

THE STRATEGIC PLAN
FY2008 TO FY2012

FOR THE

ST. LOUIS OFFICE FOR DD RESOURCES

Updated May 10, 2010

Table of Contents

Topic	Page
⇒ Introduction	2
⇒ Methodology	3
⇒ Acknowledgements	4
⇒ Definition of Terms	5
⇒ Vision, Mission & Core Values	6
⇒ Key Performance Indicators	7
⇒ Strategic Goals & Objectives	10
⇒ Conclusion	16

INTRODUCTION

The St. Louis Office for MR/DD Resources (MR/DD) was established as the result of a vote of the citizens of the City of St. Louis. It derives its authority from the Missouri Revised Statutes Chapter 205, County Health & Welfare Programs, 205.968 through 205.972. The MR/DD is responsible for administering the funds generated by a special property tax. In keeping with its statutory and fiduciary responsibilities the MR/DD Resources Board of Directors have traditionally conducted a comprehensive planning process ever three to five years. The cycle for starting that planning process arrived in late 2006.

The St. Louis Office for MR/DD Resources selected Transitions In Leadership, LLC (TIL) to facilitate their strategic planning process. TIL subcontracted with The Goldberg Group to assist with the planning process. The expected outcome was the creation of a strategic plan that would guide the future progress of the MR/DD Board for the next five years.

The two planning facilitators Dick Goldbaum TIL's Principal and Dick Goldberg, President of The Goldberg Group, worked with the MR/DD Board's Strategic Planning Steering Committee (SPSC) throughout the entire process.

The SPSC and the facilitators approached the planning process with the following basic principles and expectations.

- Obtain as much information as possible from the organization's key stakeholders.
- Consider the unique needs of the citizens of the City of St. Louis with developmental disabilities and their families.
- Be committed to working with both public and private organizations in a partnership that will maximize MR/DD's effectiveness in addressing the needs of individuals with developmental disabilities.
- Assure that the overall administration of the public funds entrusted to the organization is used in the most prudent, effective and efficient manner possible.
- Create a plan that addresses the long-term direction of the organization.
- Establish a well-defined process for monitoring and evaluating the plan's progress based on stated timelines and benchmarks.
- Commit to the continuous review and improvement of the plan as time progresses over the next five years.

The following represents the general approach to the planning process used during this project.

METHODOLOGY

The following four-step process represents the approach used to create the strategic plan for the St. Louis Office for MR/DD Resources.

- Information Gathering
 - Review of previous studies and reports conducted for MR/DD Board
 - Focus Groups with key stakeholder groups
 - Interviews with key individuals
 - Identification of State & National trends

- Strategic Thinking and Planning
 - SWOT Analysis
 - Identification and prioritization of Critical Issues
 - Development of Strategic Goals and Objectives
 - Creation of Key Performance Indicators

- Operational Thinking and Planning
 - Development of Action Steps for each Objective
 - Create an implementation plan

- Continuous Improvement
 - Establishment of schedule of status reports
 - Meet annually to review status of plan and make revisions
 - Stay informed of State and National trends

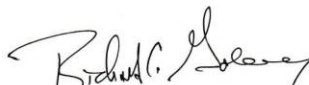
Members of the Board of Directors were periodically updated on planning process progress.

The following represents the results of the work of the SPSC and the MR/DD Board's approved five-year strategic plan.

Respectfully Submitted,



Richard I. Goldbaum, Ph.D.
Transitions In Leadership, LLC



Richard C. Goldberg, MBA, MSW
The Goldberg Group, Ltd.

Definition of Terms

In an effort to maintain planning consistency, terms used in the strategic planning process are defined below.

Values

Fundamental ethical, moral, and professional business beliefs

Mission Statement

A clear and compelling major accomplishment that serves as the focal point of effort
It should indicate the type of business in which the organization is involved.

Vision Statement

A mental image invoked by a vivid description of the organization's achievement upon completion of its mission

Goals

Broadly defined accomplishments, conditions, or results to be achieved in order for the organization to accomplish its mission

Objectives

Specific, measurable, time-bound results that lead to the accomplishment of a goal

Action Plans

Process steps to implement a strategy

Assigning specific tasks to individuals or groups and designating deadlines for task completion

Key Performance Indicators (KPIs)

Quantifiable measurements, agreed to beforehand, that reflect the critical success factors of the organization

Key Performance Indicators typically help an organization define and measure overall progress and achievement of goals.

DD Resources' Vision, Mission & Core Values

The DD Resources' Strategic Planning Steering Committee reviewed the present vision and mission statements. The Committee concluded that these statements no longer reflected the organization's position accurately. Therefore, the following are the new vision and mission statements:

Mission Statement

The Mission of the St. Louis Office for DD Resources is:

To ensure individuals with developmental disabilities in the City of St. Louis have quality services, choices and full inclusion

Vision Statement

The Vision of the St. Louis Office for DD Resources is:

An inclusive community that maximizes individual abilities

DD Resources did not have a formally stated set of core values. Therefore, the following were created:

Core Values

The Core Values of the St. Louis Office for DD Resources are:

RESPECT

We respect every individual.

SUPPORT

We identify and provide assistance to individuals in reaching their greatest potential.

SELF-DETERMINATION

We ensure that individuals have the right to participate in planning their own future and selecting their own supports.

CHOICE

We ensure that individuals have the opportunity to choose the services and providers that will meet their specific needs.

