to direct care. Family Foster Care would allow to serve the same population of children in a different setting. Early Childhood

Education and support for single parent homes would allow us to serve families upstream from the need for out of home care.

Objective 1D: Explore the use of unoccupied buildings to expand Independent Living programming on campus.

MHCO currently has two buildings on the upper campus that are utilized for purposes other than childcare. One building (Ragan) is used as storage, and a second (Critchler) is used to store in-kind donations.

Strategic Goal 2: Telling the Story

Develop a communications strategy that amplifies the voice of MHCO across the state and beyond as a leading organization for children and families.

Objective 2A: Create a Brand Guide and Toolkit for MHCO that drives the creation of a regular communication schedule to the Masonic Fraternity and the general public.

Evaluate the cadence and content of those publications. Set systems and processes in place to increase the communications footprint of MHCO.

Currently MHCO lacks a cohesive voice and feel for the organization. There are multiple logos, conflicting taglines, and no understood values for the Home. Additionally, there are

Objective 2B: Evaluate and update the public face of MHCO including, but not limited to, our website, social media platforms, and print materials

Objective 2C: Evaluate the capabilities of the SGA website in offering ecommerce solutions. Revamp the SGA website to align with current trends.

Strategic Goal 3: Creating Stability

Evaluate and create strategies to enhance the financial development program at MHCO to ensure MHCO's future of caring for children and families into the future.

Objective 3A: Evaluate the current investments of MHCO and develop policy related to use and endowment of those funds. Create ways to increase the balance of those funds.

Objective 3B: Expand the donor base outside of the Masonic Fraternity while honoring the importance of contributions from the local lodge. Increase recurring giving by X% yearly, and increase the number of new donors yearly X%

Objective 3C: Enhance MHCO's Grant footprint in order to supplement fund development efforts

Objective 3D: Evaluate cost saving and revenue generation opportunities including, but not limited to, supply drives, in-kind giving, lease opportunities leveraging the assets we currently have.

Objective 3E: Develop a formal planned giving and donor stewardship program.

Objective 3F: Continue to evaluate the marketing program for best practice. MHCO utilizes a broadcast tv station for the many of the marketing efforts. Explore if those avenues could be done in-house. Create a tangible ROI measure for marketing efforts.

Objective 3G: Evaluate the SGA policy and procedure to streamline operations in order to be financially sound. Consider systems for order management, invoicing and collecting, and customer relations to achieve those goals.

Strategic Goal 4: Create Efficiencies

Leverage systems, processes, and technology to create efficiencies in operational and

Objective 4A: Evaluate our data reporting mechanisms

Objective 4B: Create system wide training mechanism that leverages the resources we already have. In addition, explore a talent management arm of the training mechanism that identifies and cultivates employees that are seen as high value or potential high value. Succession planning.

Objective 4C: Move the organization into industry standard practices for HR, Onboarding, Payroll, and reporting.

V. Description of Strategic Planning Process

- Information and background information and evidence collected that included:
 - Organizational Assessment completed by Armstrong and McGuire May 2025
 - Previous SWOT analysis completed by Armstrong McGuire 2019
 - North Carolina Child Welfare Landscape information gathered from Annie Casey Foundation, US Bureau of Labor Statistics, NC DHHS, USDA Economic Research Service, and CDC
 - A three day, in-person, planning retreat was held in Oxford March 11th, 12th, and 13th with Board of Directors, individual Committee members, MHCO staff, alumni, and community stakeholders.
 - The vision committee of MHCO met May 7th to discuss the retreat information and outcomes.
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2021-2025 STRATEGIC PLAN



MASONIC HOME FOR CHILDREN AT OXFORD



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1. EXECUTIVE SUMMARY

This Strategic Plan identifies the main strategies that MHCO will use in the next four years to increase sustainability, address challenges, and navigate threats to existence. The plan builds on foundations of success and is based on an analysis of MHCO’s achievements to date, the strategic areas in which MHCO can have most impact in the future, and the organizational arrangements that best supports MHCO’s role and value as a residential child care provider. The Strategic Plan was developed through a collaborative process that included: interviews with key stakeholders, analysis conducted by Armstrong McGuire and Garrison Group to identify critical issues and core concepts of MHCO, internal and external literature reviews, and a retreat where 27 key board members and staff discussed the collected data and developed specific goals. During the strategic planning process, MHCO identified the main challenges facing families that utilize its services, issues involved in providing care, barriers to addressing these challenges, and key interventions that are needed. Over the next four years, MHCO will focus its work around four strategic priorities:



- increasing the census,
- team building,
- financial development, and
- programming.

This document details many aspects of determining strategies to increase sustainability of MHCO. The first section details the mission, vision, and focus on quality. The next section provides an organizational profile to include the organization’s historical value, description of current programs and services, and a description of the current service population. Organizational mandates and critical issues and challenges are then outlined. Specific goals and objectives are detailed in the final section. Appendices contain a description of the strategic planning process, assessment of strengths, weaknesses, opportunities, and threats, gap analysis, the current organizational chart and board member profiles, and the first annual plan. Each year, MHCO will update the organizational annual plan to reach the main strategic goals. The annual plan will detail the responsibilities of each department and committee. Each employee’s annual professional development goals, work objectives, and performance appraisal will be based upon departmental annual plan objective achievement.

AUTHORIZATION

The Masonic Home for Children at Oxford’s 2021-2025 Strategic Plan was approved by the Board of Directors on May 14, 2021.

Board Chairman

Date

Administrator

Date



2. ORGANIZATIONAL PROFILE AND HISTORY

HISTORY OF MHCO

The Masonic Home for Children at Oxford, Inc. (MHCO) is the oldest Masonic home for children in the country still in its original location and one of few left in operation. Since its founding in 1872, MHCO has offered distressed children a balanced home program of traditional values and morals. Originally opened as an orphanage in 1873, MHCO has gone through an evolutionary transition from orphanage to its present state as a residential child care facility offering social services to children and their families. Over 10,000 children have been served by MHCO. Graduates of the former John Nichols School at MHCO and alumni can be found in every walk of life and in every profession. A large and active alumni association and Masons across the state contribute to the care and keeping of our large family.

DESCRIPTION OF PROGRAMS AND SERVICES

MHCO offers residential foster care services to North Carolinian children and young adults in need. Programs include:

- direct care individualized for children, pre-adolescents, and adolescents with assistance skill development, academic assistance and remediation, and vocational counseling;
- independent living skill development for young adults;
- referral services for families, other agencies, and the community at large;
- coordination of medical, recreation, wellness, spiritual, educational, food, and clothing needs;
- child and family advocacy at the local, state, and national level; and
- aftercare services.

MHCO strives to ensure the best possible care for residents. MHCO provides residents with a homelike setting to develop into productive citizens. Every attempt is made to maintain the individuality and identity of each resident served. Services offered include residential foster care and preparation for

MISSION STATEMENT

Providing a safe, nurturing home for children and young adults in need with opportunities to maximize their potential.

VISION STATEMENT

Children and young adults develop and flourish here and beyond.

QUALITY STATEMENT

MHCO is committed to high quality care for children and young adults in need through:

- highly qualified personnel,
- continuously evolving evidence informed model of care, and
- active engagement with community and stakeholders.

TAGLINE

Growing Hearts, Brighter Futures

CORE VALUES

Compassion
Child-Centered
Integrity
Adaptable
Teamwork



independence. MHCO is committed to providing emotional, physical, spiritual, and social development in a trauma informed and culturally competent manner. The program introduces and supports youth in normal, age-appropriate life activities such as attending public schools, participating in school and community activities, and gaining part-time employment. Criteria for admission to the MHCO Direct Care program includes youth in North Carolina from birth to twenty-one (21) years old who need placement, have been determined to be low to moderate risk level, and are capable of functioning in the public-school setting. Youth over eighteen (18) years old are eligible for the Direct Care program if they are still in public school. Residents must attend public school while in care.

The Independent Living Program (ILP) meets the needs of young adults or residents aging out of the Direct Care program that need a safe, stable environment to successfully transition to permanent independence. MHCO believes that these young adults need a chance to improve their independent living skills, obtain further education, and secure employment in order to achieve self-sufficiency for positive long-term outcomes. ILP residents are required to be enrolled and participate in a GED program, college program, certificate program, or other vocational training to assist in gaining job skills. ILP residents are also required to have at least a part-time job while in the program to gain or enhance employment skills, learn responsibility, gain independence, and develop good work, money, and time management skills. Criteria for admission to ILP includes individuals in North Carolina from age eighteen (18) to twenty-two (22) years old who need placement and assistance in obtaining independent living skills. The target population for this program is youth who are in transition from previous placement or are homeless.

MHCO does not accept applicants who are perpetrators of violent crime, sex offenders, have a history of setting fires, actively using substances, pregnant or parenting teens, actively involved in the criminal justice system, or deemed a danger to themselves or others. MHCO does not discriminate based on race, creed, sex, disability, or religion. Accommodations are made for limited physical and mental impairment. MHCO is not capable of providing one-on-one care and supervision for special needs.

