**ADAPT STRATEGIC PLAN – FISCAL YEAR 2023/24**

**Planning Members**:

Angela Snyder, Michelle Sandahl, Emily Rose, Tammy Jackson, and Mellisa Rice

This plan expires 9/30/2024. This plan covers Fiscal Year 2023/24.

**Mission Statement Review:**

The Strategic Planning Committee and the Board of Directors reviewed the Mission Statement. The mission statement continues to adequately reflect the purpose of Adapt.

**Review of 2022-2023 Goals**:

**Programs**

**GOAL: Continue a Strong** **In-Home Supports Program**: Progress: This program in both counties saw a decline in services provided during the year. Referrals in Branch County increased toward the end of the fiscal year. The program remains strong from the perspective of providing quality services and remaining the primary provider for CLS services in each county. The St. Joe County program continues to have high mileage reimbursement expenses due to the vast geographical area of the county. The Branch In-Home program typically breaks even or has a profit. This fiscal year, the medical costs to Adapt and this program were very high, and the program will finish the fiscal year with a large deficit.

**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 with Michigan Rehabilitation Services (MRS) providing the counseling. The Program Excellence Advocate facilitates the career counseling and will continue 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 will seek to further strengthen its relationship with the Intermediate School District (ISD) and local high schools by running the Summer Youth Program for the third consecutive year 2024. St. Joe County continues to provide a handful of people job coaching services. This program has not been financially viable historically but continues to serve Adapt’s intended population.

**GOAL: Build a Strong and Active Clubhouse Membership**: Progress: The Clubhouse has maintained a steady roster of members and consistent attendance. Outlook had its Clubhouse International survey and achieved a three-year accreditation once again. The Survey process brings experienced outsiders into the program, and they conduct an Exit meeting. This meeting was attended by an administrative member of Pines which helped build rapport and communication. Also, the relationship between Clubhouse and Pines, the primary funding source, seems to be good. Pines has had turnover, and the Clubhouse Supervisor did meet with Pines personnel and explained the program as well as some processes. There has been more turnover recently and it would be a good idea to meet with the new personnel at a future meeting.

**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. Adapt homes have passed the heightened scrutiny associated with the HCBS Rule. A great deal of work has been done to our homes over the past year – this continues to be an area of need since the homes are getting older and there is significant “wear and tear”. We have continued to make repairs and upgrades to the homes, and this will continue. Adapt continues to struggle with having an adequate number of Direct Care Workers in the homes. We need about 15-20 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 long-term vacancies in our Residential Program, Adapt closed Orion Home permanently and sold the property. The Midas Home is temporarily closed at this time. In Branch County, the Alden CLS home was closed, and the property sold due to vacancies and also a shortage of workers. In April of 2022, Adapt requested an increase in rates in order to give DCW’s a wage increase and the ability to have a higher starting wage. The CMH agencies, who worked collaboratively, agreed to an 8% wage increase for DCW’s. They did not approve an administrative increase. This increase was NOT eliminated at the start of Fiscal Year 2023/24, which is a relief. Since the Covid pandemic, the State of Michigan has passed down $3.20 worth of DCW premium pay to supplement hourly wages for DCW’s. The State has not eliminated this pay, and $.85 of it just started at the beginning of Fiscal Year 2023/24. The State continues to make DCW premium pay a “temporary” increase. We continued our Referral and Retention program, although there were adjustments to the amounts paid.

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

The Day programs have been operating consistently since the shut down during the early Covid days. There have been smaller outbreaks over the last few years. The Branch County program has had a few referrals over the last 16 months and attendance has been steady. There is another day program in the county which has made a dent in Adapt’s program, but the program has been smaller for a long period of time. The program needs to focus on its quality and infusing new ideas into the routine. The main goal is to keep our core group of program participants satisfied by continuing the routine they like and begin to attract people from the other program gradually with newer and interesting activities.

**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. Adapt plans to continue with the program at this time but will continue education on Supported Employment services to promote full community integration. The shop continues to enjoy 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 in the long-term and Adapt will need to start transitioning people into competitive employment 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. The shop continues but requires serious scrutiny after losing over $200,000 during the previous two fiscal years.

**Administrative**

**GOAL: Continue Developing 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 continues to meet four times a year. The Executive Director and Financial Controller are fully transitioned and functioning well within the current climate. The Executive Director continues to serve on the Incompass Michigan Worker’s Comp Board, the Coldwater Housing Commission, and recently joined Altrusa International, a local women’s service club. The task of identifying and recruiting new Board members requires action to prepare for eventual board membership turnover.

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. There is a Residential Supervisor in St. Joe to assist the St. Joe Director with the details of running licensed homes. This position will be reevaluated as the intent of this position has not been realized. This does not appear to be the best use of resources. There is a lot of communication between the Executive Director and the County Directors. The Branch County Director of Services takes a “lead” role with human resources related issues, assisting the St. Joe Director at times. The need for this decreased significantly last fiscal year.

**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 was redesigned. Adapt maintains a contract with 2nd Story Marketing to assist with the improvement of Adapt’s visibility in the community. Various job descriptions have been updated, though several are still in need of updating. The following organizational materials were updated during the last Strategic Plan period. A comprehensive Technology Plan is in development. The agency’s By-Laws are under review by the Board of Directors.

* All Program Manuals, including the creation of one for Outlook Clubhouse
* Board of Directors Manual
* Compliance Manual
* Medication Manual
* Policies and Procedures
* Personnel Policies
* Emergency Procedures
* SDS manual
* Diversity plan

**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. A part-time employee was hired to assist the Supervisor of the St. Joe County Day and In-Home Supports Programs with monitoring authorizations and utilization of services. This has led to improvements but there are still issues periodically and there should not be any problems. The Compliance Officer conducted periodic audits of progress notes which are required to support our billing claims.

