



**Approved by CaringMatters Board of
Directors on January 21, 2026**

**Three-Year Strategic Plan
for Fiscal Years 2026-2028**

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This document is for internal use by the Board of Directors and CM staff. A Strategic Plan Framework and other documents will be created for other internal (volunteers) and external communication purposes.

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Three-Year Strategic Plan for Fiscal Years 2026-2028

INTRODUCTION

This document is the result of CM's fourth three-year strategic planning cycle. Firmly a part of CM's culture, its strategic plans have

- Served as a singular blueprint or road map for Board and staff for achieving our mission and vision
- Guided programmatic decisions
- Guided financial decisions
- Communicated our mission, goals and strategies with stakeholders
- Responded to changing environments and crises
- Provided a framework tool for accountability for outputs, quality, and result

Long-term planning gives CaringMatters the opportunity to dream about its future as an integral and essential part of Montgomery County's services for seriously ill patients, family caregivers and grieving children, adults, and families. The plan seeks to answer the question: Are we effectively and efficiently investing our assets to advance community benefit (vision) and achieve our outcomes (mission) in a matter that is viable over time (sustainable)?

CaringMatters' program goals and strategies are its heart. Creating this new plan gave the Board Workgroup an opportunity to take a comprehensive, in-depth look at all CM programs and operations; the intricacies, successes and challenges in its current service delivery; the continuing and changing needs of our service populations; external social, political and economic influences; and the strength of its infrastructure components to support service delivery and organizational operations.

The Workgroup paid particular attention to four intersecting strategic issues: 1) the continuance of our volunteer workforce model by successfully recruiting and retaining volunteers; 2) increased avenues to engage county residents who can become clients, volunteers and/or donors; 3) increase the number of residents from our diverse communities who are clients, volunteers and Board members; 4) fund-raising capabilities that can lead to full plan implementation. CM staff were essential to this process sharing their insights, expertise and information about the realities of their work with the Workgroup.

The Board is optimistic about CM's growth over the next three years. This plan is intended to be flexible. This time frame can include adjustments to current programs and/or creation of new ones.

As the plan is implemented, the interaction between Board and staff will continue. The Board will address CaringMatters' high level strategic direction, provide oversight for the plan's implementation and revision with continued mission alignment and organizational sustainability. Under the leadership of the Chief Executive Officer, staff will carry out day-to-day operations and program execution as outlined in the plan keeping the Board informed and suggesting new ways to fulfill our mission.

PLAN DEVELOPMENT

Workgroup Membership

The following Board Members and CM's Chief Executive Officer participated in the 10-person workgroup:

- Sue DeGraba*
- Lauren Grunley
- Bill Hard*
- Kevin Kane
- Kenneth Nelson*
- Craig Rice*
- Ernest (Chico) Rosemond
- Audrey Rothstein*
- Jeffrey Rubin
- Allison Stearns, CEO*

*Participated in the SP23-25 Workgroup

Carol Walsh was the volunteer facilitator of the Workgroup.

Workgroup Activities

The Workgroup met 11 times between February 12, 2005 and October 7, 2025. Each meeting was for two hours via Zoom/Teams. Meetings were organized in alignment with the Three-Year Strategic Plan for FY23-25's program, value and organization goals. CM's program departments are aligned with the three program goals. Senior program and operations staff attended for topics specific to their responsibilities, as listed below.

Meetings were held on the following dates with key agenda items.

- February 12—Getting Started
- March 12—Children's Bereavement (Gilly Cannon, Senior Director, Children's Bereavement Department)
- April 1—Parent and Caregiving (Amy Fier, Senior Director, Patient and Caregiving Department)
- April 24—Adult Bereavement (Brandon Brewer, Director, Adult Bereavement Department)
- May 24—Review of Program Goals
- June 6—Information Systems (Amy Bayersdorfer, Chief Operating Officer)
- June 26—Volunteers (Amy Fier)
- July 16—Communications/Visibility, Inclusive (DEI) Value, Mission/Vision (Leigh Bluestein, Chief Communications Officer)
- August 6—Staff, Fund Development
- August 27—Putting it All Together, Mission/Vision
- October 7---Final Draft for Board Presentation

Seeking Community Input

- The Workgroup discussed the importance of gaining community input. For the 2023-25 plan, we convened two community groups one looking at serious illness and the second grief. The Workgroup reviewed these focus group reports and found the information still relevant. We also felt it would be challenging to convene groups as universally, attention was on the negative impacts of significant decisions of the new Federal administration. Connecting with our stakeholders will be part of the rollout of the new plan.
- We surveyed our volunteers to learn their thoughts on CM's current work, our challenges and what other services CM might provide. Their responses were included in CM Workgroup materials.

Continued Montgomery County Focus

The Workgroup agreed that CaringMatters' service focus will continue to be those who live or work in Montgomery County. If CM is approached by an organization in another jurisdiction to deliver services there, CM will assess the opportunity as to its feasibility, profitability, and potential impact on Montgomery County service delivery.

MISSION, VISION, AND VALUES

Concurrent with this strategic planning process is CM's preparation of its application for renewal of its Certificate of Excellence with Maryland Nonprofits. Organizations receiving Standards for Excellence recognition have been carefully evaluated and found to consistently model high professionalism in their self-regulation of ethical and accountability practices.

One requirement for certificate renewal is the organization's three-to-five-year review of its mission. The current mission was approved by the Board during the rebranding of CaringMatters from Hospice Caring in September 2018. The Workgroup recommends the following revised mission statement, for Board approval:

Mission: CaringMatters supports people of all ages experiencing serious illness, caregiving, loss, or grief through compassionate services - so no one faces their journey alone.

This revised mission statement impacts the wording of our community vision. The community vision serves to articulate the larger visualization of well-being for all residents of our county and how we are an integral part of fulfilling that vision. The Workgroup proposes the following revised vision.

Vision: CaringMatters envisions a community that accepts death as part of life; where the processes of caregiving, dying and grieving are embraced; where everyone has access to services and where no one dies or grieves alone.

Values

These were refined during the FY2017-2019 plan development. The value regarding cultural competency became a strategic plan goal for FY2020-2022.

