



2021 Strategic Plan

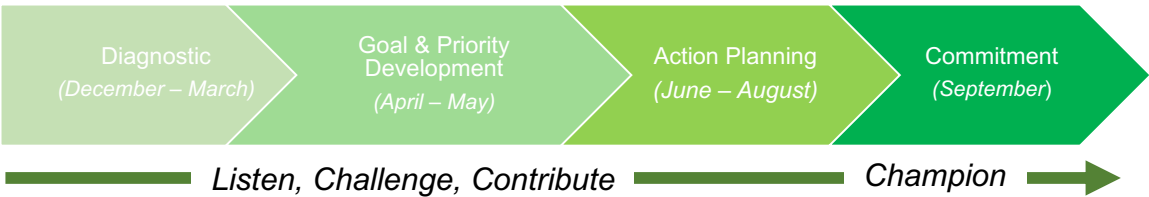
Developed December 2019 – August 2020



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Planning Process

In 2020, Community Living developed a 3-year strategic plan. The process had four phases:



- Diagnostic – evaluating Community Living’s current operations and environment
- Goal & Priority Development – establishing a shared vision for the future
- Action Planning – determining the specifics of how Community Living will achieve its goals
- Commitment – committing to the plan and agreeing on a process for keeping score

Collaborative Strategies, Inc. facilitated the planning process. A committee consisting of Board members, staff, and other stakeholders reviewed diagnostic findings and created the overarching planning deliverables – our goals and strategic priorities. Then the team divided into small groups to develop action plans for the three priorities. Additional members of the Community Living team joined the action planning teams to promote an inclusive process and engage appropriate subject matter experts.

Strategic Planning Team

The strategic planning committee consisted of the following members:

- Sue Bazzell
- Heather Bell
- John Ditch
- Barb Griffith
- Molly Maher
- Chris McCoy
- Kristen Paez
- Dave Robben
- Jeff Strickland
- Jan Whipple
- Sheri Wiltse

Diagnostic

Collaborative Strategies facilitated an extensive diagnostic process that grounded the strategic plan in the reality of Community Living’s current situation. Quantitative analysis included the program metrics, consumer demographics, and key financial information. Qualitative analysis included small group interviews as well as 1:1 interviews with members of Community Living’s leadership and key stakeholders. Assessment findings are documented in the planning committee’s meeting materials and notes.

Planning Deliverables

Our Strategic Goals – A Vision for 2024

The team developed the below goal statements - a Picture of Success in 2024. These are statements we expect to be demonstrably true at the end of the plan period. The descriptions and targets listed below create the focus and foundation for the strategic plan.

<p>Programming</p>	<ul style="list-style-type: none"> • We researched the behavioral services needs in our community along with available funding streams (public/insurance/private pay) and developed a plan to meet those behavioral needs in a financially sustainable manner. • Day Hab/SSA has a thriving and differentiated social enterprise or volunteer opportunity for its members. • SSA supports multiple models of support and service delivery. • Our residential footprint has expanded to serve 100+ people and we have diverse housing options for residents to select from. • Adult Rec is a dynamic and enriching program that facilitates community inclusion in all it does. • Our High School SOAR participants demonstrate social growth and development enabling them to transition away from dependence on 1:1 support where possible.
<p>Organizational Capacity</p>	<ul style="list-style-type: none"> • We have clearly defined and communicated the roles & responsibilities of both the administrative and programmatic staff (coordinator and up) and are confident that work is effectively distributed. • Our organizational structure best supports efficient program administration and delivery and is aligned with the needs and life stages of the members we serve. • We have a leadership team with the capacity to think strategically and the expertise and knowledge to sustain the organization – to include our board. • We prioritize and foster optimal use of tech for both administrative and programmatic purposes. • Our geographic and programmatic footprints are flexible and able to adapt with the needs of our community. • We have explored strategic partnerships and made a decision to partner or commit to internal growth and maintaining current programming. • We have regular discussions with all team members regarding their professional goals and development and have plans in place for our high potential employees.
<p>Financial</p>	<ul style="list-style-type: none"> • We have researched payment models and viable funding streams in an effort to make our programs affordable to all (e.g. private pay, insurance, Medicare, state funding, grants, etc.). • We have programmatic and financial targets for all programs and routinely report on performance to ensure we are best deploying resources • All programs are financially sustainable.