DESCRIPTION OF SERVICE POPULATION

In the Direct Care program, there were 58 children served in 2020 to include 19 admissions, 30 discharges, and 2 deferrals. The demographic profile for residents of the Direct Care program in 2020 include: 71.5% male, 36.1% female; 41.3% African American, 49.8% Caucasian, 13.4% Multi-racial, 2.3% Hispanic; and 11.1% 0-5 years old, 45.2% 6-12 years old, 49.8% 13-17 years old, 0.1% 18 years and older. The average age was 11.6 years old and the average length of stay was 1078.3 nights. English is the major language group for residents. A small portion (2.3%) of residents were bilingual and spoke Spanish. Currently, there are 25 residents in the program. The campus average grade is 83.5, there are 10 residents on the honor roll.

In the Independent Living Program, there were 23 young adults served in 2020 to include 12 admissions, 15 discharges, and 5 deferrals. The demographic profile for the residents of the Independent Living Program in 2020 include: 51.3% male, 54.0% female; 66.4% African American, 26.5% Caucasian, 2.2% Multi-racial, 8.9% Hispanic; and 48.7% 18-19 years old, 36.3% 20-21 years old, 20.4% over 21 years old. Currently, there are 9 residents in the program. There are 4 residents in college and 2 in high school. There are 6 residents currently employed.



ORGANIZATIONAL MANDATES

MHCO must follow mandates of North Carolina state licensure for residential child-care (10A NCAC 70I) and standards of accreditation by the Council on Accreditation. The Board of Directors mandates organizational policies and procedures. MHCO is mandated by comply with corporation bylaws and articles of incorporation, file and pay Social Security, maintain worker's compensation insurance, and fulfill employer responsibilities of the Family and Medical Leave Act, Americans with Disabilities Act, Health Insurance Portability and Accountability Act, Equal Employment Opportunity Commission, Rehabilitation Act, Sarbanes-Oxley Act, NC False Claims Act, American Psychological Association Code of Ethics, American Counseling Association Code of Ethics, and Electronic Communication Privacy Act.



New Pool 2019



3. CRITICAL ISSUES AND CHALLENGES



Through a capacity building grant awarded to MHCO from the SECU Foundation, Armstrong McGuire and Associates completed an organizational assessment in 2019 and identified the strengths, weaknesses, opportunities, and threats to existence for MHCO. Additionally, the Garrison Group held focus groups with staff and Board members in 2021 to help identify core values for MHCO and further delineate the SWOT analysis. Some critical issues and gaps were identified through the situational analysis to include:

SECU Foundation Grant 2019

- Identifying referral sources or differing programming for prospective service recipients that do not qualify for other existing services
- Widespread community-market image
- Employee retention and team building
- Financial development activities

STRENGTHS

Child-centered

- Stability and opportunities for children
- Continuous caring and commitment to the kids
- Service to children who might not be served elsewhere (niche), from across the state, don't take guardianship

Staff

- educated, experienced, diverse
- compassionate, well-equipped, dedicated childcare workers
- Lots with child welfare expertise

History

- 150 years of service; strong legacy still going strong

Relationships

- Strong history and connections with Masons and Alumni
- Strong relationships with external organizations/local agencies

Programming

- Family-centered model of care; flexibility in parenting style

- Strong academic supports
- Independent Living Program is unique-format, age range, long-term care, continuous structure
- Life skills and training for residents and staff
- Social skills development through varied experiences

Funding/Resources

- Strong financial oversight
- Financially responsible, significant endowment, nonprofit solely funded through donations
- Large, dedicated donor base made up of Alumni, Masons, community and more
- Well-maintained, beautiful facilities and campus

WEAKNESSES

Child-centric versus family-centric

- Families often distant, not involved
- Reunification dependent on family connections and addressing root issues
- Children need their families with them, supporting them



- Children in some cases not a good fit for our programs due to lack of information given at admission

Capacity

- Low number of residents
- Population growth and retention
- Empty buildings on campus

Functional silos

- Excellent work in different departments but not always in agreement or coordinated
- Time constraints dependent on demands
- Follow through on decisions that may be controversial or disputed
- COVID staggered shifts

Communication / Marketing / Outreach

- Awareness is limited; the best kept secret in North Carolina
- Misconception about services (e.g., orphanage vs children's home)
- Marketing to Masonic lodges and surrounding communities
- Time constraints dependent on demands-limited bandwidth and expertise
- Not always dealing with issues directly
- Effective communication (not always coordinated or pre-planned before sending), cohesiveness/consistency, and follow through between departments / staff / residents
- Outreach to community via newsletters and mailings; may feel it's more like junk mail rather than personalized

Resources

- Financial resources challenging to raise based on the type of services provided
- Lack of diversification in funding model
- Time constraints of what the job requires prevents best delivery of top-notch childcare
- Short-sighted view of tackling today's issues and sacrificing the potential of tomorrow
- Dependence on outside resources (e.g., mental health); COVID has limited resources
- Diversity, cultural training and understanding to increase effectiveness
- Safety and risk management

- Need updates to buildings and grounds- Cottages and buildings need repairs and remodeling, Underground water pipes and sewer

OPPORTUNITIES

Family First Prevention Services Act (FFPSA)

- Funding focused on in-home programming
 - Other children homes' dependence on service fees significant; not MHCO
- ILP/TLP can increase and include funding
- In-home services
- Family Resource Center – services for the community

Communications / Marketing

- Use of social media and technology for awareness building, communications
- Increasing awareness of what's changing
- Market program offerings to community agencies and target markets outside of Masonic network

COVID

- Additional trainings for new threats like COVID
- Increase in census resulting from impact of COVID (e.g., layoffs)

Staff

- Recognition
- Team building

Fundraising

- Online funding opportunities; new avenues of fundraising
- Funding through corporations

Growth

- Ability to meet needs through Independent Living Program and Transitional Living-more of our community understanding the value and benefits MHCO can offer
- Exploit our Mission and Value by getting the word out that we can help
- Look out for other businesses/organizations that offer complimentary services (e.g., day care, tutoring) for potential partnership



- Enhanced or contract staff available to meet the mental health needs of residents
- Finding ways to be more inclusive in other communities, school systems, etc.
- Before- and after-school programs
- Diversified learning atmosphere
- Youth sports
- Exploring foster care, parenting

Residential Academy

- On-campus education for residents
- Students come to MHCO for academy & other supports
- Vocational education track
- MHCO resident additional needs track
- Scholarships already exist to support continued education

Sustainable Ag program with VGCC

- Sustainable resources for our campus
- Education; vocational education opportunities

THREATS

Family First Prevention Services Act (FFPSA)

- Risk to all residential programs related to licensing constraints/expectations
- Congregate care includes MHCO even though we are unique

Funding

- Low number of residents affects fundraising
- Dependent on planned gifts
- Diminishing stakeholder groups (e.g., Masons, Alumni) and declining engagement
- Time constraints to market
- Dependence on stock market

COVID

- Highlights health, economic and social issues in our society
- Economic threat and need for safety
- Lack of normal socializing can cause physical and mental illness

Perception of DSS and other agencies

- View Home as an agency; prefer to place children in different settings
- Perception of group living contradicts the image of a family model

Competition

- Other childcare facilities (e.g., location, employee benefits)
- Movement in childcare away from residential

Technology

- Unwillingness to embrace modern practices / technology
- Cybersecurity concerns

Staffing

- Challenge to find compassionate and loving childcare workers
- Competition with other childcare facilities



Internal	Strengths	Weaknesses
	<ul style="list-style-type: none"> • Genuine care of residents and community • A safe and loving community for children • High level of support services available for each child • Family environment • Willingness to partner with local agencies • Beautiful facilities and large assets • Increased level of social work expertise • Seeking to evolve the program toward best practice • Community meetings to share the strategic vision • History of Masonic support 	<ul style="list-style-type: none"> • Serving a smaller number of children compared to historical numbers • Empty buildings on campus • Resistance to change for evolving program model becoming “trauma-informed” • “Orphanage” connotation still tied to the model • Declining funding and endowment • Lack of development expertise and structure • Limited bandwidth and expertise for communications and marketing • Retention and recruitment of childcare workers
External	Opportunities	Threats
	<ul style="list-style-type: none"> • Market program offerings to community agencies • Market MHCO to target markets outside of the Masonic network to increase engagement • Build an annual fund program to support funding needs • Seek grant opportunities to support program expansion 	<ul style="list-style-type: none"> • Declining Masonic engagement and support • Impact of Family First Preservation Act on the program model
	Positive	Negative

SWOT Analysis Summary by Armstrong McGuire and Associates 2019



Terry Gilliland HDR Bridge 2019



4. STRATEGIC GOALS AND OBJECTIVES

OBJECTIVE 1A

Hire professional marketing firm to provide recommendations to increase census and implement strategies

OBJECTIVE 1B

Enhance the co-parenting partnership to include reunification and increased aftercare support

OBJECTIVE 1C

Establish relationships with and involve external stakeholders (e.g. appendant bodies, faith community, law enforcement, hospital associations, district attorneys, etc.) to market for referrals

OBJECTIVE 1D

Develop virtual mentoring, outreach program, and census committee to include a current resident

OBJECTIVE 1E

Examine previous census decreases for trends and pitfalls and incorporate improvement ideas into daily practice

STRATEGIC GOAL 1

Maximize use of resources by operating at or near capacity in Direct Care (64) and the Independent Living Program (18)

STRATEGIC GOAL 2

Promote an engaged workforce by providing opportunities for team building and recruiting strong candidates for open positions

OBJECTIVE 2A

Expand recruitment opportunities and efforts (e.g. job fairs, community colleges, local events, networking, partnership with schools and community organizations, etc.)

