



Opportunity Village

FY 2015 – 2020

Strategic Plan

Created 9/15/15

Overall strategic plan vision: Opportunity Village will provide best of the best services to those we support.

1. Goal: Implement a person centered-person driven approach to life planning focused in positive behavior supports and grounded in the CQL authentic person centered planning excellence principles.

a. Strategy: With the permission of individuals served, conduct Personal Experience Surveys (PES) throughout the calendar year with a random sample of individuals who receive home based and community supports, employment supports, and behavioral services to determine their satisfaction with their service experience.

Metric: 95% of respondents indicate positive responses to the performance indicators in the PES.

Who: Quality Enhancement Team

When: January 2016 and throughout each calendar year.

b. Strategy: With the permission of individual's served, conduct outcomes based interviews on the 21 CQL outcomes throughout the calendar year with a random sample of individuals who receive home and community based supports, employment supports, and behavioral supports to determine the personal outcomes and supports present.

Metric: 50% of respondents report personal outcomes present and 70% of respondents report supports present.

Who: Quality Enhancement Team

When: July 2016 and throughout each calendar year

c. Strategy: Quality Enhancement staff, successfully trained through CQL on authentic person centered planning, and with permission of the individuals supported, will attend a random sample of life planning meetings to provide feedback for improvement to the team on implementation of authentic person centered planning principles.

Metric: Person centered teams will meet 80% of the criteria on authentic person centered planning principles.

Who: Quality Enhancement Team

When: July 2016 and throughout each calendar year

d. Strategy: Assigned leadership will provide coaching and on the job training to employees at least monthly on implementation of person centered planning

principles and CQL outcomes in day to day interactions with individuals we support in their respective homes.

Metric: 80% of the criteria on implementation of person centered planning principles and CQL outcomes in day to day interactions with individuals we support will be met.

Who: Home & Community Supports Leadership and Quality Enhancement Team

When: July 2016 and monthly throughout each calendar year

2. Goal: Create more integrated community employment and meaningful day activity opportunities for those we support and to supplement/diversify revenue for the agency

a. **Strategy:** Conduct market research on potential business opportunities in the North Central Iowa area.

Who: Chief Development Officer

When: ongoing through 2017

b. **Strategy:** Develop Business Plans for each potentially profitable business that we decide to pursue

Who: Chief Development Officer

When: for each business opportunity identified

c. **Strategy:** Assure a balance of workers, disabled and non-disabled, within workforce of each business created.

Who: Chief Development Officer

When: established for each business during business planning phase

d. **Strategy:** Utilize the person-centered approach to determine client interest in community day activities and employment opportunities.

Who: Employment and Day Services Team

When: Ongoing

e. **Strategy:** Foster relationships with community businesses and organizations to nurture opportunities for employment and activities in the community.

Who: Employment and Day Services Team

When: Ongoing

Overall strategic plan vision: OV will generate sufficient and flexible resources to give people the services they want

1. Goal: Create and sustain businesses and align them with the community

- a. **Strategy:** Promote/educate the community (external) and OV staff (internal) on businesses to create better partnering and collaboration
Who – Development and Leadership Team
When – On-going
- b. **Strategy:** Increase client employment opportunities through matching individuals work preferences with jobs created by the businesses
Who – Employment services
When – On-going
- c. **Strategy:** Increase number of thrift stores to four by 2017 with combined sales of \$2 million and combined net income of \$600,000
Metric: Net revenues of store operations
Who – District Store Manager, Chief Development Officer
When – 2017
- d. **Strategy:** Increase number of thrift stores to six by 2019 with combined sales of \$3 million and combined net income of \$900,000
Metric: Net revenue of store operations
Who – District Store Manager, Chief Development Officer
When – 2019
- e. **Strategy:** Study current internal business opportunities (Green Pro, custodial, wood shop, etc.) to ascertain which could be developed into stand-alone businesses for the purpose of employing people we support and providing revenue to the organization
Metric: completion of assessment and development of business plan
Who – Chief Development Officer, Work Services
When – Ongoing
- f. **Strategy:** Study and consider development of services to additional populations of people (potentially people with mental illness, elderly, home care kinds of services, etc)
Metric: Net revenue generated by new services
Who: Executive Leadership Team
When: Options will be identified by September 2015 – first opportunity will be established by March 2016

2. Goal: Reduce reliance on Medicaid funding by 10% in 10 years and 25% in 20 years

- a. **Strategy** - Research other facilities who have committed to a model for services that is far less reliant on Medicaid (Brookwood, etc.)
Metric: Completion of research
Who – Executive Leadership
When – January, 2017
- b. **Strategy** – Attract 1,000 new donors each year through personal solicitation, events and outreach
Who – Development
When – Ongoing
- c. **Strategy** – Achieve a 20% reduction in overall health insurance benefit expense from use of multiple new approaches
Who – CEO, CFO, HR Manager
When – By January 1, 2018
- d. **Strategy** – In order to contain work comp costs limit total injuries to 40 or fewer per year, limit loss time injuries to eight or fewer per year and achieve an experience mod factor of one or less from implementation of multiple new approaches.
Metrics: Experience mod. at or below 1.0
Who – CEO, CFO, HR Manager
When – Ongoing
- e. **Strategy** – Enhance investment income through more effective cash management and revised processes for managing and monitoring our investment portfolio, and limit the overall fee structure of assets in pursuit of a goal of maximizing the extent to which investment income supplements the agency budget
Metrics: Net investment return as compared to industry average
Who – CEO, CFO, Investment Committee
When – Ongoing

