

ADAPT STRATEGIC PLAN - 2023

Planning Members:

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This plan expires 9/30/2023. This plan covers the remainder of Fiscal Year 2021/22 and all of Fiscal Year 2022/23 (16-month plan)

Mission Statement Review:

The mission statement continues to adequately reflect the purpose of Adapt.

Review of 2021 Goals:

Programs

GOAL: Continue a Strong In-Home Supports Program: Progress: The Covid-19 pandemic primarily impacted services from approximately March 2020 through May 2020. There were many people we serve who wanted to suspend services for health reasons, so Adapt worked with those who wanted to continue with services. The In-Home program is at a healthy capacity in both counties. There are times when people wait for services as we look for Direct Care Workers to provide the 1:1 service. Overall, this program is financially viable and running smoothly in both counties. There is no need to seek more people to serve, as the programs appear to stay at a manageable level most of the time. The mileage reimbursement for employees was increased from \$.40/mile to \$.55/per mile keeping more in line with federal rates and accounting for the severe increase in gas prices.

GOAL: Expand Community Employment: Progress: Employment in the Branch County workshop continues, though people are educated on and encouraged to seek competitive employment. Adapt continues to operate the workshop under the 14c certificate to ensure an array of choices for those seeking employment services and options. The career counseling mandated by the Workforce Innovation and Opportunity Act (WIOA) continues through Michigan Rehabilitation Services (MRS) providing the counseling. The Program Excellence Advocate facilitates the career counseling and will be having more in-depth discussions with the people we serve and core workers from the workshop about giving serious consideration to seeking competitive employment. Employment Resources strengthened its relationship with the Intermediate School District (ISD) in 2020 and has continued since, focusing on planning transition services for students and reinforcing that Adapt is open for business to assist the ISD in any way we can.

GOAL: Build a Strong and Active Clubhouse Membership: Progress: Attendance decreased during the earlier months of the Covid pandemic, but it has been stable since reopening. The overall attendance remains low relative to past years, but the Clubhouse has been more financially viable with limited staffing and decreased health costs. The Clubhouse Supervisor and staff should focus on activities that increase its community visibility through fundraisers and participation in local events. Also, a meeting with Pines staff to explain the program would be beneficial since Pines has had a lot of turnover within its case management department, which is the gateway to referrals to the program. The program also has an International Clubhouse survey to prepare for over the next several months.

GOAL: Maintain Quality Residential Services while Meeting the Home and Community Based Waiver Services (HCBS) Transition Rule and Licensing Requirements:

Adapt's administrative members continue to follow guidance and requirements issued by Michigan Department of Health and Human Services (MDHHS) and Southwest Michigan Behavioral Health

(SWMBH) authority. It appears all Adapt homes have passed the heightened scrutiny associated with the HCBS Rule. Covid and the State's mandates drastically altered the lifestyle of the Residents in our homes as was the case for all people. The homes could not have visitors except under very limited circumstances and community outings were almost non-existent, which is a significant departure from Adapt's normal routine and our Mission. The visitor restriction ended, although the homes must continue to screen visitors, and everyone needs to wear a mask while in the homes. This is not helpful when considering the working conditions of Direct Care Workers in the homes. It is an added burden for some people, as the job can be quite physical at times. Staffing and maintenance have been the greatest challenges over the 18 months. We have offered different types of bonuses, the pay rate is higher, and supervisors have been extremely accommodating. The employment situation around the country has been detrimental to the operation of the homes and the agency. It has slowed progress, and in some cases, prevented it altogether. We have several homes in need of attention to the physical building. We need about 20-25 employees between the two counties to be at a comfortable level regarding the workforce. We were able to secure approval for a pay raise for the Residential Direct Care Workers, but the threat of that funding being removed is ever present and has not helped substantially since people can find much easier jobs for the same or more pay. With the shortage of workers, and as some residents moved out of an Adapt home or passed away from illness, Adapt closed the Orion Home permanently and the Midas Home is temporarily closed at this time. Both of those homes are/were licensed in St. Joe County. In Branch County, the Alden CLS home is closed due to vacancies and also a shortage of workers.

GOAL: Provide High Quality Day Services while Meeting the Home and Community Based Waiver Services (HCBS) Transition Rule:

Day services were interrupted by the Covid-19 health crisis during much of 2020. The program was closed in both counties from mid-March to early-August 2020. They were open three months and then closed again until February 1, 2021. The St. Joe program increased attendance significantly and has more employees working in the program than the Branch program. Despite the overall large roster of program participants, the St. Joe Day program is barely in the black financially, and the Branch Day program continues to lose a significant amount of money. The Branch program has continued with a more traditional approach to services and Covid interrupted plans to enable adjustments to the program. The St. Joe program is allowing participants to attend more than individuals are authorized and this is causing problems with billing.