OBJECTIVE 2B

Enhance employment information available to the public (e.g. “day in the life”, videos, pictures, virtual tours of campus facilities, marketing plan to engage Masonic lodges, employee ladder, etc.)

OBJECTIVE 3B

Provide team building activities through internal and external resources



OBJECTIVE 3A

Hire professional marketing firm to provide recommendations and implement strategies for 150th anniversary campaign

OBJECTIVE 3B

Examine financial development personnel resources needed

OBJECTIVE 3C

Identify and communicate with new channels to increase knowledge of MHCO (e.g. Our State Magazine, 150th anniversary stories, TV, direct mail, general public, corporate, etc.)

OBJECTIVE 3D

Develop new entrepreneurship and in-kind donation sources (e.g. property as revenue stream, partnership with NC State, in-kind services donations, etc.) to increase revenue and reduce spending for operating expenses

STRATEGIC GOAL 3

Improve short- and long-term financial sustainability by increasing the endowment to \$50M toward providing perpetual care for children in need

STRATEGIC GOAL 4

Expand programming to impact more youth through collaboration and community-based programs

OBJECTIVE 4A

Explore possibilities and rebranding for Oxford Academy and daycare facility

OBJECTIVE 4B

Collaborate with community-based programs (e.g. Youth Villages, etc.)

OBJECTIVE 4C

Develop and incorporate the Transitional Living Program into daily operation



5. APPENDICES

DESCRIPTION OF STRATEGIC PLANNING PROCESS

Stakeholder interviews and focus groups were conducted by Armstrong McGuire in 2018 and Garrison Group in 2021 to develop the SWOT analysis and organizational profile. Management staff reviewed previous strategic initiatives and objectives. The SWOT analysis, organizational profile, gap analysis were finalized by management staff and prepared for the Strategic Planning Retreat.

A Strategic Planning Retreat was held March 6, 2021 with 12 personnel, 14 board members, and the Chair of the Vision Committee of the Board of Directors in attendance via Zoom. Activities included reflecting



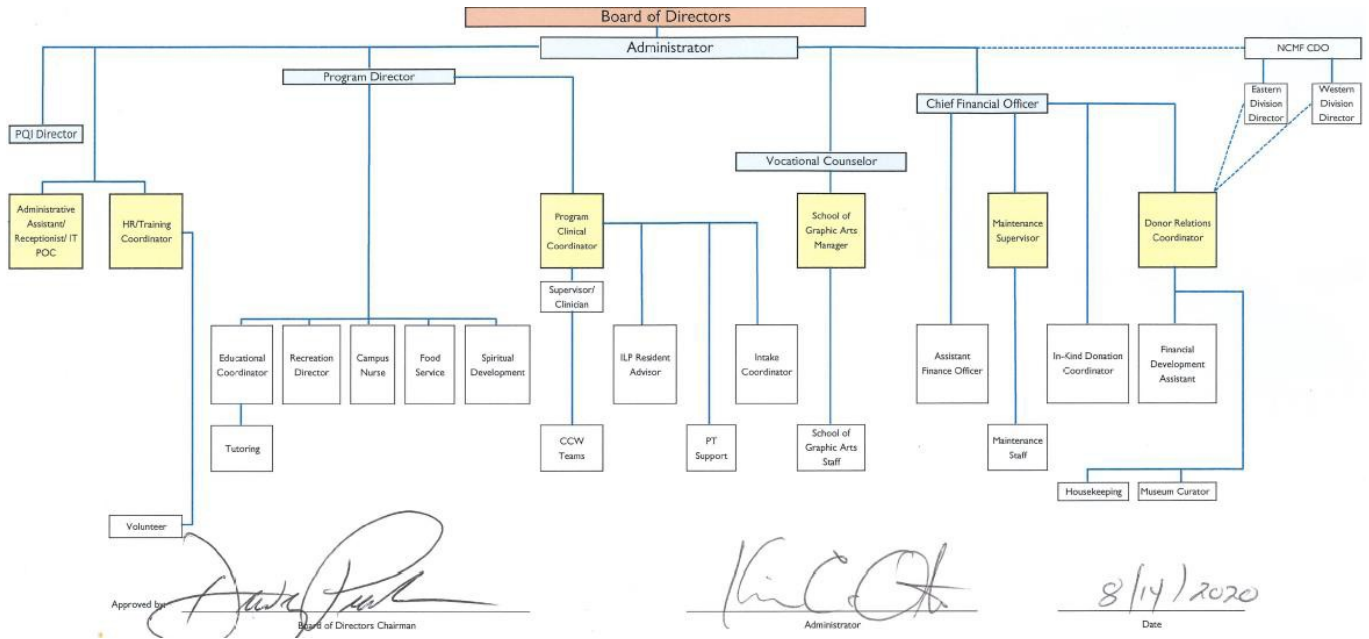
on MHCO's past, discussing the current organizational profile, analyzing where MHCO stands currently including internal strengths and weaknesses and external threats and opportunities for growth, envisioning the future, and strategizing how to close the gap between MHCO's operations in 2021 and vision for 2025. Polling showed that revisions may be needed to the mission and vision statements and was discussed in the Vision Committee of the Board of Directors at the May 2021 Board meeting. The Vision Committee of the

Board of Directors suggested verbiage changes to the statements and the changes were accepted by the Board of Directors. Goals, objectives, and initiatives were developed to enhance the sustainability of MHCO including increasing the census, team building, financial development, and programming.

The ideas gathered from the retreat were compiled and discussed for feasibility and implementation at various board committee meetings in early May 2021. The Board of Directors approved the current version of the Strategic Plan on May 14, 2021. Organizational and departmental annual plans will be developed annually before budget decisions for the following year are discussed. Annual employee work plans and performance appraisals will incorporate strategic goals developed from each departmental annual plan.



2021 ORGANIZATIONAL CHART



Outdoor Classroom Built at the Granville Athletic Park 2018



MASONIC HOME FOR CHILDREN AT OXFORD

2021 BOARD MEMBER LIST AND PROFILES

Mr. Dewey R. Preslar, Jr.

- Board Chair
- Executive Committee Chair
- Serves on Finance Committee
- Consultant, Preslar Risk Services, Inc.

Mr. Speed Hallman

- Board Vice Chair
- Financial Development Committee Chair
- Serves on Finance Committee, Program Planning, and Executive Committee
- Special interest in communications, fundraising, and community relations

Mr. Luther Starling, Jr.

- Board Treasurer
- Chair of Finance Committee
- Serves on Financial Development Committee and Executive Committee
- President, Smithfield Chicken and Barbeque

Mrs. Kathy Johnson

- Chair of Marketing Committee
- Serves on Program Planning and Vision Committees
- Trainer/Professor, UNC Chapel Hill
- Special interest in child welfare issues, policy and procedure development, and program development

Mr. Jon Welborn

- Chair of Audit Committee
- Serves on Policy and Personnel Committee
- Lawyer, Welborn Law Firm, PLLC

Dr. Tony Cozart

- Serves on Masonic Homecoming Festival, Nominations, and Audit Committees
- Educator, Franklin-Granville-Vance Smart Start
- Special interest in early childhood education

Mr. Tim Norris

- Serves on Policy and Personnel and Audit Committees

Dr. Carla Emerson

- Chair of Program Planning Committee
- Serves on Nomination Committee
- Clinical Program Manager/Counselor, Wake Forest University

Mr. Anthony Sessoms

- Serves on Audit and Nominations Committees
- CPA, Denning, Herring, Sessoms & Company, PA, CPAs

Mrs. Maria Lowder

- Serves on Finance Committee and Vision Committee
- Executive Director, North Hills Christian School

Mrs. Tracy Armwood

- Board Secretary
- HR Director for WhiteStone: A Masonic and Eastern Star Community
- Chair of Policy and Personnel Committee
- Serves on Executive Committee

Mr. Kevan Frazier

- Serves on Financial Development and Vision Committees
- Western Carolina University

Mr. David Wicker

- Grand Master of Grand Lodge of NC
- Serves on Policy and Personnel and Executive Committees
- Attorney with Roberti Wittenburg et al.

