



**Jay Nolan**

**Community Services**

**Strategic Plan**

**2014 - 2019**

**Approved and Adopted by the Board of Directors**

**March 2014**

## Development of the Strategic Plan

The SOAR framework was used to facilitate the development of JNCS's strategic plan for 2014-2019. SOAR examines organizational **S**trengths, **O**pportunities, **A**spirations, and **R**esults and represents a positive, participative approach to strategy development based on appreciative inquiry. Appreciative inquiry is grounded in two simple concepts:

- 1) What you seek, you find more of – the more positive the strategy development process, the more innovative ideas will be created and possibilities explored.
- 2) People commit to what they help create – the more participative the plan creation, the more committed people will be to implementing success.

The above “wordle” represents the strengths as identified by JNCS staff members. Individuals from all components of JNCS participated in the contribution of information to this plan. In addition to interviewing key staff, parents, board members, and service agency liaisons, the strategic planning consultant, Mary Schuh, reviewed existing and previous JNCS Strategic Plans, the most recent audits, and CARF recommendations. All interviews were summarized and transcribed according to the elements of the SOAR process. These elements included the following topics and questions:

- Strengths: What are our strengths? What can we build upon?
- Opportunities: What are the opportunities? What are people/stakeholders asking for? What new skills do we need?
- Aspirations: What do we aspire to? What do we care deeply about?
- Result: What results do we want? How will we know we have been successful?

Summaries were analyzed for themes and were organized into four strategic initiatives:

1. Strengthening Our Organizational Infrastructure;
2. Improving Our Organizational Culture;
3. Sustaining Our Mission, Vision, and Values; and
4. Expanding Our Services and Revenue Sources.

## Strategic Initiatives

*Strategic Initiative 1):* Strengthen the **organizational infrastructure** by operating more efficiently and cost effectively and by creating a stronger fund raising capacity.

*Strategic Initiative 2):* Improve the **organizational culture** of our agency by renewing our commitment to a shared vision, strong partnerships with each other and the community, responsive accountability, and support for our staff to be valued and professional.

*Strategic Initiative 3):* Actively sustain **our mission, vision, and values** through more consistent and cohesive methods of planning and delivering services that flow from our values and provide a framework for the individuals we support to have a stronger voice in their lives and greater life opportunities.

*Strategic Initiative 4):* Expand our services by developing **new service options and additional revenue sources**.

## Targeted Objectives for the Strategic Initiatives

*Strategic Initiative 1):* Strengthen the **organizational infrastructure** by operating more efficiently and cost effectively and by creating a stronger fund raising capacity.

*Objectives for this strategic initiative:*

- A. Create and implement a plan for using technology more effectively within the organization, i.e., assuring all departments are using Soneto reliably, upgrading accounting systems, and maximizing the overall use of technology.
- B. Create and implement a plan for addressing changes in labor laws that will impact both our payroll costs and our methods of service delivery.
- C. Create a plan for increasing our ongoing capacity for fund raising by utilizing professional consultation services to assist us to develop and implement strategies.
- D. Develop and implement an effective system for creating an agency annual report and for developing the organization's budget each year.

***Strategic Initiative 2):*** Improve the **organizational culture** of our agency by renewing our commitment to a shared vision, strong partnerships with each other, responsive accountability, and support for our staff to be valued and professional.

*Objectives for this strategic initiative:*

- A. Utilize an extensive PATH futures planning process for all aspects of our agency to renew our commitment to a shared vision and mission.
- B. Explore and create new strategies for how we work together across departments and between staff and the Board of Directors utilizing a shared commitment to the agency's PATH and the Strategic Plan.
- C. Strengthen the Board of Directors by expanding the numbers and diversity of the people who serve on it including providing support for valued roles for people with disabilities on the Board.
- D. Create and effectively implement a system of accountability that makes the Strategic Plan and the PATH our daily road map for how we operate as an agency including specific lines of responsibility and methods of accountability.
- E. Create and implement a plan for assuring our staff are valued and professional by providing a living wage, career paths for advancement, opportunities for having a voice and valued roles in the operation of the agency, and recognition for their accomplishments.
- F. Create and implement a plan for expanding our presence in the community and strengthening our connections to businesses, community organizations, and others.

***Strategic Initiative 3):*** Actively sustain **our mission, vision, and values** through more consistent and cohesive methods of planning and delivering services that flow from our values and provide a framework for the individuals we support to have a stronger voice in their lives and greater life opportunities.

*Objectives for this strategic initiative:*

- A. Effectively and consistently use a values based method of planning and delivering supports for individuals across the agency (using PATH and circles of support.)

- B. Assure that all individuals we support have effective means of communication and opportunities to have a voice and control in the delivery of their supports and in their lives.
- C. Assure that the adults and young adults we support have opportunities to earn income in meaningful jobs or small business ownership.
- D. Assure that individuals' PATH planning includes consideration of aging and end of life issues, both for themselves and their family members.