STEWARDSHIP

We administer public funds fairly, with openness and integrity.

RESPONSIVENESS

We are effective, efficient, accessible and act in a timely manner.

PARTNERSHIP

We support these core values through partnerships with individuals, providers, the community and other funders.

KEY PERFORMANCE INDICATORS (KPIs)

Key Performance Indicators are measurable components of an organization's overall functioning that reflect the success and effectiveness of its operations and services. The following represent those components that will be measured by DD Resources in order to monitor and evaluate its achieved level of performance when compared to established benchmarks:

- 1. Financial Leveraging Factor (%) or (\$)**
 - a) Public Funds**
 - b) Private Funds**

- 2. Number of Collaborative Interagency Ventures (#)**

- 3. Stakeholder Satisfaction and Knowledge of DD Resources**
 - a) Consumer Survey Results (>80%)**
 - b) Provider Survey Results (>80%)**
 - c) Internal Stakeholder Survey Results**
 - Board**
 - Staff**
 - d) Community at large (>80%)**

- 4. Client Demographics**
 - a) Primary Disability**
 - Autism**
 - Mental Retardation**
 - Cerebral Palsy**
 - Learning Disability**
 - Epilepsy**
 - b) Support Intensity Scale Score (#)**
 - c) Race**
 - -European American**
 - -African American**
 - -Hispanic**
 - -Other**
 - d) Gender**
 - Female**
 - Male**
 - e) Public Policy District**
 - City Alderman Ward**
 - Missouri State Representative District**
 - Missouri State Senate District**
 - Federal House of Representative District**
 - Federal Senate District**

5. Client Tracking System

- a) **Total number of individuals served**
 - **Service Category**
 - **Primary Disability**
 - **Race**
 - **Gender**
 - **Public Policy District**
- b) **Total amount expended:**
 - **Individual**
 - **Service Category**
 - **Primary Disability**
 - **Race**
 - **Gender**
 - **Public Policy District**

6. Wait List for Services

- a) **Employment**
- b) **Residential**
- c) **Transportation**
- d) **Habilitation**
- e) **Adaptive Equipment**
- f) **Socialization**
- g) **Case Management**
- h) **Client Demographics**

7. Staff Statistics

- a) **Staff Turn Over**
- b) **Number of Staff Professional Development Hours Attended by Individual and Total**
- c) **Staff Tuition Reimbursement (%)**
 - **% of staff utilizing**
 - **\$ expended**

8. Community/Public Awareness & Education

- **# Contacts**
- **Political level**
- **Provider level**
- **Community Groups**
- **Other Funders**

9. Provider Staff Statistics

- a) **Turn Over Rate**
- b) **Average Length of Time to Fill Open Position**
- c) **Average Number of Years of Staff Employment**

DD RESOURCES' STRATEGIC PLAN

Fiscal Year 2008 through Fiscal Year 2012

Goals & Objectives

Critical Issue #1: IDENTIFY NEW SOURCES OF FUNDING

Goal #1: By the end of FY 2012, DD Resources will be leveraging all its available funds by at least 35%.

Objective #1.1: *By January 1, 2008, a formula and tracking system for financial leveraging will be developed. (COMPLETE)*

Objective #1.2: *By January 1, 2008, DD Resources will create and implement the plan for accessing additional Federal, State and/or City funding to enhance its own funding.*

Objective #1.3: *By January 1, 2008, DD Resources will create and implement a plan for increasing its ability to access private funding in partnership with additional entities.*

Objective #1.4: *By the end of FY 2008, DD Resources will evaluate and decide whether to continue discussions with the Department of Mental Health/St. Louis Regional Center regarding the devolution of State funding to the local SB 40 entity (MR&/DD Resources).*

Key Performance Indicators:

The following represent the KPIs associated with efforts to leverage funding:

- Financial Leveraging Factor (%) or (\$)
 - Public Funds
 - Private funds
- Number of Collaborative Interagency Ventures (#)
- Average Cost by Service Area
 - Employment
 - Residential
 - Socialization
 - Habilitation
 - Adaptive Equipment
 - Transportation
 - Case Management

Critical Issue #1: IDENTIFY NEW SOURCES OF FUNDING TO PROVIDE BETTER SERVICES TO MORE PEOPLE

Strategic Goal #1: By the end of the FY' 2012 DD Resources will be accessing additional public and private funding at a rate of at least 35% of its available funds.

Objective #1.1: By January 1, 2008, a formula and tracking system for financial leveraging will be developed.

ACTION STEPS	PROJECTED COMPLETION DATE	PERSON RESPONSIBLE - OVERSEEING ACTION STEP PROGRESS	PROJECTED MANPOWER NEEDS	PROJECTED CAPITAL EQUIPMENT NEEDS	PROJECTED IMPACT ON ORGANIZATION'S BUDGET	STATUS
Step #1 Research with other agency's to determine if formula available.	7/30/07	Michelle Darden	None	None	None	7/15/07 COMPLETE
Step #2 Develop committee to establish definition and method of tracking	8/30/07	Emily Smith	None	None	<\$50.00	7/30/07 COMPLETE
Step #3 Establish baseline with current data.	8/30/07	Emily Smith	None	None	None	7/30/07 COMPLETE
Step #4 Develop computer system	11/30/07	Richard Barton	None	None	Funding to support development \$30,000	Board Approval November 2007 COMPLETE
Step #5 Implement formula through tracking method	1/1/08	Emily Smith	None	None	None	Effective January 1 COMPLETE

Critical Issue #1: IDENTIFY NEW SOURCES OF FUNDING TO PROVIDE BETTER SERVICES TO MORE PEOPLE

Strategic Goal #1: By the end of the FY' 2012, DD Resources will be accessing additional public and private funding at a rate of at least 35% of its available funds.