Mr. Raul Herrera

- Serves on Program Planning and Finance Committees
- Senior Loan Officer for New American Funding Inc

Mr. Larry Thompson

- Chair of Nominations Committee
- Serves on Financial Development Committee
- NC Department of Transportation



2021-2022 ANNUAL PLAN

STRATEGIC GOAL 1

Maximize use of resources by operating at or near capacity in Direct Care (64) and the Independent Living Program (18)

OBJECTIVE 1A

Hire professional marketing firm to provide recommendations to increase census and implement strategies

- The Marketing Committee of the Board of Directors will hire a marketing firm and determine specific objectives from the strategy prepared by Angel Oak Creative by December 31, 2021
- The PQI Director and groups will collect data to examine trends and provide recommendations for improvement by June 30, 2022
- The Finance and Financial Development departments will assist with coordinating marketing efforts toward increasing census and donations by June 30, 2022

OBJECTIVE 1B

Enhance the co-parenting partnership to include reunification and increased aftercare support

- The Program Department will perform a needs assessment and compile a listing of needed support resources by December 31, 2021
- The Program Department will enlist community resources to provide co-parenting education and activities by June 30, 2022
- The Program Department will develop a reunification program outline of activities to put in place by June 30, 2022
- The PQI Director and groups will collect data to examine trends and provide recommendations for improvement by June 30, 2022
- The Program Department will implement CARE principles into daily work with residents and their families by December 31, 2021

OBJECTIVE 1C

Establish relationships with and involve external stakeholders (e.g. appendant bodies, faith community, law enforcement, hospital associations, district attorneys, etc.) to market for referrals

- The Administrator and Program Department will compile a listing of external stakeholders and begin making contact about referrals by December 31, 2021
- The PQI Director and groups will collect data to examine trends and provide recommendations for improvement by June 30, 2022
- The Administrator will educate and provide resources for Ambassadors and Lodges to help market in their communities by December 31, 2021
- The Program Department will explore virtual mentoring with alumni and residents and possibilities for an outreach program to market for referrals and further establish relationships with external stakeholder by June 30, 2022



OBJECTIVE 1E

Examine previous census decreases for trends and pitfalls and incorporate improvement ideas into daily practice

- The PQI Director and groups will collect data to examine trends and provide recommendations for improvement by June 30, 2022
- The Program Director and Program Planning Committee will discuss trends and pitfalls of previous census decreases and develop a plan to incorporate improvement ideas into daily practice by June 30, 2022
- The Program Department will identify and implement a more efficient referral and intake process to decrease the amount of time from initial referral to placement by June 30, 2022
- The Program Department will begin implementing CARE principles into daily programming and identify strategies to address challenges to limit unplanned discharges and maintain census stability by December 31, 2021
- The Program Department will explore developing a census committee to include current residents and alumni to examine census changes and pitfalls by June 30, 2022



STRATEGIC GOAL 2

Promote an engaged workforce by providing opportunities for team building and recruiting strong candidates for open positions

OBJECTIVE 2A

Expand recruitment opportunities and efforts (e.g. job fairs, community colleges, local events, networking, partnership with schools and community organizations, etc.)

- The PQI Director and groups will collect data to examine trends and provide recommendations for improvement by June 30, 2022
- The HR Specialist will develop and present a plan to the Policy and Personnel Committee to determine ways to expand recruitment practices by June 30, 2022

OBJECTIVE 2B

Enhance employment information available to the public (e.g. “day in the life”, videos, pictures, virtual tours of campus facilities, marketing plan to engage Masonic lodges, employee ladder, etc.)

- The Marketing Committee and Financial Development will develop a virtual tour of the cottages for employment recruitment by December 31, 2021
- The Administrator will educate and provide resources for Ambassadors and Lodges to help market in their communities by December 31, 2021
- CARE educators will train staff in CARE principles to provide opportunities and strategies to address challenges in working with youth in a team environment by December 31, 2021

OBJECTIVE 2C

Provide team building activities through internal and external resources

- Leadership will participate in training and round table groups with the Garrison Group by December 31, 2021
- The HR Specialist will explore and recommend resources for team building with various departments and all staff by June 30, 2022

OBJECTIVE 2D

Align Human Resources initiatives, recruitment, onboarding, and employee retention to address needs and employee development

- The HR Specialist will expand the staff workload and qualifications report to identify and clarify department needs by June 30, 2022
- The HR Specialist will develop a plan to provide training, coaching, and supervision to support identified needs by June 30, 2022
- Administration will develop succession plans for identified key positions (i.e. Administrator, Program Director, Chief Financial Officer, SGA Manager, Maintenance Director, and Program Clinical Coordinator) and include possible internal candidates, development objectives, training and education opportunities, and timeframes for increased delegation of duties and transition dates by June 30, 2022



STRATEGIC GOAL 3

Improve short- and long-term financial sustainability by increasing the endowment to \$50M toward providing perpetual care for children in need

OBJECTIVE 3A

Hire professional marketing firm to provide recommendations and implement strategies for 150th anniversary campaign

- The Marketing Committee of the Board of Directors will hire a marketing firm or contract with advertising through media by December 31, 2021
- The PQI Director and groups will collect data to examine trends and provide recommendations for improvement by June 30, 2022
- The Finance and Financial Development departments will assist with coordinating marketing efforts toward the 150th anniversary campaign by June 30, 2022

OBJECTIVE 3B

Examine financial development personnel resources needed

- The Finance and Financial Development Committee determine additional resources needed for recording of gifts and donation acknowledgment and incorporate into 2022 budget by December 31, 2021

OBJECTIVE 3C

Identify and communicate with new channels to increase knowledge of MHCO (e.g. Our State Magazine, 150th anniversary stories, TV, direct mail, general public, corporate, etc.)

- The Finance and Financial Development Committee will increase knowledge of MHCO in the Triangle area by contracting with advertising through media by December 31, 2021
- The Finance and Financial Development Committee will identify and list possibilities of new channels to increase knowledge of MHCO by December 31, 2021

OBJECTIVE 3D

Develop new entrepreneurship and in-kind donation sources (e.g. property as revenue stream, partnership with NC State, in-kind services donations, etc.) to increase revenue and reduce spending for operating expenses

- The Finance and Financial Development Committee will have two meetings with stakeholders to identify possible mission focused donation sources by June 30, 2022
- The Finance and Financial Development Committee will revise and update the in-kind donation wish list to include top needed items and services for the residents and MHCO December 31, 2021



STRATEGIC GOAL 4

Expand programming to impact more youth through collaboration and community-based programs

OBJECTIVE 4A

Explore possibilities and rebranding for Oxford Academy and daycare facility

- The Marketing and Vision Committees of the Board of Directors will explore possibilities for Oxford Academy and daycare facility by June 30, 2022
- The Program Department will perform a needs assessment for community needs for educational and daycare opportunities by June 30, 2022
- The Program Department will identify stakeholder and community resource collaboration opportunities by June 30, 2022
- The PQI Director and groups will collect data to examine trends and provide recommendations for improvement by June 30, 2022

OBJECTIVE 4B

Collaborate with community-based programs (e.g. Youth Villages, etc.)

- The Program Department will negotiate collaboration with Youth Villages and determine impact of collaboration on residents and MHCO by June 30, 2022
- The Program Department will plan space to develop to meet needs of collaboration with Youth Villages by June 30, 2022
- The Administrator will analyze needs and develop plans for Outreach Coordinator by December 31, 2021
- The PQI Director will discuss possibility of capital improvement grants (e.g. SECU Foundation and Duke Endowment) for outreach expenses by December 31, 2021
- Administration will continue to develop a partnership with Baptist Children's Homes to recruit and supervise foster homes in the local community by June 30, 2022

OBJECTIVE 4C

Develop and incorporate the Transitional Living Cottages into daily operation

- The Program Department will determine staffing needs, prepare existing buildings, develop curriculum and marketing materials, and determine grant funding opportunities for the Transitional Living Cottages by December 31, 2021
- The PQI Director and groups will write for grants for Transitional Living Cottages based on recommendations from Program Department by June 30, 2022



Strategic Planning – Day One

March 11, 2026

Outline

Chris Allabaugh's Introduction and Historical Context

Survival at Sea Exercise

- Chris introduces a survival at sea exercise, describing a scenario where participants are adrift on a yacht in the South Pacific.
- Participants are asked to prioritize 15 items based on their importance for survival, working individually and then as teams.
- The exercise aims to illustrate the importance of teamwork and negotiation in survival situations.
- Chris explains the scoring process and the importance of collective effort over individual skills.

Evaluation of Strategic Goals: Maximizing Resource Use

- Chris and participants discuss the first strategic goal set in 2021 to maximize resource use by operating at or near capacity in direct care and independent living programs.
- The group evaluated progress, including hiring a professional marketing firm, enhancing co-parenting partnerships, and establishing relationships with external stakeholders.
- Participants shared their insights on the effectiveness of these strategies, with some noting the use of Fox and CBS for marketing and the challenges of working with community colleges for recruitment.
- The discussion highlighted the need for better quantification of census trends and the importance of stakeholder relationships.

