# ADAPT STRATEGIC PLAN – FISCAL YEAR 2025/26

## Mission Statement Review:

The Board of Directors reviews the Mission Statement annually and it was reviewed at the 10/1/2025 Board Meeting. The mission statement continues to adequately reflect the purpose of Adapt.

## Summary of Progress with 2024-2025 Goals:

## Programs

**GOAL: Maintain High Quality Supported Employment Services:**

Supported employment services remain about the same with a small reduction in the overall number of people served in the program. There were issues this past summer with the Michigan Rehabilitation Services (MRS) counselors when the Employment Resources Program Supervisor tried to run aspects of the Summer Youth Program as well as with routine billing, which translated into some financial loss for Adapt. The participation in the program was less than the previous year. The Program Supervisor discussed these issues with the MRS District Manager, with whom she has had a long-standing working relationship and it is expected the program will run smoothly during the summer of 2026.

**GOAL: Maintain Quality Residential Services:**

Overall, the Residential program is strong. The quality remains as the size of the program has decreased over the last several years, and Fiscal Year 2024/25 was no exception. The Westbrook AFC and the Quimby Specialized Residential Home were closed in 2025 due to financial constraints for Westbrook and a shrinking referral pool for Quimby. The overall size of Adapt's Residential program between the two counties is smaller than it has ever been. Staffing levels have never bounced back to pre-Covid days, and the smaller program is more manageable with current hiring conditions. Staffing and hiring have improved in the last couple of years but remain challenging. It is more difficult to find people with a strong work ethic and driver's license. Consolidating has allowed Adapt to remain financially viable and retain dedicated employees.

**GOAL: Provide High Quality Day Services:**

The Day Programs in both counties continued through last Fiscal Year as they had the previous year. Branch County remains small and consistent. The daily roster averaged 16 people during the last quarter of FY 2024/25. The fiscal year ended with two (2) full-time employees and a full-time supervisor after a long-time employee retired. That position was not filled due to the small number of program participants and a lack of referrals to the program. Staff started completing their documentation of services electronically on the MITC program, and they found it to be cumbersome initially. The St. Joe Day Program averaged 34 people daily during the last quarter of FY 2024/25 and typically employs six (6) staff and a supervisor who also managed the In-Home Supports program. Documentation of services continued to be done on paper. The program remained very active, and the building barely accommodates the number of people attending each day. The commitment was made at the end of FY 2024/25 to expand the program into the office area of the building and rent additional office space along the same "strip" and parking lot area from the same landlord to make more room for the Day Program activities.

## Administrative

**GOAL: Maintain Strong Leadership:**

The Executive Director remains accessible to the program supervisors and encourages each administrative member and manager to take a positive approach with employees. The Board of Directors met four times during FY 2024/25. The Executive Director and Financial Controller are fully transitioned and function well within the current climate. The Executive Director continues to serve on the Incompass Michigan Worker's Comp Board, the Coldwater Housing Commission, and serves as the Assistant Treasurer for Altrusa of Branch County, a local women's service club. Both Directors of Services (Branch and St. Joe) have transitioned well and are fully functioning in their roles. The supervisory teams (Home and Program Supervisors) remain stable. The Executive Director made the decision to send the Program Excellence Advocate through Incompass Michigan's 2025 Leadership Academy which provided an opportunity for networking, learning, and general professional development; this position within Adapt works across both counties. Adapt's 50th Year Anniversary Celebration occurred on August 2nd and was attended by approximately 350-400 people. This was a team effort to pull off such a large and successful event.

**GOAL: Long-term Financial Health:**

The final numbers for FY 2024/25 are not in, but we know that there was an overall loss. Adapt remains strong from money in CD's. The mental health landscape is very different these last 5-7 years vs. Adapt's first 45 years of existence. Funding is tighter and actually appears to be under attack at all times. We were told by funding sources in July that there would be no rate increases for FY 2025/26 due to SWMBH's severe Medicaid deficit (to the tune of 7.5 million dollars). The CLS service provided in Residential settings – the CLS Homes and the hours people receive in sites where they were receiving 12 hours, for example, have been under the microscope, and reduced. It looks different in each county, but the changes wreaked havoc on the budget with those types of residential sites quite suddenly during the last quarter of the fiscal year which happened around the time of projecting the budget for FY 2025/26.

