

## STRATEGIC PLAN FY17-FY19 Executive Summary

The Arc of East Central Iowa’s mission is “to empower people with intellectual and related disabilities to engage in lifelong opportunities to live, learn, work and play with dignity, freedom and full inclusion in their communities. Our vision is “...Be a proactive advocate committed to the empowerment, independence and dignity of all individuals with intellectual and related developmental disabilities and their families”.

### Using the Strategic Plan

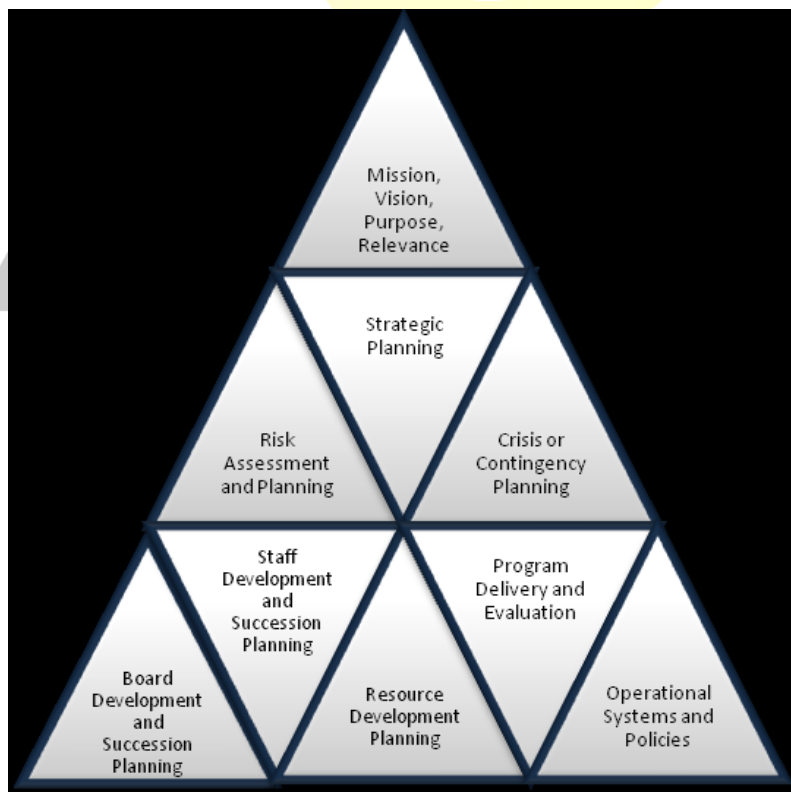
This strategic plan is intended to be a management tool for The Arc. It presents the most comprehensive compilation of the plan and its component parts. It is a record of the strategic planning process and the decisions reached by the Board of Directors and staff.

The strategic direction and goals included in this plan are The Arc’s response to its understanding of what our clients, volunteers, staff and community value most about the organization. This plan recognizes the ever-changing environment of in home care, adult services, and site based services while offering services that positively assist our clients. The Arc’s budget will support this strategic plan in a manner that allows necessary growth while maintaining a fiscally conservative approach.

The life of this three-year strategic plan will be a time of assessing and deepening The Arc’s approach to its work. The main overlying objectives of this plan will be:

1. Ensuring sustainability of the organization through stability, longevity, and continuity
2. The people we serve, our staff, and volunteers
3. The quality and effectiveness of our services

Throughout this plan, we keep in mind on our core values:



- We believe there is Strength in **diversity**.
- We believe that each **individual and family is unique** and has value.
- We believe that individuals and families are best served in an **inclusive** community
- We believe that individuals with disabilities **deserve** quality educational, vocational, social, and living opportunities.
- We believe that individuals must be treated with **dignity**.
- We believe that each individual/family has a **right to make its own decisions**.

## **STRATEGIC FOCUS # 1: PEOPLE**

It is vital to the communities The Arc serves to be responsive and able to offer resources that are accessible and appropriate. Our leadership will continuously review and implement the most effective servicing models, while adhering to the fiscal budget, to ensure our clients and families experience the best possible outcomes that The Arc is known for. To that end, this plan focuses on staff retention and continual training by offering a supportive work environment that inspires employees to achieve excellence in external and internal customer service. The Arc cannot survive without the work of its staff and many volunteers. It is important to increase both volunteer familiarity and involvement in all areas of The Arc's services and events. This will enhance the volunteer experience and ultimately ensure the highest level of customer service.