Promoting and Engaging the Workforce

- The second strategic goal focused on promoting and engaging the workforce by providing opportunities for team building and recruiting strong candidates.
- Participants discussed the use of social media for employment information, the impact of day-in-the-life videos, and the involvement of community colleges and local events for recruitment.
- The group reflected on the importance of team building activities, both structured and informal, and the need for more structured events.
- Chris emphasized the value of professional development and the role of leadership programs in fostering team building.

Improving Financial Sustainability

- The third strategic goal aimed to improve short and long-term financial sustainability by increasing the endowment to \$50 million.
- Participants discussed the decision not to hire a professional marketing firm, the examination of financial development personnel resources, and the use of new channels to increase knowledge of MHCO.
- The group evaluated the progress made in increasing the endowment from \$20 million to \$33 million over five years.
- Participants debated the terminology of "quasi endowment" versus "operating reserve" and the need for a clear definition and policy for endowment use.

Expanding Programming to Impact More Youth

- The fourth strategic goal aimed to expand programming to impact more youth through collaboration and community-based programs.
- Participants discussed the exploration of possibilities for rebranding Oxford Academy and the development of a transitional living program.
- The group considered the feasibility of starting a charter school and a daycare facility, with concerns about unrelated business income and the need for qualified staff.
- Participants reflected on the importance of community outreach and the potential benefits of a daycare facility for staff recruitment and community engagement.

Organizational Assessment and Future Directions

- Chris shared findings from an organizational assessment by Armstrong McGuire, highlighting key themes such as the need for bold action, increased community outreach, and reimagining physical space.
- The assessment identified strengths in quality of care, community outreach, and physical assets, but also highlighted challenges in funding, property use, and clarity on future directions.
- Participants discussed the importance of raising leadership transition as an opportunity for organizational change and staff engagement.
- The group reflected on the need for a sustainable endowment, effective fundraising, and the importance of preserving the family unit and community support.

Challenges and Leadership Needs at Masonic Home for Children

- According to an organizational assessment by Armstrong McGuire, Masonic Home for Children faces significant challenges, including financial stability, technology needs, and resistance to change.
- The organization must address performance and morale issues, ensure the relevance of the residential care model, and protect its campus from land value pressures.
- Leadership must develop a vision, delegate effectively, and engage others, while maintaining a stable environment for children.
- The insular and change-resistant environment of the administrative staff must be addressed, along with the need for better communication with the board.

Ideal Relationships and Internal Improvements

- The ideal relationship is defined as transparent, communicative, collaborative, and strategically focused.
- The board feels proud to be part of MHCO, but there is room for improvement in committee effectiveness.
- Internal improvements could include following best practices in HR, especially in performance management, and making staff more responsible for their work.
- A larger endowment and stronger communication of the organization's mission are identified as key goals.

Staff Surveys and Organizational Health

- Staff surveys reveal a 3.8 rating for the effectiveness of delivering the mission and a 3.3 rating for organizational health.
- Strengths include a family-first, safe, nurturing environment, and a unique program that positively impacts children.
- Challenges include staff favoritism, low morale, and toxic policies.
- The need for better leadership, more positive teamwork, and improved communication is emphasized.

Child Welfare Landscape and Strategic Planning

- The current landscape of child welfare in North Carolina was discussed, including adverse childhood experiences (ACEs), poverty, and food insecurity.
- The state has 33 child care centers, with varying ratings, and 149 children enrolled in NC Pre-K programs.
- The organization has 15,968 cases of child neglect, 2,392 cases of physical abuse, and 1,500 cases of sexual abuse.

Child Welfare Data and Trends

- Data on child poverty, food insecurity, and the number of children in foster care is presented.
- The state has 14,000 children in foster care, with significant disparities across counties.
- The impact of the Family First Prevention Services Act (FFPSA) and the COVID-19 pandemic on child welfare was discussed.
- The need for better data collection and reporting on child welfare behaviors was emphasized.

Comparative Analysis of Children's Homes

- Other children's homes in North Carolina were compared, including their models of care, programs, and services.
- South Mountain Children and Family Services has converted their cottages to foster homes and operates child advocacy centers.

- Black Mountain Home for Children has a robust independent living program and partnerships with local retreat centers and has a culinary program run by kids.
- American Children's Home in Lexington operates an Early Childhood Education Center.

Legislation and Industry Changes

- The impact of the Family First Prevention Services Act (FFPSA) on the industry was discussed, including the shift towards foster care.
- The Care Act is introduced as an effort to separate children's homes from troubled teen institutions.
- The need for legislation to support children's homes and improve their designation was emphasized.
- The role of the Coalition of Residential Excellence (CORE) in driving this legislation is highlighted.

Private Foster Parenting and Case Management

- The process of becoming a licensed foster parent through DSS or a private agency was explained.
- Private agencies like Black Mountain Home for Children provide training, licensing, and case management for foster parents.
- The benefits of choosing a private agency include more personalized support and better resources.
- The importance of having a parent organization to support foster parents is emphasized.

Strategic Planning Notes – Day Two

March 12, 2026

Outline

Introductions and Initial Conversations

- Dr. Tony Cozart led a prayer, thanking God for the beauty of the day and the blessings on the home.
- Chris Allabaugh thanks everyone for returning and suggests introductions to familiarize new attendees.

Discussion on Mission and Vision Statements

- Chris Allabaugh discusses the importance of having a clear mission and vision statement.
- Participants debate the accuracy and clarity of the current mission and vision statements.
- Suggestions are made to simplify the mission statement and align it with the home's core values.
- The idea of including the Community Support Center in the mission statement was discussed.

Values and Decision-Making

- Chris Allabaugh explains the importance of values in guiding decision-making and providing direction.
- Participants share their personal values, including faith, family, and service.
- The concept of committing to a child for a lifetime was emphasized as a core value.
- The need for values to be decision drivers and guardrails was highlighted.

Empowerment and Role Modeling

- Participants discussed the importance of empowering children and young adults.
- The role of the home in providing skills and role modeling was emphasized.
- The impact of the home on children's self-confidence and ability to navigate life was highlighted.
- The importance of creating a supportive and nurturing environment was discussed.

Final Thoughts and Reflections

- Participants reflected on their experiences and the impact of the home on their lives.
- The importance of providing a safe and nurturing environment is reiterated.
- The need for continuous improvement and evolution of the home's mission and values is acknowledged.

- The meeting concluded with a commitment to continue working towards the home's mission and vision.

Facility Overview and Initial Impressions

- Ken Haigler discusses the top-notch facilities available, emphasizing the quality of the resources.
- Ken Haigler highlights the importance of these facilities in fostering a sense of equality and confidence among the participants.
- Chris Allabaugh compares the facility to a small college campus, creating a safe and welcoming environment.
- The conversation touches on the importance of representing the organization through logos and branding.

Review of Logos and Branding

- Chris Allabaugh presents various logos and asks for feedback on whether they represent the organization's identity.
- The group discusses the significance of different logos.
- Chris Allabaugh emphasizes the importance of aligning logos with the organization's values and mission.

Group Exercises and Visioning

- Chris Allabaugh outlines the next phase of the meeting, focusing on dreaming big and visioning for the future.
- Participants are divided into groups to brainstorm about the organization's future, using specific rules to ensure effective collaboration.
- The exercise involves thinking about the organization in the year 2030, considering various aspects like programs, finances, partnerships, and infrastructure.
- The groups are encouraged to think outside the box and come up with ambitious goals for the organization.

Post-Lunch Group Rotation

- Participants reconvened and continued their group exercises, focusing on different aspects of the organization's future.
- Each group rotated through various categories, including programmatic goals, financial planning, partnerships, and system improvements.
- The exercise involved identifying top priorities and challenges in each category, with participants sharing their insights and ideas.
- The conversation highlighted the importance of collaboration and collective brainstorming in achieving the organization's vision.

Final Reflections and Next Steps

- Chris Allabaugh summarized the key points from the group exercises, emphasizing the importance of the identified goals.
- Participants were encouraged to think about what might be stopping them from achieving these goals and to address these challenges.
- The meeting concluded with a focus on the next steps, including further collaboration and planning to implement the discussed ideas.
- The conversation ends on a positive note, with participants expressing enthusiasm and commitment to the organization's mission.

Strategic Planning Notes – Day Three

March 13, 2026

Outline

Prayer and Introductions

- Kristyn Butts led a prayer, thanking God for the new day and the honor to serve.
- Chris Allabaugh asked for introductions from new participants.
- Robbie and David Sneed introduced themselves and their roles, mentioning their 18 years of service.
- Tim Kivvett and his wife, Stacie, introduced themselves as cottage parents at Alumni College.

Review of Previous Day's Discussions

- Chris Allabaugh recapped the previous day's discussions on mission, vision, values, and the commitment to children for a lifetime.
- The group is encouraged to continue pondering and jotting down ideas.
- The focus is on looking forward to what the organization would like to achieve by 2030.
- The importance of understanding other children's homes in the area is brought up.