Values

- Compassionate, respectful presence
- High quality services that honor personal choices
- Culturally competent, accessible support
- Impactful programs that make a positive difference
- Dedicated volunteers and partners whose support is essential
- Deep engagement as an integral part of our community
- Responsible and transparent resource management

Three Year Strategic Plan for Fiscal Years 2026-2028 (SP26-28)

Summary of Program, Value and Organizational Goals

PROGRAM GOALS

1. Increase companionship, practical home assistance, transportation and support services to assist more people with serious illnesses and their caregivers.
2. Grow peer support groups, camps, retreats and family programs to serve more grieving individuals
3. Expand community awareness about serious illness, caregiving, death and grief through educational events, social media, public awareness campaigns and professional workshops.

VALUE GOAL

Increase engagement with all individuals in our diverse communities so they have full access to culturally competent services with positive personal results.

ORGANIZATIONAL GOALS

1. Increase our visibility to serve more Montgomery County residents, recruit volunteers, develop partnerships and increase financial support.
2. Recruit, train, and retain multilingual and culturally diverse volunteers to continue delivering services and supporting administrative and fund-raising activities.
3. Ensure enough highly qualified staff to deliver, with the involvement of valued volunteers, exemplary programs that meet desired outcomes.
4. Maintain a system of secure integrated hardware, software, data, communications and people resources that enables programmatic and operational decision-making.
5. Secure funding to sustain, expand, and diversify programs and promote organizational longevity.

PROGRAM GOALS AND STRATEGIES

Strategies within each goal are for a three-year time period with annual implementation plans identifying which strategies would be addressed in each fiscal year; some strategies would not begin in FY26. Strategies that would “continue” means that the numbers served over time is uncertain based on a mix of the number of program participants, volunteer availability and staff resources. Strategies labeled “increase” would expand the numbers served or other outputs over the three years. The anticipated increase in numbers served would be set for each fiscal year based on staff recommendations and approved budgeted resources. “Maintain” indicates that programs would remain at the same level of outputs. FY 2025 baseline data serve as a reference point for the three-year period.

Each program goal has a target population. This plan is a blueprint which provides CM with the ability to redesign or add new strategies that contribute to the overall increase in numbers of the goal’s target population who are served with positive benefits to patients/clients.

GOAL: Increase companionship, practical home assistance, transportation and support services to assist more people with serious illnesses and their caregivers.

Community Need

- Seniors are the fastest growing age group in the County. Currently 238,833 (22%) are 60+ years; 11% are 70 years and older. By 2040 the 60+ population will be over a quarter of the population. Life expectancy is increasing, with older adults age 85+ expected to increase by approximately 77 percent between 2019 and 2030. The county’s 60+ population is very racially/ethnically diverse. Approximately 15% are Asian; 18% Black or African American; 21% Hispanic or Latino; and 41% White.
- Along with this growth comes increases in frailty, chronic diseases, and dementia. In 2021, 36% of people 75 years and older had a disability affecting ambulation (22% of the group) or independent living (22%) with the rest having cognitive and other disabilities. Nationally, more than 1 in 9 (11%) age 65 or older has Alzheimer’s or dementia. This number is expected to greatly increase.
- The number of family caregivers is unknown. As the population ages and becomes frailer and ill, available informal caregivers decline in numbers. Family caregivers are often caregiving alone as commercial home health care is expensive and family caregivers sometimes are hesitant to trust others to provide care, even for respite. In Asian, Black/African American and Hispanic cultures families are more likely to rely on family caregivers for longer times, which leads us to believe that given our county’s diversity, there are many isolated long-term caregivers.
- Montgomery County has a sizable population of people 65 years of age or older who fall in between Medicaid eligibility and having the private resources to pay for the care they may need to live safely in their homes and communities. This “Senior Gap” of individuals needs enhanced supports to avoid early and unnecessary facility-based care.
- Older residents encounter transportation barriers in accessing medical care. Public transportation can be income or geographically restricted with trips lengthy, time-consuming and bus stops inaccessible, especially when experiencing medical treatment side effects.

Populations to be Served

- Individuals of any age in Montgomery County with a serious, life-limiting illness
- Individuals of any age facing acute decline in functioning or progression of the illness
- Individuals of any age with the above health status who are pursuing curative treatment or receiving medical hospice services

- Individuals with serious illness who need transportation support to access essential medical and social services
- Family members/caregivers of those with the above health status

Desired Outcomes for Those Served

Volunteer Helping Hands

- Patient experienced increased emotional support and was less socially isolated.
- Practical support helped the patient with daily living.
- Family members/caregivers were better able to carry out other responsibilities.
- Family members/caregivers had some relief from the stress of caregiving.

JustRides

- Keep appointments, arriving on time
- Feel supported by a caring volunteer during this stressful time

Caregiver Support

- Learn new ways and resources to care for a family member
- Supported in caregiving challenges
- Reminded of ways to handle stress
- Recognize caregiving successes
- Build a network of support
- Reduce feelings of isolation

How CM is Unique

Volunteer Helping Hands

- We visit patients who have serious, life-limiting illnesses; are not required to provide a doctor’s prognosis of six months to live; and can be seeking curative treatment (which they cannot in medical hospice care).
- Because our service is ineligible for public or private insurance, we have more flexibility in the services we can provide.

JustRides

- Service is door-to-door. The CM volunteer picks the person up at their residence and returns them home at the conclusion of their treatment.
- We help the patient solve their transportation needs by looking at available options.
- Volunteer training includes volunteers learning about our compassionate patient focus and the challenges/side effects the cancer patient is facing from treatment.

Caregiver Support

- To our knowledge our mentorship is the only local program of its kind.

Proposed FY2026-2028 Program Strategies

Strategies—Patient & Caregiver	FY 2025 Baseline Data
1. Continue serving patients in Volunteer Helping Hands	FY25: 81 <i>Number of patients to be served depends upon the challenge of volunteer availability.</i>
2. Increase the number of seriously ill patients that JustRides transports to medical and social services	FY25: 722 one-way trips

Strategies—Patient & Caregiver	FY 2025 Baseline Data
3. Increase the number of caregivers who are supported through groups and mentorships	Groups: 25 caregivers Mentorship: new in FY26: 12 caregivers

Goal: Grow peer support groups, camps, retreats and family programs to serve more grieving individuals.

