

# The Arc of Carroll County

2009 STRATEGIC AND BUSINESS PLAN

DEVELOPED: SPRING 2009



THE ARC OF CARROLL COUNTY  
STRATEGIC AND BUSINESS PLAN

***Vision***

*We are a leading organization that champions for and supports people with developmental disabilities, while cultivating relationships that enrich our community*

***Values***

*Innovation* – our founders pioneered the opportunities that exist today for people with developmental disabilities. We build on their courageous tradition of innovation and creativity in the design and delivery of our services

*Integrity* – we operate with integrity in all that we do – as a service provider, as an employer, and as members of our community.

*Respect* – we treat everyone with respect. Dignity, choice, ability, privacy and opinion are fundamental principles of who we are

*Quality* – we embrace the highest standards in all that we do. Quality in service and character drives our actions and attitudes

*Caring* – we act with a genuine spirit of caring. A sincere interest in and concern for the complete well-being of all people define our actions

***Purpose***

*To support people in their individual pursuit of a fulfilling life*

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**Internal Strengths:** What do you see as the major **strengths** that currently exist that should be reinforced and leveraged? List those internal factors that contribute to the success of The Arc.

1. Dedicated to clients (life-long)
2. Excellent, caring staff
3. Good reputation in community
4. Cooperative training program and community partnerships
5. Responsiveness to families
6. Giving clients a sense of self worth
7. Quality residential units
8. Openness to ideas/opinions
9. Advocacy
10. Breadth of services
11. Positive community education
12. Contributions to local economy – employer job training
13. Individualized support
14. Health care/medical support
15. CARF accreditation

**Internal Limitations:** What are the significant **limitations** that currently exist that might be hindering The Arc from achieving success? List the things that are getting in the way of The Arc growing and achieving the desired future.

1. Parking
2. Communication and communication vehicles
3. Traditional service models (i.e. hours, funding)
4. Thinking small/insular attitude
5. Not risk takers/lack of innovation
6. Lack of work in workshop
7. Facility
8. Interdepartmental communication
9. Staff turnover
10. Funding (non government)
11. Lack of succession plan
12. Brand identity – awareness of Arc
13. Board visibility and commitment
14. Lack of sense of urgency
15. Family involvement

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**External Opportunities:** What do you see as the major **opportunities** that can be exploited to further achieve the mission and vision? List those items that exist outside the control of The Arc that, if taken advantage of, could lead to greater levels of success and growth.

1. Partnerships with businesses and other organizations (e.g. similar non-profits; FACT Group?)
2. Post secondary market trend (analyze and understand)
3. Increase awareness of Arc in community and benefit to community
4. Take advantage of current job trends/demographics (aging)
5. Potential sources of funding (government, grants, etc)
6. Add more housing units (economy)
7. More parental family involvement

**External Threats:** What are the **threats** that you see that have the potential for significantly inhibiting The Arc from achieving its vision - those items that pose a risk to the future of The Arc?

1. Current economic environment
2. Competition
3. Implications and perception of the name
4. Perception of Arc and its services (schools, etc). what ROI does Arc and clients provide to community
5. External funding we can't control
6. Aging population/competitive advantage
7. Board membership

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***Trends***

- \$ follows the person
- People centered plans
- People broker their own services
- More partnerships
- Less funding from the government
- Providing more “non-traditional” services

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***BHAG (10-30 year goal)***

*To become the most dynamic, sought after provider of services without boundaries*

***Critical Goal Categories (to move toward the vision and the BHAG)***

Critical Goal Categories are areas that are essential to realizing the vision and achieving the mission. They are used to focus goal setting, action planning and implementation. Organizational resources will be allocated to achieving the goals within the Critical Goal Categories.