Objective #1.2: By January 1, 2008, DD Resources will create and implement the plan for accessing additional Federal, State and/or City funding to enhance its own funding.

ACTION STEPS	PROJECTED COMPLETION DATE	PERSON RESPONSIBLE - OVERSEEING ACTION STEP PROGRESS	PROJECTED MANPOWER NEEDS	PROJECTED CAPITAL EQUIPMENT NEEDS	PROJECTED IMPACT ON ORGANIZATION'S BUDGET	STATUS
Step #1 Establish Committee	9/1/07	Michelle Darden	None	None	>\$50	8/15/07 Ongoing Used DMH/TCM Committee Initially.
Step #2 Identify and prioritize needs (waitlists, surveys, demographics)	10/1/07	Chrystal Griffin	None	None	None	
Step #3 Identify relevant funding sources and potential partners	11/1/07	Michelle Darden	None	None	\$475 Purchase grant sources	FY 99/00 Received an ongoing contract from St. Louis Regional Office to jointly fund the Educational Coach program. 10/15/07 1/20/10 Received a one year renewal grant for Great Horizon and Horizon Club. Received an ongoing contract from St. Louis Regional Office to jointly fund Pre-Employment/Habilitation. DD Resources has an ongoing funding relationship with HUD, DMH, and MODOT.

Step #4 Develop plan based on secured information	1/1/08 Revise 1/1/09 Revise 1/1/10 Revise 1/1/11 Revise 1/1/12	Emily Smith	None	None	None	
---------------------------------------------------------------	----------------------------------------------------------------------------	-------------	------	------	------	--

Critical Issue #1: IDENTIFY NEW SOURCES OF FUNDING TO PROVIDE BETTER SERVICES TO MORE PEOPLE

Strategic Goal #1: By the end of the FY' 2012, DD Resources will be accessing additional public and private funding at a rate of at least 35% of its available funds.

Objective #1.3: By January 1, 2008, DD Resources will create and implement a plan for increasing its ability to access private funding in partnership with additional entities.

ACTION STEPS	PROJECTED COMPLETION DATE	PERSON RESPONSIBLE - OVERSEEING ACTION STEP PROGRESS	PROJECTED MANPOWER NEEDS	PROJECTED CAPITAL EQUIPMENT NEEDS	PROJECTED IMPACT ON ORGANIZATION'S BUDGET	STATUS
Step #1 Establish Committee	9/1/07	Michelle Darden	None	None	None	8/15/07 COMPLETE
Step #2 Identify and prioritize needs (waitlists, surveys, demographics)	10/1/07	Chrystal Griffin	None	None	>\$500	9/15/07
Step #3 Identify relevant funding sources and potential partners	11/1/07	Michelle Darden	None	None	\$475 Purchase grant sources	10/15/07 1/20/10 Committee has created a spreadsheet of grant prospects. Also obtained a copy of the 2010 St. Louis Business Journal's Giving Guide
Step #4 Develop plan based on secured information	1/1/08 Revise 1/1/09 Revise 1/1/10 Revise 1/1/11 Revise 1/1/12	Emily Smith	None	None	None	1/20/10 Discussion on possibility of pursuing grant writers from larger agencies to bring in other perspectives.

Critical Issue #1: IDENTIFY NEW SOURCES OF FUNDING TO PROVIDE BETTER SERVICES TO MORE PEOPLE

Strategic Goal #1: By the end of the FY' 2012, DD Resources will be accessing additional public and private funding at a rate of at least 35% of its available funds.

Objective #1.4: By the end of FY 2008, DD Resources will evaluate and decide whether to continue discussions with the Department of Mental Health/St. Louis Regional Center regarding the devolution of State funding to the local SB 40 entity (MR&DD Resources).

ACTION STEPS	PROJECTED COMPLETION DATE	PERSON RESPONSIBLE - OVERSEEING ACTION STEP PROGRESS	PROJECTED MANPOWER NEEDS	PROJECTED CAPITAL EQUIPMENT NEEDS	PROJECTED IMPACT ON ORGANIZATION'S BUDGET	STATUS
Step #1 Create position paper regarding TCM	June 15, 2008	Barbara Searight	None	None	None	Completed prior to 6/30/09
Step #2 Organize meeting with DD Resources Board of Directors and DMH Deputy Director Bernie Simons	June 30, 2008	Barbara Searight	None	None	None	Completed on 6/27/08
Step #3 Have monthly follow up meetings with East District SB40 Directors & local DMH directors	October 2008	Michelle Darden	None	None	None	Started October 2008 and on-going with monthly meetings
Step #4 As needed, invite local DMH director to Board Meeting for updates	On-going	Michelle Darden	None	None	None	Occurred at November 2009 meeting.

Critical Issue # 2: IMPROVE RELATIONSHIPS WITH KEY STAKEHOLDER GROUPS

Goal #2: By January 1, 2009, and each year thereafter, DD Resources' relationship with its community partners will receive at least an 80% satisfaction rating for cooperation, collaboration and communication.

