



# Community Living, Inc.

## Strategic Plan

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*Approved by the Board of Directors  
November 6, 2014*



Welsch Consulting

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# Community Living, Inc. **Strategic Plan**

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## Community Living, Inc. Strategic Plan

### COMMUNITY LIVING STRATEGIC PLANNING TEAM

The Community Living Strategic Planning Team met on September 4, 2014 at the Old Hickory Golf Club, St. Peters, MO for the purpose of creating a strategic plan.

Those in attendance at the retreat were the following:

Mary Alsup-Niedergerke	Dave Bazzell	Keith Bolton
Joann Burpo	Leann Clement	Jodi Darrohn
Linda Dimmic	John Ditch	Denise Grindstaff
Barbara Griffith	Greg Haag	Mark Hollander
Pam Keys	Susan Luetkenhaus	John Maxwell
Sandy Mohrmann	Bev Moore	Shelley Moore
Dan O'Donnell	Kristen Paez	Carolee Patek
Bob Pearl	Karl Ruhmann	Christine Rutherford
Cort Macbeth Smith	Jeff Strickland	Thomas Westphal
Marty Wexler	Annette Wexler	Jan Whipple
Sheri Wiltse	Bill & Vicki Welsch, Facilitators	

### REVIEW AND FINALIZE THE 2009-2013 STRATEGIC PLAN

The current Community Living strategic plan and most recent strategic plan update were emailed to the Strategic Planning Team prior to the September 4 retreat. Everyone present agreed that the current strategic plan is finalized.

### COMMUNITY LIVING VISION

Those present at the retreat created a new vision:

***We envision a community where all people lead fulfilling lives.***

### COMMUNITY LIVING MISSION

Those present at the retreat created a new mission:

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

### COMMUNITY LIVING CURRENT OPERATIONS

Community Living's CEO, Barb Griffith reviewed statistics summarizing Community Living's current operational status as outlined in Appendix I.



## **STAKEHOLDER INPUT**

Three reports summarizing stakeholder input were emailed to strategic planning participants prior to the strategic planning retreat:

- Community Living, Inc. Participant Satisfaction Survey results
- Summary of Stakeholder Input from June, 2014 focus group meetings
- Responses from June 14, 2014 focus group participants

These reports were reviewed at the planning retreat. Comments and observations from participants are summarized in Appendix II.

## **STRATEGIC PLAN DEVELOPMENT PROCESS**

Participants at the strategic planning session identified five "Critical Questions" faced by Community Living. Working in small groups, participants then outlined proposed goals, actions, persons accountable and timelines consistent with each "Critical Question." Those results are outlined below.

***Critical Question ONE: What will Community Living do to provide innovative programs and services that will facilitate growth and expansion?***

***Critical Question TWO: What will Community Living do to diversify their funding?***

***Critical Question THREE: What will Community Living do to recruit and retain quality personnel?***

***Critical Question FOUR: What will Community Living do to create a sustainable organizational culture of capable leadership?***

***Critical Question FIVE: What will Community Living do to improve communication and streamline decision making within the organization?***

## **Critical Question ONE: What will Community Living do to provide innovative programs and services that will facilitate growth and expansion?**

**Goal One:** By 2018, Community Living will have implemented five new and/or innovative programs or services.

Action 1.1: Referral sources/provider partners will be enlisted to provide a report to the Strategic Planning Committee (SPC) identifying best practices and innovative ideas within Community Living's existing programs and services.

Person: Kristen Paez

Deadline: July 2015

Action 1.2: Designated Community Living representatives will visit other agencies/programs and present a report to the SPC identifying best practices and innovative ideas in a variety of programming areas.

Person: Sheri Wiltse

Deadline: December 2015

Action 1.3.a: The SPC will take the results of 1.1 and 1.2 and develop goals for program growth/expansion/changes.

Person: Sheri Wiltse

Deadline: July 2016

Action 1.3.b: Department Heads will begin steps to implement approved goals for growth/expansion/change.

Person: Sheri Wiltse

Deadline: July 2016

Action 1.4: Present findings of research, along with recommendations, regarding services for the aging population in multiple service areas to the SPC.

Person: Pam Keys

Deadline: September 2015

Action 1.5.a: Survey Community Living staff/programs to determine therapy interests/needs/issues and present findings to SPC.