Discussion on Central Children's Home

- Chris Allabaugh mentioned Central Children's Homes as another children's home in town and asked for information about it.
- Dr. Tony shared some insights about Central Children's Home's challenges with the census and capacity.
- The group discussed the potential for partnerships and support for Central Children's Home.
- The idea of providing case management and vocational services was considered.

Group Breakout and Theme Discussions

- Chris Allabaugh outlined the goal for the day: to create overarching goals and sub-goals for potential themes.
- The four themes were communications, programs, development, and systems.
- Groups were formed to work on each theme, with specific tasks and goals assigned.
- The importance of clear communication and consistent branding was emphasized.

Communications Theme Discussion

- The group discussed the need to improve the website and social media presence.
- The importance of making the mission, vision, and values clear was highlighted.
- The need for more testimonials and stories of impact was mentioned.
- The group proposed creating a target number of people served and increasing awareness through better communication.

Programs Theme Discussion

- The group discussed the need to increase the number of people served, including children and families.
- The idea of implementing the care model and supporting childcare workers was discussed.
- The importance of creating partnerships with local businesses and agencies was emphasized.
- The group considered expanding beyond the campus and providing services across the state.

Development Theme Discussion

- The group discussed the need for a more streamlined grant process and better collaboration between departments.
- The importance of nurturing relationships with donors and sharing impact was highlighted.
- The need for a Director of Communication and Development position was mentioned.
- The group proposed creating a donor newsletter to keep donors informed about the impact of their contributions.

Systems Theme Discussion

- The group discussed the need for better HR management, onboarding, and professional development.
- The importance of embracing technology and improving data management was emphasized.
- The group discussed the need to review and evaluate policies surrounding investments and an endowment.

Strategic Theme 1:

Communications (Brand Guide, Communications Schedule, SGA Website, e-commerce, MHCO Website, Story Telling, Logos, Mission, Vision, Values, Ambassador)

Overarching Strategic Goal:

Clarify mission, vision, and core values of the Masonic Home for Children.

Sub Goal 1:

Create a brand guide aligned with the mission, vision, and core values.

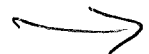
Sub Goal 2:

Identify the MHCO story.

Sub Goal 3:

Strengthen print and digital communication program.

Sub Goal 4: Develop a communication schedule for sharing the story.



Subgoal 5: Update digital communication platforms to engage stakeholders, clients, and the community.

Subgoal 6: Enhance ^{the} ambassador program to include clear mission, and consistent messaging.

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Subgoal 6: Enhance ^{the} ambassador program to include clear mission, and consistent messaging.

Group 2



brand guide - review of relevant staff

- ind. children
- ② resources
- ③ community knowledge of services

Strategic Theme 1:

Communications (Brand Guide, Communications Schedule, SGA Website, e-commerce, MHCO Website, Story Telling, Logos, Mission, Vision, Values, Ambassador)

reg. calendar of commun.

Overarching Strategic Goal:

All communications should accomplish at least one of these goals: increased number of children/families receiving services; increased resources (\$); increased community knowledge of services + accomplishments

Sub Goal 1:

consistent message + consistent look

Sub Goal 2:

establish committee to review and approve brand guide, logos, etc.

Sub Goal 3:

Strategic Theme 1:

Communications (Brand Guide, Communications Schedule, SGA Website, e-commerce, MHCO Website, Story Telling, Logos, Mission, Vision, Values, Ambassador)

Overarching Strategic Goal:

Strengthen Public Awareness engagement, & support for MHCO by communicating its mission, impact & involvement through exceptional storytelling, partnerships & outreach.

Sub Goal 1: Storytelling

Develop a consistent branding & style guide by end of 2026

Sub Goal 2: Partnerships

Identify & grow active corporate, non-profit, & foundation partnerships by January 2027

Sub Goal 3: Outreach

Explore & identify methods of consistent communication for outreach by end of 2026

David Wicker, Ken Hagler, Gabi Wheat, Sara Becker

Strategic Theme 1:

Communications (Brand Guide, Communications Schedule, SGA Website, e-commerce, MHCO Website, Story Telling, Logos, Mission, Vision, Values, Ambassador)

Overarching Strategic Goal:

Increase awareness by
Communicate clearly what we do, who we serve,
the programs we have, the costs to families &
custodians, how to access services, who supports us.

Sub Goal 1:

Improving website, making FB link more visible,
more active social media (IG-profile isn't available)

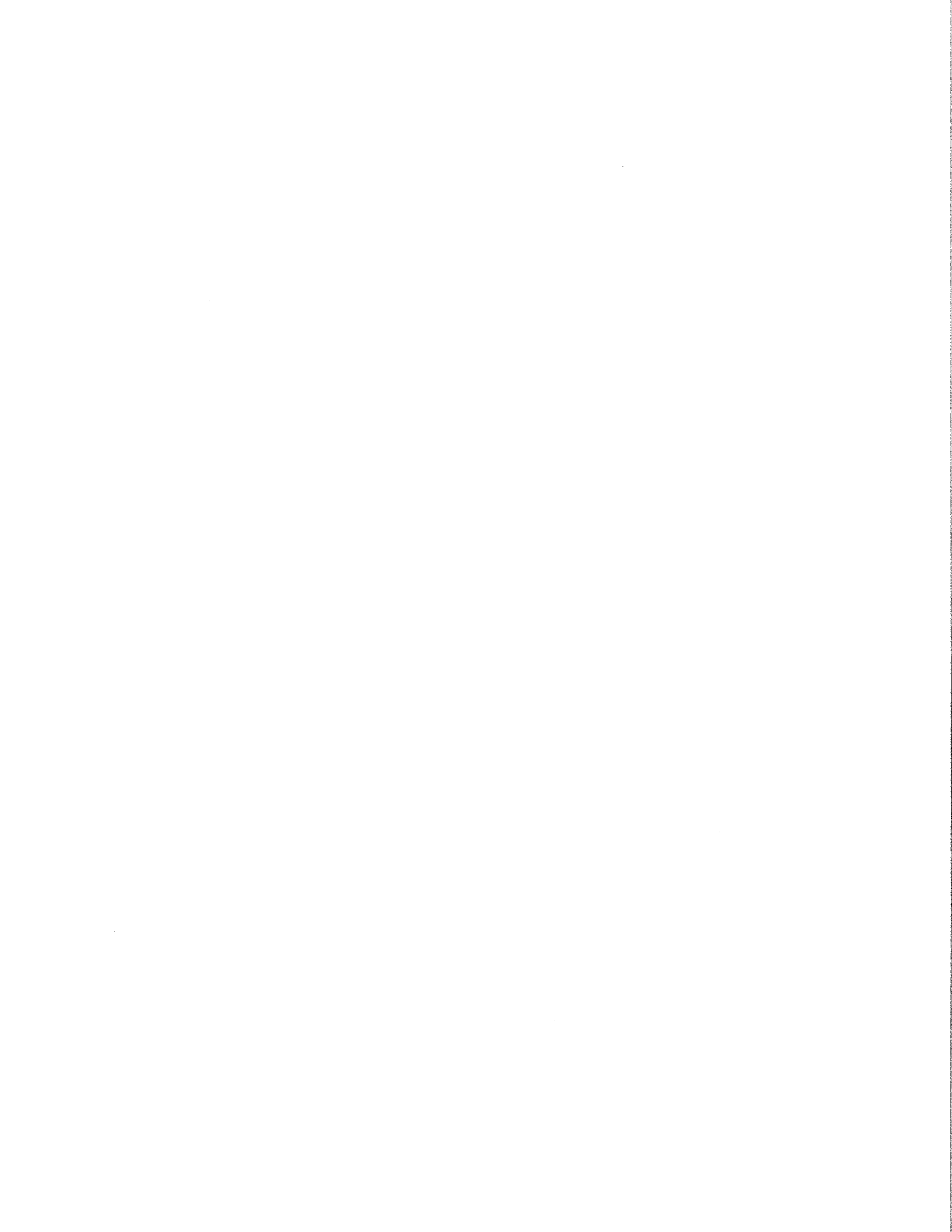
Sub Goal 2:

Tell more stories of our impact in the lives
of the children & families we serve;
Tell CCW stories as well

Sub Goal 3:

Revise Mission Statement / Vision Statement
Create Value Statement, Consistent Branding/
logo across the agency

"Vulnerable populations"



Strategic Theme 1:

Communications (Brand Guide, Communications Schedule, SGA Website, e-commerce, MHCO Website, Story Telling, Logos, Mission, Vision, Values, Ambassador)

Overarching Strategic Goal:

- ② Fundraising
- ① More kids
- ③ Community Awareness
Consistent

Sub Goal 1:

Sub Goal 2:

Sub Goal 3:

Strategic Theme 1:

Communications (Brand Guide, Communications Schedule, SGA Website, e-commerce, MHCO Website, Story Telling, Logos, Mission, Vision, Values, Ambassador)

Overarching Strategic Goal:

Develop a unified communication strategy that sets MHCO as a leading Residential Care Organization for children.