Objective #2.1: *By September 1, 2007, DD Resources will identify how it is perceived by its community partners and stakeholders. (COMPLETE)*

Objective #2.2: *Based on results of Objective #2.1, DD Resources will approve and implement a community relations plan by January 1, 2008.*

Objective #2.3: *A survey will be taken annually to determine knowledge and perception of DD Resources among its community partners and stakeholders.*

Key Performance Indicators:

The following represent the KPIs associated with improving relationships and knowledge of DD Resources with key stakeholder groups:

- Number of Collaborative Interagency Ventures (#)
- Consumer Survey Results (>80%)
- Provider Survey Results (>80%)
- Internal Stakeholder Survey Results
 - Board
 - Staff

Critical Issue # 2: IMPROVE RELATIONSHIPS WITH KEY STAKEHOLDER GROUPS

Strategic Goal #2: By January 1, 2009 and each year thereafter, DD Resources relationship with its community partners will receive at least an 80% satisfaction rating for cooperation, collaboration and communication.

Objective ##2.1: By December 1, 2007, DD Resources will identify how it is perceived by its community partners and stakeholders.

ACTION STEPS	PROJECTED COMPLETION DATE	PERSON RESPONSIBLE - OVERSEEING ACTION STEP PROGRESS	PROJECTED MANPOWER NEEDS	PROJECTED CAPITAL EQUIPMENT NEEDS	PROJECTED IMPACT ON ORGANIZATION'S BUDGET	STATUS
Step #1 Identify community partners and stakeholders.	9/15/07	Michelle Darden	None	None	None	9/1/07 -Surveys -Quarterly Meetings COMPLETE
Step #2 Satisfaction survey to be reviewed and revised	9/30/07	Michelle Darden	None	None	None	9/15/07 Note: Surveys revised October/November 2007. Administered November 2007. COMPLETE
Step #3 Survey to be administered via mail yearly	10/1/07	Michelle Darden	None	None	Postage Return envelopes/w postage >\$1,000	9/15/07 COMPLETE
Step #4 Survey results to be tabulated by St. Louis Univ. Dept Social Work	10/15/07	Michelle Darden Mike Mancini	1 week 1 FTD	None	Student to tabulate responses, write summary Est. 1 week FTD >\$3,000	11/10/07 Results are tabulated internally Ongoing
Step #5 Results to be submitted to board	11/1/07	Michelle Darden Mike Mancini	None	None	None	12/1//07 Ongoing

Critical Issue # 2: IMPROVE RELATIONSHIPS WITH KEY STAKEHOLDER GROUPS

Strategic Goal #2: By January 1, 2009 and each year thereafter, DD's Resources relationship with its community partners will receive at least an 80% satisfaction rating for cooperation, collaboration and communication.

Objective #2.2: Based on results of Objective #2.1, DD Resources will approve and implement a community relation's plan by March 1, 2008.

ACTION STEPS	PROJECTED COMPLETION DATE	PERSON RESPONSIBLE - OVERSEEING ACTION STEP PROGRESS	PROJECTED MANPOWER NEEDS	PROJECTED CAPITAL EQUIPMENT NEEDS	PROJECTED IMPACT ON ORGANIZATION'S BUDGET	STATUS
Step #1 Develop committee using results of survey to address areas of concern	1/10/08	Michelle Darden	None	None	>\$250	1/5/08 Complete
Step #2 Solicited input from stakeholder groups on ways to enhance service	1/15/08	Michelle Darden	None	None	>\$250	1/10/08 -Quarterly committee meetings
Step #3 Organize information in form of report with specific recommendations and timelines.	2/1/08	Michelle Darden	None	None	None	

Critical Issue # 2: IMPROVE RELATIONSHIPS WITH KEY STAKEHOLDER GROUPS

Strategic Goal #2: By January 1, 2009 and each year thereafter, DD Resources relationship with its community partners will receive at least an 80% satisfaction rating for cooperation, collaboration and communication.

Objective #2.3: A survey will be taken annually to determine knowledge and perception of MR&DD Resources among its community partners and stakeholders.

ACTION STEPS	PROJECTED COMPLETION DATE	PERSON RESPONSIBLE - OVERSEEING ACTION STEP PROGRESS	PROJECTED MANPOWER NEEDS	PROJECTED CAPITAL EQUIPMENT NEEDS	PROJECTED IMPACT ON ORGANIZATION'S BUDGET	STATUS
Step #1 Establish time line for completion of surveys for the next five years.	2/1/08	Michelle Darden	None	None	None	Complete
Step #2 Refer to Goal 2 Objective 2.1 Action steps 1-5	2/1/08	Michelle Darden	None	None	Steps 1-5	

**Critical Issue # 3: IMPROVE RELATIONS AND INCREASE
COMMUNITY RECOGNITION**

Goal #3: By June 30, 2012, the community at large will have at least an 80% level of name recognition and understanding of the contributions DD Resources makes through the use of public funds.

Objective #3.1: *A plan for a comprehensive public awareness and educational campaign for the community at large will be presented to the DD Resources' Board for review and approval by October 1, 2007. (Complete)*

Objective #3.2: *The impact of the public awareness and education campaign will be measured annually.*

Key Performance Indicators:

The following represents the KPI's associated with improving the level of name recognition of DD Resources in the community at large:

- Community Survey Results (>80%)

Critical Issue # 3: IMPROVE AND INCREASE RECOGNITION WITH THE COMMUNITY AT LARGE.