- **Step Up Employee Engagement**
- **Reduce Employee Turnover**
- **Increase Volunteer Base**

## **STRATEGIC FOCUS #2: QUALITY AND EFFECTIVENESS OF SERVICES**

This strategic plan will guide The Arc in offering services that are cost effective and of the highest quality. Best practice models will be studied in all critical need areas in order to constantly improve what and how services are delivered to our clients. The Arc's Day Care will create and implement approaches to increase the educational experience for children of each age group in our care. A significant challenge for the organization will be the transition from the current delivery of Medicaid services to the States managed care model beginning in April FY16. Currently, The Arc provides services to a seven county area. This will require implementing a much more efficient service delivery program across a large geography with possibly fewer dollars. Key to the implementation of these models and approaches are the professionalism of direct service staff members. The Arc leadership will guide staff and, when needed, volunteers, in order to maximize the quality and effectiveness of each service area.

- **Enhanced Services**
- **Increased Training**
- **Improve Internal Operations**

## **STRATEGIC FOCUS #3: SUSTAINABILITY**

In this strategic plan, sustaining The Arc's services goes beyond maintaining the status quo. Rather, focus will be given to increasing our reach from each department and within each

community we serve. Key areas of The Arc's sustainability focus include fiscal responsibility through conservative budget development and management. The Arc has had a great history of coming in at or better than budget. This strategic plan will enable The Arc to continue this trend. The Arc will focus on increased service units to increase revenue. From a Resource Development perspective, new and/or enhanced events and appeals as well as targeted marketing efforts will significantly increase agency revenues. All critical services will increase collaboration with other service providers in the Linn County area and the remaining six counties included in The Arc's service region. In doing so, The Arc will expand and strengthen our outreach, awareness, and fund development sources.

It is the hope of The Arc's Board of Directors and staff that the FY 17-19 Strategic Plan will guide the organization to successfully meet the changing needs of the communities and people we serve.

- **Expand Community Awareness**
- **Boost Fundraising**
- **Escalate Board of Directors**
- **Influence Public Policy**

### **Our Changing Landscape**

As of the creation of this strategic plan, the landscape within which The Arc operates is one of continual change, especially due to the 2016 statewide restructuring of Medicaid services. This will possibly change the way the organization traditionally serves clients. The Arc will have to evaluate the seven-county multiservice delivery model and develop more ways to be inclusive and collaborative with key partners in the region for long term efficiencies and supports.

To stay current, The Arc finds it imperative to increase and participate in professionally recognized quality measures. For example, the agency will have to look at ongoing participation in the Iowa Quality Rating System (QRS) and CARF, which both require adherence to quality standards set forth by their programs. From a budgeting perspective, many grants favorably recognize and award successful programs that participate in the QRS and/or are CARF accredited. Ongoing participation in these programs ensures consumers are receiving the highest quality care available.