***Strategic Initiative 4):* Expand our services by developing **new service options and additional revenue sources.****

*Objectives for this strategic initiative:*

- A. Explore and create a model for providing services in a self-directed service delivery system.
- B. Expand our current services into a broader geographic area particularly in the northern part of our Los Angeles service area.
- C. Explore and create a report on the feasibility of new ways to provide services that will enlarge and diversify our revenue base, (i.e., providing services to different populations and age groups, contracting with school systems, offering fee for service private pay options for things we do well such as person centered planning and service delivery, exploring services covered by insurance, and others.)

## **Implementation of the Strategic Plan**

### **Overview of Implementation**

An effective strategic plan includes focused and committed efforts to be accountable to all stakeholders through the plan. This commitment requires a strong partnership between management staff and the Board of Directors as well as buy in and active involvement from the people served, their families, and direct support staff.

Tracking and sharing information related to the strategic initiatives of the plan can be a motivating way to celebrate what we have accomplished as an agency. Working on the objectives can help all of us to feel a sense of forward movement for the organization. It is easy to get “stuck” in the day to day struggles to meet the needs of the people whom the agency is dedicated to serve. The strategic plan tracking and reporting process will help us to see the “big picture” of our purpose as an organization and our commitment to ongoing improvement in all that we do.

In defining and moving forward with the following implementation plan, we demonstrate our understanding of our responsibility to take the strategic plan seriously and make it our road map for how we move our organization toward the ideals and outcomes that we set for ourselves. We have included processes to hold each other accountable in a positive and celebratory manner. We must all be watchful to assure that the process stays positively focused and does not become a burden and a drudge we dislike and minimalize.

### **Implementation Processes**

We will manage the implementation of this strategic plan through the following processes:

#### *Strategic Plan Team:*

The Strategic Plan Team (SPT) is made up of the Senior Management Team and others as appointed by the Executive Director. Strategic Plan Team members’ roles are determined by the Executive Director and the overall team. The Executive Director assures that the SPT meets as needed to make reasonable progress toward the success of the overall Strategic Plan.

Members of the Board of Directors may serve as members of the Strategic Plan Team and work groups for specific goals. Board Members are encouraged to select work groups and goals that interest them so they can play a role in helping the work group to implement the goal. They can also serve as a liaison to the Board for that issue. The Board of Directors also serves the function of overall oversight of the forward progress of the Strategic Plan.

*Assignments of Responsibility:*

1. Each objective will have one or two persons who are assigned to assure that all aspects of that objective are addressed, documented, and reported. The assignments will be made as a group by the Senior Management Team based on selecting the individuals who will best serve that objective. The “goal coordinators” with the work group may assign responsibility to other individuals for sub-goals within that objective.
2. The role of the “goal coordinators” includes the following:
  - a. Identify who will make up the task force or work group for that goal. These work group members may change as the progress toward the goal changes.
  - b. Determine what help the work group may need throughout the process (including assistance and input from people served, families, direct support staff, consultants, outside experts, etc.)
  - c. Convene the work group on a schedule that allows for the goal to be addressed adequately.
  - d. Facilitate the development of more detailed definitions of the goal and sub-goals assigned to the work group.
  - e. Assure that the work group establishes a timeline and milestones for the implementation of this goal.
  - f. Assist the work group to create and implement strategies that lead to a successful outcome for the goal.
  - g. Assist the work group to set up methods of tracking and collecting data for the goal.
  - h. Work with the full Strategic Plan Team to set up a system for reporting on the progress toward the goal in the overall system for reporting.

*Timelines:*

Not all goals are in active implementation at any given time. We believe that it is better to target a reasonable number of goals to work on and concentrate our efforts on them for a period of time. We want to avoid burnout in working on the Strategic Plan and we do not want to dilute our efforts by stretching personnel too thin across too many objectives.

The Strategic Plan Team with the Board of Directors will establish the priorities and sequence of goals to be addressed. These decisions are based on a number of factors: pending actions by outside entities, urgency of the needs of people we serve, availability of resources to address the goal, and other factors which change over time. The sequence of addressing goals may be broken down within the goal. Sub goals within a stated goal may have different timelines.

*Data Collection:*

In order to determine the level of progress toward successful outcomes, each work group will determine a method of data collection for the goals and sub-goals assigned to them. The data collection can be in numerical terms and/or narrative descriptions of progress. The work group assigns a target for each aspect of the implementation of a goal or sub-goal.

The work group determines methods for collecting the information or data. Again, our intention is to be reasonable in the level of data collection to which we commit ourselves. We do not want so much effort put into data collection that it takes away from the actual implementation efforts for the goal. We intend to find the best method of data collection that can be done in the least intrusive way.