GOAL: Analyze the Long-Term Viability of the Workshop

All individuals working in the shop continue to receive the required career counseling mandated by the WIOA. The Executive Director has had conversations with Directors from other organizations and consultants from Incompass Michigan (formerly MARO) about the status of workshops. Adapt plans to continue with the program at this time but will increase education on Supported Employment services to promote full community integration. The shop continues to enjoy enough work with a variety of tasks, and business partnerships remain strong. There is legislation mandating the eventual discontinuation of the 14c Certificate through the Department of Labor (DOL), phasing in higher wages that must be paid regardless of productivity level over the next five years, until no one is under the minimum wage. This is not sustainable long-term and Adapt will need to start transitioning people into competitive employee if they desire. There has been very little movement toward transitioning people to competitive employment as the shop continues to have ample work available and workers are comfortable in that setting.

Administrative

GOAL: Continue Developing Strong Leadership

The Executive Director has maintained contact with program supervisors and is accessible and encourages each administrative member and manager to take a positive approach with employees.

The Board of Directors continues to meet three to four times a year. The Executive Director's role is quite different than what the previous Director experienced. It appears the Executive Director and Financial Controller are fully transitioned and functioning well within the current climate.

Both Directors of Services (Branch and St. Joe) have transitioned well into their respective roles. The St. Joe Director has experienced the majority of time spent in his position dealing with Covid-related issues, including severe staffing shortages, sick employees, and residents, and managing programs within the guidelines issued by the state and local entities. The St. Joe Director continues in this capacity as the staffing situation continues to worsen. There are more traditional tasks that have not been in focus with which he will need additional support and education. After not having an assistant for about 18 months there is a Residential Supervisor in St. Joe now to assist the St. Joe Director with the details of running licensed homes. There is a lot of communication between the Executive Director and the County Directors.

GOAL: Review and Update Written Organizational Materials

Updating occurred as policies were changed, typically involving bonus pay or programs to address staffing issues. The website needs to be revamped. Adapt has just entered into a one-year contract with 2nd Story Marketing to assist with the improvement of the website and brochures. Various job descriptions have been updated.

GOAL: Maintain the Corporate Compliance Program

The program has been maintained. There has been little to investigate over the past couple of years. The focus of the program is on prevention – randomly auditing the documentation written by employees regarding the service provided to ensure we bill accurately. The Compliance Officer has monitored homes and programs, however, there is an issue with providing St. Joe Day Program services above what is authorized, and this has caused more work for the employees who do the billing, and we are unable to be paid for some services already rendered.

Goals for June 2022 through September 2023:

Using information gathered from program supervisors and discussion amongst administrative members regarding various concerns and needs, the following goals were determined to be priority based on the needs of consumers, strengths of the organization and areas in need of improvement, requirements by funding sources, and expected viability of programs.

Programs

GOAL: Continue a Strong In-Home Supports Program:

Objective A: Continue to monitor travel expenses and work with employees to reduce mileage without sacrificing the quality of the program. We have increased our mileage reimbursement rate to better compensate employees for the current high gas prices. Overall, it is in everyone's best interest to choose outings and routes carefully in order to conserve resources.

Objective B: Attend local job fairs, including community college campus events, in an effort to recruit staff for the part-time positions in this program. Utilize appropriate websites and advertising forums to find qualified candidates.

Objective C: Share job postings on the Adapt Facebook page.

Objective D: Ensure all progress notes/goal documentation and timesheets meet the standards set forth by SWMBH and the respective CMH agencies to ensure all billed claims have supporting documentation. Program Supervisors need to regularly "spot check" notes submitted by staff

members and offer ongoing education and training on documentation requirements.

Objective E: Ensure all staff members have vehicle insurance and have required emergency kits and plans in their vehicles while transporting persons served.

Objective F: Ensure back-up employees for higher need consumers when the regularly scheduled employee is unable to work. This should be addressed case-by-case as some shifts can be rescheduled and others cannot.

Objective G: Provide group CLS services as requested by the CMH agencies.

Objective H: Limit the number of referrals accepted in both Counties if it becomes difficult to find employees for these part-time positions.