Our Strategic Priorities

To achieve the 2024 vision, Community Living articulated a short list of priorities. “Priorities” implies focus – so there can only be a handful. The planning team identified three critical priorities.

Priorities

1. Deepen our commitment to **innovation and inclusion**, reviewing our program portfolio for opportunities to introduce **new approaches and business models** that will improve our ability to deliver value to families and members.
2. Design and implement an **organizational structure** that best supports programmatic, administrative, and leadership needs while also setting a solid path for **leadership succession**.
3. Diversify and grow funding streams and other sources to sustain **long term financial health and support continued innovation**.

Timeline

Of utmost importance to Community Living was a thoughtful and measured approach to both developing and implementing the plan. It is critical that the plan becomes a part of how the organization works.

We took care to design a plan that focuses on building a strong foundation for both the organization and the programs in year one to position us to innovate and make bolder changes in years two and three.

Pages 4-6 detail the activities from all three priorities to provide an aggregated view of the work that we are committing to in each quarter and each year while pages 8-11 breakdown the activities by priority. The priority breakdowns on pages 8-11 provide a snapshot of all the work that we are committed to in achieving each priority.

Below is a high-level view of the timeline and accountability for key actions in each strategic priority that will be completed in the **near-term**. Green depicts the estimated completion.

Priority	Activity				Primary Owner
		Oct-Dec	Jan-Mar	Apr-Jun	
		Q2	Q3	Q4	
1	Develop an Internal Communications Playbook that includes content, channels, and cadence.				Katie Amrhein
1	Capture lessons learned (+/-) from new hires in the past 12 months and rebuild the New Employee Orientation framework to better support employee integration and development. - Clarify cadence and expectations.				Julie Thornton
1	Rollout Communications Playbook and train on new channels to employees.				Katie & John
1	Develop organization-wide sensitivity training/ongoing campaign (e.g. Respect Campaign) to reset our attitudes and approaches with our clients and each other. - Include Communication/Respect training for employees to help foster a culture of continuous improvement, e.g. how to suggest a new idea.				Kristen Paez and John Ditch
1	Analyze our Retention Program execution and efficacy and develop a plan to consistently act on the data and information being gathered.				Barb Griffith
2	Evaluate and define roles & responsibilities - Clarify supervisor responsibilities - Identify gaps and inefficiencies (e.g. duplicative efforts) - Standardize Job Descriptions (90% standard across org and 10% specific to program) - Include KPIs for each position - Salary Bands (understand funding restrictions)				Barb Griffith
2	Explore opportunities to centralize program functions to increase efficiencies and improve program offerings (e.g. meal planning, cleaning, etc.)				Erin Leichner
3	Add a form to the monthly financial reporting to capture "so what"/impact.				Molly
3	Create and implement a Donor Engagement and Stewardship Plan.				Heather
2	Establish spans of control/gearing ratios for directors/managers/supervisors and explain the "why". These will be different for different programs.				Sheri Wiltse
3	Develop Program Department Heads funding competencies. - Add grant funding opportunities to business plan - Include Heather in Program Department Head meetings to provide regular training and information				Molly & Sheri
1	Rebuild our supervisor program with clear curriculum scaffolded to support continuous growth. Standardize supervisor/leader expectations across programs.				Training Department
1	Establish a mentor program, possibly pairing mentors and mentees from different parts of the organization. Include financial and status benefits for mentors, e.g. short coats in a hospital.				Sheri Wiltse