Other issues jeopardized Adapt's financial strength including, the workshop sales being lower, Westbrook taking six (6) months to close completely, and health expenses going from "promising" during the first half of the fiscal year to the "worst ever" by the end of the year. The final quarter of FY 2024/25 and working on the budget for FY 2025/26 was a massive learning experience for the Executive Director insofar as checking more frequently on what the Home and Program Supervisors are doing with staffing patterns and where "extra" staff are being pulled. The situation also prompted an in-depth look at all kinds of expenditures simultaneously. All areas are examined periodically, but a critical analysis of everything was necessary and resulted in a goal for the Financial Controller to do quarterly audits of the budget where all staffing patterns are once again examined to ensure supervisors have remained on track; the Executive Director will use this quarterly data to make needed adjustments.

## *Goals through September 30, 2026:*

Using information gathered from program supervisors and discussion amongst administrative members regarding various concerns and needs, as well as an in-depth assessment of the financial health of the organization and discussions from Board meetings during FY 2024/25, the following goals are Adapt's priorities:

## Programs/Services

### GOAL: Provide Quality Supported Employment Services

*Rationale: Although this program is small and generally loses money every year, Employment Resources is the only supported employment service for people with developmental disabilities offered through CMH in Branch County and Adapt is the only provider. In St. Joe County, Pivotal, the CMH Agency, provides supported employment services in-house and Adapt provides job coaching as requested.*

**Objective 1:** Nurture the existing relationship between Branch ISD and Employment Resources through open and periodic communication regarding employment opportunities in the Summer Youth program as well as after graduation from school.
**Objective 2:** Ensure WIOA counseling is completed with those who currently work in the workshop and those who apply to promote community employment. Greater emphasis on transitioning to community employment needs to occur during these counseling sessions if Adapt is seeking to actively discontinue the subminimum wage program in the shop.
**Objective 3:** Employment Resources personnel will make at least as many contacts with local businesses as last fiscal year and will seek contact with new local businesses.
**Objective 4:** The Employment Resources supervisor will continue to have regular contact with Pines and MRS personnel to promote referrals and develop employment sites and resources.
**Objective 5:** The Program Supervisor will review documentation written by the job coach regularly to ensure compliance with billing requirements.
**Objective 6:** Operate the Summer Youth program in cooperation with MRS and local schools.
**Objective 7:** Nurture the existing relationship between Pines and Employment Resources through open and periodic communication; contact the CSM Supervisor and ask to attend a meeting to discuss the program and troubleshoot any concerns or obstacles.

### GOAL: Provide Quality Clubhouse Services

*Rationale: Although this program is small and generally loses money every year, Outlook Clubhouse is the only Psychosocial Rehabilitation (PSR) service for people with chronic mental health issues offered through CMH in Branch County and Adapt is the only provider.*

**Objective 1:** Nurture the existing relationship between Pines and Outlook through open and periodic communication; contact the CSM Supervisor and ask to attend a meeting to discuss the program and troubleshoot and concerns or obstacles.
**Objective 2:** The Outlook Supervisor will check ViewPoint regularly (at least weekly) to see if there are people authorized for services for which a referral has not been made; check authorizations for members. Address any concerns promptly.
**Objective 3:** Have regular fundraisers to provide opportunities for member engagement and empowerment, as well as raise funds for the program.

**Objective 4:** Analyze attendance patterns to determine if remaining open Monday through Friday during the regular program times is the most cost-effective model.
**Objective 5:** Investigate the need to develop a new Transitional Employment (TE) contact.
**Objective 6:** Analyze the make-up of the Advisory Board to determine if new, additional, or different members would be beneficial to the program.

## GOAL: Maintain Quality Residential Services:

*Rationale: This is Adapt's largest program in terms of revenue, expenditures, and assets. The program has decreased in size over the years, and 2024/25 was no exception with the closure of Westbrook AFC and Quimby Specialized Residential. Closing Westbrook is a financial win for Adapt.*