Another constantly changing area within The Arc agency is development and marketing. With the continually changing environment in which The Arc exists, the agency must stay ahead of the curve regarding the most effective development and marketing practices. Whether through social media, cutting edge events, or personal visits, The Arc must go beyond the expected outreach practices to provide the community and donors with the most current information. Collecting and updating information about our donors and prospects is key to target marketing efforts that prove most advantageous to The Arc.

Sincerely,

David Thielen  
Executive Director

# FY2017-2019 Strategic Plan – Site Based Services

<b>Mission</b>	To empower people with intellectual and related disabilities to engage in lifelong opportunities to live, learn, work and play with dignity, freedom and full inclusion in their communities								
<b>Vision</b>	Be a proactive advocate committed to the empowerment, independence and dignity of all individuals with intellectual and related developmental disabilities and their families								
<b>Focuses</b>	<b>People</b> Clients, Staff, Volunteers			<b>Quality</b> Efficiency, Effectiveness			<b>Sustainability</b> Stability, Longevity, Continuity		
<b>3 Year Targets</b>	<b>Goal P1:</b> Improve employee retention and overall satisfaction <b>Goal P1 ACTION ITEMS:</b> <ul style="list-style-type: none"> <li>The Service Center Coordinator and Daycare/Enrichment Site Director and Assistant Director will have a positive contact at least 1x per week (kudos, pat on the back, thanks) with a direct service provider.</li> <li>Incorporate one team building activity per quarter into staff meetings/trainings.</li> <li>Incorporate one family based activity per year for Daycare/Enrichment Program outside of normal business hours.</li> </ul>			<b>Goal Q1:</b> Increase overall customer service satisfaction <b>Goal Q1 ACTION ITEMS:</b> <ul style="list-style-type: none"> <li>Decrease the number of errors found in service documentation. Baseline determined with FY17 data. Decrease# of errors by 2% in FY18.</li> <li>Achieve QRS Certification                             <ul style="list-style-type: none"> <li>Level 2 by December 30, 2016.</li> <li>Level 3 by December 30, 2018</li> </ul> </li> <li>Increase consumer satisfaction on Q8 (classroom activities, outdoor activities, field trips, arts/crafts) area as reported Daycare/After work Services satisfaction survey by 2% in FY16, FY17. Baseline FY15 Respite satisfaction 81.5% Satisfied or Very Satisfied</li> </ul>			<b>Goal S1:</b> Explore transportation possibilities for College Community, Linn-Mar and Marion School districts with To the Rescue, NTS, etc. <b>Goal S1 ACTION ITEMS:</b> <ul style="list-style-type: none"> <li>Connect with at least 3 entities by December 31, 2016.</li> </ul>		
<b>Dash board</b>	<b>Measure</b>	<b>Actual</b>	<b>Goal</b>	<b>Measure</b>	<b>Actual</b>	<b>Goal</b>	<b>Measure</b>	<b>Actual</b>	<b>Goal</b>
	Positive Contact	Not consistent	1x week	Decrease errors in reporting	FY17	Decrease 2% in FY18 and FY19	Transportation	None	Connect with entities in FY16
	Team building	Not consistent	1x quarter	QRS	None	Level 2 in FY16, Level 3 in FY18			
	Family based activity	Have not done	1x year	Customer Satisfaction	81.5%	Increase 2% each year, starting in FY16 survey			
<b>Values</b>	<b>Diversity.....Unique Families &amp; Individuals.....Inclusive.....Deserving.....Dignity.....Right to Decide</b>								