GOAL: Expand Community Employment

Objective A: St. Joe CMH has approached Adapt about providing the Supported Employment services in the County. They currently provide that service “in-house” and with the coming departure of the employee who runs the program, CMH personnel requested we take a look at providing services for approximately 40 people.

Objective B: Continue to streamline costs when able. Ensure timely billing of MRS services.

Objective C: Nurture the existing relationship between Branch ISD and Employment Resources, which was strengthened over the previous two years as more transition services for students are provided.

Objective D: Ensure WIOA counseling is completed to promote community employment.

Objective E: Employment Resources will continue making contacts with local businesses. The Job Developer will seek new contacts and nurture existing relationships. We will continue seeking appropriate community forums for promoting community employment and building partnerships.

Objective F: 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 G: Promote community employment more vigorously throughout the agency. Provide more information during new hire training, include employment information in newsletters, and increase discussions with persons served about competitive community employment. The Program Excellence Advocate has been assigned specifically to this task.

Objective H: Review documentation written by the job coaches regularly to ensure compliance with billing requirements.

Objective I: Monitor the workload for Job Development duties which are currently being shared by program employees.

Objective J: Re-establish partnerships with community employers through face-to-face contact and other forms of direct communication as Covid restrictions ease.

Objective K: Operate the Summer Youth program in cooperation with the ISD.

GOAL: Build a Strong and Active Outlook Clubhouse Membership

Objective A: The Advisory Board will continue to meet during the year to assist the Clubhouse Supervisor with the continued development of the program.

Objective B: The Clubhouse Supervisor will consult with other Clubhouse Supervisors in the region to gain additional knowledge and support regarding program requirements and development.

Objective C: Seek local employers who are interested in developing a Transitional Employment (TE) site with the Clubhouse as members move through the different stages of employment.

Objective D: Maintain compliance with the Clubhouse International standards by following recommendations and staying up to date on changes.

Objective E: Arrange a meeting with Pines personnel to discuss the program. Educate newer Pines employees on the purpose and target membership of the program. Offer Pines employees an opportunity to provide feedback on services, with a goal of increasing membership.

Objective F: Renew community outreach as Covid restrictions continue to ease.

Objective G: Prepare for the next International Clubhouse Survey.

GOAL: Maintain Quality Residential Services while Meeting the Home and Community Based Waiver Services (HCBS) Transition Rule and Licensing Requirements:

Objective A: 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 B: 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 C: Continue recruiting new employees as aggressively as possible and utilize resources to compensate staff appropriately to compete in the current economy.

Objective D: Continue to evaluate the physical condition of each home/property and make upgrades as appropriate.

Objective E: Continue to be responsive to each CMH agency with regard to working with consumers in need of residential services and providing the type of care/services requested to meet individual needs. Ensure adequate staffing levels in each home.

Objective F: Encourage supervisors to take an active approach in 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. Home supervisors need to communicate areas of need to administrative personnel consistently.

Objective G: Remain in compliance with licensing requirements.

Objective H: Continue to evaluate staffing patterns and adjust accordingly to resident vacancies to ensure financial health.

Objective I: Continue advocating for higher pay for Direct Care Workers that is made permanent on the State level. Advocate for the maintenance of the pay increase approved by both CMH agencies in order to maintain our current employees.

Objective J: Encourage all employees to "like" and follow our Facebook page, share job posts, encourage people to apply at Adapt, and remind staff and supervisors to help new employees, train them correctly, and treat them with respect and patience.

Objective K: Utilize professional marketing services to boost the organization's visibility in the community and assist with employee recruitment efforts.

GOAL: Provide High Quality Day Services while Meeting the Home and Community Based Waiver Services (HCBS) Transition Rule

Objective A: Continue to offer activities of interest to consumers and desired by CMH agencies and other stakeholders by being responsive to recommendations and feedback.

Objective B: Promote a culture of positivity with day program employees in both counties by providing needed training and engaging in positive discussions with individual staff members during staff meetings.

Objective C: The Branch County Day program Supervisor will meet with the St. Joe Supervisor and observe the program to determine how to best serve day program participants in Branch County (Covid has delayed this meeting). This will happen soon as it was delayed by Covid for two years. The Branch County program will be evaluated, and changes made based on what is learned from the other county.

Objective D: Survey all day program participants about the desire to participate in volunteerism in both counties. Volunteerism was minimal due to Covid.

Objective E: Ensure each program has the materials and resources needed to provide high quality services.

