



# Developmental Disability **Advocates**

Connecting Individuals with Resources  
IN JEFFERSON COUNTY - SINCE 1978

## STRATEGIC PLAN



FY2021 - 2023

## INTRODUCTION

During May-September 2020, Developmental Disability Advocates (DD Advocates) undertook a strategic planning process, facilitated by Collaborative Strategies, Inc. *The objectives of the process were:*

1. **Bring focus and direction to the organization through the creation of a 3-year strategic plan.**
2. **Provide a developmental and team strengthening experience for all active participants.**
3. **Align stakeholders to complete the organization’s mission.**

*The process had three phases:*

1. **Diagnostic** - *evaluating DD Advocates’ current operations and environment.*
2. **Strategic Goal Development** - *establishing a shared vision for DD Advocates’ future and the critical goals that must be accomplished for the vision to become reality.*
3. **Action Planning** – *determining the specifics of how DD Advocates executes and implements their strategic goals.*

Collaborative Strategies facilitated a thorough diagnostic process that grounded the strategic plan in the reality of DD Advocates’ current situation.

<b>Quantitative</b> analysis included a review of:	<b>Qualitative</b> analysis included review of:
<ul style="list-style-type: none"><li>➤ Compliance</li><li>➤ Outcome results</li><li>➤ Funding trends</li><li>➤ Historical financial results</li></ul>	<ul style="list-style-type: none"><li>➤ Recent stakeholder surveys</li><li>➤ One-on-one interviews with the Ad Hoc Planning Committee</li><li>➤ Focus groups with the Board of Directors, Service Coordination Team, Provider Partnership, and Together Advisory Committee</li></ul>

A strategic planning committee reviewed the diagnostic findings and created the overarching planning deliverable – strategic goals. The committee divided into smaller groups to work on the action plans for each strategic goal. Additional DD Advocates staff joined the action planning teams to promote an inclusive process and engage appropriate subject matter experts. The strategic planning committee consisted of the following members:

Stacey Ismail, Executive Director  
David Weiler, Director of Administration  
Bill Knittig, Director of Service Coordination  
Angie McGoveran, Assistant Director of Service Coordination

## SWOT ANALYSIS

The planning committee conducted a SWOT (Strengths, Weaknesses, Opportunities, Threats) analysis to guide and inform the development of DD Advocates’ strategic goals.

**Strengths:** characteristics of the organization that give it an advantage over others.

**Weaknesses:** characteristics of the organization that place it at a disadvantage relative to others.

**Opportunities:** elements in the environment that the organization could exploit to its advantage.

**Threats:** elements in the environment that could cause trouble for the organization.



# SWOT Analysis Results

Strengths	Weaknesses
<ul style="list-style-type: none"> <li>• <b>People. Staff and management. Performance, expertise.</b></li> <li>• <b>Agency culture.</b></li> <li>• <b>Reputation.</b></li> <li>• <b>Relationships.</b> With ERA, service providers, community.</li> <li>• “Reach.” Only one serving those without Medicaid.</li> <li>• Financial stability.</li> <li>• CARF accreditation.</li> <li>• SCORES system.</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Awareness.</b> Brand identity.</li> <li>• <b>Turnover.</b></li> <li>• <b>Productivity.</b> Lower than peers. Focus may be creating employee satisfaction issues.</li> <li>• Lack of recent needs assessment.</li> <li>• Training. Improve consistency and provide alternatives to face-to-face training.</li> <li>• Processes. Improve consistency, understanding of regulatory requirements.</li> <li>• Access to services (wait list).</li> <li>• Funding.</li> <li>• Space for service coordination expansion.</li> </ul>
Opportunities	Threats
<ul style="list-style-type: none"> <li>• <b>Service coordination expansion from DMH.</b></li> <li>• <b>Identify and serve more people.</b></li> <li>• <b>Tax levy increase.</b></li> <li>• <b>Transportation. A new model?</b></li> <li>• ERA collaboration.</li> <li>• Improved productivity.</li> <li>• “Tele-health”</li> <li>• Employment opportunities for those with disabilities.</li> <li>• <b>Increase awareness.</b></li> <li>• Increase visibility of succession plans.</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Managed care.</b></li> <li>• Funding. Budget cuts. No new waiver slots. Provider crisis.</li> <li>• <b>DSP crisis</b> (due in part to minimum wage and underfunded providers).</li> <li>• COVID.</li> <li>• Wait list.</li> <li>• DMH regulatory compliance.</li> <li>• Continued ability to use SCORES.</li> <li>• Future Board turnover. Loss of experience and relationships.</li> </ul>

## SCENARIO PLANNING

Recognizing the uncertainty surrounding the passage of a tax levy increase, the possibility of managed care, and the impact of either on the organization’s strategic goals, the planning committee undertook a scenario planning exercise.