# FY2017-2019 Strategic Plan – In Home Services

<b>Mission</b>	To empower people with intellectual and related disabilities to engage in lifelong opportunities to live, learn, work and play with dignity, freedom and full inclusion in their communities.								
<b>Vision</b>	Be a proactive advocate committed to the empowerment, independence and dignity of all individuals with intellectual and related developmental disabilities and their families								
<b>Focuses</b>	<b>People</b> Clients, Staff, Volunteers			<b>Quality</b> Efficiency, Effectiveness			<b>Sustainability</b> Stability, Longevity, Continuity		
<b>3 Year Targets</b>	<p><b>GOAL P1:</b> Improve employee retention and overall satisfaction</p> <p><b>GOAL P1 ACTION ITEMS:</b></p> <ul style="list-style-type: none"> <li>Each Service and Support Coordinator will have a positive contact at least 1x per week (kudos, pat on the back, thanks) with a direct service provider.</li> <li>Offer 3 live trainings for Arc direct service providers throughout the year.</li> <li>Explore hiring additional Full-time Direct Service Professionals (SCL/Hab).</li> </ul>			<p><b>GOAL Q1:</b> Increase overall customer service satisfaction.</p> <p><b>GOAL Q1 ACTION ITEMS:</b></p> <ul style="list-style-type: none"> <li>Increase Service and Support Coordinator rating on In-home services satisfaction survey by 1% in FY 16, FY17 and FY18. Baseline FY 15 89.25% Satisfied or Very Satisfied. FY14 88% Satisfied or Very Satisfied</li> <li>Decrease the number of errors found in service documentation. Baseline determined with FY17 data. Decrease# of errors by 2% in FY18.</li> <li>Decrease number of critical and non-critical errors found in consumer file audits. Baseline FY15 48% of files contained at least 1 non-critical error 27% of files contained at least 1 critical error. Decrease % of errors by 5% in FY 16. Decrease % of errors by 3% in FY 17</li> <li>Increase consumer satisfaction by service area as reported on In-home services satisfaction survey by 1.5% in FY16, FY17. Baseline FY15 Respite satisfaction 90% Satisfied or Very Satisfied. Baseline FY15 SCL satisfaction 85% Satisfied or Very Satisfied</li> </ul>			<p><b>GOAL S1:</b> Improve on community collaborations and outreach for In-home services.</p> <p><b>GOAL S1 ACTION ITEMS:</b></p> <ul style="list-style-type: none"> <li>Connect with at least 8 referring entities per year (Case Management, Schools, DHS, AEA, Doctors/Therapists offices, human service agencies/local non-profits) to ensure knowledge of waiver services and Arc services.</li> <li>Hire at least 2 additional staff each fiscal year in outlying counties (Jones/Benton). 1 additional staff each year in Iowa and Cedar counties.</li> </ul>		
<b>Dash board</b>	<b>Measure</b>	<b>Actual</b>	<b>Goal</b>	<b>Measure</b>	<b>Actual</b>	<b>Goal</b>	<b>Measure</b>	<b>Actual</b>	<b>Goal</b>
	Positive Contact	Not consistent	1x week	Increase Customer Satisfaction	89.25%	Increase 1% each year	Connect with 8 referring entities per year	Not consistent	8 per year
	Offer 3 trainings per year for DSP's	None	3 trainings per year	Decrease documentation errors	FY17 baseline	Decrease 2% in FY18, FY19	Hire additional staff in outlying counties	Not done	2 staff per year in Jones/Benton, 1 in IA/Cedar
	Hire additional FT DSP's		Explore and develop plan	Decrease critical and non-critical errors	48%/27%	Decrease 5% in FY16, 3% in FY17, 1% in FY18/FY19			
			Increase customer service satisfaction	90% Respite 85% SCL	Increase 1.5% FY16/FY17				
<b>Values</b>	<b>Diversity.....Unique Families &amp; Individuals.....Inclusive.....Deserving.....Dignity.....Right to Decide</b>								