**Objective 1**: Continue to be responsive to the unique training needs of staff members in each home. Utilize the agency's in-house training resource as well as appropriate outside educational opportunities.
**Objective 2**: Encourage all employees and supervisors to help new employees, train them correctly, and treat them with respect and patience, in order to retain quality staff members.
**Objective 3:** Modify the Training Program substantially and expect new hires to begin working more quickly and train as they work; this will provide new learning benefits. For existing employees, training primarily online will take them away from their direct care positions less often. This will promote consistent care in the Residential program, which is the foundation of quality services.
**Objective 4**: Encourage supervisors to take an active approach toward retaining residential staff through ongoing and regular positive contact with individual staff members, resolving issues as they arise, engaging in team building during monthly staff meetings, and highlighting the achievements/progress of residents.
**Objective 5**: Continue recruiting new employees as aggressively as possible and utilize resources to compensate staff appropriately to compete in the current economy.
**Objective 6**: Continue advocating higher pay for Direct Care Workers; this decision is made on the State level.
**Objective 7**: Stay current on the latest developments with the state HCBS Transition Plan related to the major changes expected with residential settings. Maintain compliance with HCBS standards.
**Objective 8**: Remain in compliance with licensing requirements.
**Objective 9**: Continue to evaluate the physical condition of each home/property and make upgrades as needed.
**Objective 10**: Aggressively advocate for appropriate residential services for persons served, especially when faced with reduced services that do not meet the person's needs.
**Objective 11**: Ensure Residents are choosing and participating in meaningful home and community activities as much as they are able.
**Objective 12**: Ensure Residents are choosing their bedroom décor as much as possible.
**Objective 13**: Ensure Residents are choosing as much of their daily routine as possible.

## GOAL: Provide Quality Day Services

*Rationale: In St. Joe County, the Day Program has been strong and clearing a nice profit while many other programs are not. The program averaged around 34 people daily during the fourth quarter of FY 2024/25, which is actually less than expected. The program averaged just over 30 people in October 2025. There is no other Day Program in St. Joe County. In Branch County, the program remains small, serving 16 people daily on average. There is a competitor in Branch County. We are primarily serving people who have been coming to the program for many years.*

***St. Joe County***

**Objective 1**: Continue offering innovative and interesting activities to program participants.
**Objective 2**: Promote a culture of positivity with day program employees by providing needed training and engaging in positive discussions.
**Objective 3**: Survey all day program participants about the desire to participate in volunteerism. Develop volunteer opportunities accordingly.
**Objective 4**: Ensure the program has the materials and resources needed for persons served.
**Objective 5**: The Program Supervisor will check on service authorizations at least weekly to ensure all participants have current authorizations, anticipate expired authorizations and treatment plans to ensure Adapt will be paid for services provided.

***Branch County***

**Objective 1**: The Program Excellence Advocate will update a master list of resources and activities in the area.
**Objective 2:** Evaluate staffing levels and adjust as needed to ensure adequate support of and attention to program participants.
**Objective 3:** The Program Supervisor and Staff will spend time at the Sturgis Program to observe activities and the layout since its reorganization and expansion.
**Objective 4:** Discuss with program participants the types of activities they would like offered at the program.
**Objective 5:** Rethink how the building space is used to offer more interesting and engaging activities for current participants and as a draw for referrals.
**Objective 6:** Ensure the program has the materials and resources needed for persons served.

# Administrative

## GOAL: Maintain Strong Leadership

***Rationale: All organizations require strong leadership to be successful, especially during challenging times. The mental health field is facing change and funding shortages; it will be difficult for many years ahead. It is essential the layers of management and leadership remain strong, from the Board of Directors to the Home and Program Supervisors – and the few levels in between.***

**Objective 1**: Promote a positive working environment at all levels. Each administrative member will work on their own personal approach to promote positivity amongst employees by being supportive and acknowledging the work people do on a regular basis.
**Objective 2**: Each County Director will continue frequent communication with each other and the Executive Director to ensure needed training and support to fulfill their roles, and to operate as a cohesive unit.

**Objective 3**: Attend relevant conferences and association meetings to build knowledge base and network of peers.
**Objective 4**: Hold the Board of Directors meetings on a regular basis to ensure an exchange of information and utilize input from Board members. Meetings are typically held quarterly; it was decided that they will be held every other month at the 10/1/2025 meeting due to the packed meeting agendas.
**Objective 5**: Ensure the Financial Controller and Executive Director maintain open and frequent communication with each other and the Board.
**Objective 6**: Administrative meetings as needed. Utilize email and conference calls, as much as possible, to promote efficiency.
**Objective 7**: Continue training and providing appropriate work tasks to the Program Excellence Advocate who will promote adherence to program standards, assist with updating written materials as needed, and complete tasks that promote quality services.
**Objective 8**: Promote a culture of acceptance regarding diversity amongst employees and persons served.
**Objective 9:** The Executive Director will assess each Administrative Team member's workload at the time of their annual evaluation and at least one time during their work year. Tasks will be reassigned or evaluated for necessity.