Children’s Bereavement

Community Need

The national Child Bereavement Estimation Model estimates that 9% of Maryland’s youth will experience the death of a parent or sibling by age 18; this equals over 20,000 youth in our county. These data do not include losses from other family, friends, and important adults. Whether sudden loss from accident, homicide or suicide or loss resulting from a lingering progressive illness, family members are devastated and searching for ways to survive their loss and grieve. Caregiving adults are trying to address their own loss while trying to parent and often holding a job. They worry about what to say and often say nothing.

Children feel totally alone, worry about their futures, and wonder what they may have done to cause the death and fear making their parents’ grief worse. Regardless of their developmental stage, the children may not be able to adequately recognize and articulate their feelings. So, they stay silent. These losses result in challenges to emotional, social and academic development. Unresolved grief in children can lead to increased risk for problems that require extensive treatment. Immediate and ongoing emotional and social support from family, school and peers is one of the most important strategies for the healthy adjustment of grieving children and teens.

Populations to be Served

- Children from early childhood through adolescence who have experienced the death of an important person in their lives
- Parents, guardians and other primary family caregivers of grieving children who also are likely grieving
- Education and health and human services professionals serving grieving children and/or their parents, guardians

Desired Outcomes for Those Served

Good Grief Clubs and Camp Erin

- Learn to recognize and talk about their grief and feelings
- Realize that there are other students who are also grieving, and they are not alone
- Learn some tools/strategies that they plan to use during difficult feelings and times
- Identify adults who they can go to for help

Family Nights

Adults and their children

- Can better talk about and remember the person who died
- Learn new ways to handle difficult times such as family celebrations and holidays
- Share feelings of loss with each other

Parenting While Grieving

- Better understand how children grieve based on their age and development
- Have some new ways to communicate with and listen to their children
- Have some new tools to increase their self-care so they can care for their children

- Have identified how they can create their own important support systems

How CM is Unique

- No other local organization delivers programs with similar content and outcomes as our Good Grief Clubs, Camp Erin, Family Nights and Parenting While Grieving
- As a result, without marketing this capability, CM is often contacted by individuals for information and resources on children’s grief
- No other organization has a Memorandum of Understanding with the Montgomery County Public Schools for respective roles for delivering Good Grief Clubs and building the capacity of its student services employees in supporting grieving students.

Proposed FY2026-2028 Program Strategies

Strategies—Children’s Bereavement	FY25 Baseline Data
1. Increase the number of school-aged children served through Good Grief Clubs in public and private or independent schools.	229
2. Increase the number of school-aged children served through Camp Erin	50
3. Maintain the number of families served through Family Nights	28 (Capacity: 5 FN with 6 families of varying sizes)
4. Maintain the number of parents served through Parenting While Grieving	14 parents (Capacity: 2 series with 10 attendees each)
5. Maintain building the capacity of MCPS to respond to the needs of grieving children through training and consultation and responding to other community individuals and professionals.	MCPS Contract: up to 5 workshops and 110 individual consultations to MCPS personnel. Non-MCPS individual consultations occur

Adult Bereavement (AB)

Community Need

Unresolved grief in adults interferes with daily functioning. Research has found proven links to increased inflammation, heart disease, stroke, and cancer. Grieving adults can lack information and have misconceptions about how they should grieve, the signs of grief; any expected timeline, ways to cope and how to remember their loved one.

Seniors may experience a variety of types of grief as they age: ambiguous grief for the loss of the life they once had; anticipatory grief as they see a special person in their lives decline in health with death increasingly imminent; and grief that occurs when a loved one dies.

Data are not collected via any individual surveys regarding the number of people who are grieving in Montgomery County. One possible indicator of number of grieving people relates to the number of deaths in the county; according to the Maryland Vital Statistics Report, 6950 people died in 2022. An unknown number of county residents are grieving the loss of loved ones who could have lived and died elsewhere in the country or internationally.

The WebMD 2019 research report provides an estimate of grieving people and their characteristics. Details of the study can be found at <https://laopcenter.com/mental-health/grief-statistics/>

Populations to be Served

- Adults who have experienced the death of an important person of any age
- Employees of businesses who are experiencing the death of co-worker
- Education and health and human services professionals serving grieving adults

Desired Outcomes for Those Served

Adult Bereavement Support Groups

- Find words to better identify and express their feelings about their loss
- Gain some new tools to use in their daily life
- Recognize that the way they are grieving is “normal” and that grief doesn’t have a timeline or specific stages
- Are reminded that taking care of themselves is crucial and that they deserve to do so
- Realize that they are not alone and have a support network

Bereaved Caregiver Retreat

- Are better able to reflect on the meaning of their caregiving role.
- Discover some ways to remember and honor their important person while letting go of their role as caregiver.
- Are reminded of some ways to take care of themselves and that they deserve to do so.
- Gain some tools/approaches that they will use to renew their lives
- Are better prepared to transition from their prior caregiving role to focus on their own life.

Tree of Love (outcome data are not collected)

- Opportunity to remember loved ones

How CM is Unique

Peer Support Groups

- We use a peer-support model where the uniqueness is allowing participants to share their own grief narratives while supporting one another in an environment of care, compassion, and free from judgement, fostered by our volunteer co-facilitation model rather than a clinically led approach. We use a rolling enrollment approach where people can begin as soon as they would like, rather than waiting for a new group to begin. Groups are organized by type of loss (ex., parent, child, spouse, suicide) while others are mixed. Groups are either on-line or in person. Realizing that there is no time line for grief, people can stay in a group for as long as they deem necessary.

Bereaved Caregivers Retreat

- No other organization has a program for bereaved caregivers.

Tree of Love

- No other organization offers a similar program

Proposed FY2026-2028 Program Strategies

Strategy—Adult Bereavement	FY 25 Baseline Data
1. Increase the number of grieving adults who are served through AB Peer Support Groups	226
2. Maintain the number of bereaved caregivers who are served through a Retreat.	14

Strategy—Adult Bereavement	FY 25 Baseline Data
3. Maintain the annual Tree of Love to memorialize deceased loved ones.	60
4. Continue consultations with grieving individuals and those caring about them and educational and health and human services professionals	This work has been occurring; data has not been maintained.
5. Launch a Corporate Grief Support Program to serve employee(s) who have experienced loss.	Not available—new program. Timeline for implementation to be determined.