# FY2017-2019 Strategic Plan – Adult Services

<b>Mission</b>	To empower people with intellectual and related disabilities to engage in lifelong opportunities to live, learn, work and play with dignity, freedom and full inclusion in their communities								
<b>Vision</b>	Be a proactive advocate committed to the empowerment, independence and dignity of all individuals with intellectual and related developmental disabilities and their families								
<b>Focuses</b>	<b>People</b> Clients, Staff, Volunteers			<b>Quality</b> Efficiency, Effectiveness			<b>Sustainability</b> Stability, Longevity, Continuity		
<b>3 Year Targets</b>	<p><b>GOAL P1:</b> All Project SEARCH staff will have the required training in job development and job coaching</p> <p><b>GOAL P1 ACTION ITEMS:</b></p> <ul style="list-style-type: none"> <li>By January 1, 2017 the skills instructor and job coaches will receive APSE/ACRE certification in job development and job coaching.</li> <li>By August 1, 2017 the community integration facilitator and skills instructor will receive training to become a certified employment support professional, (CESP).</li> </ul> <p><b>GOAL P2:</b> Increase staff professionalism, morale, and retention in the Day Hab Program</p> <p><b>GOAL P2 ACTION ITEMS:</b></p> <ul style="list-style-type: none"> <li>Provide a Team Building Activity to encourage staff morale at least quarterly.</li> <li>Provide direct care staff with up to 10 additional hours of training per year.</li> </ul> <p><b>GOAL P3:</b> Grow Day Hab inclusion and program opportunities</p> <p><b>GOAL P3 ACTION ITEMS:</b></p> <ul style="list-style-type: none"> <li>Seek out 2 additional/new volunteer opportunities per year.</li> <li>Provide a "Fun Day" for participants quarterly. To include activities that require additional planning, money, resources, etc.</li> </ul>			<p><b>GOAL Q1:</b> Obtain CARF Accreditation in Job Development and Employment Supports</p> <p><b>GOAL Q1 ACTION ITEMS:</b></p> <ul style="list-style-type: none"> <li>By June 1, 2016 the CARF Preparation Team will collect 100% of the required documentation.</li> <li>By June 24, 2016 all Project SEARCH (PS) graduates will be offered job development and employment supports as needed.</li> <li>By July 1, 2016 The CARF preparation Team will meet monthly to determine which Arc policies need to be updated and/or reviewed by the board.</li> <li>By January 1, 2017 the Arc will receive CARF accreditation in Job Development and Employment Supports.</li> <li>By June, 2017 all PS graduates will be provided job development supports and employment supports.</li> <li>By July 1, 2017 all of PS graduates will be employed in integrated community settings.</li> </ul> <p><b>GOAL Q2:</b> Replicate the PS model in a school based approach.</p> <p><b>GOAL Q2 ACTION ITEMS:</b></p> <ul style="list-style-type: none"> <li>By August 1, 2016 the LEA and host business will be identified.</li> <li>By October 1, the school based steering committee will be established.</li> <li>By August 2017, the school model will be implemented including ten participants.</li> <li>By July 1, 2018 85% of graduates of the schooled program will be competitively employed in integrated community settings.</li> <li>By June 1, 2019 92% of all school based PS graduates will be employed at the time of graduation.</li> </ul>			<p><b>GOAL S1:</b> Revise marketing and program entrance criteria for the adult model of Project SEARCH (PS)</p> <p><b>GOAL S1 ACTION ITEMS:</b></p> <ul style="list-style-type: none"> <li>By June 1, 2016 a revised set of entrance criteria will be established and used to select new interns for cohort 3.</li> <li>By January 1, 2017 a comprehensive marketing plan will be developed and put into place for all potential referring agencies/programs.</li> <li>By August 1, 2017 the school based model will follow entrance criteria established by the PS Steering Committee.</li> <li>By August 1, 2018 another adult PS site will be developed in the Cedar Rapids/Marion area.</li> </ul> <p><b>GOAL S2:</b> Develop a succession plan for PS leadership</p> <p><b>GOAL S2 ACTION ITEMS:</b></p> <ul style="list-style-type: none"> <li>By August 1, 2017 a comprehensive succession plan will be developed for the Director of Adult Services and Special Programs Facilitator.</li> <li>By June 2018 new PS leadership will be put into place.</li> <li>By June, 2018 a comprehensive leadership structure will be put into place to guide and direct future Project SEARCH efforts.</li> </ul> <p><b>GOAL S3:</b> Increase networking with other Day Hab programs</p> <p><b>GOAL S3 ACTION ITEMS:</b></p> <ul style="list-style-type: none"> <li>Find 1 Day Hab program outside of Iowa to network with at least quarterly. To include: written/email correspondence, set up virtual tours/calls, idea share, participant ownership learning about other programs.</li> </ul>		
<b>Dash board</b>	<b>Measure</b>	<b>Actual</b>	<b>Goal</b>	<b>Measure</b>	<b>Actual</b>	<b>Goal</b>	<b>Measure</b>	<b>Actual</b>	<b>Goal</b>
	APSE/ACRE cert	None	Acquired by 1-1-17	CARF Accreditation	Current	Re-certified by 1-1-2017	Revised set of entrance crit. and used	Old Criteria	New Criteria
	Certified Employment Support Professional	None	Acquired by 8-1-17	PS Grads employed in integrated comm. setting		July 1, 2017	Comprehensive Plan	None	1-1-2017
	Team Building Activity Quarterly	None	Quarterly	School Based Project Search- bus. identified	None	8-1-2016	School model following entrance criteria	None	8-2017
	Provide 10 CEC's per year	None	10 per year	Implement School based PS	None	8-2017	3 <sup>rd</sup> PS site developed		8-1-2018
	2 additional volunteer ops per year		2 per year	PS Grads of School Based employed	None	85% by 7-1-2018, 92% 6-1-2019	New/Comprehensive PS Leadership		6-2018
Fun Day quarterly	None	Quarterly				Network with other Day Hab programs	None	Quarterly networking	
<b>Values</b>	<b>Diversity.....Unique Families &amp; Individuals.....Inclusive.....Deserving.....Dignity.....Right to Decide</b>								