*Reporting:*

Each work group will create a report each quarter on the progress for their assigned goal during the past quarter (or progress to date.) The goal coordinator is responsible for assuring that reports are completed on time and are comprehensive in scope. The quarterly reports will be submitted to the Executive Director at the end of the quarter. Work groups with lower priorities assigned may not submit a full report.



The Strategic Plan Team will meet in the month after the end of each quarter to share quarterly reports, review progress on goals, provide input to each other on future directions, address barriers or concerns, share resources, etc. The meeting will take place at least a week prior to the meeting of the Board of Directors for the month. (Quarterly reports will be due at the end of March, June, September and December. Quarterly report meetings will take place in April, July, October and January each year.)

The Strategic Plan Team will prepare presentations for the Board of Directors meeting for the month following the end of the reporting quarter. The SPT will determine which work groups will lead discussions about progress for that quarter at the Board of Directors meeting. The presentations and discussion at the Board meeting will be designed to celebrate accomplishments and determine effective strategies to use for the next quarter. The SPT can bring in other people to participate such as people who receive service or family members.

The Executive Director may utilize the services of a consultant in leading the STP quarterly meetings and the Board of Directors quarterly update meeting as he sees fit. An outside person can often help to bring objectivity to the process and serve as an added resource.

Quarterly reports and minutes of the Team meetings and the Board presentations will be kept in the Strategic Plan notebook. Responsibility for maintaining the notebook will be assigned by the Executive Director. Quarterly reports will also be available for public review on the website, in the office, and other places that allow access to all stakeholders.

*Annual Review:*

Each year, the January quarterly meetings will have an additional focus beyond looking at the progress to date for goals. Both the Strategic Plan Team meeting and the quarterly presentation and discussion with the Board of Directors will also include a review of the overall nature of the Strategic Plan.

At this time, all stakeholders should have an opportunity to give input on and make suggestions about the Strategic Plan. The Executive Director and the Board of Directors may choose to enlist the services of an outside facilitator to assist with this annual review process.

At the time of the annual review of the Plan, the Strategic Plan Team and the Board of Directors may put forth suggestions for changing the Strategic Plan to better serve the needs of the organization and respond to the input of stakeholders. Changes will need to be approved by the Board of Directors. The Executive Director will assure that a new edition of the Strategic Plan is created and disseminated with the approved changes and a notation of the date of review. A copy of the updated Strategic Plan will be kept in the Strategic Plan notebook.

The Strategic Plan Team will then need to establish implementation strategies for the changes. The SPT will create new work groups if needed and realign timelines as appropriate.

The agency Annual Report will include an overview of progress toward the Strategic Plan goals. The Annual Report will be shared with all stakeholders through various methods of delivery.

*Dissemination:*

The Strategic Plan will be made available to stakeholders by the following methods:

- Posting it on the website
- Having copies available in the reception area
- Being reviewed at Self Advocacy Group meetings and Family Group meetings
- Sending out copies to anyone who requests a copy
- Conducting input sessions at least once a year to review the Strategic Plan

**Targeted Objectives with Assignments and Priorities**

Each of the targeted objectives under each strategic initiative has assigned people called “Goal Coordinators.” They will have primary responsibility to the Strategic Planning Team for assuring that their goal is addressed adequately, documented and reported.

The Strategic Planning Team has assigned a priority for each objective at this time. The numbering system refers to the following:

#1 Priority = Needs to be addressed immediately.

#2 Priority = Needs to be started within the next 6-9 months. May be a multi-year goal.

#3 Priority = Needs to be started within the next 12 months. May be a multi-year goal.

Some of the objectives contain several sub-goals within the overall objective. The priority refers to the fact that at least one of the sub-goals is that priority however not all sub-goals may have the same priority. Work groups will set priorities for sub-goals when they meet.

**Strategic Initiative 1):** Strengthen the **organizational infrastructure** by operating more efficiently and cost effectively and by creating a stronger fund raising capacity.

A. Create and implement a plan for using technology more effectively within the organization, i.e., assuring all departments are using Soneto reliably, upgrading accounting systems, and maximizing the overall use of technology.

<u>Priority:</u>	<u>Assigned to:</u>	<u>Work Group Members (at this time)</u>
#1	Jeff and TerriLynn	Richard

B. Create and implement a plan for addressing changes in labor laws that will impact both our payroll costs and our methods of service delivery.

<u>Priority:</u>	<u>Assigned to:</u>	<u>Work Group Members (at this time)</u>
#1	June and Jessica	Neerod, Rebecca, Adam, Jenny

C. Create a plan for increasing our ongoing capacity for fund raising by utilizing professional consultation services to assist us to develop and implement strategies.

<u>Priority:</u>	<u>Assigned to:</u>	<u>Work Group Members (at this time)</u>
#3	Jeff and Board of Directors	Jessica, Rebecca

D. Develop and implement an effective system for creating an agency annual report and for developing the organization's budget each year.