Goal #3: By June 30, 2012 the community at large will have At least an 80% level of name recognition and understanding of the contributions DD Resources makes through the use of public funds.

Objective #3.1: A plan for a comprehensive public awareness and educational campaign for the community at large will be presented to the MR&DD Resources' Board for review and approval by October 1, 2007.

ACTION STEPS	PROJECTED COMPLETION DATE	PERSON RESPONSIBLE - OVERSEEING ACTION STEP PROGRESS	PROJECTED MANPOWER NEEDS	PROJECTED CAPITAL EQUIPMENT NEEDS	PROJECTED IMPACT ON ORGANIZATION'S BUDGET	STATUS
Step #1 Establish committee to define focus of outreach (grassroots or global or both)	7/1/07	Barb Searight	None	None	>\$250	6/1/07 Complete
Step #2 Select method of plan development&/ implementation (Consultant/staff)	8/1/07	Barb Searight	None	None	None	7/1/07 Complete
Step #3 Develop RFP Hire consultant begin process of developing plan Or Begin process of plan development with staff	9/15/07	Barb Searight	None	None	Consultant \$45,000-\$60,000 None With either cost to implement plan	8/15/07 Complete
Step #4 Complete plan	10/01/07	Barb Searight	None	None	None	9/15/07 Complete Marketing plan was completed and approved by the board members during the October 2009 board meeting.

Critical Issue # 3: IMPROVE AND INCREASE RECOGNITION WITH THE COMMUNITY AT LARGE.

Goal #3: By June 30, 2012 the community at large will have At least an 80% level of name recognition and understanding of the contributions DD RESOURCES makes through the use of public funds.

Objective #3.2: The impact of the public awareness and education campaign will be measured annually

ACTION STEPS	PROJECTED COMPLETION DATE	PERSON RESPONSIBLE - OVERSEEING ACTION STEP PROGRESS	PROJECTED MANPOWER NEEDS	PROJECTED CAPITAL EQUIPMENT NEEDS	PROJECTED IMPACT ON ORGANIZATION'S BUDGET	STATUS
Step #1 Measurement to be determined by work group in Objective 3.1	7/1/08	Michelle Darden	None	None	None	Tool developed in 2007
Step #2 Establish method to solicit feedback	8/1/08 Update 10/15/08	Michelle Darden	None	None	None	Methodology established in 2007
Step #3 Customer Satisfaction Survey to include awareness of function of this office	2/28/09	Michelle Darden	None	None	>\$1,000	Initiated in 2007; ongoing process.
Step #4 Data collected, reviewed, plan of correction developed	3/15/09 10 11 12	Michelle Darden	None	None	Mailings 1 Wk FTD student >\$3,000	2007 & 2009 Business surveys were conducted 2009 Faith Based surveys were conducted; ongoing process

Critical Issue #4: IMPROVE MONITORING AND EVALUATION SYSTEMS

Goal #4: By July 1, 2009, DD Resources will establish a system for evaluating the following:

- **Customer satisfaction**
- **Quality of care being delivered**
- **DD Resources' operated case management services**

Objective # 4.1: *By January 1, 2008, DD Resources will clarify and define performance standards for: (COMPLETE)*

- *Customer satisfaction*
- *Quality of care*
- *Program outcomes*
- *Case management*

Objective #4.2: *By March 1, 2008, DD Resources will develop a methodology for assessing adherence to established standards (see objective #4.1).*

Objective #4.3: *By May 1, 2008, DD Resources will issue the policy and procedures related to the implementation of the new System of Quality of Care Evaluations.*

Objective #4.4: *By July 1, 2008, a comprehensive methodology will be established for educating consumers about evaluating the quality of care they are receiving through DD Resources' funding.*

Objective #4.5: *DD Resources will evaluate its present management information system to determine its capacity to track the System of Quality of Care Evaluations.*

Key Performance Indicators:

The following represent the Key Performance Indicators associated with assessing quality of care:

- Number of Collaborative Interagency Venture (#)
- Definitions and Assessment Methodologies are Identified
- Policies and Procedures are Promulgated
- Consumer Survey Results (>80%)
- Provider Survey Results (>80%)
- Internal Stakeholder Survey Results
 - Board
 - Staff
- System of Quality of Care Evaluations

Critical Issues #4: IMPROVE MONITORING AND EVALUATION OF QUALITY OF SERVICES.

Goal #4: By January 1, 2008, DD Resources will clarify and define performance standards for:

- **Customer satisfaction**-satisfaction (surveys)
- **Quality of care**- need
- **Program outcomes**- internal: Schuch
- **Case management**- satisfaction surveys

Objective # 4.1: By January 1, 2008, DD Resources will clarify and define performance standards for:

- Customer satisfaction
- Quality of care
- Program outcomes
- Case management

ACTION STEPS	PROJECTED COMPLETION DATE	PERSON RESPONSIBLE - OVERSEEING ACTION STEP PROGRESS	PROJECTED MANPOWER NEEDS	PROJECTED CAPITAL EQUIPMENT NEEDS	PROJECTED IMPACT ON ORGANIZATION'S BUDGET	STATUS
Step #1 Committee to be established	6/1/07 Completed 10/20/08	Chrystal Griffin	None	None	>\$250	5/15/07 Diane Schuch, an independent consultant, was contacted and assisted with the development of agency standards. 10/20/08 A committee was established. 8/31/09 COMPLETE
Step #2 Research current best practices	7/1/07 Completed before 6/30/08	Chrystal Griffin	None	None	Publications \$150	6/1/07 This was completed by Diane Schuch. 8/31/09 COMPLETE
Step #3 Determine standards	9/1/07 Completed and implemented before 6/30/08	Chrystal Griffin	None	None	None	8/1/07 Initiated in 2007, but is an ongoing process. 8/31/09 COMPLETE
Step #4 Proposed standards to be reviewed by group of providers and individuals	11/1/07 This is completed by Diane Schuch with the approval of the former Exec. Dir., Barbara Searight before 6/30/08.	Chrystal Griffin	None	None	None	This was initiated by Diane Schuch, Coaches, and the former Exec. Dir., Barbara Searight before 6/30/08. Ongoing
Step #5 Committee	12/1/07	Chrystal Griffin	None	None	None	8/31/09 COMPLETE

to review/revise based on feedback						
Step #6 Standards to be converted to outcome measures (CARF)	5/1/08 complete	Chrystal Griffin	None	None	\$10,000 for consultant	Initiated in 2007, but is an ongoing process.

Critical Issues #4: IMPROVE MONITORING AND EVALUATION OF QUALITY OF SERVICES.

Goal #4: By January 1, 2008, DD Resources will clarify and define performance standards for:

- **Customer satisfaction**
- **Quality of care**
- **Program outcomes**
- **Case management**

Objective #4.2 :By March 1, 2008, DD Resources will develop a methodology for assessing adherence to established standards (See objective #4.1).

ACTION STEPS	PROJECTED COMPLETION DATE	PERSON RESPONSIBLE - OVERSEEING ACTION STEP PROGRESS	PROJECTED MANPOWER NEEDS	PROJECTED CAPITAL EQUIPMENT NEEDS	PROJECTED IMPACT ON ORGANIZATION'S BUDGET	STATUS
Step# 1 Staff to prepare changes based on committee findings	3/15/08 Before 6/30/08, outcome based standards were established for FY 07/08. Based on the results, alterations to standards for FY 08/09 were made.	Chrystal Griffin	None	None	None	Quarterly and fiscal year.
Step # 2 Public hearing to be held for community feedback.	4/15/08 10/20/08 This has not occurred. Other ideas to obtain public feedback were requested on 10/20/08 b/c when public hearings have been used in the past, DD Resources has not seen much if any attendance.	Chrystal Griffin	None	None	4 hearings x \$50=\$200 PR	On hold as of 10/20/08 waiting for suggestions. 5-14-09 Scheduled to occur in the October 09 Newsletter 8/31/09 Newsletter or special flyer asking for feedback through the mail in lieu of a public forum. 9/30/09 Based on feedback received in Satisfaction survey's, DD Resources will postpone sending out feedback via surveys as the public feels that we currently have too many surveys.
Step #3 Board to make final decision	5/15/08 Board members were informed	Chrystal Griffin	None	None	None	9/09/09 Board members were informed of program

	of program objectives and outcomes.					objectives and outcomes.
Step #4 New standards to be implemented	7/1/08 FY08/09 have been written and implemented except for administration outcomes. This is in process.	Chrystal Griffin	None	None	None	9/09 /09 Board members were informed of program objectives and outcomes.

Critical Issues #4: IMPROVE MONITORING AND EVALUATION OF QUALITY OF SERVICES.

Goal #4: By January 1, 2008, DD Resources will clarify and define performance standards for:

- Customer satisfaction
- Quality of care
- Program outcomes
- Case management

Objective #4.3: By May 1, 2008, DD Resources will issue the policy and procedures related to the implementation of the new System of Quality of Care Evaluations.

ACTION STEPS	PROJECTED COMPLETION DATE	PERSON RESPONSIBLE - OVERSEEING ACTION STEP PROGRESS	PROJECTED MANPOWER NEEDS	PROJECTED CAPITAL EQUIPMENT NEEDS	PROJECTED IMPACT ON ORGANIZATION'S BUDGET	STATUS
Step #1 Current monitoring process to be updated to include changes authorized	7/1/08	Chrystal Griffin	None	None	None	6/15/08 In progress Revision to forms Complete as of 8/31/09
Step #2 Provider/consumer meetings held to review new format/procedure. Quarterly.	8/1/08	Chrystal Griffin	None	None	>\$250	Feedback Sessions with the agencies have been scheduled through the June of 2010.
Step #3 Computer system enhanced to accept changes	9/1/08 Computer system enhancements have been in progress since 8/15/08	Richard Barton	None	None	Enhancement cost >\$10,000	8/15/08 In Progress TCM data billing- Web Page. Oct. & Nov.- website adjustments for TCM billing continue.
Step #4 Changes implemented	10/1//08	Chrystal Griffin	None	None	None	In process 10/20/08
Step #5 Evaluate effectiveness	2/1/09	Chrystal Griffin	None	None	None	1/15/09 Survey

Critical Issues #4: IMPROVE MONITORING AND EVALUATION OF QUALITY OF SERVICES.

Goal #4: By January 1, 2008, DD Resources will clarify and define performance standards for:

- Customer satisfaction
- Quality of care
- Program outcomes
- Case management

Objective #4.4: By July 1, 2008 a comprehensive methodology will be established for educating consumers on how to evaluate the quality of care they are receiving through DD Resources' funding.