# FY2017-2019 Strategic Plan – Resource Development

<b>Mission</b>	To empower people with intellectual and related disabilities to engage in lifelong opportunities to live, learn, work and play with dignity, freedom and full inclusion in their communities								
<b>Vision</b>	Be a proactive advocate committed to the empowerment, independence and dignity of all individuals with intellectual and related developmental disabilities and their families								
<b>Focuses</b>	<b>People</b> Clients, Staff, Volunteers			<b>Quality</b> Efficiency, Effectiveness			<b>Sustainability</b> Stability, Longevity, Continuity		
<b>3 Year Targets</b>	<p><b>GOAL P1:</b> Engage Board of Directors in the annual campaign and events to increase fundraising efforts annually.</p> <p><b>GOAL P1 ACTION ITEMS:</b></p> <ul style="list-style-type: none"> <li>Increase leadership volunteer involvement in resource development committee</li> <li>Increase number of individual donors by 6% over 3 years</li> <li>Increase fundraising revenue year over year.</li> </ul> <p><b>GOAL P2:</b> Build and maintain membership</p> <p><b>GOAL P2 ACTION ITEMS:</b></p> <ul style="list-style-type: none"> <li>Conduct Annual membership drive</li> <li>Retain ___ % of members</li> <li>Increase membership by 2% annually by FY19</li> <li>Conduct Membership survey by FY18</li> <li>Conduct Membership event by FY19</li> </ul> <p><b>GOAL P3:</b> Develop at minimum 1 new fundraising event by FY19</p> <ul style="list-style-type: none"> <li>Halloween Parade</li> <li>Look at feasibility of Festival of Lights</li> <li>Membership appreciation event</li> </ul>			<p><b>GOAL Q1:</b> Increase the efficiency of our Donor Data base</p> <p><b>GOAL Q1 ACTION ITEMS:</b></p> <ul style="list-style-type: none"> <li>Appoint a lead staff to become the DQ expert and determine all inputting and report parameters</li> <li>Ensure all reports and information generated by DQ is current and correct</li> <li>Increase prospect and donor data base to enhance targeted marketing efforts</li> </ul> <p><b>GOAL Q2:</b> Increase communications to The Arc donors and friends through social media</p> <p><b>GOAL Q2 ACTION ITEMS:</b></p> <ul style="list-style-type: none"> <li>Send a monthly email blast containing a short story about The Arc as well as pertinent events</li> <li>Create and maintain social media pages for The Arc and have regular posts. Increase likes and reach.</li> <li>Keep The Arc website up to date and donor friendly</li> <li>Utilize another social media platform to spread awareness</li> </ul> <p><b>GOAL Q3:</b> Raise and maintain awareness of The Arc within the 7 counties served</p> <p><b>GOAL Q3 ACTION ITEMS:</b></p> <ul style="list-style-type: none"> <li>Create and implement an annual marketing strategy</li> <li>Increase the number of public speaking engagements within the 7 county area each year to 24 by year 3</li> </ul>			<p><b>GOAL S1:</b> Expose and use The Arc's brand to reflect growing inclusiveness in services.</p> <p><b>GOAL S1 ACTION ITEMS:</b></p> <ul style="list-style-type: none"> <li>Update materials to be all inclusive</li> <li>Inform the community of inclusive and changing services</li> </ul> <p><b>GOAL S2:</b> Actively promote estate and planned giving membership</p> <p><b>GOAL S2 ACTION ITEMS:</b></p> <ul style="list-style-type: none"> <li>Create brochure addressing benefits of estate planning and ways to make such a gift to The Arc</li> <li>Discuss planned giving to The Arc in communications</li> <li>Build relationships with local estate planning professionals &amp; engage them at The Arc</li> <li>Increase estate and planned giving prospects over 3 years.</li> </ul> <p><b>GOAL S3:</b> Expand number &amp; depth of corporate contributions</p> <p><b>GOAL S3 ACTION ITEMS:</b></p> <ul style="list-style-type: none"> <li>Enhance the annual corporate campaign</li> <li>Increase # of corporate donors by 6% over 3 years</li> <li>Increase total corporate giving by 6% over 3 years</li> </ul> <p><b>GOAL S4:</b> Increase funding from grants by 6% over 3 years</p> <p><b>GOAL S4 ACTION ITEMS:</b></p> <ul style="list-style-type: none"> <li>Apply for relevant grants</li> <li>Establish partnerships with non-profit organizations interested in collaborative grant opportunities</li> </ul>		
<b>Dash board</b>	<b>Measure</b>	<b>Actual</b>	<b>Goal</b>	<b>Measure</b>	<b>Actual</b>	<b>Goal</b>	<b>Measure</b>	<b>Actual</b>	<b>Goal</b>
	Increase donors		2% annually for 3 years	Ensure correct and comprehensive data base		Current & correct reports, enhanced target marketing by Q3 FY17	Brand exposure		All inclusive branding on all public materials in 7 county area By 12-16
	Increase fundraising revenue		Increase year over year	Email Communications	Qtrly	Monthly	Estate Planning brochure	None	Create by 8-16
	Annual Membership Survey	None	Annually FY18	Facebook/LinkedIn Twitter/Youtube	Fb/Linked in only	Regular posts. Increase reach	Estate planning contacts and communications	Little	Increase number of contacts and communication pieces
	Membership Drive	None	Annual Membership Drive	Increased communications with constituencies using social media	1500	Increased website and Facebook visits by 1-1-17. 1600 by 1-17, 1700 by 1-18, 1800 by 1-19	Increase estate intent and realized gifts		Increase planned giving gifts year over year.
	Retention		Membership Retained. Increase 2% annually.	Increased material & presentations in 7 county area	10-12 presently	24 speaking engagements per year by 6-19	Expand Corporate & individual contributions		Increase number of donors by 6% over 3 years. Increase total giving by 6% over 3 yrs.
	Event Development		1 new event by FY19	New Donor Database Software		No later than FY18	Increase agency funding from grants		Increase grant funding by 6% over 3 years
<b>Values</b>	<b>Diversity.....Unique Families &amp; Individuals.....Inclusive.....Deserving.....Dignity.....Right to Decide</b>								