Person: Pam Keys

Deadline: September 2015

**Critical Question ONE (continued)**

Action 1.5.b: Using findings from 1.5.a, implement, as appropriate, therapy changes to existing system.

Person: Pam Keys

Deadline: March 2016

Action 1.6.a: Survey Community Living staff to determine areas of need in serving individuals with challenging behaviors reporting findings to the SPC with recommendations per program.

Person: Kristen Paez

Deadline: September 2015

Action 1.6.b: Using findings from 1.6.a., as approved by the SPC, implement changes/new programs as appropriate.

Person: Kristen Paez

Deadline: September 2016

**Goal Two:** Community Living will increase the number of clients served by 5% per year for the next three years.

Action 2.1: After analyzing referrals for services and inquiries for services, submit findings related to demand, trends and capacity to the SPC.

Person: John Ditch

Deadline: December 2014

Action 2.2: Expand day habilitation service to include a program for individuals with behavioral challenges.

Person: Joann Burpo

Deadline: July 2016

Action 2.2.a: Research and report on potential need for services for those requiring one-to-one services to determine feasibility.

Person: Joann Burpo

Deadline: March 2015

Action 2.2.b: Create a day habilitation service model serving individuals who require one-to-one staffing.

Person: Joann Burpo

Deadline: December 2015

**Critical Question ONE (continued)**

Action 2.2.c: In the day habilitation model providing services to individual requiring one-to-one, provide a transition component into day habilitation that does not require one-to-one staffing.

Person: Joann Burpo  
Deadline: December 2015

Action 2.2.d: Secure space for a one-to-one day habilitation service for at least 10 people (clients and staff included).

Person: Joann Burpo  
Deadline: December 2015

Action 2.3: Create a seamless transition between all facility based Respite Services to serve children and adults requiring all levels of supervision.

Person: Pam Keys  
Deadline: July 2016

Action 2.4: Re-brand and expand employment services to a business model with a focus on solutions to employers' staffing needs.

Person: Shelley Moore  
Deadline: July 2016

Action 2.4.a: Hold focus groups with employers, funding partners, and Community Living staff to determine employers' needs.

Person: Shelley Moore  
Deadline: March 2015

Action 2.4.b: Create and implement a diversity and disability awareness training curriculum to use with employers.

Person: Shelley Moore  
Deadline: July 2015

Action 2.4.c: Create and implement marketing strategies to use with employers focused on money saving opportunities.

Person: Shelley Moore  
Deadline: December 2015

Action 2.4.d: Implement new business model for providing employment services to employers in the community.

Person: Shelley Moore  
Deadline: July 2016

**Critical Question ONE (continued)**

Action 2.5: Create a list of five resources to use for finding accessible housing.

Person: Leann Clement

Deadline: July 2015

Action 2.6: Increase volunteer base for Recreation Program to 75 volunteers.

Person: Jodi Darrohn

Deadline: September 2016

Action 2.7: Develop and implement an outreach program to go into schools, various community organizations, etc., for the purposes of providing information, educating the community and gaining referrals.

Person: Bev Moore

Deadline: July 2015

**Goal Three:** Community Living has enhanced service delivery through the use of innovative technology by 2017.

Action 3.1.a: Research web based electronic documentation systems (EDS) for consumer records for all programs.

Person: John Ditch

Deadline: July 2015

Action 3.1.b: Implement EDS for 50 consumer records.

Person: John Ditch

Deadline: July 2016

Action 3.1.c: Implement EDS in all programs as appropriate.

Person: John Ditch

Deadline: July 2017

Action 3.2.a: Evaluate staff proficiency in technology related to job descriptions.

Person: John Ditch

Deadline: July 2015

Action 3.2.b: Ensure proficiency of all staff based on job description as measured by comprehensive testing.

Person: John Ditch

Deadline: July 2016



**Critical Question ONE (continued)**

Action 3.3: Create a list of five resources to use to find state of the art technology to enhance the lives of our clients.

Person: Leann Clement

Deadline: December 2015

## **Critical Question TWO: What will Community Living do to diversify their funding?**

**Goal One:** Double development income in next 5 years.

Action 1.1: Develop and implement a Planned Giving program.

Person: Christine Rutherford

Deadline: September 2016

Action 1.2: Develop a plan to cultivate and solicit major gift donors.