Objective F: Continue to monitor program revenue and expenditures. The financial picture differs greatly between the two counties and any adjustment that can be made to improve the financial

outlook will be, though the likelihood of either program breaking even is small.

Objective G: The Program Excellence Advocate will create a master list of resources and activities in each county for the program (Revise according to current availability of activities).

GOAL: Analyze the Long-Term Viability of the Workshop

Objective A: Continue to employ a core group of workers who are productive and can work within Covid restriction guidelines.

Objective B: Ensure all equipment is in good working condition.

Objective C: Continue seeking jobs for individuals with a variety of skill levels.

Objective D: Ensure a good working relationship with businesses through open and responsive communication.

Objective E: Maintain current contacts and jobs available to individuals with a variety of skill levels.

Objective F: Continue scheduling the required career counseling per the federal Workforce Innovations and Opportunities Act (WIOA) with the MRS Counselor.

Objective G: Continue monitoring the benefit of maintaining the 14c certificate (sub-minimum wage certificate) for the organization. Legislation exists to phase out subminimum wage employment over the next four years.

Objective H: Ensure full compliance with the Department of Labor (DOL) relative to sub-minimum wage requirements.

Objective I: Encourage workshop applicants to explore competitive community employment. New hires must receive the career counseling prior to beginning in the workshop. The Program Excellence Advocate will have more in-depth conversations with those who express interest in community employment in an effort to prepare more people for the eventual discontinuation of the 14(c) Certificate program.

Administrative

GOAL: Maintain Strong Leadership

Objective A: The Executive and County Directors will maintain positive working relationships with program supervisors in both counties by demonstrating an interest in each program, highlighting positive attributes and achievements, and maintaining accessibility.

Objective B: 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 C: 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 D: Attend relevant conferences and association meetings to build knowledge base and network of peers as Covid restrictions continue to lift.

Objective E: Hold Board of Directors meetings on a regular basis to ensure an exchange of information and utilize input from Board members. The Executive Director will continue to provide the Board with regular updates via email between meeting dates.

Objective F: Ensure the Financial Controller and Executive Director maintain open and frequent communication with each other and the Board.

Objective G: Conduct Administrative meetings as needed. Utilize email and conference calls, when possible, to promote efficiency.

Objective H: 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 I: Schedule two Joint County Meetings with all Administrative and Home/Program supervisors.

Objective J: Explore options for an Appreciation or fun day for Home and Program Supervisors when the staffing shortage is not as severe. The best option at this time is to make Joint County meetings a forum for sharing positive stories, buying lunch, and having a relaxed tone.

GOAL: Review and Update Written Organizational Materials

Objective A: Update policies and procedures to ensure all applicable standards are met. Some policies have been updated but the whole manual needs review and any updated policies need to be in the manual. Distribute updated handbook to all employees and require a signature after review.

Objective B: Maintain updated materials in the Organizational Manual.

Objective C: Continue to update all training materials and ensure the materials are utilized consistently between the two counties during the hiring/orientation process and on an annual basis.

Objective D: Utilize professional marketing services to update the agency logo, website, and general brochure for all services to better advertise Adapt.

Objective E: Utilize the Adapt newsletter, completed two times a year, to promote all goals and objectives in this plan, by increasing communication with all Stakeholders regarding all changes, issues, and processes.

Objective F: Utilize professional marketing to maximize written social media content.

GOAL: Maintain the Corporate Compliance Program

Objective A: Continue to utilize the Corporate Compliance Program and associated training materials to reflect MDHHS, SWMBH, CARF, and CMH standards, while ensuring the plan makes sense for Adapt. Update the plan as needed.

Objective B: Ensure the Corporate Compliance Officer has appropriate visibility and support to properly implement the Compliance program.

Objective C: Ensure all associated training materials are updated and easy to use, and all supervisors are aware of their ongoing training responsibilities.

Objective D: Program and Home supervisors will increase efforts to ensure employees are documenting billable services accurately and completely.

Objective E: The Program Excellence Advocate will conduct periodic internal audits of documentation to reduce liability associated with billing claims.

Objective F: Continue to implement safeguards during our billing process to avoid inaccurate billing and potential paybacks. Program supervisors must track authorized services for participants and ensure adequate units of service are available to avoid extra work for the billing department and that we are providing services for which we can bill.

Objective G: The Program Excellence Advocate will conduct frequent audits of documentation in the CLS Homes with Live-In Caregivers to reduce liability associated with billing claims and the risks associated with having one primary staff and one relief staff.

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