# FY2017-2019 Strategic Plan – Boards

<b>Mission</b>	To empower people with intellectual and related disabilities to engage in lifelong opportunities to live, learn, work and play with dignity, freedom and full inclusion in their communities								
<b>Vision</b>	Be a proactive advocate committed to the empowerment, independence and dignity of all individuals with intellectual and related developmental disabilities and their families								
<b>Focuses</b>	<b>People</b> Clients, Staff, Volunteers			<b>Quality</b> Efficiency, Effectiveness			<b>Sustainability</b> Stability, Longevity, Continuity		
<b>3 Year Targets</b>	<p><b>GOAL P1:</b> Increase BOD diversity <b>GOAL P1 ACTION ITEMS:</b></p> <ul style="list-style-type: none"> <li>Incorporate representation from each of the counties</li> <li>Identify affinity groups to have represented on the BOD</li> </ul> <p><b>GOAL P2:</b> Fully populate BOD committees and meet regularly. <b>GOAL P2 ACTION ITEMS:</b></p> <ul style="list-style-type: none"> <li>Reinitialize and maintain Resource Development &amp; Marketing, Endowment, Service and Support, Nomination and Governance. Each committee will include BOD members, staff, community volunteers, and Arc members.</li> </ul>			<p><b>GOAL Q1:</b> Increase BOD familiarity and involvement with organization. <b>GOAL Q1 ACTION ITEMS:</b></p> <ul style="list-style-type: none"> <li>BOD meet monthly / at least 10 times per year</li> <li>All Committees meet at minimum quarterly</li> <li>Continue on-going BOD familiarity with programs, issues through briefings by staff and other subject matter experts at Board meetings.</li> <li>Develop and initiate minimum bi-annual informal “mixer” events with Boards and staff.</li> <li>BOD members each attend 75% of combined board/committee meetings.</li> </ul> <p><b>GOAL Q2:</b> Review, amend bylaws as needed <b>GOAL Q2 ACTION ITEMS:</b></p> <ul style="list-style-type: none"> <li>Review Committee roles and responsibilities</li> </ul> <p><b>GOAL Q3:</b> BOD communications <b>GOAL Q3 ACTION ITEMS:</b></p> <ul style="list-style-type: none"> <li>Develop vehicles for regular and timely communications with BOD – Google Docs</li> </ul>			<p><b>GOAL S1:</b> Engage BOD more in the fiscal, program, and community leadership sustainability aspects of The Arc <b>GOAL S1 ACTION ITEMS:</b></p> <ul style="list-style-type: none"> <li>More direct involvement in funding development, communications with donors, events, etc.</li> <li>Develop speaking points and presentation materials for Board funding calls and speaking opportunities.</li> </ul> <p><b>GOAL S2:</b> Maintain regular and updated documentation of BOD functions. <b>GOAL S2 ACTION ITEMS:</b></p> <ul style="list-style-type: none"> <li>Job Descriptions</li> <li>Conflict of Interest</li> <li>Memberships</li> <li>BOD/Committee assignments and attendance</li> <li>Agenda/Minutes</li> </ul> <p><b>GOAL S3:</b> Conduct annual BOD Survey <b>GOAL S3 ACTION ITEMS:</b></p> <ul style="list-style-type: none"> <li>Review increase/decrease in survey results and develop an action plan.</li> </ul>		
<b>Dash board</b>	<b>Measure</b>	<b>Actual</b>	<b>Goal</b>	<b>Measure</b>	<b>Actual</b>	<b>Goal</b>	<b>Measure</b>	<b>Actual</b>	<b>Goal</b>
	County representation on BOD	None	Incr. representation by 1 per fiscal year (3 by FY19)	BOD 10 times per year, Committees quarterly, 75% attend	BOD 10 times per year, Committees quarterly	BOD 10 times per year, Committees quarterly, 75% attend	Develop speaking points and presentation materials	None	Available to BOD 7-1-17
	Committees populated and functioning with diverse affinities	Mostly filled	Representation on committees include volunteers and members	Program/issue briefing component at each BOD meeting	None	Program/issue briefing component at each BOD meeting	Documentation Updated	Annually	Annually
	Populate Committees with non-board volunteers	Some volunteers	1 per committee that will allow non-board members	Evaluate potential bylaw changes after BOD consultation	Not done on a regular basis	Annually	Annual Survey	Only done once	Annually in January
	Social Event/Mixer	None	Bi-Annually	Develop regular ED & Board Pres. Communication	Not done	Q1 FY17			
<b>Values</b>	<b>Diversity.....Unique Families &amp; Individuals.....Inclusive.....Deserving.....Dignity.....Right to Decide</b>								