Sub Goal 1:

Develop an unified approach that clearly aligns + strengthens relationships with Masons of NC to maximize their efforts + financial support.

Sub Goal 2:

Develop a strategy that maximises MHCO e-commerce capabilities.

Sub Goal 3:

Recommend a unified branding strategy ^{→ culture} that allows MHCO to accomplish the current strategic needs while honoring the history & accomplishments of our past.



Maximize program capacity to serve as many children who _____

- 1) Reach current census capacity
- 2) Consider feasibility of increasing census capacity

3) Explore feasibility of expanding ~~off~~ or creating additional services/programs such as:

↳ Foster Care

→ Maternity Support

→ Day Care

→ Early ~~child~~ Education

Maximize program capacity to serve
as many children who

1) Reach current census capacity
2) Consider feasibility of increasing
census capacity

3) Explore feasibility of expanding
off or create additional
services/programs such as:

- Foster care
- Residential care
- Day care
- Early child development

Strategic Theme 2:

Programs (CARE, Partnerships, Program Development/Expansion, Service Reach, Talent Management, Outreach)

Overarching Strategic Goal:

Strengthen current residential programming, while expanding mission aligned programs that support children, staff, families, & communities through educational, developmental → enrichment opportunities.

Sub Goal 1:

Implement Trauma Informed model of care, while increasing our current census & expanding staff talent to support our mission - Mid 2029

Sub Goal 2:

Incubate vital programs through our Community Support Center sandbox starting mid-2027

Sub Goal 3:

Explore additional programs that align with MHCO's mission mid 2027

Strategic Theme 2:

Programs (CARE, Partnerships, Program Development/Expansion, Service Reach, Talent Management, Outreach)

Overarching Strategic Goal:

Provide research based, trauma informed, high quality programming to improve the lives of vulnerable children, young adults, and families.

Sub Goal 1:

Implement CARE with validity and integrity across all programs.

Sub Goal 2:

Grow needs-based, community partnerships.

Sub Goal 3:

Evaluate program reach and unmet needs to increase service delivery.

Sub Goal 4: Leverage staff talents effectively to meet needs and empower personnel.

Strategic Theme 2:

Programs (CARE, Partnerships, Program Development/Expansion, Service Reach, Talent Management, Outreach)

Overarching Strategic Goal:

Evaluate Programmatic Development that enhances our current mission

Sub Goal 1:

Develop a strategy that maximizes the capabilities + capacity of the residential childrens program

Sub Goal 2:

Identify at least one new complementary program to include feasibility and business plan that enhances services and revenue

Sub Goal 3:

Create a professional development program that grows, attracts, and retains top talent allowing successful implementation of programmatic growth

Strategic Theme 2:

Programs (CARE, Partnerships, Program Development/Expansion, Service Reach, Talent Management, Outreach)

Overarching Strategic Goal:

Maximize program capacity to serve as many Level 1 children in need as we can

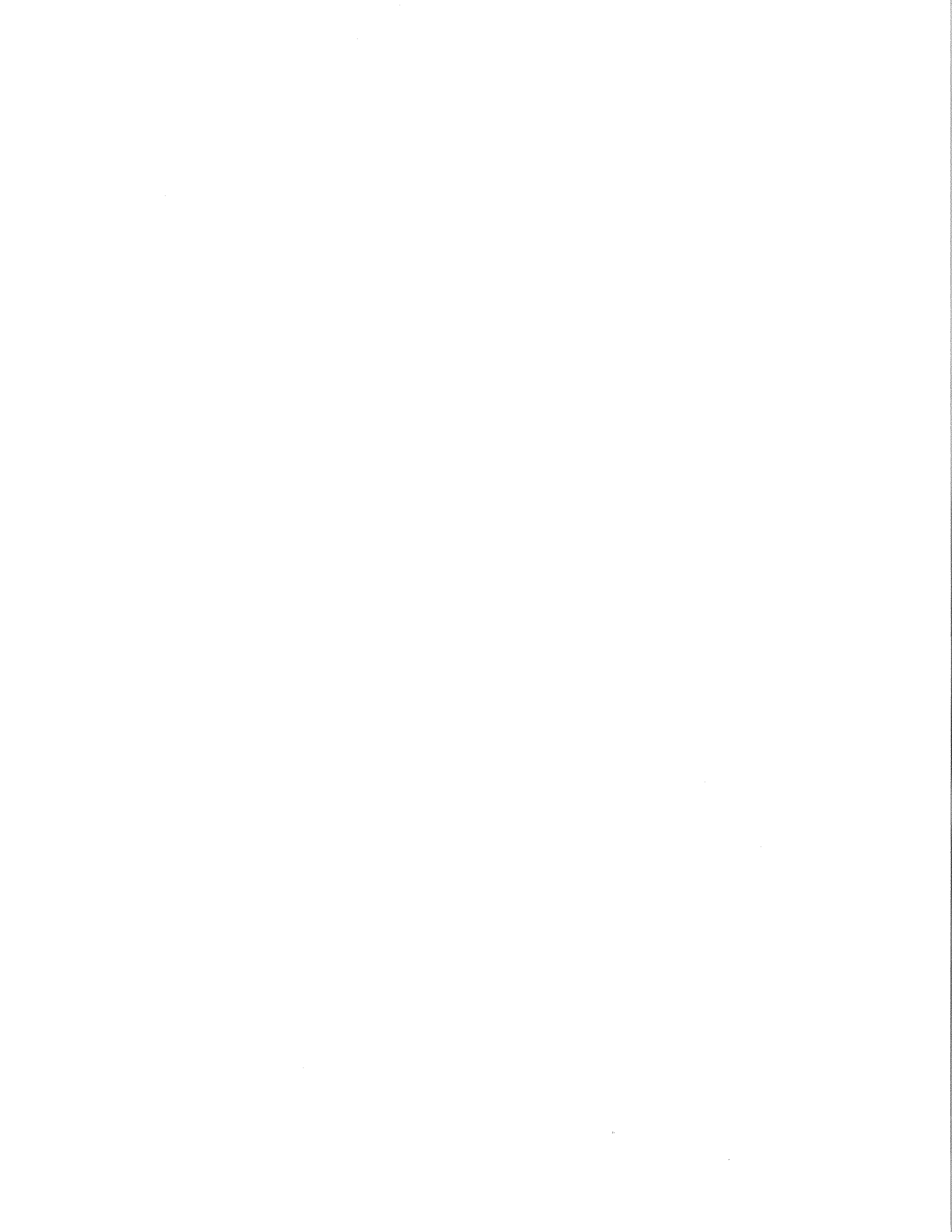
Sub Goal 1:

Reach current census capacity on campus across all programs

Sub Goal 2: Explore the ~~current~~ feasibility of ^{expanding} ~~increasing~~ census capacity.

Sub Goal 3:

Evaluate opportunities to broaden child and family services, including preschool, childcare, foster care, maternity care, and entrepreneurial programs.



Strategic Theme 2:

Programs (CARE, Partnerships, Program Development/Expansion, Service Reach, Talent Management, Outreach)

Overarching Strategic Goal:

Create a target # of people served -
Serve more kids & families

Sub Goal 1:

Increase ILP services; Create a strong life skills program for on campus/ off campus young adults

Sub Goal 2:

Implement the CARE model; Support CEWs through training/de-escalation skills/tools.

Sub Goal 3:

Strengthen and seek relationships with local agencies/businesses to increase CSC partnerships/Charity Tracker

Sub Goal 4:

Provide tutorial programs across the state - using Masonic Lodges/volunteers to help students succeed academically

Strategic Theme 3:

Development (Grants, Stewardship, Expanding Donor Base, Director Position, Supply Drive, New Opportunities)

Overarching Strategic Goal:

Expand development initiatives to raise annual operating income.

Sub Goal 1:

Create a comprehensive development plan including an annual campaign calendar.

- Director of Development & Communication
- Development Committee.
- Annual Giving officer

Sub Goal 2:

Explore new revenue sources including corporations, churches, businesses, young alumni, and new individual donors.

Annual Giving officer
Board
Dir of Dev & Comm.

Sub Goal 3:

Pursue new methods of giving to increase annual gifts.

CFO, Dir of Dev. & Comm; Annual Giving officer

Sub Goal 4:

Enhance stewardship ^{program} to intentionally recognize and grow donor relationships.

CFO, CFO, Dir of Dev/Comm.
Annual Giving Board



Strategic Theme 3:

Development (Grants, Stewardship, Expanding Donor Base, Director Position, Supply Drive, New Opportunities)

Overarching Strategic Goal:

Develop a Leadership ~~strategy~~ ^{directed} strategy to build a permanent campus endowment while increasing annual contributions to support operating expenses

Sub Goal 1:

Recruit staff with necessary expertise. Establish development systems consistent with best practices.

Sub Goal 2:

Build donor database to support goals

Sub Goal 3:

~~Write~~ ^{integrate} grants-writing to development staff (dotted line?)