<u>Priority:</u>	<u>Assigned to:</u>	<u>Work Group Members (at this time)</u>
#1	Jeff, Richard and TerriLynn	Rebecca

**Strategic Initiative 2):** Improve the **organizational culture** of our agency by renewing our commitment to a shared vision, strong partnerships with each other, responsive accountability, and support for our staff to be valued and professional.

A. Utilize an extensive PATH futures planning process for all aspects of our agency to renew our commitment to a shared vision and mission.

<u>Priority:</u>	<u>Assigned to:</u>	<u>Work Group Members (at this time)</u>
#2	Jeff	TerriLynn, Cindy

B. Explore and create new strategies for how we work together across departments and between staff and the Board of Directors utilizing a shared commitment to the agency's PATH and the Strategic Plan

<b><u>Priority:</u></b>	<b><u>Assigned to:</u></b>	<b><u>Work Group Members (at this time)</u></b>
#3	Jeff and Board of Directors	

C. Strengthen the Board of Directors by expanding the numbers and diversity of the people who serve on it including providing support for valued roles for people with disabilities on the Board.

<b><u>Priority:</u></b>	<b><u>Assigned to:</u></b>	<b><u>Work Group Members (at this time)</u></b>
TBD	Allen and Board of Directors	

D. Create and effectively implement a system of accountability that makes the Strategic Plan and the PATH our daily road map for how we operate as an agency including specific lines of responsibility and methods of accountability

<b><u>Priority:</u></b>	<b><u>Assigned to:</u></b>	<b><u>Work Group Members (at this time)</u></b>
#1	Jeff	Cindy

E. Create and implement a plan for assuring our staff are valued and professional by providing a living wage, career paths for advancement, opportunities for having a voice and valued roles in the operation of the agency, and recognition for their accomplishments.

<b><u>Priority:</u></b>	<b><u>Assigned to:</u></b>	<b><u>Work Group Members (at this time)</u></b>
#2	June and Camille	Jorge, TerriLynn

F. Create and implement a plan for expanding our presence in the community and strengthening our connections to businesses, community organizations, and others.

<b><u>Priority:</u></b>	<b><u>Assigned to:</u></b>	<b><u>Work Group Members (at this time)</u></b>
#3	Lisa and Camille	Jenny, Jorge

**Strategic Initiative 3):** Actively sustain our **mission, vision, and values** through more consistent and cohesive methods of planning and delivering services that flow from our values and provide a framework for the individuals we support to have a stronger voice in their lives and greater life opportunities.

A. Effectively and consistently use a values based method of planning and delivering supports for individuals across the agency (using PATH and circles of support.)

<u>Priority:</u>	<u>Assigned to:</u>	<u>Work Group Members (at this time)</u>
#2	Jessica and Rebecca	Cindy, Lisa, Jenny

B. Assure that all individuals we support have effective means of communication and opportunities to have a voice and control in the delivery of their supports and in their lives.

<u>Priority:</u>	<u>Assigned to:</u>	<u>Work Group Members (at this time)</u>
#2	Jessica and Neerod	Cindy, Rebecca

C. Assure that the adults and young adults we support have opportunities to earn income in meaningful jobs or small business ownership.

<u>Priority:</u>	<u>Assigned to:</u>	<u>Work Group Members (at this time)</u>
#2	Rebecca and Lisa	Cindy, Jorge

D. Assure that individuals' PATH planning includes consideration of aging and end of life issues, both for themselves and their family members.

<u>Priority:</u>	<u>Assigned to:</u>	<u>Work Group Members (at this time)</u>
#2	Jessica and Jorge	Jenny, Rebecca, Cindy, Camille

**Strategic Initiative 4):** Expand our services by developing **new service options and additional revenue sources.**

A. Explore and create a model for providing services in a self-directed service delivery system.

<u>Priority:</u>	<u>Assigned to:</u>	<u>Work Group Members (at this time)</u>
#1.5	Jenny and Cindy	Jorge, Lisa, Jessica

B. Expand our current services into a broader geographic area particularly in the northern part of our Los Angeles service area.

<b><u>Priority:</u></b>	<b><u>Assigned to:</u></b>	<b><u>Work Group Members (at this time)</u></b>
#2	Jorge and Cindy	Lisa, Rebecca

C. Explore and create a report on the feasibility of new ways to provide services that will enlarge and diversify our revenue base, (i.e., providing services to different populations and age groups, contracting with school systems, offering fee for service private pay options for things we do well such as person centered planning and service delivery, exploring services covered by insurance, and others.)

<b><u>Priority:</u></b>	<b><u>Assigned to:</u></b>	<b><u>Work Group Members (at this time)</u></b>
#2.5	Cindy and Jenny	Lisa