ACTION STEPS	PROJECTED COMPLETION DATE	PERSON RESPONSIBLE - OVERSEEING ACTION STEP PROGRESS	PROJECTED MANPOWER NEEDS	PROJECTED CAPITAL EQUIPMENT NEEDS	PROJECTED IMPACT ON ORGANIZATION'S BUDGET	STATUS
Step #1 Face to face/phone surveys will be ongoing	Monthly	Michelle Darden	None	None	None	Monthly by 21 st of each Ongoing
Step #2 Service advocates/case manager who purchase services will be trained on proposed outcome of service	9/1/07 12/1/07 3/1/08 6/1/08	Michelle Darden	None	None	>\$500	Ongoing In process Done through the TCM's (DD Resources only)
Step #3 Consumers will be provided training via multiple modalities on expected quality of care	5/1/08 Incomplete-No progress as of 10/20/08. Videos re: residential & hab. Services have been created and used in the past, but they are not used very much.	Michelle Darden	None	None	Food/transportation Development of multiple modalities >\$2,000	10/20/08 No progress
Step #4 Consumer provided information on alternative service providers (Choice)	6/1/08 Incomplete- No progress as of 10/20/08	Michelle Darden	None	None	Distribution of information >\$2,000	10/20/08 no progress

**Critical Issues #4: IMPROVE MONITORING AND EVALUATION OF QUALITY OF SERVICES.
(Measured through surveys)**

Goal #4: By January 1, 2008, DD Resources will clarify and define performance standards for:

- Customer satisfaction
- Quality of care
- Program outcomes
- Case management

Objective #4.5: DD Resources will evaluate its present management information system to determine its capacity to track the System of Quality of Care Evaluations.

ACTION STEPS	PROJECTED COMPLETION DATE	PERSON RESPONSIBLE - OVERSEEING ACTION STEP PROGRESS	PROJECTED MANPOWER NEEDS	PROJECTED CAPITAL EQUIPMENT NEEDS	PROJECTED IMPACT ON ORGANIZATION'S BUDGET	STATUS
Step #1 Review current system	1/1/08 Completed before 6/30/08	Richard Barton	None	None	None	
Step #2 Develop enhancement plan to current system based Strategic Plan	2/1/08 In process for the Targeted Case management program outcomes	Richard Barton	None	None	None	
Step #3 RFP Identify contractor	3/1/08 Acumen, the computer consulting company that designed the DD Resources website has been making these adjustments since 2007.	Richard Barton	None	None	Contractor \$45,000-60,000	
Step #4 Engage service to implement revisions	4/1/08	Richard Barton	None	None	None	
Step #5 Put satisfaction survey results online.						8/31/09 Team suggested perhaps adding to billing. Also put internal results of what the agencies thought about Fiscal, PT TCM. Adding on the website a summary of agency results. Ask if the agencies found it useful and if they say yes then it should

						be added permanently.
--	--	--	--	--	--	-----------------------

Critical Issue #5: STAFF RECRUITMENT AND RETENTION TO MEET CHANGING NEEDS AND SERVICE ENVIRONMENTS

Goal #5: By The end of FY2010, DD Resources, in partnership with the provider and consumer community, will establish supports for enhancing the effectiveness of recruiting, training and staff retention in the disability sector.

Objective #5.1: *By July 1, 2008, a plan will be developed to address critical provider staff supports such as compensation studies, job fairs, and leadership training.*

Key Performance Indicators

- Number of Collaborative Ventures (#)
- Provider Staff Turnover
- Average Number of Years of Service
- Average Length of Open Positions

Critical Issue #5: STAFF RECRUITMENT AND RETENTION TO MEET THE CHANGING NEEDS AND SERVICE ENVIRONMENT

Goal #5: By the end of FY 2010, DD Resources, in partnership with the provider and consumer community, will establish supports for enhancing the effectiveness of recruiting, training and staff retention in the disability sector.

Objective #5.1: By July 1, 2008, a plan will be developed to address critical provider staff supports such as compensation studies, job fairs, and leadership training.

ACTION STEPS	PROJECTED COMPLETION DATE	PERSON RESPONSIBLE - OVERSEEING ACTION STEP PROGRESS	PROJECTED MANPOWER NEEDS	PROJECTED CAPITAL EQUIPMENT NEEDS	PROJECTED IMPACT ON ORGANIZATION'S BUDGET	STATUS
Step #1 Identify best practice models.	11/1/07	Olivia Pruitt	None	None	None	
Step #2 Establish provider group and consumer group	12/1/07	Olivia Pruitt	None	None	>\$500	
Step #3 Develop key plan with outcomes	3/1/08	Olivia Pruitt	None	None	None	
Step #4 Secure board support	4/15/08	Olivia Pruitt	None	None	None	
Step # 5 Implement approved plan	7/1/08	Olivia Pruitt	None	None	Cost TBD	

Update: In 2008, it was determined that DD Resources can only focus on DD Resources employment statistics, etc.

Critical Issue #6: INCREASING BOARD DEVELOPMENT AND KNOWLEDGE

Goal #6: By July 1, 2008, DD Resources' Board of Directors (Board) will have a better understanding of its roles & responsibilities.