## GOAL: Short-Term Financial Health of the Organization

***Rationale: There are two distinct financial issues – short and long-term viability. Many of the objectives overlap or could be in the short or long-term category, but some activities are distinctly long-term tasks or projects, or the benefits will show over a long period of time. Identifying issues for the short term enables staff to focus on the expected returns or savings and make periodic adjustments.***

**Objective 1**: **WORKSHOP** - Decide if the workshop benefits the agency overall financially and still aligns with Adapt's Mission Statement, considering most of the workers are not Adapt's primary population. Consider losses over the last few years and the projection for FY 2025/26 along with the continued national trend of discontinuing subminimum wage.
**Objective 2**: **IN-HOME SUPPORTS -** Continue to monitor travel expenses and work with employees to reduce mileage without sacrificing the quality of the program. An in-depth audit on travel expenses and activities of the St. Joe program will be conducted.
**Objective 3**: **IN-HOME SUPPORTS** – Hire an adequate number of part-time employees and avoid full-time positions in both counties.
**Objective 4**: **EMPLOYMENT RESOURCES** - Continue to streamline costs when able. Ensure timely billing of MRS services.
**Objective 5**: **EMPLOYMENT RESOURCES** – Continue to work with other agencies on offering additional services, as requested; strive to increase the number of participants in the Summer Youth Program in 2026.
**Objective 6**: **DAY PROGRAMS** – Continue to monitor the staffing ratios of programs in both counties. Adjust staffing to ensure Adapt can provide quality services while maintaining efficient use of employees and resources.
**Objective 7**: **CLUBHOUSE** – Monitor the staffing level and number of program participants; consider adjusting the hours or days of the program if program participation does not increase.
**Objective 8**: **RESIDENTIAL -** Continue to evaluate staffing patterns and adjust accordingly to residential vacancies to ensure financial health.

**Objective 9**: **RESIDENTIAL -** Ensure all residential beds remain filled; when vacancies are unavoidable, reach out to CMH agencies to find a person well-suited to the population of the home; this needs to be done frequently and assertively until vacancies are filled.
**Objective 10**: **ALL PROGRAMS/DEPARTMENTS** – Monitor monthly spending on consumables closely. Provide county directors/supervisors with monthly spending reports.
**Objective 11**: **ADMINISTRATIVE -** Ensure employees receive support, appreciation, and customized training in addition to the standard training upon hire and annually. Retaining employees equals savings in training expenses.
**Objective 12**: **ADMINISTRATIVE -** Monitor health care costs on a monthly basis in preparation for making decisions about Open Enrollment in May 2026.
**Objective 13**: **ADMINISTRATIVE** – Contact the representative from the non-profit insurance pool in January 2026 to provide Adapt's information for a quote which would be prior to our annual open enrollment. This program would require Adapt changing from Blue Cross to Priority Health insurance.
**Objective 14**: **ADMINISTRATIVE -** Analyze the employee premium/portion for health insurance and determine an appropriate increase prior to Open Enrollment in 2026.
**Objective 15**: **ADMINISTRATIVE -** Monitor the workload of each Administrative employee to ensure optimum use of resources. Adjust schedules, pay rates, and positions accordingly.
**Objective 16**: **ADMINISTRATIVE -** The Financial Controller will conduct budget audits quarterly, as specified in her 2025 performance evaluation (dates given). The Executive Director and Financial Controller will work through information gathered, especially the schedules and staffing patterns of homes and programs and adjust operations and expenditures as needed.

## GOAL: Long-Term Financial Health of the Organization

***Rationale: There are two distinct financial issues – short and long-term viability. Many of the objectives overlap or could be in the short or long-term category, but some activities are distinctly long-term tasks or projects, or the benefits will show over a long period of time. Identifying issues as long-term enables staff to research possible endeavors and analyze current programs and processes with appropriate expectations and an eye toward long-term planning and payoff.***

**Objective 1**: **ADMINISTRATIVE -** Thoroughly investigate the best way to augment the Training Program to be more cost effective and time efficient, while maintaining overall quality.
**Objective 2**: **ADMINISTRATIVE -** Research the possibility of providing services not funded by CMH agencies and/or Medicaid; consider options outside of the current Mission Statement but remaining within Human Services and nonprofit territory to increase long-term sustainability of the organization.
**Objective 3**: **ADMINISTRATIVE -** Research any health insurance option that is brought to the attention of the Board or personnel with the goal of curbing costs.
**Objective 4**: **ADMINISTRATIVE -** As administrative members and program supervisors begin to retire, consider a different structure of management, division of tasks, etc. according to the size of the agency at the time of attrition.
**Objective 5**: **ADMINISTRATIVE -** Continue to consolidate resources when necessary; consider the sale of assets relative to the condition of the economy/market and the service needs of mental health and the population(s) served.

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