Person: Christine Rutherford

Deadline: September 2015

Action 1.3: Expand the parameters of our annual Partnership Program to include opportunities for small businesses and individuals.

Person: Barbara James

Deadline: September 2015

Action 1.4: Expand total number of grant requests by 10% annually.

Person: Christine Rutherford

Deadline: September 2015

**Goal Two:** Establish an endowment fund program by 2017.

Action 2.1: Establish guidelines for an endowment fund program and implement.

Person: Christine Rutherford

Deadline: January 2016

Action 2.2: Create an investment policy for an endowment fund program and implement.

Person: Bob Pearl

Deadline: January 2016

**Goal Three:** Community Living will establish two new ongoing funding sources within 36 months.

Action 3.1: Develop a business plan for operating a business for purpose of generating revenue, client job training and employment opportunities.

Person: Shelley Moore

Deadline: September 2016

**Critical Question TWO (continued)**

Action 3.2.a: Contact five entities outside St. Charles County regarding expansion of Community Living services.

Person: Sheri Wiltse

Deadline: January 2016

Action 3.2.b: Determine feasibility of expanding services into surrounding counties.

Person: Sheri Wiltse

Deadline: January 2016

Action 3.3: Research possibilities for inclusive services/programs, integrating individuals with and without developmental disabilities, for further diversification of funding sources. Present report and recommendations to SPC.

Person: Jodi Darrohn

Deadline: January 2016

Action 3.4: Explore possibilities of establishing a business for the sole purpose of generating additional revenue. Present a report and recommendations to SPC.

Person: Bob Pearl

Deadline: June 2016

**Goal Four:** Research federal grant opportunities.

Action 4.1: Solicit assistance from a Federal Grant consultant to assess Community Living's ability to access and utilize Federal Grants. Present report and recommendations to SPC.

Person: Christine Rutherford

Deadline: September 2015

## **Critical Question THREE: What will Community Living do to recruit and retain quality personnel?**

**Goal One:** Reduce days to fill to 30 days for all positions.

Action 1.1: Determine generational valued employment factors and develop recruitment strategies.

Person: Keith Bolton

Deadline: January 2015

Action 1.2: Implement five innovative ways to advertise and reach out to candidates.

Person: Keith Bolton

Deadline: January 2016

**Goal Two:** Increase retention rates for High and Middle performers by 5%.

Action 2.1: Develop and implement Professional Development strategies for all job classes.

Person: Keith Bolton

Deadline: January 2016

Action 2.2: Review existing benefit plan for potential revisions or changes.

Person: Keith Bolton

Deadline: July 2015

Action 2.3: Conduct a study of benefits of full time versus part time staff, delineating the pros and cons of each. Evaluate and propose changes as appropriate.

Person: Nikki Treadway

Deadline: July 2015

Action 2.4: Provide an array of benefits after determining feasibility.

Person: Keith Bolton

Deadline: November 2015

Action 2.5: Revise new employee orientation process to extend beyond current 90-day norm in order to improve one-year turnover and retention.

Person: Keith Bolton

Deadline: July 2015

Action 2.6: Review existing wage and salary plan.

Person: Keith Bolton

Deadline: March 2015

**Critical Question THREE (continued)**

Action 2.7: Present a new wage/salary/compensation plan.  
Person: Keith Bolton  
Deadline: June 2015

**Goal Three:** Implement an effective quality training program for staff and leadership by December 2016.

Action 3.1: Review current training programs and present revisions/changes as appropriate.  
Person: Keith Bolton  
Deadline: January 2015

Action 3.2: Review current list of trainers and determine needs for changes and implement as appropriate.  
Person: Keith Bolton  
Deadline: March 2015

Action 3.3: Determine the optimal use of online training curricula (College of Direct Support, Drivers Training, etc.) and implement requirements.  
Person: Keith Bolton  
Deadline: February 2015

## **Critical Question FOUR: What will Community Living do to create a sustainable organizational culture of capable leadership?**

**Goal One:** Everyone in a senior management position possesses appropriate skills and attributes needed for the position by 2018.