Strategic Theme 3:

Development (Grants, Stewardship, Expanding Donor Base, Director Position, Supply Drive, New Opportunities)

Overarching Strategic Goal:

Demonstrate excellence in Financial Development across the organization by strategically identifying, communicating, soliciting & stewarding prospects, including individuals, corporations, & foundations.

Sub Goal 1:

Strengthen relationships with masonic fraternity
→ expand outreach to the general public

Sub Goal 2:

Build annual giving program to cover operating costs

Sub Goal 3:

Build planned giving program to grow endowment
→ endow planned gifts in five years

Strategic Theme 3:

Development (Grants, Stewardship, Expanding Donor Base, Director Position, Supply Drive, New Opportunities)

Overarching Strategic Goal:

Increase Awareness to donors, strengthening current relationships and creating new relationships

Sub Goal 1:

More streamlined Grant process throughout the agency; making sure that all departments involved collaborate; follow up w/ funders through reports, nurturing relationships + sharing impact

Sub Goal 2:

Fill Director of Dev/Comm.

Sub Goal 3:

More specific letters/newsletters ~~to~~ targeted to donors to see the direct impact.

"These are your kids" - follow up with kids and their successes

"My donation made ~~me~~ a meaningful impact"
invite to public events → Baccalaureate

ex- new furniture at LLP cottages from campaign

Strategic Theme 3:

Development (Grants, Stewardship, Expanding Donor Base, Director Position, Supply Drive, New Opportunities)

Overarching Strategic Goal:

Develop funding sources that sustain current programmatic offerings and allow for expanded reach and scope

Sub Goal 1:

Develop a plan to expand our donor base that will allow us to look to the future while honoring our Masonic history and support.

Sub Goal 2:

Identify & onboard Donor Dev Leadership successfully establishing funding supporting the mission of the organization

Sub Goal 3:

Strategic Theme 4:

Systems (HR Management, Onboarding, IT, Embracing Technology, Professional Development, Reporting, Data Management)

Overarching Strategic Goal:

Ensure we have modernized IT systems that allow the most efficient operations of the Masonic Home for Children

Sub Goal 1:

More Streamlined efficient electronic HR process

Sub Goal 2:

Evaluate current IT model

Sub Goal 3:

Prioritize Data Reporting Management for Programming / HR

Strategic Theme 4:

Systems (HR Management, Onboarding, IT, Embracing Technology, Professional Development, Reporting, Data Management)

Overarching Strategic Goal:

Create a digitally, integrated system to improve access, efficiency, and reporting.

Sub Goal 1:

Utilize role specific technology (IT) training.

- IT coordinator / company
- HR specialist
- COO

Sub Goal 2:

Develop a reporting dashboard to accurately and clearly communicate.

- COO / CEO
- Director of Res
- Financial Dev. Assist
- POI
- Annual Giving Officers

Sub Goal 3:

Increase digital security across all systems.

- IT coordinator / company
- Security Res. officer



morale
consistent
applied
principles

Strategic Theme 4:

Systems (HR Management, Onboarding, IT, Embracing Technology, Professional Development, Reporting, Data Management)

Overarching Strategic Goal:

Consistently apply ^{established} policies of HR, Onboarding, and Prof Development to accomplish dedicated, well-trained staff to carry out the mission of MHCO.

- Regularly professional development opportunities.

Goal 1:

standardized

Consistently train staff to ensure data management and technology use are ~~not~~ used appropriately for business practices across campus.

- Consistent training during on-boarding
- Performance expectation includes accurate and timely data entry.

Sub Goal 2:

- Daily, dedicated IT support on campus.

- use technology to deliver greater efficiency where possible

Sub Goal 3:



Strategic Theme 4:

Systems (HR Management, Onboarding, IT, Embracing Technology, Professional Development, Reporting, Data Management)

Overarching Strategic Goal:

Align resources & processes by 2030 to continuously improve our physical & digital security, enable fingertips reporting for interested parties, & enhance program design.

Sub Goal 1:

Develop a campus security enhancement policy/plan including possible gates or other measures for reducing traffic in housing areas, & address critical infrastructure & promote sustainability.

Sub Goal 2:

Design, implement, & audit cybersecurity systems to safeguard residents, staff, facilities, & organizational data.

Sub Goal 3:

Develop & implement real time data & reporting systems to drive program design & continuous improvement

Strategic Theme 4:

Systems (HR Management, Onboarding, IT, Embracing Technology, Professional Development, Reporting, Data Management)

Overarching Strategic Goal:

Update current systems

Sub Goal 1:

Train staff to use current available technology to increase efficiency throughout the agency (ex. teams)

Sub Goal 2:

HR system needs to be updated; training onboarding

Sub Goal 3:

Charity tracker

Programmatically

Daycare ✓✓

ILP/TP Program Expansion/Focus ✓✓
Build Development Program

Create young alumni program

Entrepreneurial (coffee shop, etc) opportunities
for residents

- INCREASE EXPOSURE
- BOY SCOUT DEMOLITION
- MAXIMIZE SPACE FOR RECREATION
- DEDICATE BUDGET FOR OUTREACH EXPOSURE
- Foster Care
- Apprenticeships
- Family Care (Birth moms / Pre-Natal)
- Maximize Census

Partnerships

- 100 County Engagement (DSS / GAL / Courts) ^{FAMILY} ✓

- New Business Partners

- Secondary Ed. - Comm. Colleges ✓ ✓
VGCC apprentice work - HVAC, plumbing etc.

- ~~100~~ CSS - charge rent

- Awareness - "we're open to partnering"

Systems

- Digital and Secure Systems. ✓
(Files and Physical)
- Systematic Storytelling ✓
photos from routine + special activities
- Data Management + Reporting ✓✓
- Enhanced security program

Teams

- ✓ Fully Staffed (Programming)
- Board Support (Risks)
Be Willing to take
- Programming (Edu Res)

- Staff support for Secondary Trauma

- Board / Staff cohesion

- Co-Parenting w/families and Community support.

- Volunteers - JF Webb students to tutor, foster grandparents, mentors for TLP, peer-to-peer counseling
- separate Education from Vocational
- Relief for house parents - 4 hour respite from staff (Admin.) or volunteers

Financially

- Diverse Givers ✓
- Endowment ✓✓
- Annual Giving
 - Funds for More Staff ✓✓
 - Funds for Campus Updates/Renovations
 - More Creative / Innovate Fundraising
 - Dev Calendar (12-18 mths)

Financially

- Diverse Givers ✓
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Space + Infrastructure

- PICKLEBALL COURTS
- PLAYGROUND IMPROVEMENTS
- VEG. GARDEN


- Infrastructure - underground utilities

- Sustainability

- Safety - Preg Unwed Mothers

- Child Care Center ✓✓
- Preventative Property Management + Rotation
- Satellite Campus investigation
- Dedicated Educ. Space with working bathrooms
heat + AC
- Growth - inc. census capacity

Challenges

- finances (need more \$) ✓✓✓
- regulations
- number of staff (need more) ✓✓
- INCREASE ~~OFFICE~~ OCCUPANCY
- A drawing consisting of a blue heart with a red outline on the left, and a smiley face with blue eyes and a red outline on the right. A red arrow points downwards from the smiley face.
- Licensure
- Resistant to Change (Board, Staff) ✓
- Public misperception
- CAMPUS SECURITY
- Community engagement
- outdated systems

Proud of:

- * Community Resource Center
Huge Potential for
our counties served
Use + promote in
Media often

Publications (beautiful
work ~ share!)

Proud of:

- increased on-campus census
- this beautiful campus ✓
- **OUR COMMUNITY**
- **OUTSTANDING CHILD CARE - 11K+ AND GROWING** ✓
- Accreditation
- Gala Support
- Children served
- **Excellent Staff** ✓✓
- Staff Diversity
- Grounds + set up for Homecoming
- **Board giving - 100% - Excellent**

Proud of:

* Transitional Living

Legacy and history and strong number of "alumni" still engaged and supportive.

- The dedication of the staff here on the campus and the wonderful things that are done for residents.

Co-parenting

Homecomings

* Care provided to residents

Continued Care

campus outings

Vocational Education

Proud of:

Community Support
Center x2

Financial Stability

150th Anniversary

Community Support Center

Growing Census

Community Support CTR.

Social Activities/Interactions for youth/residents

Homecoming

Campus-maintenance

Tradition/History

Missed Out:

- NASCAR

- aftercare services

- Family Support/Training

- referral opportunities | Scope of practice

- more general public support

EXPANDING our Donor BASE ✓

Daycare ✓

Missed Out:

- using development software
to its capacity ✓

- Need more full time
fundraisers + grant
writer

- ILP Apprenticeships / Career Dev.

- ENGAGING / COMMUNICATING WITH / BRINGING IN NEW DINERS / FRIENDS
FROM COMMUNITY & OUTSIDE OF MASONRY

- Marketing More
- Publications sent to
stakeholders

Missed Out:

- Teamwork - too many
Silos
- Creating stronger
"connections"
within + without
MHCO
- Acknowledging big gifts,
grants
- Using resources received
- "Young Alumni Niche" different needs
Help