Priority	Activity				Primary Owner
		Oct-Dec	Jan-Mar	Apr-Jun	
		Q2	Q3	Q4	
1	Build an employment model that supports interested part-time employees transitioning to full-time by working with multiple programs.				Molly & Keith
2	Identify several growth paths/opportunities for employees to advance in the organization. Include clearly scaffolded progression as well as alternative opportunities w/ eligibility requirements/preferences for each move. Consider profiling employees individual journeys, e.g. John Ditch. Communicate broadly.				Michelle
2	Assess strategic alliance opportunities to ensure we can continue to meet our mission objectives and make recommendations to Board for FY 22 & 23. Explore national options, e.g. Arc.				Barb Griffith
3	Develop Program Scorecards with quantitative and qualitative targets (e.g. Current Ratio, Participant Satisfaction, Employee Retention, etc.).				John with Erin
3	Investigate and establish sustainability break points for programs				Molly
3	Develop a plan to grow the endowment fund with benchmarks.				Heather
3	Explore Other Income Sources and provide analysis and recommendations to Board. - Private Pay - Insurance - Medicaid - Medicare				Molly
1	Explore Federal & State Rules and Regulations to identify opportunities to introduce different residential models - CMS (Center for Medicaid Services) or HCBS				Sheri Wiltse / Director of Residential
1	Lobby and advocate at Federal & State level for funding to be individualized/person-centered – funding is currently one size fits all. Lobby at local level for affordable housing.				Barb Griffith
1	Explore opportunities to pay more per hour to increase retention and decrease overtime, e.g. "Intensive Pay"				Molly Maher
2	Add future (personal/professional) development goals section and discussion to annual performance appraisal. Look 3+ years out.				Keith & John
2	Develop a proposal that supports a co-operative or revenue model with similar organizations to improve our training offerings while also making them more financially sustainable, e.g. MedAid and MANDT				Molly & Julie
2	Identify our high-potential employees and develop a program to support them. Ensure we respect and honor "bloom where you're planted people".				Barb Griffith

The team has also planned key activities for future years. Below is the summary view of each of the **long-term** activities. Owners for these activities will be identified in the Q4 strategy meeting when we update the timeline and expectations for the coming year.

Priority	Activity	FY22	FY23
3	Research Multi-Year Federal Grants that align with our programs and mission.		
3	Research and develop a business plan/model for an inclusive Social Enterprise (coffee shop, bakery, print shop, etc.).		
1	Explore alternative residential settings and staffing models that are more cost-effective and offer less-intensive support models. - Include a technology proposal to reduce staff – what cutting edge technology can we invest in and leverage to better serve participants and be more cost effective, e.g. Video Monitoring.		
1	Develop relationships with Real Estate Developers in St. Charles County.		
1	Administer an interest survey to capture what our participants really want to do and/or their interest in trying new things and then develop small group programming within the center model responsive to their interests.		
1	Develop an intentional program for sophomores through seniors to demonstrate social growth and development enabling them to transition away from dependence on 1:1 support where possible.		
1	Leverage summer camp to best facilitate transition from SOAR to DayHab		
1	Explore use of DMH funds for pre-employment training		
1	Administer an interest survey to capture what our participants really want to do and/or their interest in trying new things.		
1	Facilitate integrated recreation opportunities, Pathways to Independence, LifeBridge Partnership. Recreation is an excellent vehicle to link people up with natural supports.		
2	Develop and maintain a list of internal and external names to steward for c-suite succession planning. Assign each person to an executive and/or board member to steward.		
2	Add an annual review of the organizational structure to the Board responsibilities to affirm that the organization is maintaining a clear structure.		
3	Research Family Offices/Charitable Trusts aligned with our program and mission.		
3	Identify, prospective current vendors and 15 new businesses that align with our mission to solicit.		
1	Develop a Transitional Young Adult Program.		
1	Develop an inclusive and supported employment program through a social enterprise that offers a full continuum of opportunities for work – BCI. SEE PRIORITY 3		
1	Facilitate small group, independent, integrated recreation. We are active or passive participants alongside people with disabilities to ensure they are safe, comfortable, and confident.		
1	Facilitate continuum of rec supports to heavily support participants in the beginning and then decrease their supports and encourage/enable them to independently utilize and engage recreation.		

Key Investments

In recognition that the strategic priorities require funding, the team forecasted key investments over the next three years. The summary figures give us a sense of how much we expect the plan to cost. We will address the costs for FY22 and FY23 once we are closer to that timeframe and better able to estimate expected expenses.

	FY21	FY22	FY23
Operating			
Magnetic Messaging (Priority 3)	\$ 3,000		
Leadership Workshop (Priorities 1 & 2)	\$ 5,000		
Strategic Alliances work Ali Chang Ray (Priority 1)	\$ 400		
Total Additional Operating Expense	\$ 8,400	\$ -	\$ -

Action Plans

Each strategic priority has a detailed project plan outlining the required tasks, timelines, and responsible parties. (See subsequent pages.)

Updates and changes to the plan are to be expected – what is important is that Community Living actually uses the plan as a roadmap.