- Action 1.1: Identify "senior management" positions.  
Person: Keith Bolton  
Deadline: January 2015
  
- Action 1.2: Identify skills and attributes for every senior management position.  
Person: Keith Bolton  
Deadline: July 2015
  
- Action 1.3: Assess each incumbent's (those in identified senior management positions) leadership skills and attributes.  
Person: Barb Griffith  
Deadline: December 2015
  
- Action 1.4: Evaluate and revise as appropriate, job descriptions to ensure skills and attributes are included.  
Person: Keith Bolton  
Deadline: July 2015
  
- Action 1.5: Develop an Individualized Leadership Enhancement Plan for each incumbent.  
Person: Barb Griffith  
Deadline: July 2016

**Goal Two:** Outline the delegation of CEO duties and responsibilities.

- Action 2.1: Generate a list of current CEO duties and responsibilities.  
Person: Barb Griffith  
Deadline: January 2015

**Critical Question FOUR (continued)**

Action 2.2: Generate and deliver a report to Board regarding CEO duties and responsibilities.

Person: John Maxwell, Chairman of the Board and Dan O'Donnell

Deadline: March 2015

**Goal Three:** Community Living's organizational structure identifies possible successors for key positions by January 2016.

Action 3.1: Review and revise, as appropriate, organizational chart including responsibilities for each senior position.

Person: Keith Bolton

Deadline: July 2015

Action 3.2: Develop a cross training plan for all senior management/leadership positions (plan for institutionalizing knowledge).

Person: Sheri Wiltse

Deadline: July 2015

Action 3.3: Develop and implement a leadership training program for future leaders.

Person: Sheri Wiltse

Deadline: December 2015

## **Critical Question FIVE: What will Community Living do to improve communication and streamline decision making within the organization?**

**Goal One:** A process for communicating critical information within our organization is in place by January 2016.

Action 1.1: Assess current lines/methods of communication within Community Living creating report to present to SPC.

Person: John Ditch

Deadline: March 2015

Action 1.2: Develop a plan to improve the timeliness of communicating important information that includes continuous follow-up opportunities. Present draft to SPC for approval.

Person: John Ditch

Deadline: December 2015

**Goal Two:** A process for making major decisions is in place by January 2016.

Action 2.1: Establish an efficient process for typical and routine decisions that need to be made. Present to SPC for approval.

Person: Sheri Wiltse

Deadline: July 2015

Action 2.2: Establish protocols for presenting projects/ideas/activities that need approval from senior management and/or board.

Person: Keith Bolton

Deadline: July 2015

Action 2.3: Establish the scope of authority for making decisions for each position within the agency.

Person: Sheri Wiltse

Deadline: July 2015



## **PROCESS FOR ONGOING STRATEGIC PLAN REVIEW**

The strategic plan will be reviewed and updated at least quarterly by the Strategic Planning Committee consisting of identified Community Living staff as well as members of the board of directors planning committee. As part of this process, each of the "Critical Questions" will be revisited to assure the goals and actions identified in the plan are appropriate. Plan adjustments will be made as needed.

A report will be presented to the Board of Directors annually.

## Appendix I

Corporate operational information presented by Community Living President and CEO at September 4, 2014 strategic planning retreat.

- Community Living "Fact Sheet"
- Fiscal Year 2014 sources of revenue
- Community Living Count of Participants

## Appendix II

### *Comments from retreat participants based on stakeholder input*

- I liked the comments of people saying that what we do, we do well.
- Concentrate on retaining direct support staff.
- Serve as recruiter and trainer of staff of other agencies.
- Decision making takes some time.
- Makes things more streamlined and easier.
- Lot of commitment and compassion.
- Lack of innovation.
- Issues with reimbursement.
- I'm not sure what is wanted when innovation is discussed.
- Noticed a division between leadership team and front line staff.
- The quality and commitment of direct support staff.
- Comments about staff turnover.
- Disconnect between upper management and direct support staff.
- Over reliance on government funding.
- Leadership development to be prepared to address critical issues.
- We have tried to be innovative.
- We need to share our innovation with others.
- Lack of decision makers.
- Competitive wages for staff.
- Excellence in programming.
- What will we look like in 5 years if there is no growth?
- Do we grow? How to grow. Is there a demand?
- Staff and organization can be more efficient in regards to technology.
- Competitive wages for professional staff to not loose critical staff.
- Cohesiveness among merged companies.
- Need services for aging population and changing needs.
- Employee benefits need review.
- Need to address "silo-effect" and misinformation.
- Transportation is the "major monster"
- Lots of great, insightful comments.
- Perception vs Reality. Improved Communication.
- Issues around Technology (reporting, etc.)