# FY2017-2019 Strategic Plan – Administration

<b>Mission</b>	To empower people with intellectual and related disabilities to engage in lifelong opportunities to live, learn, work and play with dignity, freedom and full inclusion in their communities								
<b>Vision</b>	Be a proactive advocate committed to the empowerment, independence and dignity of all individuals with intellectual and related developmental disabilities and their families								
<b>Focuses</b>	<b>People</b> Clients, Staff, Volunteers			<b>Quality</b> Efficiency, Effectiveness			<b>Sustainability</b> Stability, Longevity, Continuity		
<b>3 Year Targets</b>	<p><b>GOAL P1:</b> Conduct Workplace Retention Efforts <b>GOAL P1 ACTION ITEMS:</b></p> <ul style="list-style-type: none"> <li>Conduct Annual Employee Survey</li> <li>Conduct Employee appreciation event annually</li> <li>Recognize Years of Service</li> <li>Increase Employee Retention year over year</li> </ul> <p><b>GOAL P2:</b> Get all employees on consistent staffing model and evaluations that are consistent with PT and FT definitions <b>GOAL P2 ACTION ITEMS:</b></p> <ul style="list-style-type: none"> <li>Employees over 30 hrs. are FT w/benefits</li> <li>Employees under 30 hrs. are PT</li> <li>Standard pay structure developed</li> <li>Standardize Merit based performance evaluations</li> </ul>			<p><b>GOAL Q2:</b> Be in ACA compliance annually <b>GOAL Q2 ACTION ITEMS:</b></p> <ul style="list-style-type: none"> <li>Regular monitoring of ACA reporting</li> <li>Affordable benefits offered in a standardized format</li> </ul> <p><b>GOAL Q3:</b> Decrease overhead costs to staff turnover <b>GOAL Q3 ACTION ITEMS:</b></p> <ul style="list-style-type: none"> <li>Increase FT positions and decrease PT staff model to meet increased consumer needs, and decrease onboarding, training, and turnover costs</li> </ul> <p><b>GOAL Q3:</b> Increase overall effectiveness of policies and processes to provide a better quality of services <b>GOAL Q3 ACTION ITEMS:</b></p> <ul style="list-style-type: none"> <li>Effective use of ADP by utilizing more functions</li> <li>Streamlined invoicing and billing process through the Finance Department</li> <li>Effective and increased use of Quantum for payroll, billing, and reporting</li> <li>Improve internal processes that would enhance the paperless movement, personnel and client files digital</li> <li>Streamline shared drives to improve filing and data space.</li> </ul>			<p><b>GOAL S1:</b> Have succession plans in place for each director level position <b>GOAL S1 ACTION ITEMS:</b></p> <ul style="list-style-type: none"> <li>Meet with each director and have them partner with key staff to assure systems and responsibilities are understood to assure continuity</li> </ul> <p><b>GOAL S2:</b> Monitor and evaluate contracts/agreements to meet financial and programmatic needs. <b>GOAL S2 ACTION ITEMS:</b></p> <ul style="list-style-type: none"> <li>Ongoing reviews of costs, rates, policies and exceptions to policies and submit/recommend changes as needed. Make contractual changes as needed.</li> <li>Audit, Banking, Insurance RFP's</li> <li>Have an outside agency perform a general risk assessment of The Arc.</li> </ul> <p><b>GOAL S3:</b> Increase current use of technology systems to advance mission programs <b>GOAL S3 ACTION ITEMS</b></p> <ul style="list-style-type: none"> <li>Software program that enhances the scheduling and increases provider match compatibility.</li> <li>Website that is application friendly, fresh, and interfaces with consumers.</li> </ul>		
<b>Dashboard</b>	<b>Measure</b>	<b>Actual</b>	<b>Goal</b>	<b>Measure</b>	<b>Actual</b>	<b>Goal</b>	<b>Measure</b>	<b>Actual</b>	<b>Goal</b>
	Employee Survey		Annually in January	ACA Monitoring	Establishing	Report quarterly	Succession Plan	None	Per Director position
	Employee Appreciation event	Not done	Annually by 2017	Affordable benefit in a standardized format	Not standard	Annually, but established by 2016	Monitor and evaluate MCO contracts	Not in place	Make changes and recommendations as needed
	Years of Service	Not done	Annually by 2016	Increase FT positions	50 FTE	3-4 FTE per year			
	Employee Retention		Improve year over year, baseline 2016	ADP Utilization	Not done	Increase use	Technology Platforms		Increase usage of system by at least 1
	Clear FT/PT model	Not clear	Over 30 hrs. FT/Under 30 PT, 2018	ACH billing process	Not done	All services on ACH 2016	Website		New, interfacing
	Agency Pay Structure		Establish. 2018	Paperless		Add systems to avoid paper	RFP	Overdue	Within 2016/2017 year
	Merit base evaluations	Not done	Annually, 2017	Streamline drives		Streamlined process			
<b>Values</b>	<b>Diversity.....Unique Families &amp; Individuals.....Inclusive.....Deserving.....Dignity.....Right to Decide</b>								

<b>Values</b>		
<b>Diversity</b>	<b>We believe there is Strength in diversity</b>	
<b>Unique Families and Individuals</b>	<b>We believe that each individual and family is unique and has value</b>	
<b>Inclusive</b>	<b>We believe that individuals and families are best served in an inclusive community</b>	
<b>Deserving</b>	<b>We believe that individuals with disabilities deserve quality educational, vocational, social, and living opportunities.</b>	
<b>Dignity</b>	<b>We believe that individuals must be treated with dignity</b>	
<b>Right to Decide</b>	<b>We believe that each individual/family has a right to make its own decisions.</b>	
<b>On Target</b>	<b>Caution</b>	<b>Concern</b>
<b>Green: Results are on or over the established target.</b>	<b>Yellow: Results are under the established target, but within a tolerance interval. They need to be analyzed and monitored.</b>	<b>Red: Results are under the established target and require urgent attention</b>

*The Arc*®