The scenarios and actions are summarized on the following page.

# Scenario Planning

Managed Care	Internal Service Coordination	<ul style="list-style-type: none"> <li>• Hire a public awareness/program specialist position</li> <li>• Focus awareness on education, prevention and creative programming. Afterschool care, ISLA, transportation? Have to find and serve more people</li> <li>• Consolidate SC and Admin into a new space</li> <li>• Pursue new public transportation model</li> <li>• Continue capital and agency funding. DDA to propose funding levels AND move to a POS model</li> <li>• Consider MACDDS/ERA collaborations (OHCDs?)</li> <li>• Gradual SC growth</li> </ul>	<ul style="list-style-type: none"> <li>• Consider public awareness/program specialist position</li> <li>• Awareness = grassroots outreach</li> <li>• Consolidate SC and Admin into a new space</li> <li>• Pursue new public transportation model</li> <li>• Funding remains flat. Continue capital and agency funding. DDA to propose funding levels and move as able to POS/new services</li> <li>• Consider MACDDS/ERA collaborations (OHCDs?)</li> <li>• Gradual SC growth</li> </ul>
	External Service Coordination	<ul style="list-style-type: none"> <li>• Hire a public awareness/program specialist position</li> <li>• Focus awareness on education, prevention and creative programming. Afterschool care, ISLA, transportation? Have to find and serve more people</li> <li>• Move out of Herky. Only need Admin space</li> <li>• Pursue new public transportation model</li> <li>• Continue capital and agency funding. DDA to propose funding levels AND move to a POS model</li> <li>• Maintain current MACDDS/ERA collaboration efforts</li> <li>• SC = remaining non-Medicaid only</li> </ul>	<ul style="list-style-type: none"> <li>• Consider public awareness/program specialist position</li> <li>• Awareness = grassroots outreach</li> <li>• Pursue new public transportation model</li> <li>• Move out of Herky. Only need Admin space</li> <li>• Funding remains flat. Continue capital and agency funding. DDA to propose funding levels and move as able to POS/new services</li> <li>• Maintain current MACDDS/ERA collaboration efforts</li> <li>• SC = remaining non-Medicaid only</li> </ul>
		Yes	No
Tax Levy Passes?			

## MISSION, VISION, VALUES

The planning committee re-affirmed the organization’s current mission, vision, and values. The committee also made a conscious effort to ensure that its work was guided by and consistent with the mission, vision, and values.

### Mission

Providing resources to create opportunities for individuals with developmental disabilities in Jefferson County to live full and enriched lives.

### Vision

The vision of Developmental Disability Advocates is that individuals with developmental disabilities live a life of their choice and are fully included in the community

### Core Values

#### Person Centered

- *Respect & Dignity.* All individuals are treated with respect and dignity and their rights are ensured by persons providing them with services and supports.

- *Valued.* All individuals are viewed holistically as valued members of their family and the community.
- *Choice.* Individuals and/or the support team design their services to enhance their lives and achieve their personal vision.
- *Quality Services.* Individuals and/or the support team determine the quality of services based on the outcomes experienced.

### **Financial Accountability**

- *Management.* All public and private funds shall be administered with transparency and in full compliance with acceptable accounting standards.
- *Sustainability.* Developmental Disability Advocates' own financial status, along with those organizations it funds, shall have a strong viability for the short and long term.
- *Stewardship.* Developmental Disability Advocates shall utilize its available resources in the most efficient and effective manner possible.
- *Outcomes.* Providers seeking funding from Developmental Disability Advocates shall define and demonstrate their positive impact on the lives of individuals served.