Family Grief Center: Evolution of CaringMatters as the primary community resource on child, adult and family grief.

The Workgroup discussed how CaringMatters’ grief services can progress into what might be called a Family Grief Center where current and new programs address different types of bereavement (the death of a loved one as well as anticipatory and ambiguous grief). In addition to the strategies above, both our Children’s Bereavement and Adult Bereavement Directors respond to many calls which can result in limited-time individual consultations, provision of information resources and referrals to community agencies. As appropriate, the Directors refer clients to each other’s programs, so we have an unknown number of families that are served across departments. Also, marketing materials can be developed that include both Departments in one brochure. Data from service inquiries will be consistently collected to identify how we can be a further resource in response to community need.

Goal: Expand community awareness about serious illness, caregiving, death and grief through educational events, social media, public awareness campaigns and professional workshops.

Community Need

In American society, conversations surrounding death, dying, and bereavement are frequently avoided. Most people in the United States stay away from thinking about their own mortality and eventual death and thus have not had conversations with family members or doctors about end-of-life. Similarly, grief is accompanied by stigma, misinformation and silence as people are challenged in knowing how to handle their own grief and others not knowing what to do or say to comfort the grieving. This stigma is often a barrier to people seeking help.

Increasing the knowledge about grief of community members, family members, school staff, health and human services professionals, and volunteers and professionals who work with those who are seriously ill, dying or grieving will have a significant impact on the health and well-being of those who have experienced serious illness and death of important people in their lives.

Given the number of people who are seriously ill, are caregivers or are grieving, the number of people who need or desire information greatly outnumbers those being served.

Populations to Be Served

Community members, family members, close friends, school staff, health and human services professionals, community groups, and volunteers and other professionals who work with those who are caregiving, seriously ill, dying or grieving.

Desired Outcomes

- Increased knowledge or skills (learning objectives specific to the event’s topic)
- Identified ways to immediately apply information to their personal or professional life
- Intention to share information with friends or co-workers

How CM is Unique

CM has gained a reputation as a reliable and quality partner for well-attended virtual community education events and a source of expert speakers, offering well-prepared presentations and organized administration. We have two films and one television documentary that we have the rights to use during sponsored screenings and discussions: *Voices of Grief, Honoring the Sacred Journey*, on how we can navigate successfully through grief or companion others along their journey; *Nine to Ninety*, and *End Game*, a Netflix documentary on palliative care and advance care planning.

There has been an increase in national print and social media sources publishing articles on end-of-life, loss and grief. These are regularly posted to our Facebook page.

Proposed FY2026-2028 Program Strategies

Strategies—Community Education	FY25 Baseline Data
1. Maintain CM sponsorship of five educational events annually	5 events with 177 people
2. Continue to respond to requests for presentations that educate and engage the community.	Will be dependent upon requests received (not a marketed service).
3. Continue to post articles and new resources on CM social media	Not counted/tracked

VALUE GOAL: Increase engagement with all individuals in our diverse communities so they have full access to our culturally competent services with positive personal results.

Cultural competence moves beyond “cultural awareness” (knowledge of other cultural groups) and “cultural sensitivity” (knowledge as well as experience with another culture). Besides recognizing cultural patterns of behavior, the culturally competent person must acknowledge the social inequities and injustices faced by groups with certain characteristics. Diversity includes race/ethnicity, gender, sexual orientation and other groups such as age, income and disability who have experienced unequal opportunities to fully achieve their potential.

The Workgroup discussed the current Federal political climate against “diversity, equity and inclusion” or DEI. The Workgroup determined that CM’s commitment is to continue to serve all of Montgomery County’s residents.

Proposed FY2026-2028 Program Strategies

The following strategies are a mix of effective qualitative practices (#1-3) and quantitative measures (#4-6). Annual implementation plans will identify specific activities for the fiscal year. Numeric data will be collected and reported to the Board semi-annually and at the end of the year.

Strategies--Serving Diverse Communities
1. CM will have ongoing relationships with public entities, community organizations, and informal leaders that can help us build responsive services

Strategies--Serving Diverse Communities
2. Board, Trustees, staff and volunteers will increase their knowledge and ability to deliver culturally competent services.
3. CM will increase its ability to provide written organization and program information and program-site interpretation in languages most often spoken (threshold languages) in the county.
4. Board, Trustees, staff and volunteers will more closely mirror Montgomery County's diversity.
5. Programs' patients/clients will more closely reflect Montgomery County's diversity.
6. Programs will strive for inclusivity across all abilities, gender/sexual orientations, and income levels.

ORGANIZATIONAL GOALS & STRATEGIES

As with the Value Goal strategies, each organizational goal's strategies are a mix of practices or processes and numerical indicators. Annual implementation plans will describe specific activities. Reporting on each strategy progress will occur throughout the year with statistical measures reported as timely (example, Fund-Development Goal at each Board meeting as part of financial reports).

ORGANIZATION GOAL: Increase visibility to serve more Montgomery County residents, recruit volunteers, develop partnerships, and increase financial support.

Engaging and communicating with our community residents and the many public and private service agencies, faith communities and corporations is essential to CM success. The Workgroup reviewed the many ways our Chief Communications Officer leads and implements communications strategies. Data will be more consistently collected on how people learn about us and our programs. While a mix of the strategies listed below is important, the Workgroup is placing a priority on Board and Trustees forming personal connections with our several stakeholders and audiences. Orientations and other methods will help these CM representatives be knowledgeable about our work to convey our value to others. With many people learning about CM through our website (including internet searches), the Workgroup recommends that staff explore how our website can be updated in pace with current technology and design and associated costs.

Proposed FY2026-2028 Program Strategies

Strategies—Communications/Visibility
1. The Board, Trustees, staff and volunteers are knowledgeable ambassadors.
2. Print materials, social and video media, and our website are engaging and provide up-to-date information about CM programs and events and volunteer opportunities .
3. Community events and resource fairs yield prospective clients, volunteers and other supporters.
4. Our presence on community workgroups, advisory councils and commissions increases our visibility.
5. Partnering with a breadth of community organizations and the corporate community widens our networks of contacts and community connectors
6. We will learn about our target audiences while informing them about our work.