Strategic Priority 1: Deepen our commitment to **innovation and inclusion**, reviewing our program portfolio for opportunities to **introduce new approaches and business models** that will improve our ability to deliver value to families and members.

The planning team elected to focus our programmatic efforts in the next three years on Residential, Adult Rec, SOAR, and Day Hab/SSA. *This does not mean that the other programs are going away or less important, it is a recognition that if we focus on everything, we are likely to make progress on nothing.* We are also committed to exploring how we can best meet the growing behavioral service needs in our community.

Year 1:

Activity	Oct-Dec	Jan-Mar	Apr-Jun	Primary Owner	Program
	Q2	Q3	Q4		
	Develop an Internal Communications Playbook that includes content, channels, and cadence.				
Capture lessons learned (+/-) from new hires in the past 12 months and rebuild the New Employee Orientation framework to better support employee integration and development. - Clarify cadence and expectations.				Julie Thornton	All
Rollout Communications Playbook and train on new channels to employees.				Katie & John	All
Develop organization-wide sensitivity training/ongoing campaign (e.g. Respect Campaign) to reset our attitudes and approaches with our clients and each other. - Include Communication/Respect training for employees to help foster a culture of continuous improvement, e.g. how to suggest a new idea.				Kristen Paez and John Ditch	All
Analyze our Retention Program execution and efficacy and develop a plan to consistently act on the data and information being gathered.				Barb Griffith	All
Rebuild our supervisor program with clear curriculum scaffolded to support continuous growth. Standardize supervisor/leader expectations across programs.				Training Department	All
Establish a mentor program, possibly pairing mentors and mentees from different parts of the organization. Include financial and status benefits for mentors, e.g. short coats in a hospital.				Sheri Wiltse	All
Build an employment model that supports interested part-time employees transitioning to full-time by working with multiple programs.				Molly & Keith	All
Explore Federal & State Rules and Regulations to identify opportunities to introduce different residential models - CMS (Center for Medicaid Services) or HCBS				Sheri Wiltse or Director of Residential	Residential
Lobby and advocate at Federal & State level for funding to be individualized/person-centered – funding is currently one size fits all. Lobby at local level for affordable housing.				Barb Griffith	Residential
Explore opportunities to pay more per hour to increase retention and decrease overtime, e.g. "Intensive Pay"				Molly Maher	Residential

Strategic Priority 1: Deepen our commitment to **innovation and inclusion**, reviewing our program portfolio for opportunities to **introduce new approaches and business models** that will improve our ability to deliver value to families and members.

Years 2 & 3:

Activity	FY22	FY23	Program	Notes
Explore alternative residential settings and staffing models that are more cost-effective and offer less-intensive support models. - Include a technology proposal to reduce staff – what cutting edge technology can we invest in and leverage to better serve participants and be more cost effective, e.g. Video Monitoring.			Residential	- Consider graduated programs by age. - Increase dignity of risk in our staffing models. - Duplex/villa model, e.g. Boone County & St. Louis Life
Develop relationships with Real Estate Developers in St. Charles County.			Residential	
Administer an interest survey to capture what our participants really want to do and/or their interest in trying new things and then develop small group programming within the center model responsive to their interests.			DayHab/SSA	Facilitate participants signing up for inclusive small group activities in the community that interest the participants, e.g. Curves
Develop an intentional program for sophomores through seniors to demonstrate social growth and development enabling them to transition away from dependence on 1:1 support where possible.			SOAR	
Leverage summer camp to best facilitate transition from SOAR to DayHab			SOAR	Facilitates understanding/cross-training between employment services, SOAR, DayHab
Explore use of DMH funds for pre-employment training			SOAR	Possibly use extreme team
Administer an interest survey to capture what our participants really want to do and/or their interest in trying new things.			Adult Rec	
Facilitate integrated recreation opportunities, Pathways to Independence, LifeBridge Partnership. Recreation is an excellent vehicle to link people up with natural supports.			Adult Rec	e.g. Community College Theater Program Integration. Explore Lindenwood theater department for partnership for senior projects. Maybe Lindenwood fashion program.
Develop a Transitional Young Adult Program.			DayHab/SSA	
Develop an inclusive and supported employment program through a social enterprise that offers a full continuum of opportunities for work – BCI. SEE PRIORITY 3			DayHab/SSA	Participants want a job like their family members. SOAR created an arm off our summer program called extreme team for more independent kids (Thor) to get them excited to work
Facilitate small group, independent, integrated recreation. We are active or passive participants alongside people with disabilities to ensure they are safe, comfortable, and confident.			Adult Rec	Develop partnerships with a small group of organizations to facilitate a positive experience for our participants
Facilitate continuum of rec supports to heavily support participants in the beginning and then decrease their supports and encourage/enable them to independently utilize and engage recreation.			Adult Rec	Fostering independence – creating and learning how to find recreation and build natural supports. If we throw you in the deep end, community living will be the safety net – let's take some serious risks Families are more open to taking risks and integrating their children in work and recreation