Objective #6.1: *By September 1, 2007, the Board will conduct an evaluation of itself to identify needed development .*

Objective #6.2: *By January 1, 2008, DD Resources will establish a structured Board training regimen that will guide the Board in fulfilling the twelve principles of governance.*

Objective #6.3: *A Board evaluation will be conducted biannually to measure progress as defined by established benchmarks.*

Key Performance Indicators

- Comparison of the Benchmark Self Assessment to Future Progress

Critical Issue #6: INCREASING BOARD DEVELOPMENT AND KNOWLEDGE.

Goal #6: By July 1, 2008, MR&DD Resources' Board of Directors (Board) will have a better understanding of its roles & responsibilities

Objective #6.1: By September 1, 2007 conduct a Board self-evaluation to identify Board development needs.

ACTION STEPS	PROJECTED COMPLETION DATE	PERSON RESPONSIBLE - OVERSEEING ACTION STEP PROGRESS	PROJECTED MANPOWER NEEDS	PROJECTED CAPITAL EQUIPMENT NEEDS	PROJECTED IMPACT ON ORGANIZATION'S BUDGET	STATUS
Step #1 Research best practices	7/15/07	Michelle Darden	None	None	None	
Step #2 Board Select evaluation tool to determine benchmark	8/15/07	Michelle Darden	None	None	>\$1,000	
Step #3 Implement tool	9/15/07	Michelle Darden	None	None	None	
Step #4 Review results, take action as necessary	9/30/07	Michelle Darden	None	None	None	
Step #5 Evaluate yearly	9/30/08 9/30/09 9/30/10 9/30/11 9/30/12	Michelle Darden	None	None	None	

Update: Occurs annually through surveys.

Critical Issue #6: INCREASING BOARD DEVELOPMENT AND KNOWLEDGE.

Goal #6: By July 1, 2008, MR&DD Resources' Board of Directors (Board) will have a better understanding of its roles & responsibilities

Objective #6.2: By January 1, 2008, MR&/DD Resources will establish a structured Board training regimen that will guide the Board in fulfilling the twelve principles of governance.

ACTION STEPS	PROJECTED COMPLETION DATE	PERSON RESPONSIBLE - OVERSEEING ACTION STEP PROGRESS	PROJECTED MANPOWER NEEDS	PROJECTED CAPITAL EQUIPMENT NEEDS	PROJECTED IMPACT ON ORGANIZATION'S BUDGET	STATUS
Step #1 Research best practices	8/15/07	Michelle Darden	None	None	>\$500	" See Notes Below"
Step #2 Establish board committee develop, implement, oversight	9/15/07	Michelle Darden	None	None	None	
Step #3 Implement Plan	1/15/09	Michelle Darden	None	None	None	

Update: DD Resources' Board determined that they wanted agencies to present at meetings. In addition, DD Resources Board members have been attending MACDDS trainings. Held Roberts Rule of Order training in March 2010.

Critical Issue #6: INCREASING BOARD DEVELOPMENT AND KNOWLEDGE.

Goal #6: By July 1, 2008, MR&DD Resources' Board of Directors (Board) will have a better understanding of its roles & responsibilities

Objective #6.3: A Board evaluation will be conducted biannually to measure progress as defined by established benchmarks.

ACTION STEPS	PROJECTED COMPLETION DATE	PERSON RESPONSIBLE - OVERSEEING ACTION STEP PROGRESS	PROJECTED MANPOWER NEEDS	PROJECTED CAPITAL EQUIPMENT NEEDS	PROJECTED IMPACT ON ORGANIZATION'S BUDGET	STATUS
Step #1 Review progress using benchmark biannually	8/30/08 2/28/09 8/30/09 2/28/10 8/30/10 2/28/11 8/30/11 2/28/12 8/30/12	Michelle Darden	None	None	None	15 days prior to each due date
Step #2 Adjust plan as indicated from review	9/30/08 3/30/09 9/30/09 3/30/10 9/30/10 3/30/11 9/30/11 3/30/12 9/30/12	Michelle Darden	None	None	None	15 days prior to each due date Surveys- first 6 months. June- first monthly survey.

Update: Surveys are conducted at the end of all board meetings.

CONCLUSIONS

Now that the strategic plan for the St. Louis Office for MR&/DD Resources has been established, the challenge is to ensure that it is a viable and active product. The plan provides the staff and board of the organization with a clear roadmap to follow as it moves toward its vision. Goals are accomplished as the related Objectives are fulfilled. Completion of Objectives relies on the implementation of Action Steps. Each is dependent upon the other.

It is the responsibility of MR&/DD Resources' staff to ensure that Action Steps are implemented and accomplished. The Board is responsible for monitoring staff's progress.

MR&DD Resources has established its five-year strategic plan based on identified critical issues. These issues have one primary focus, improving the organization's ability to respond to the needs of individuals with developmental disabilities. The manner in which MR&DD Resources has chosen to address these factors is established in the strategic plan.

The organization will evaluate its progress by not only monitoring the status of Action Steps, Objectives and Goals, but also through the tracking and analysis of Key Performance Indicators.

Each year, MR&DD Resources should conduct a planning retreat to review the progress toward accomplishing the goals identified in the strategic plan. The people involved in the planning retreat should review the present environment and establish any necessary changes to the strategic plan. Keeping the strategic plan current will ensure its relevancy to the factors impacting MR&DD Resources.

The St. Louis Office for MR&DD Resources' Board of Directors approved this strategic plan at its regular scheduled meeting on May 10, 2007.

M:\cgriffin\public\Strategic Plan updated 2-4-10