ORGANIZATION GOAL: Recruit, train, and retain multilingual and culturally diverse volunteers to continue delivering services and supporting administrative and fund-raising activities.

The Workgroup learned that a variety of data are maintained on volunteers including demographics, spoken languages, and hours donated in specific programs or for administrative tasks or fund-raising. There is no goal for number of volunteers to be recruited/needed as several factors come into play which are unique to each program, including time (day, evening, etc.) the volunteer is needed, frequency of volunteer times, spoken or unspoken length of commitment to volunteering (ex., seven sessions of a Good Grief Club or several weeks/months for Volunteer Helping Hand patient). There is a balance between having volunteers available and volunteering shortly after being selected. Most of CMs volunteers are White, female, and over 55 years of age. This contrasts with the higher percentages of people of color participating in CM services.

While the Federal Community Cares Corps (C3) grant includes funding for a part-time Volunteer Coordinator, those responsibilities are currently spread across several staff rather than having hired a new staff person as the C3 funding can be suddenly pulled. Relevant program and administrative staff meet monthly to create action plans and collaborate on new volunteer recruitment and retention initiatives.

Proposed FY2026-2028 Program Strategies

Strategy--Volunteers
1. There are an adequate number of volunteers to meet program and organizational goals and strategies in a timely manner.
2. Montgomery County’s diverse communities will be aware of CM volunteer opportunities.
3. We will build partnerships with higher education institutions to secure student interns.
4. Our application and selection process will lead to quality, vetted volunteers.
5. Volunteers will formally provide feedback through an annual survey where at least 80% of respondents will agree or strongly agree that they are prepared for their roles; have ongoing support with a sense of community and feel appreciated for their contributions.
6. Volunteers who discontinue volunteering will complete an exit interview.

ORGANIZATION GOAL: Ensure enough highly qualified staff to deliver, with the involvement of value volunteers, exemplary programs that meet desired outcomes.

Throughout the plan development process, the Workgroup reviewed current staffing resources for program, value, and organizational goals and then considered what would be required to achieve goals and strategies accounting for growth in current programs and adding new services with continued service quality over three years. The position titles could be revised. Combining of positions and full-time vs part-time were discussed. However, all agreed that the CEO is responsible for staff configurations within current and proposed staff positions that would be funded within the total salary line-item amount in an approved annual budget.

Proposed FY2026-2028 Program Strategies

Strategies--Staff
1. Maintain competitive compensation and working conditions that attract and retain high performing employees
2. Increase hours in Children’s Bereavement Services
3. Increase hours/create position in Adult Bereavement Services
4. Create a Volunteer Coordinator position
5. Create a Fund-Development support position

ORGANIZATIONAL GOAL: Maintain a system of secure integrated hardware, software, data, communications, and people resources that enable programmatic and operational decision-making.

In the past three years, CM greatly increased its IT capabilities with the accomplishment of a multitude of strategies has led to a significant improvement in operating systems, hardware and software. These included moving to SharePoint, upgrading the internet service and the Wi-Fi infrastructure, migrating the MicroSoft Access database to the current 365 version; upgrading volunteer and staff computer hardware along with installing Windows 11; purchasing a new multifunctional copier; purchasing an initial videoconferencing system; contracting with a new IT consultant firm; migrating QuickBooks on line for accounting and SurveyMonkey for client outcomes survey data collection, analysis and reporting and other purposes.

The Workgroup members agreed that the first three strategies listed below be addressed in FY26. With this strong foundation in place, the balance of the strategies and accompanying tasks/activities would focus on ensuring that accepted IT practices are in place. All could contribute to IT systems that are modern and current, safe and secure, effective and invisible.

Proposed FY2026-2028 Program Strategies

Strategies—Information System
1. The technology infrastructure in the Cottage will have minimal downtime and system failures.
2. The system will support staff, Board and volunteers working effectively in a hybrid (onsite and remote) work model.
3. Up-to-date database(s) will house comprehensive, relevant and efficiently collected patient/client, volunteer, fund development and financial data.
4. Staff and volunteers will receive training and ongoing support to fulfill their responsibilities in their collection, entry, reporting and use of data.
5. Personal and financial data collected, stored, and used in accordance with applicable confidentiality and security government laws and regulations and CM policies.
6. Internal and external technical expertise, training, and ongoing support will maximize the uninterrupted functioning of hardware and software.
7. IT single point-of-failure risk will be minimized through maintaining written and updated policies and procedures that are known to multiple key personnel.

ORGANIZATION GOAL: Secure funding to sustain, expand, and diversify programs and promote organizational longevity.

The Workgroup recommends continuing the breadth of revenue-generating resources from past years. A significant addition under Strategy 1. Special Events is that in addition to the major events (Silver Linings Gala, Raise Your Glass, and the CaringMatters Annual Golf Tournament) would be member(s) of the Board and Trustees sponsoring small events where they reach out to friends and others to attend to learn more about CM and inspire attendees to donate. These could be “house parties” or sports-oriented (pickle ball games) or whatever would draw people. Staff would be minimally involved; there could be an event guide developed for event sponsors to reference.

The new Bloomerang software has a donor management module that will enable closer monitoring of fund-raising progress by source to help the Development Committee and Board determine the effectiveness and net benefit of each strategy against costs.

Proposed FY2026-2028 Program Strategies

Strategies—Fund Development
1. Use special events of varying sizes/types to engage people with CM that can lead to volunteering and/or financial support
2. Increase the number of new and repeat individual donors (can include increasing donation amounts by repeat donors)
3. Sustain or increase foundation funding (number of foundations and the amount granted)
4. Sustain or increase government funding
5. Increase the number of funders and donated amounts from businesses/corporations.
6. Sustain and increase the number of individual and corporate Annual Major Donors, who bundle their annual support into one donation and receive special recognition.
7. Increase the number of planned givers who are members of the Pam Hard Legacy Circle
8. Earned Income revenue will come from fees/donations for community education events and/or certain programs (ex., GGC in private schools, adult bereavement services to corporations)
9. Continue to participate in workplace campaigns (United Way, CFC, Maryland Charity Campaign)
10. A specified amount of Board Designated Cash Reserves/Endowment will be budgeted annually for operating and/or capital expenses according to an established written policy.
11. In-kind donations, especially for programs will be secured
12. Achieve full Board of Directors and Trustees participating in making an annual contribution to the extent each is able and in engaging potential donors.