Strategic Priority 2: Design and implement an **organizational structure** that best supports programmatic, administrative, and leadership needs while also setting a solid path for **leadership succession**.

This priority articulates our commitment to **organize and empower our employees to best deliver our programming and support each other and our members**.

Activity				FY22	Primary Owner
	Oct-Dec	Jan-Mar	Apr-Jun		
	Q2	Q3	Q4		
Evaluate and define roles & responsibilities <ul style="list-style-type: none"> - Clarify supervisor responsibilities - Identify gaps and inefficiencies (e.g. duplicative efforts) - Standardize Job Descriptions (90% standard across org and 10% specific to program) - Include KPIs for each position - Salary Bands (understand funding restrictions) 					Barb Griffith
Explore opportunities to centralize program functions to increase efficiencies and improve program offerings (e.g. meal planning, cleaning, etc.)					Erin Leichner
Establish spans of control/gearing ratios for directors/managers/supervisors and explain the “why”. These will be different for different programs.					Sheri Wiltse
Identify several growth paths/opportunities for employees to advance in the organization. Include clearly scaffolded progression as well as alternative opportunities w/ eligibility requirements/preferences for each move. Consider profiling employees individual journeys, e.g. John Ditch. Communicate broadly.					Michelle
Assess strategic alliance opportunities to ensure we can continue to meet our mission objectives and make recommendations to Board for FY 22 & 23. Explore national options, e.g. Arc.					Barb Griffith
Add future (personal/professional) development goals section and discussion to annual performance appraisal. Look 3+ years out.					Keith & John
Develop a proposal that supports a co-operative or revenue model with similar organizations to improve our training offerings while also making them more financially sustainable, e.g. MedAid and MANDT					Molly & Julie
Identify our high-potential employees and develop a program to support them. Ensure we respect and honor “bloom where you’re planted people”.					Barb Griffith
Develop and maintain a list of internal and external names to steward for c-suite succession planning. Assign each person to an executive and/or board member to steward.					Barb Griffith
Add an annual review of the organizational structure to the Board responsibilities to affirm that the organization is maintaining a clear structure.					Board Chair

Strategic Priority 3: Diversify and grow funding streams and other sources to sustain long term financial health and support continued innovation.

This priority moves us in a direction where we are **metric-driven and all of our programs are financially viable.**

Activity				FY22	Primary Owner
	Oct-Dec	Jan-Mar	Apr-Jun		
	Q2	Q3	Q4		
Add a form to the monthly financial reporting to capture "so what"/impact.					Molly
Create and implement a Donor Engagement and Stewardship Plan.					Heather
Develop Program Department Heads funding competencies. - Add grant funding opportunities to business plan - Include Heather in Program Department Head meetings to provide regular training and information					Molly & Sheri
Develop Program Scorecards with quantitative and qualitative targets (e.g. Current Ratio, Participant Satisfaction, Employee Retention, etc.).					John with Erin
Investigate and establish sustainability break points for programs					Molly
Develop a plan to grow the endowment fund with benchmarks.					Heather
Explore Other Income Sources and provide analysis and recommendations to Board. - Private Pay - Insurance - Medicaid - Medicare					Molly
Research Multi-Year Federal Grants that align with our programs and mission.					Heather
Research and develop a business plan/model for an inclusive Social Enterprise (coffee shop, bakery, print shop, etc.).					Sheri Wiltse
Research Family Offices/Charitable Trusts aligned with our program and mission.					Heather
Identify, prospective current vendors and 15 new businesses that align with our mission to solicit.					Heather



Community Living, Inc. is committed to excellence and compassion in providing innovative services and opportunities for people with disabilities.