1. Service needs (Mary Jo)
2. Resource development
3. Staff development (Danna)
4. Program quality (Danna)
5. Marketing (Don)
6. Fiscal management (Mary Jo)
7. Relationships and partnerships (communication) (Don)

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*GOALS*

*CRITICAL GOAL CATEGORY #1: SERVICE NEEDS*

Key factors to consider:

- Team involvement – evaluation/review of current services on an individualized basis to determine what’s needed regardless of barriers
- Individual – determine their wants
- A tool – should be meaningful and viable to adequately assess needs
- Staff training – encouraging staff to coach independence and choice rather than enabling

Specific Goals:

By July 2010, conduct a one-time program needs assessment to plan the long-term program offerings

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*CRITICAL GOAL CATEGORY #2: RESOURCE DEVELOPMENT*

Key factors to consider:

- Properties – includes evaluating, having clear purpose, efficiency, cost, meeting need (maintenance)
- Fund raising
- Board development, membership, expectations, guidelines, training, recruitment/retention, visibility and commitment
- Membership – participation, involvement, participation
- Vehicles
- Technology – hardware, software, applicability

Specific Goals:

1. Create Long Term plan for all of the assets based on data from the service needs assessment
2. Grow family participation in membership and funding by 50% by the end of the year
3. Identify target segments of potential funding and develop a growth objective and action plan to a greater percentage of total funding from those sources
4. Assess technical needs for Arc
5. Develop clear set of board expectations, role, purpose and vision along with a plan to achieve them by June, 2010
6. Identify purpose, mission and role for advisory board and use them to resurrect it by June, 2010

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*CRITICAL GOAL CATEGORY #3: STAFF DEVELOPMENT*

Key factors to consider:

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Specific Goals:

1. Develop specific departmental orientation/procedures for new hires. Complete by December, 2009.
2. Develop or acquire training on several priority issues such as professional boundaries vs. care issues, teamwork culture, dual diagnosis, safety (lifting/transferring; for location specific needs. Completed by June, 2010.
3. Target specific recruiting for difficult positions. Completed by June, 2010.
4. Develop targeted annual training calendar. Completed by June, 2010.

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*CRITICAL GOAL CATEGORY #4: PROGRAM QUALITY*

Key factors to consider:

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Specific Goals:

1. Ensure properly trained staff. Create a tie-in to our referral bonus program wherein staff who refer new employees will receive bonus only when new hires have completed at least 75% of required trainings; and if referring staff is not up to date on trainings, bonus will be withheld until updates are completed. Complete by September, 2009
2. Explore development of methods to better distribute PEC Data. Complete by December, 2009.
3. Create a steering committee to explore innovation in programming for day and residential programs. (For example: initiated “special interest groups”, etc.). Complete by December, 2009.
4. Develop and implement a staff questionnaire that will be completed before each individual’s annual IP meeting to receive specific input about an individual’s needs and goal attainment. Complete by July, 2010.

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*CRITICAL GOAL CATEGORY #5: MARKETING*

Key factors to consider:

- “Saying what you mean, and mean what you say” commitment to marketing
- Purposeful and thoughtful
- Audience identification and fit the message/marketing to their needs
- Develop brand and brand image
- Ongoing funding and resource commitment

Specific Goals:

1. Develop/enhance events that are designed to increase brand awareness of The Arc by June, 2010
2. Develop consistent marketing message, process and printed materials that feature a “custom designed” focus and used by staff. Need to develop staff training regarding marketing The Arc by June, 2010
3. Create more inviting lobby area by September, 2009

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*CRITICAL GOAL CATEGORY #6: FISCAL MANAGEMENT*

Key factors to consider:

- Available funding to achieve the vision/BHAG
- Putting a price tag on other CGC's

Specific Goals:

1. Conduct review of Service Funding Plans based on needs assessment
2. Prioritize key needs within one month
3. Develop investment plan with input from finance committee

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*CRITICAL GOAL CATEGORY #7: RELATIONSHIPS AND PARTNERSHIPS*

Key factors to consider:

- Integrate partnerships and relationships that support all aspects of The Arc's marketing and programmatic functions

Specific Goals:

1. Identify The Arc's audience and major stakeholders. Define the relationship, assess needs, and evaluate the relationships for satisfaction, ability to grow/enhance by December, 2009
2. For the large/major groups, develop a plan that enhances the relationship for and with The Arc by June, 2010

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Critical Goal Category: Service Needs

Goal: Conduct a one-time program needs assessment to plan the long-term program offerings by November 2010 and present results by February 2011.