Board of Directors

The Board will ensure that the Strategic Plan is a useful living document with the following responsibilities:

- **Implementation**
 - The Strategic Plan will be incorporated into the annual work plans of Board Committees with reports to the Board aligned with the Strategic Plan.
 - As each year's budget is developed and approved, the Board will identify how that budget contributes to the achievement of the Strategic Plan and how decreases or increases in resources may require changes in annual implementation.
 - The Board will maintain a focus on the three years, not just the current year.
 - A three-year budget of projected expenses and needed revenue to meet goals and strategies will be created.

- **Monitoring**
 - The Board will continue to require the CEO to give a report at each Board meeting on CM's progress in fulfilling the plan.
 - The Board will conduct a formal review of the status of implementation plan at set times throughout the year; this will include a look at any key changing community needs or conditions.
 - The Board will require an annual report of the just completed fiscal year's outputs, outcomes and other accomplishments to be organized by the plan's goals and strategies

Chief Executive Officer and Staff

- The Chief Executive Officer will work with each senior staff and program manager to create an annual implementation plan using a specific template, to identify expected accomplishments and needed resources to fulfill the strategic plan for each year. The implementation plan will be reviewed quarterly for completion and any needed adjustments. The work plan will be a part of the staff's performance evaluation.
- Staff meetings will include updates on strategic plan accomplishments and tasks, especially those that cross programs and intersect staff responsibilities and schedules.

APPENDIX A Brief Description of Programs

The following is a brief description of our programs within the three program goals of our strategic plan. Our goal is to serve all individuals in our diverse communities, so they have full access to our culturally competent services with positive personal results. All programs have intended outcomes for participants as listed on the back page of the Strategic Plan Framework. End-of-service surveys measure the program's impact.

Goal: Increase companionship, practical home assistance, transportation and support services to assist more people with serious illnesses and their caregivers.

Volunteer Helping Hand's volunteers provide companionship; respite for caregivers; help with errands and household tasks; and transportation to medical and social services. Our clients can be early in their illness and receiving medical care along with social-emotional and practical supports or enrolled in a medical hospice. In late FY21, VHH returned to in-person contacts when both the volunteer and client are vaccinated and boosted and wear masks.

Our **Caregiver Support Group** helps family caregivers meet the challenges of constant care of their ill loved ones, especially those caring for frail seniors with memory diagnoses. Weekly virtual meetings enable caregivers to attend without leaving their loved one. The group helps caregivers feel less isolated and stressed while learning about new resources and ways to care for their loved one.

Caregiver Mentors is a new program for fiscal year 2026. People who have been caregivers for family members will be trained as mentors and matched with current caregivers (mentees) to decrease isolation, share ideas on caregiving and ways to reduce stress, and connect with needed community resources.

JustRides helps meet the critical door-to-door transportation needs of cancer patients in making medical and social services appointments. JustRides recruits and trains volunteers to provide needed transportation as part of a partnership with JCA's (Jewish Council on Aging) VillageRides program. Partnering with VillageRides has been beneficial for CaringMatters in the development of the new JustRides volunteer training and handbook, as well as marketing materials such as flyers and volunteer ID badges. This partnership has also given CaringMatters access to RideScheduler software.

Goal: Increase the number of grieving individuals and families served through peer support groups, camps, retreats and family programs.

Grieving Children

A **Good Grief Club** (GGC) is a school-based seven-week program, co-facilitated by a CM volunteer and school counselor. A mix of guided conversations and creative arts, sessions are held during the school day at all school levels in public and independent schools. The program is a partnership with the Montgomery County Public Schools through a Memorandum of Understanding. MCPS's Office of Student Wellness and Engagement promotes the program to the district's 209 schools, including those serving special populations.

Camp Erin is an annual weekend camp for 50 children ages 8 to 17. Volunteers support campers in grief work and typical camp activities. The camp is held at an accredited youth campground, donated by Bar-T. We became part of Eluna's national network of children's bereavement camps in 2017.

The **Family Nights (FN)** program focuses on enhancing communication between adults and their children about their loss, using therapeutic art activities, guided by volunteer art educators, and sharing within and across families. FNs are held in early evenings prior to family-oriented holidays.

Parenting While Grieving--Supporting a Child Grieving the Death of a Parent is a virtual socio-educational program. Using a curriculum, two clinicians lead seven weekly sessions on Zoom. As a result, parents gain insight into their children's grief and learn skills to help their children while also examining how they can practice self-care. The parents may be newly single due to the death of a partner or have become responsible for parenting related children where both parents have died.

Our **Capacity-Building** program responds to professionals who are encountering children and youth and their families who have experienced a death and are uncertain how to support them. We hold webinars focusing on children's grief for schools and health and human services organizations. Staff consult with families and professionals about specific grieving children; expand and update information on CMs COVID-19 website resource pages; and regularly email information and tools to front-line professionals and CMs email list. Many materials also are in Spanish.

Grieving Adults

Peer Support Groups enable people to share their stories, learn from one another and create support networks. We are unique from other local services in that we use a rolling enrollment approach where people can begin as soon as they would like, rather than waiting for a new group to begin. Groups are organized by type of loss (ex., parent, child, spouse, suicide) while others are mixed. Groups are co-facilitated by trained volunteers who also have experienced loss. Initially enrolled for eight sessions, members then can choose to participate for as long as they feel necessary.

The annual weekend **Bereaved Caregiver Workshop/Retreat** helps participants transition from their role as a full-time caregiver to refocus and rebuilt their life, absent their now deceased loved one. Activities include presentations, journaling, discussions, and self-care strategies.

Tree of Love is an annual event which uses a program of music, poetry, reading of names, and candle-lighting to honor and memorialize loved ones who have died.

Goal: Expand community awareness about serious illness, caregiving, death and grief through educational events, social media, public awareness campaigns and professional workshops.