### **Leadership**

- *Staff Excellence.* The organization strives to recruit, hire, train, and retain employees with the best skill sets and provide opportunities for professional growth.
- *Board/Staff Partnership.* Board members and staff work together to fulfill the organization's mission through open communication in a spirit of collaboration and consensus building based on trust and respect of each other's roles and responsibilities.

DD Advocates has a robust performance management process that will be used to drive timely and successful implementation of this strategic plan. That process includes:

- Monthly Leadership team meetings and
- Quarterly follow-up at Board of Director meetings.

In addition, DD Advocates will complement this process with an annual review, facilitated by Collaborative Strategies.

# Goal 1: Increase Awareness of the Organization

**Objective:** Execute an annual campaign increasing long-term awareness in the community.

**Key Performance Indicators:** Passage of Tax Levy Increase; Increase the Number of Individuals Served by 5% Annually

ACTIONS	RESPONSIBLE	COMPLETION DATE	PROGRESS INDICATOR
Execute awareness plan developed with <i>Hot in the Kitchen</i> promoting a tax levy increase ballot proposition.	Public Awareness Committee	April 30, 2021	Tasks/activities from public awareness plan are implemented 100% complete to the plan.
Develop an annual “awareness calendar” that includes a set of coordinated activities such as social media postings, annual report, presentations, advertising, etc.	Public Awareness Committee	April 30, 2021	Annual plan is developed and implemented 100% complete to the plan.
Establish goals for all activities.	Public Awareness Committee	April 30, 2021	Goals are established, tracked and reported on.
Estimate the annual cost for all activities and include in the annual budget.	Director of Administration	April 30, 2021	Public Awareness is included in each annual agency budget.
Assess the organizational resources required to manage/execute the annual awareness calendar. Consider a new role to meet this need and the need for a provider relations specialist.	Director of Administration  Executive Director	April 30, 2021 (if tax levy is successful)  Years 2-3: Re-evaluate need and resources available.	Assessment is completed and a job description developed if determined necessary.

## Goal 2: Expand the Depth and Breadth of Services Offered in Jefferson County

**Objective:** Create a purchase-of-services plan to continue growing new services in the county.

**Key Performance Indicator:** Increase funding level for existing direct service(s) and/or add one new service type per year.

ACTIONS	RESPONSIBLE	COMPLETION DATE	PROGRESS INDICATOR
Establish funding priorities for tax levy revenue. Consider: <ul style="list-style-type: none"> <li>➤ Review of past needs assessments and satisfaction survey responses.</li> <li>➤ A review of what services our ERA peers are providing.</li> <li>➤ A review of personal care and crisis services.</li> </ul>	DD Advocates Leadership Team  Board of Directors	December 1, 2020	Clear message to voters about what additional tax dollars will be used for.  Funding priorities established regardless of passage of tax levy increase.
Determine what additional services will be purchased directly and define who will be eligible for additional services.	DD Advocates Leadership Team  Board of Directors	December 1, 2021	Services offered in Jefferson County are expanded to include vital services funded by ERA partners.
Evaluate and select providers from whom services will be purchased.	DD Advocates Leadership Team	March 31, 2022	Provider(s) submit funding requests for identified, needed service(s).

## Goal 2: Expand the Depth and Breadth of Services Offered in Jefferson County, cont.

<p>Assess the additional organizational resources required to support provider relationships. Leverage existing resources like the ERA collaborative</p> <p>Consider a new role to meet this need and the need for a public awareness specialist.</p>	<p>Director of Administration</p> <p>Executive Director</p>	<p>April 30, 2022</p>	<p>Assessment is completed and a job description developed if determined necessary.</p>
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## Goal 3: Help Our Provider Partners Address Their Capacity Challenges

**Objective:** Identify and launch small-scale, low cost (non-reliant on a tax levy increase) initiatives to free up redundant overhead costs that can be reallocated by our providers for direct care costs.