<b>Action Plan</b>				
<b>Item #</b>	<b>Who</b>	<b>Will do What</b>	<b>By when</b>	<b>Resource Needs</b>
1.	AED, VSM, RPC, FISSC	Develop/identify the tools and processes to use across all program areas to solicit needs and wants.	By 10/31/09	Existing samples for review
2.	AED, VSM, RPC, FISSC	Train Coordinator level on proper usage of tool.	By 11/30/09	The tool and meeting space
3.	Coordinators and designated interviewers	Implement assessment with Coordinator responsible for end result.	By 11/30/10	The tool and staff with close relationships with each person
4.	Strategic Planning Team	Deliver an interim plan with recommendations based on 60-70% completion of assessments to identify future trends	February, 2010	Assessment data
5.	ADQA, Controller	Develop ways to collect and analyze findings. Any items that emerge from the assessment process that can be implemented immediately will be put into action. See notes in other Goal Categories for more information	Ongoing from 11/30/09 – 11/30/10	The tool and thinking brains
6.	Strategic Planning Team	Compile results and have information available for other critical goal categories.	By 2/28/2011	

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Critical Goal Category: Resource Development

Goal: Create Long Term plan for the assets based on data from the service needs assessment

<b>Action Plan</b>				
<b>Item #</b>	<b>Who</b>	<b>Will do What</b>	<b>By when</b>	<b>Resource Needs</b>
1.	ED, AED, Controller	Create long-term plan for main facility based on findings from the needs plan	March, 2010	Service Needs Assessment
2.	ED, AED, Controller	Create plan for properties based on findings from the needs plan	March, 2010	Service Needs Assessment
3.	ED, AED, Controller, DoT	Create a plan for vehicles	March, 2010	Service Needs Assessment

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Critical Goal Category: Resource Development

Goal: Identify target segments of potential funding from other sources and develop a growth objective and action plan to a greater percentage of total funding from those sources

<b>Action Plan</b>				
<b>Item #</b>	<b>Who</b>	<b>Will do What</b>	<b>By when</b>	<b>Resource Needs</b>
1.	ED, Controller, DD	Increase total funding from other sources by \$75,000	End of FY 10	
2.	ED, Controller, DD	Increase total funding from other sources by an amount to be determined on FY10 outcome	TBD	
3.	ED, Controller, DD	Increase total funding from other sources by an amount to be determined on FY11 outcome	End of FY 12	

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Critical Goal Category: Resource Development

Goal: Assess technical needs for Arc, develop a plan and implement recommendations

<b>Action Plan</b>				
<b>Item #</b>	<b>Who</b>	<b>Will do What</b>	<b>By when</b>	<b>Resource Needs</b>
1.	HR	Develop an expansive technology plan that goes beyond the office/staff needs to include communications and clients (adaptive technology).	February, 2010	
2.	Controller, IT	Expand the current data security plan and develop recommendations	February, 2010	
3.	Controller, IT	Conduct technology and security audit	February, 2010	
4.	ED	Explore connecting with a non-traditional technology partner	February, 2010	

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Critical Goal Category: Resource Development

Goal: Grow family participation in membership and funding by 50% by end of the year.

<b>Action Plan</b>				
<b>Item #</b>	<b>Who</b>	<b>Will do What</b>	<b>By when</b>	<b>Resource Needs</b>
1.	ED, DD	Rework membership structure and send new materials.	June, 2009	
2.	DD	Host 6 membership events per year.	Ongoing	

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Critical Goal Category: Resource Development

Goal: Develop a clear set of board expectations, role, purpose and vision along with a plan to achieve them by June, 2010.