Our **Community Education** program uses workshops, webinars, film screenings and discussions, and co-sponsored community forums to increase knowledge and enhance skills related to end-of-life and grief. Presenters are either our own staff or local or national professionals who typically volunteer their services. Audiences include community members, civic and faith groups and health and human services professionals. We also post informative articles on our website and Facebook pages.

APPENDIX B
Three Year Strategic Plan FY2026-2028
Summary of Goals and Their Strategies

PROGRAM GOALS & STRATEGIES

PROGRAM GOAL Increase companionship, practical home assistance, transportation and support services to assist more people with serious illnesses and their caregivers.

Program Strategies

1. Continue serving patients in Volunteer Helping Hands
2. Increase the number of seriously ill patients that JustRides transports to medical and social services
3. Increase the number of caregivers who are supported through groups and mentorships

PROGRAM GOAL: Grow peer groups, camps, retreats and family programs to serve more grieving individuals and families.

Children's Bereavement

Program Strategies

1. Increase the number of school-aged children served through Good Grief Clubs in public and private schools.
2. Increase the number of school-aged children served through Camp Erin
3. Maintain the number of families served through Family Nights
4. Maintain the number of parents served through Parenting While Grieving
5. Continue to build the capacity of MCPS to respond to the needs of grieving children through training and consultation and responding to other community individuals and professionals.

Adult Bereavement (AB)

Program Strategies

1. Increase the number of grieving adults who are served through AB Peer Support Groups
2. Maintain the number of bereaved caregivers who are served through a Retreat.
3. Maintain the annual Tree of Love to memorialize deceased loved ones.
4. Continue consultations with grieving individuals and those caring about them and educational and health and human services professionals.
5. Launch a Corporate Grief Support Program to serve businesses experiencing loss of employee(s).

PROGRAM GOAL: Expand community awareness about serious illness, caregiving, death and grief through educational events, social media, public awareness campaigns and professional workshops.

Program Strategies

1. Maintain CM sponsorship of five educational events annually
2. Continue to respond to requests for presentations that educate and engage the community.
3. Continue to post articles and new resources on CM social media

VALUE GOAL: Increase engagement with all individuals in our diverse communities so they have full access to our culturally competent services with positive personal results.

Serving Diverse Communities Strategies

1. CM will have ongoing relationships with public entities, community organizations, and informal leaders that can help us build responsive services
2. Board, Trustees, staff and volunteers will increase their knowledge and ability to deliver culturally competent services.
3. CM will increase its ability to provide written organization and program information and program-site interpretation in languages most often spoken (threshold languages) in the county.
4. Board, Trustees, staff and volunteers will more closely mirror Montgomery County's diversity
5. Programs will more closely mirror patients/clients that reflect Montgomery County's diversity
6. Programs will strive for inclusivity across all abilities, gender/sexual orientations, and income levels.

ORGANIZATIONAL GOALS & STRATEGIES

ORGANIZATION GOAL: Increase visibility to serve more Montgomery County residents, recruit volunteers, develop partnerships, and increase financial support.

Communications/Visibility Strategies

1. The Board, Trustees, staff and volunteers are knowledgeable ambassadors.
2. Print materials, social and video media, and our website are engaging and provide up-to-date information about CM programs and events
3. Community events and resource fairs yield prospective clients, volunteers and other supporters.
4. Our presence on community workgroups, advisory councils and commissions increases our visibility.
5. Partnering with a breadth of community organizations and the corporate community widens our networks of contacts and community connectors
6. We will learn about our target audiences while informing them about our work.

ORGANIZATION GOAL: Recruit, train, and retain multilingual and culturally diverse volunteers to continue delivering services and supporting administrative and fund-raising activities.

Volunteer Strategies

1. There are an adequate number of volunteers to meet program and organizational goals in a timely manner.
2. Montgomery County's diverse communities will be aware of CM volunteer opportunities.
3. We will build partnerships with high education institutions to secure student interns.
4. Our application and selection process will lead to quality, vetted volunteers.
5. Volunteers will formally provide feedback through an annual survey where at least 80% of respondents will agree or strongly agree that they are prepared for their roles; have ongoing support with a sense of community and feel appreciated for their contributions.
6. Volunteers who discontinue volunteering will complete exit interview.

ORGANIZATION GOAL: Ensure enough highly qualified staff to deliver, with the involvement of value volunteers, exemplary programs that meet desired outcomes.

Staff Strategies

1. Maintain competitive compensation and working conditions that attract and retain high performing employees

2. Increase hours in Children's Bereavement Services
3. Increase hours/create position in Adult Bereavement Services
4. Create a Volunteer Coordinator position
5. Create a Fund-Development support position

ORGANIZATIONAL GOAL: Maintain a system of secure integrated hardware, software, data, communications, and people resources that enables programmatic and operational decision-making.

Information Systems Strategies

1. The technology infrastructure in the Cottage will have minimal downtime and system failures.
2. The system will support Staff, Board and volunteers to work effectively in a hybrid (onsite and remote) work model.
3. Up-to-date database(s) will house comprehensive, relevant and efficiently collected patient/client, volunteer, fund development and financial data.
4. Staff and volunteers will receive training and ongoing support to fulfill their responsibilities in their collection, entry, reporting and use of data.
5. Personal and financial data collected, stored, and used in accordance with applicable confidentiality and security government laws and regulations and CM policies.
6. Internal and external technical expertise, training, and ongoing support will maximize the uninterrupted functioning of hardware and software.
7. IT single point-of-failure risk will be minimized through maintaining written and updated policies and procedures that are known to multiple key personnel.

ORGANIZATION GOAL: Secure funding to sustain, expand and diversify programs and promote organizational longevity

Fund Development Strategies

1. Use special events of varying sizes/types to engage people with CM that can lead to volunteering and/or financial support
2. Increase the number of new and repeat individual donors (can include increasing donation amounts by repeat donors)
3. Sustain or increase foundation funding (number of foundations and the amount granted)
4. Sustain or increase government funding
5. Increase the number of and donated amounts from businesses/corporations.
6. Sustain and increase the number of individual and corporate Annual Major Donors, who bundle their annual support into one donation and receive special recognition
7. Increase the number of planned givers who are members of the Pam Hard Legacy Circle
8. Earned Income revenue will come from fees/donations for community education events and/or certain programs (ex., GGC in private schools, adult bereavement services to corporations)
9. Continue to participate in workplace campaigns (United Way, CFC, Maryland Charity Campaign)
10. A specified amount of Board Designated Cash Reserves/Endowment will be budgeted annually for operating and/or capital expenses according to an established written policy.
11. In-kind donations especially for programs will be secured
12. All Board members will donate to the extent they are able and will reach out to potential donors.

