Strategic Plan/Roadmap for the Future - 2017 and on…

Strategic Vision - 2017 The Consistency Year

In 2017 our strategic vision is to increase consistency in our services, service delivery, and processes. Building on last year's focus on efficiency we will operate on consistency. Our vision is that by increasing our consistency, we will be organized and deliberate in our efficiency. CARF quality compliance and continuing our 'stellar' reputation by offering person-centered programing of the highest quality are always Capabilities priorities. As we look towards 2017, are priority is to be consistent while maintaining the highest level of quality.

2017 Outcome Goals

Additional Service Delivery performance indicators and targets are defined in the performance measurement and management plan. See this plan for more information. These goals are established:

Financial

Goal: Capabilities projects a 4.5% increase of profit in 2017.
Point person: Bill Blumhorst

Facilities

We expect to add one office location in Athens in 2017.
Point person: Belinda Bockrath

- Services already are being provided in counties served in the Athens area, anticipate opening an office by the end of the 1st quarter.

Program/Service Development

New funding sources for the services we currently provide

Goal: To earn a total of $44,000 through Re-entry Services in southern area
Point person: Belinda Bockrath

- 15 hours of curriculum/program development
- 1st staff person has 2 hours/8 hour service day for unbillable, 2nd and or 3rd staff person has 1 hour
- Analyze outcomes at end of the 1st quarter to determine profitability of service
    - Market to potential new areas based on results

Goal: To earn a total of $44,000 through Private contracts with school boards and/or county boards of developmental disabilities
Point person: Kellie Janning & Kathy Ditson

- Determine two new school boards and/or county boards of developmental disabilities with biggest need of private services
- Develop contract for services with each school or county board with need for services
- Analyze outcomes at end of the 2nd quarter to determine profitability of private contracts
    - Market to new potential school or county boards based on results

Other streams of revenue & new services

Goal: To have positive return on investment for Hosting an educational training for State of Ohio Department of Public Safety for Disability Instructors

Capabilities
Connecting the dots

Point person: Bill Blumhorst

- Analyze the potential revenue and costs of providing the educational training for State of Ohio Department of Public Safety for Disability Instructors
- Determine fee for service based on potential ROI
- Analyze the ROI after the 3rd quarter to determine other potential areas for the service
    - Market to other potential customers based on results

Existing Programs/Services; Integration of new segments of the continuum

Maintain a consistent atmosphere that supports all Capabilities staff.

Point person: District Leaders

- Ensure monthly case reviews with all staff that provide services are being completed
    - Each district will develop their own method for reviews and discuss in the 2nd quarter what has worked and make changes as recommended
- Reduce job coach turnover to below 50% (currently 61.3%)
    - Review the requirements of hiring degreed coaches in the 1st quarter
    - Put coaches on rotating nights and weekends for those who do not want to have all nights and weekends
- Increase staff/manager contact so that staff/manager is in direct contact with their staff/manager every day they work
    - Each district will determine best utilization of direct contact between manager and consultant
    - Ride along schedules will be determined by district leader and branch manager based on needs of each consultant
- Hold employees accountable for service quality expectations
    - Branch managers will analyze a few cases of each consultant in the first quarter to determine if paperwork is being completed with the persons served as they meet
    - Branch managers will write positive educational reviews for each consultant provide quality service by the end of the 2nd quarter
    - Branch managers and trainers will review expectations with each consultant and each service they provide by the end of the 1st quarter

Consistently remind our coworkers of the value they bring.

Point person: District Leaders

- "Catch" people doing good more than we "catch" people doing wrong. Have manager notes reflecting this
    - Recognize one or more stakeholders at each monthly staff meeting for their contacts, placements, closures
    - Complete manager notes once per week with comments of one or more stakeholders and their accomplishments
- Train managers and leaders in the first quarter on ways to show formal and informal appreciation to staff
    - Meet with each Branch Manager one time per month in the first quarter to train on formal and informal appreciation techniques
- Set expectation for managers to show at least monthly appreciation to a person they support.
    - During weekly call, discuss what appreciation was shown, share techniques with others
- Quarterly, recognize one staff person externally (social media, papers, nomination for awards…)
    - Nominate one person from each office by the end of the 1st quarter on internal outlets

- District Leaders discuss nominees and pick one from each district to recognize externally in the 2nd quarter.
- Recognize the everyday great work.
- Stress the importance of each role to new hires.
  - Discuss different positions within the organization including consultants, managers, leaders

Have consistent quality of service.

Point person: District Trainers

- Train all new staff in scenario and mock situations for at least two hours. (Train outside of active cases)
- Establish case metrics for all services. What does success in providing the service look like?
  - Review policies and procedures in January, ensure consistency among districts
- Define what the steps are in providing each service. Spell it out.
  - Review in January to ensure training materials match real life situations
- Have a monthly opportunity for coworkers to meet and share advice on cases.