<b>Action Plan</b>				
<b>Item #</b>	<b>Who</b>	<b>Will do What</b>	<b>By when</b>	<b>Resource Needs</b>
1.	ED, PoB	Review and create board expectations.	June, 2010	
2.	ED, PoB	Review and create board role.	July, 2009	
3.	ED, PoB	Review and create board purpose.	July, 2009	
4.	ED, PoB	Review and create board vision.	July, 2009	
5.	ED, PoB	Combine the board expectations, role, purpose and vision into Board Standards Packet and present.	June, 2010	

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Critical Goal Category: Resource Development

Goal: Identify purpose, mission and role for advisory board and use them to resurrect it by June, 2010.

<b>Action Plan</b>				
<b>Item #</b>	<b>Who</b>	<b>Will do What</b>	<b>By when</b>	<b>Resource Needs</b>
1.	ED, PoB, Board	Define tasks and role for the advisory board.	June, 2010	
2.	ED, PoB, Board	Identify candidate for board.	June, 2010	

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Critical Goal Category: Staff Development

Goal: Develop or acquire training to assist employees to meet the balance between empathy with families/clients and professional boundaries

<b>Action Plan</b>				
<b>Item #</b>	<b>Who</b>	<b>Will do What</b>	<b>By when</b>	<b>Resource Needs</b>
1.	HR, QA, RPC, FISSPC, VSM	Written, specific departmental orientation/procedures for new hires. Some have been developed and are being implemented. Others will be developed, reviewed and implemented within 6 months.	By December, 2009	
2.	ED, AED, HR, QA	Develop or acquire training on several priority issues; identify subject matter experts or utilize staff effort to develop appropriate content (6-12 months). <ul style="list-style-type: none"> <li>a) Professional boundaries vs. care issues (to include sensitivity to appropriate conduct).</li> <li>b) Teamwork culture</li> <li>c) Dual diagnoses</li> <li>d) Safety (lifting/transferring; possibly presented for location-specific needs; van safety belts, wheelchair lifts, etc.)</li> </ul>	By June, 2010	Training Budget
3.	HR	Target-specific recruiting for difficult positions. To include identifying and recruiting CNA candidates. Immediately. Am already working with CCC on this part.	By June, 2010	
4.	ED, AED, HR, QA	Develop targeted annual training calendar	By June, 2010	Training Budget
5.	HR, DD, PC	Develop and present a "Careers at The Arc" community presentation. 6 months	By June, 2010	

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Critical Goal Category: Program Quality

Goal: Explore development of methods to better distribute PEC data.

<b>Action Plan</b>				
<b>Item #</b>	<b>Who</b>	<b>Will do What</b>	<b>By when</b>	<b>Resource Needs</b>
1.	QA	Explore development of methods to better distribute PEC data.	December, 2009	

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Critical Goal Category: Program Quality

Goal: Ensure properly trained staff by July 2012.

<b>Action Plan</b>				
<b>Item #</b>	<b>Who</b>	<b>Will do What</b>	<b>By when</b>	<b>Resource Needs</b>
1.	HR	Create tie-in to referral bonus program.	September, 2009	
2.	QA, Controller	Explore alternative methods for staff compensation.	July, 2009	

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Critical Goal Category: Program Quality

Goal: Create steering committee to explore innovation in programming for day and residential programs by December, 2009.

<b>Action Plan</b>				
<b>Item #</b>	<b>Who</b>	<b>Will do What</b>	<b>By when</b>	<b>Resource Needs</b>
1.	QA, VPC, RPC, FISSC, VSM	Create steering committee to explore innovation in programming for day and residential programs.	December, 2009	

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Critical Goal Category: Program Quality

Goal: Develop and implement a staff questionnaire that will be completed before each individual’s annual IP meeting to receive specific input about an individual’s needs and goal attainment by December 2010.

<b>Action Plan</b>				
<b>Item #</b>	<b>Who</b>	<b>Will do What</b>	<b>By when</b>	<b>Resource Needs</b>
1.	PC's	Develop and implement a staff questionnaire that will be completed before each individual’s annual IP meeting to receive specific input about an individual’s needs and goal attainment by December 2010.	July, 2010	

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Critical Goal Category: Marketing

Goal: Develop/enhance events that are designed to increase brand awareness of The Arc by June 2010.