**Key Performance Indicator:** Provider agency turnover and open positions are decreased year over year.

ACTIONS	RESPONSIBLE	COMPLETION DATE	PROGRESS INDICATOR
<p>Create a multi-organizational task force. Include providers, ERA partners, IT providers/experts, DMH, Station MD, etc. Participants must be empowered to make changes</p>	<p>Director of Administration  Executive Director</p>	<p>March 31, 2021</p>	<p>Form the task force and document discussion and decisions.</p>
<p>Identify redundant costs and establish savings thresholds that need to be met for actions. Consider a focus on tele-health which could be funded by the Jefferson Foundation. Other areas of redundancy and potential savings include recruiting, training, scheduling, and IT.</p>	<p>Director of Administration  Executive Director</p>	<p>April 30, 2021</p>	<p>Cost/benefit analysis is completed for various areas of redundancy. Included in FY 22 budget as appropriate.</p>

## Goal 4: Continue to Strengthen Partnerships, Improve Collaboration, and Prepare for the Possibility of Managed Care

**Objective:** Increase the visibility, broaden the relationships, and be more proactive regarding possible managed care with the partners who are critical to our future: MACDDS, ERA, DMH, etc.

**Key Performance Indicator:** High-level managed care response plan developed by 6/30/2023.

ACTIONS	RESPONSIBLE	COMPLETION DATE	PROGRESS INDICATOR
Educate and communicate the value and importance of our partner relationships to the DD Advocates Leadership Team and Board.	Executive Director  Director of Administration  Director of Service Coordination	Ongoing	Relationships/managed care are addressed in each Executive Director report at Board meeting.
Continue to educate the Board regularly regarding managed care. Share what other states are doing and their results.	Executive Director	Ongoing	Managed care is topic of FY 22 Board retreat or earlier if needed.
Broaden relationships with partners beyond 1-2 specific individuals. Develop relationships at multiple agency levels that will generate long-term relationships, sustainable beyond the individuals in current roles.	Executive Director  Director of Administration  Director of Service Coordination	Ongoing	Continued expansion of ERA.

## Goal 4: Continue to Strengthen Partnerships, Improve Collaboration, and Prepare for the Possibility of Managed Care, cont.

<p>Members of the Executive Leadership Team will identify and engage in opportunities to maximize knowledge of managed care models and be involved in state level decisions. Secure Board support for the time and money required to do so.</p>	<p>Executive Director  Director of Administration  Director of Service Coordination</p>	<p>June 30, 2022</p>	<p>List of participation in strategically selected committees, workgroups, national webinars/conferences is expanded.</p>
<p>Utilize the DD Advocates Leadership Team to develop a high-level “if-then” response to managed care which may include an OHCDS model with MACDDS and/or ERA partners.</p>	<p>DD Advocates Leadership Team</p>	<p>June 30, 2023</p>	<p>All partners have made a commitment to developing a high-level response plan by 6/30/23.</p>

## Goal 5: Migrate to a New, Integrated Public Transportation Model

**Objective:** Work with the Transportation Solutions Committee to migrate to a new, integrated public transportation model that provides better results AND a cost savings.

**Key Performance Indicator:** Transportation services are expanded for individuals with developmental disabilities in Jefferson County.

ACTIONS	RESPONSIBLE	COMPLETION DATE	PROGRESS INDICATOR
Design a new model by mapping the migration from the existing model. Consider the urban/rural dynamics of the Ozark model.	Director of Administration  Transportation Solutions Committee	October 31, 2020	Mapping exercise complete.
Collect and collaborate on data necessary for urban/rural grant applications (cost, number of people served, types of services, quality of services, outcomes).	Director of Administration  Transportation Solutions Committee	October 31, 2020	Grant application for urban model submitted by OATS to East/West Gateway.
		January 31, 2020	Grant application for rural model submitted by OATS to MODOT
Educate the Board on the existing and new models. Help them understand the mindset shift to funding an integrated transportation model that serves our population. Share the Ozark model results.	Director of Administration  Transportation Solutions Committee	December 31, 2020	September 2020 Board meeting on urban model.  Board retreat held in Fall 2020 on rural/overall model.

## Goal 5: Migrate to a New, Integrated Public Transportation Model, cont.

DD Advocates determines funding commitment for expanded and integrated transportation model.	Director of Administration  Transportation Solutions Committee	April 30, 2021	DD Advocates funding committed in FY 22 budget.
New model implementation begins in phases.	Director of Administration  Transportation Solutions Committee	July 2021  January 2022	Urban implementation likely begins.  Rural implementation likely begins.