Administrative

Goal: Allow for flexibility, but say what we mean.

Point person: Caseload Facilitator/Administrative Assistant Manager

- Shift reporting so that each report is accurate to current workforce standards.
  - Review in January to determine and make changes by end of 1st quarter as necessary
- Implement double check procedures
  - Review with corporate leadership team by end of 1st quarter
  - Implement in first month of 2nd quarter
- Change policies that require calculations so less calculations are needed.
  - Review with corporate leadership team by end of 1st quarter
  - Implement in first month of 2nd quarter
- Define "grey policies" eg. Dress Code, Company Car Usage, Purchasing/ Ordering system
  - Review with corporate leadership team in January/February
  - Implement in first month of 1st quarter
- Capabilities expects to change to a cloud computing platform by the end of the 1st quarter

Human Resources

Goal: Focus on expansion while also retaining stakeholders.

Point person: Jane Huber

- Capabilities expects to increase staff according to the projections of service. We expect to increase overall number of staff from 133 to 145. New positions are expected in the Athens office.
- Capabilities expects to decrease turnover from 33.8% to 30%
- Capabilities expects to add an HR Software program by the end of the 1st quarter

Succession Planning

Goal: Provided targeted training and opportunities for staff to showcase and define their strengths.

Point person: Wendi Saintignon

- Host monthly trainings for managers & staff that are nominated to have potential as managers.
- Host monthly trainings for trainers & staff that are nominated to have potential as trainers.

Capabilities
Connecting the dots

Service Utilization

Capabilities projects that we will serve 3.4% more people in 2017. All counties we serve are expected to remain the same if not increase in the number of persons served. Counties that we are expected growth include: Athens, Vinton, Jackson, Pike, Highland, Butler, Warren, Union, and Marion.

Capabilities projects these changes in service utilization in 2017:

Service	Projection of Percentage Change	# of Persons Served in 2016	Projected # of Persons Served in 2017	Service Revenue in 2016	Projected Service Revenue in 2017
Benefits Analysis	+2%	379	387	$100,267.80	$102,273.16
Career Exploration	+1%	234	236	$137,539.92	$138,915.32
Community Based Assessment	+5%	327	343	$541,949.84	$569,047.33
Computer Training	0%	28	28	$62,986.40	$62,986.40
Day Habilitation	+15%	87	100	$660,453.23	$759,521.22
Drivers Training/Assessments/PDE	0%	357	357	$328,491.38	$328,491.38
Online Drivers Training (tracked for 2017)	+25%	51	64	$799.06	$998.83
Intake	+5%	1,160	1,218	$155,772.72	$163,561.36
Interpreting	-25%	4	3	$1,056.88	$792.66
Job Coaching	+5%	339	356	$856,758.22	$899,596.13
Job Development Hourly Performance Based	+3%	 940 405	 968 417	$1,820,118.24	$1,874,721.79
Job Seeking Skills Training	+1%	271	273	$125,962.97	$127,222.60
Personal Adjustment	0%	36	36	$21,485.12	$21,485.12
Rehabilitation Technology	0%	15	15	$5,726.34	$5,726.34
Retail/Cash register/ POS/ Customer Service Training (tracked for 2017)	+25%	8	10	$3,392.00	$4,240.00
Retention	+3%	503	518	$201,057.80	$207,089.53
Summer CX	+5%	17	18	$21,802.50	$22,892.63

Summer Work	+3%	59	62	$198,613.50	$205,601.91
Supported Employment Community	0%	43	43	$26,406.91	$26,406.91
Vocational Assessments	0%	158	158	$177,517.40	$177,517.40
Work Adjustment	+5%	65	68	$30,949.74	$32,497.23
All Other	+1%	N/A	N/A	$112,080.97	$113,201.78
Total	+4.5%(Revenue) +3.4%(Persons Served)	5,486	5,678	$5,591,188.94	$5,844,787.03

Research and Investigation for the future

Goal: Complete research so we can determine future goals of the organization

- We are exploring these area for office expansion in the next couple of years: Marion/Union or Butler/Warren/Hamilton. Delaware in 2018. Point person: District Leaders
- These office location are being researched for the next five years: Franklin County, Indiana and Cincinnati. We will make plans and schedules on these areas in 2017. District Leaders
- Expansion of partnership with Capabilities Charitable Fund (nonprofit) Point person: Justin Blumhorst
- Employer services: Staffing agency and diversity training. Point person: Gary Loach
- Marketing VR system and copywriting customized paperwork developed for OOD and DODD. Point person: Jane Huber
- Contract information technology services. Point person: Justin Blumhorst
- Contract facilities services. Point person: Katie Blumhorst
- BWC Case Management. Point person: Karen Blumhorst
- Warehouse/Forklift Training for OOD – incorporate non-profit and collaborate with Crown. Point person: Sara Katterheinrich
- Ticket to Work. Point person: Julia Haehn