<b>Action Plan</b>				
<b>Item #</b>	<b>Who</b>	<b>Will do What</b>	<b>By when</b>	<b>Resource Needs</b>
1.	DD	Develop/enhance events that are designed to increase brand awareness of The Arc.	June, 2010	

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Critical Goal Category: Marketing

Goal: Develop consistent marketing message, process and printed materials that feature a “custom designed” focus and used by staff by June 2010.

<b>Action Plan</b>				
<b>Item #</b>	<b>Who</b>	<b>Will do What</b>	<b>By when</b>	<b>Resource Needs</b>
1.	DD	Develop consistent marketing message, process and printed materials that feature a “custom designed” focus and used by staff.	June, 2010	
2.	DD, HR	Develop staff training regarding marketing The Arc.	June 2010	

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Critical Goal Category: Marketing

Goal: Create a more inviting lobby area by September 2009.

<b>Action Plan</b>				
<b>Item #</b>	<b>Who</b>	<b>Will do What</b>	<b>By when</b>	<b>Resource Needs</b>
1.	ED, AED, DD	Create a more inviting lobby area.	September, 2009	

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Critical Goal Category: Fiscal Management

Goal: Conduct a review of service funding plans based on service needs assessment.

<b>Action Plan</b>				
<b>Item #</b>	<b>Who</b>	<b>Will do What</b>	<b>By when</b>	<b>Resource Needs</b>
1.	Controller and PC's with the assistance from the management team	Compare current service funding plan to individual service needs assessments to maximize DDA funding.	Within 1 month of individual assessments; all complete by 12/31/10	Current funding plans and individual needs assessments
2.	Controller and PC's with assistance from the management team	Any small scale needs that can be filled immediately do it.	Ongoing	Funding, individual needs assessments
3.	Controller and PC's with assistance from the management team	Any larger scale items get put in the official service needs assessment.	By 12/31/10	

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Critical Goal Category: Fiscal Management

Goal: Prioritize key needs.

<b>Action Plan</b>				
<b>Item #</b>	<b>Who</b>	<b>Will do What</b>	<b>By when</b>	<b>Resource Needs</b>
1.	Strategic Planning Team	Utilize service needs assessment to examine financial implications.	Contingent upon other CGC deadlines	
2.	Strategic Planning Team	Prioritize needs based on importance and financial implications.	Contingent upon other CGC deadlines	

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Critical Goal Category: Fiscal Management

Goal: Develop an investment plan with input from Finance Committee.

<b>Action Plan</b>				
<b>Item #</b>	<b>Who</b>	<b>Will do What</b>	<b>By when</b>	<b>Resource Needs</b>
1.	Finance Committee	Examine current investment plan.	July 2009	Current plan
2.	Finance Committee	Research alternative options.	October 2009	Information on investments
3.	Finance Committee	Present options to the Board of Directors.	November 2009	
4.	Finance Committee	Revise investment plan to include agreed upon options.	December 2009	
5.	Finance Committee	Work with brokers to implement changes	March 2010	Money!

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Critical Goal Category: Relationships and Partnerships

Goal: Identify The Arc’s audience and major stakeholders. Define the relationships, assess needs, and evaluate the relationships for satisfaction, ability to grow/enhance by December 2009.

<b>Action Plan</b>				
<b>Item #</b>	<b>Who</b>	<b>Will do What</b>	<b>By when</b>	<b>Resource Needs</b>
1.	ED	Will solicit input from senior staff.	May, 2009	
2.	Senior Staff	Define the relationships, assess needs, and evaluate the relationships for satisfaction, ability to grow/enhance.	December, 2009	

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Critical Goal Category: Relationships and Partnerships

Goal: For the large/major groups, develop a plan that enhances the relationship for and with The Arc by June, 2010.

<b>Action Plan</b>				
<b>Item #</b>	<b>Who</b>	<b>Will do What</b>	<b>By when</b>	<b>Resource Needs</b>
1.	ED, Senior Staff	For the large/major groups, develop a plan that enhances the relationship for and with The Arc	June, 2010	