APPENDIX C

Brief History of CaringMatters

1989

- Hospice Caring is founded.
- Obtained license through the State of Maryland as Limited Hospice Care Program (continues to this day)
- Opened fit office in Good Shepherd Lutheran Church in Gaithersburg
- Hosted first volunteer training
- Served first family through volunteer caregiving program, now known as Volunteer Helping Hands (continues to this day)
- Launched Adult Bereavement Support Group Program (continues to this day)

1990's

1990

- Hosted first Tree of Love Ceremony (continues to this day)

1993

- Moved into larger offices space at the Izaak Walton League Building in Gaithersburg

1996

- Recognized by the City of Gaithersburg with the Outstanding Organization Award

1998

- Held first Good Grief Club in partnership with Montgomery County Public Schools (continues to this day)

2000's

2000

- Secured greatly discounted lease for the Cottage for offices and some programming from the City of Gaithersburg (continues to this day)
- Held first Camp Caring or grieving children, ages 8-12 (see 2017 for change)

2001

- Hosted Cottage renovation Grand Opening

2003

- Created and dedicated the Cottage Gardens

2005

- Named by Catalogue of Philanthropy for the first time as one of the best small nonprofit organizations in the Washington DC area (continued inclusion in the catalogue to this day)
- Received Community Service Award from the Montgomery County Public Schools

2007

- Completed conference room addition in memory of Joshua Freeman

- Designated by Maryland Nonprofits with the Standards of Excellence Seal of Excellence (successful renewals since that time)

2010's

2012

- Ranked by Great Nonprofits as a Top-Rated Children and Families Nonprofit Organization
- Profiled in a joint report from the Center for Nonprofit Advancement and Volunteer Frontier highlighting the effective use of volunteers for maximum impact

2015

- Launched Community Education Program (continues to this day)
- Expanded Good Grief Clubs to serve the county's diverse communities and developed bi-lingual videos and multi-language printed materials, which can be found on CM's website

2016

- Recognized by the Soroptimist International of Upper Montgomery County which presented their annual Ruby Award to Penny Gladhill, Hospice Caring founder and Director of Volunteer Helping Hands

2017

- Designed and implemented the Family Nights program (continues to this day)
- Held the first Bereaved Caregivers retreat (continues to this day)
- Expanded Camp Caring into Camp Erin, a national network of children's grief camps, doubling the size of the camp and the broadening the age range served
- Three-Year Strategic Plan for FY2017-2019 adopted by the Board

2018

- Rebranded as CaringMatters, with new logo and tagline and updated mission statement
- Earned the GuideStar Platinum Seal for transparency showcasing program results
- Given the Montgomery Nonprofit Village's Making a Difference Award for small nonprofits
- With the first state funding, coordinated and trained a team of facilitators to deliver workshops on Advance Care planning and the promotion of Advance Directives

2019

- Celebrated 30th Anniversary
- Updated By-laws to expand the infrastructure of the Board of Directors
- Recognized by the Healthcare Initiative Foundation with the Brooks Saltsman Award for our commitment to volunteerism in the health and wellness field.
- Featured in *Washingtonian Magazine*, which named Nancy Richardson, serving as Board Chair, as a Washingtonian of the Year.
- Three-Year Strategic Plan for FY2020-2022 adopted by the Board

2020's

2020

- COVID-19 pandemic closed CM physical office with staff working from home and programs transitioned to virtual delivery whenever possible
- Began The Whole You program in partnership with Shady Grove Adventist Aquilino Cancer Center to connect cancer patients with community services (continues to this day)
- Began the Children's Bereavement Capacity Building program to provide consultation and education to family members and educational and health and human services professionals
- Three-Year Strategic Plan for FY2020-2022 adopted by the Board

2021

- Began a Family Caregiver Support Group
- GGCs returned to in person delivery at public schools in October
- Began Parenting Grieving Children, a 7-week online educational series
- Began a virtually delivered Caregivers Support Group.
- In partnership with Adventist Healthcare and funded by Healthcare Initiative Foundation, began The Whole You program providing community resource navigation for patients with cancer.
- Collaborated with University of Maryland Psychology Department to analyze several years of GGC survey results led to accepted poster sessions at the American Psychological Association's annual conference and anticipated publication in a professional journal.
- Launched the Pam Hard Legacy Circle, a planned giving initiative in honor of a cherished volunteer.

2022

- Camp Erin returned to in person delivery
- Recognized by the Montgomery County Commission for Women and Montgomery Women by honoring Allison Stearns CEO of CaringMatters, as a recipient of the Women Making History Award.
- Selected as one of 30 agencies serving grieving children across the nation to be part of the Childhood Bereavement Changemaker program funded by New York Life and led by Judi's House/JAG Institute which will expand CMs capacity to use data to inform planning, improve services, influence change, and increase funding.

2023

- Began JustRides Program in partnership with Adventist Healthcare's Cancer Centers to provide door-to-door transportation for their patients to medical and other treatment appointments.
- Received Federal Community Cares Corps funding from the Department of Health and Human Services for Volunteer Helping Hands and Caregiver Support Groups
- Three-Year Strategic Plan for FY2023-2025 adopted by the Board

2024

- Started rebuilding a redesigned patio at the Cottage financed by a Maryland State Bond Bill sponsored by Senator Cheryl Kagan with a donation from the Montgomery Village Rotary Foundation.
- Received a Community Resources Partnership Grant from the Maryland Department of Health's Community Health Resources Commission to support our school-based Good Grief Clubs as contributing to child and adolescent behavioral health (has been renewed for a second year).

2025

- Unveiled the completed Cottage patio constructed by Allentuck Landscaping and dedicated to Allison Stearns, CaringMatters CEO and in memory of her husband, Eric Stearns
- Selected by Eluna to join a new national advisory group focused on enhancing Camp Erin volunteer training and resource development.