3. Goal: Align resources and reserves to maximize the impact on our mission

- a. **Strategy:** Complete a structured assessment of all organization facilities to include functional usefulness, future potential use and current condition
Who – Maintenance/Contract Coordinator
When – By July, 2016
- b. **Strategy:** Assess the merits of a spending policy for income off reserves and/or determine if investment portfolio segmentation is necessary
Who – Investment Committee, CFO, CEO

When – By September, 2016

4. Goal: Increase charitable giving to \$2 million annually by 2018, \$3 million by 2020

- a. **Strategy:** Increase Easy Give monthly donors to 100 by January 2016, 150 by 2018
- b. **Strategy:** Increase number of Legacy Circle members (planned givers) to 100 by 2017, 150 by 2019.
- c. **Strategy:** Add four additional fundraising events in other communities by 2017.
- d. **Strategy:** Development staff will host 12 Envision Success Hours w/ CEO each year.
- e. **Strategy:** Development staff will provide 40 presentations or tours to clubs and groups each year.
- f. **Strategy:** Development staff will attend 48 public events per year to network.
- g. **Strategy:** Development staff will make 768 personal visits or phone calls per year.

Who: Development

5. Goal: Create branded marketing campaign to maintain strong reputation and increase community support.

- a. **Strategy:** Survey staff, donors, volunteers, and employers of our clients to get their stories and find messaging to incorporate into marketing materials.
Who: Development, Community Employment, Human Resources
When: January, 2016
- b. **Strategy:** Identify market segments; employment, volunteers, donors, etc. and tailor messaging for demographics to attain goals established elsewhere in strategic plan.
Who: Development, Community Employment, Human Resources
When: June, 2016
- c. **Strategy:** Engage marketing firm to brand our organization and create comprehensive marketing package.
Who: Development
When: January 2017
- d. **Strategy:** Deploy consistently branded messaging across organization to strengthen our efforts and maintain strong reputation.

Who: Development

When: Ongoing

Overall strategic plan vision: Opportunity Village will develop an adequate workforce which is prepared to meet the needs of those we support.

1. Goal: Increase number of staff applicants by 20% over 2014.

- a. **Strategy:** Utilize branded advertising to promote employment through radio, movie theater ads, employment fairs, and on-line resources.
Who: Human Resources, Development
When: Ongoing
- b. **Strategy:** Expand current applicant referral program
Who: Human Resources
When: March 2016
- c. **Strategy:** Develop more targeted promotion of job openings through trade specific resources.
Who: Human Resources
When: Ongoing

2. Goal: Create or collaborate with others to create a certification program for Direct Support Staff.

- a. **Strategy:** Work with local Community College to develop outline for certification.
Who: Human Resources, Staff Training
When: September 2016
- b. **Strategy:** Work with state and national programs to develop broader certification for this industry.
Who: Human Resources, Staff Training
When: December 2019

3. Goal: Continuous professional development of staff to better support clients

- a. Review current training and identify organizational training gaps
- b. Identify external professional development opportunities and establish a mechanism to vet the opportunities and recommend to staff
- c. Set specific goals and benchmarks for numbers of staff impacted
- d. Pursue increases in training budget to support efforts
- e. Establish mechanism/policy to encourage staff participation in professional development through incentives or pay increases
Who: Executive Leadership Team, HR
When: Plan established by March 2016 – begin implementation by July 2016, complete process by 2018

4. Goal: Commit to attaining an organizational average pay for Professional Support Staff of \$15

Who: Executive Leadership, Board

When: Fiscal year 2020

5. Goal: Revise and expand the current Leadership Training programs

a. Strategy: Expand the Leadership Track program to three distinct levels

Who: Executive Team, Training Coordinator

When: New process to begin October 2015 – final group starting 2017

b. Strategy: Expand and focus the current monthly leadership training opportunities to include practical information for supervisors and information about the organization (policies, structures, etc.)

Who: Executive Team, Training Coordinator

When: New process to begin October 2015 – ongoing

Overall strategic plan vision: Opportunity Village will embrace Managed Care and be responsive to the changes driven by managed care.

1. Goal: Proactively prepare and respond to the changes needed to be a preferred provider.

a. Strategy: The Village will implement and utilize software systems to collect and manage data for reporting to managed care organization and using data to better understand internal cost structure.

Who: CEO, CFO, Services Team, Accounting,

When: January 2016

b. Strategy: Consider mergers or acquisitions to remain viable and competitive in meeting managed care organization objectives.

Who: Executive Leadership and Board

When: As opportunities present themselves

c. Strategy: Consider restructuring organization to better meet demands of competitive environment in the future (managed care, geographic dispersion, limited funding increases, etc.)

Who: CEO, Executive Team

When: October, 2015