***Goals for October 2023 through September 2024****:*

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, 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/Services**

**GOAL: Maintain High Quality In-Home Supports Services**:

**Objective A:** Utilize appropriate websites and advertising forums to find qualified candidates to interview for employment.

**Objective B:** 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 and employees are working with persons served on their goals effectively. Program Supervisors must regularly “spot check” notes submitted by employees and offer ongoing training on documentation requirements.

**Objective C:** Ensure all employees have vehicle insurance and have required emergency kits and plans in their vehicles while transporting persons served.

**Objective D:** 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 E:** Provide group CLS services as requested by the CMH agencies.

**Objective F:** Utilize a waiting list as needed, to avoid sacrificing the quality of services provided to people already being served.

**Objective G:** Investigate technology, such as MITC software, to prepare for the required use of an EVV system by the State of Michigan. Use of this technology will potentially make meeting documentation requirements and tracking time spent with the person served more efficient.

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

**Objective A:** Nurture the existing relationship between Branch ISD and Employment Resources through open and periodic communication.

**Objective B:** Ensure WIOA counseling is completed with those who currently work in the workshop and to those who apply to promote community employment.

**Objective C:** Employment Resources personnel will continue making contacts with local businesses. Seek new contacts and nurture existing relationships.

**Objective D:** 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 E:** Promote community employment more vigorously throughout the agency. Increase discussions with people served about competitive community employment. The Program Excellence Advocate has been assigned specifically to this task.

**Objective F:** The Program Supervisor will review documentation written by the job coaches regularly to ensure compliance with billing requirements.

**Objective G:** Operate the Summer Youth program in cooperation with MRS and local schools.

**Objective H:** Offer additional paid services as requested by MRS and other agencies, as appropriate.

**GOAL: Strengthen 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**: Increase staffing in accordance with International standards and within appropriate financial parameters.

**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**: Conduct robust community outreach to members.

**Objective G**: Follow Clubhouse International Standards and address recommendations from last survey.

**GOAL: Maintain Quality Residential Services:**

**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 needed.

**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 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. 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; this decision 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 and supervisors to help new employees, train them correctly, and treat them with respect and patience, in order to retain quality staff members.

**GOAL: Provide High Quality Day Services**

**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**: Survey all day program participants about the desire to participate in volunteerism in both counties. Develop volunteer opportunities accordingly.

**Objective D**: Ensure each program has the materials and resources needed for persons served.

**Objective E**: 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).

**Objective F:** Evaluate staffing levels and adjust as needed to ensure adequate support of and attention to persons served.

**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.

**Objective** **E**: Hold Board of Directors meetings on a regular basis to ensure an exchange of information and utilize input from Board members.

**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**: Promote a culture of acceptance regarding diversity amongst employees and persons served.

**GOAL: Maintain Updated Written Organizational Materials**

**Objective A**: Keep policies and procedures updated to ensure all applicable standards are met. Distribute updated materials to employees as needed.

**Objective B**: Maintain updated materials in the Organizational Manual. The manual serves as a central location to find all agency materials in a hard copy format.

**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**: Continue professional marketing services to better advertise Adapt through social media and community exposure.

**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.

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

**Objective A**: **WORKSHOP** - Determine if the workshop benefits the agency’s financial health overall and still aligns with Adapt’s Mission Statement. Currently employing approximately 20 “core workers,” many of whom are not the population we typically serve. Legislation exists to phase out subminimum wage employment over the next couple years and the shop has lost approximately $200,000 over the previous two (2) fiscal years.

**Objective B**: **WORKSHOP** - Evaluate pricing for all vendors the Workshop does jobs for and ask for needed increases according to calculations used to at least break even. The response of the vendors will have a large impact on future decisions regarding the workshop.

**Objective C**: **IN-HOME SUPPORTS** - Continue to monitor travel expenses and work with employees to reduce mileage without sacrificing the quality of the program. Employees will work with the person served on choosing outings and routes carefully in order to conserve resources. This applies primarily to the St. Joe County program which has extremely high staff expenses. An in-depth audit on travel expenses and activities of the St. Joe program will be conducted.

**Objective D**: **IN-HOME SUPPORTS** – Hire an adequate number of part-time employees and avoid full-time positions.

**Objective E**: **EMPLOYMENT RESOURCES** - Continue to streamline costs when able. Ensure timely billing of MRS services.

**Objective F**: **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 2024.

**Objective G**: **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 H**: **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 I**: **CLUBHOUSE** – Monitor the staffing level and number of program participants as we increase staffing to meet the Clubhouse International standards and recommendations from the last survey.

**Objective J**: **CLUBHOUSE** – Engage in more fundraising activities.

**Objective K**: **RESIDENTIAL** - Continue to evaluate staffing patterns and adjust accordingly to residential vacancies to ensure financial health.

**Objective L**: **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.

**Objective M**: **ALL PROGRAMS/DEPARTMENTS** – Monitor monthly spending on consumables closely. Provide county directors/supervisors with monthly spending reports.

**Objective N**: **ADMINISTRATIVE** - Utilize professional marketing services to boost the organization’s visibility in the community and assist with employee recruitment efforts to ensure adequate staffing levels.

**Objective O**: **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 P**: **ADMINISTRATIVE** - Investigate technology, such as MITC software, to prepare for the required use of an EVV system by the State of Michigan. This will improve billing for services, completion of needed documentation, accuracy with clocking in and out by the employee, and potentially decrease mileage reimbursement costs, depending on the programs Adapt purchases.

**Objective Q**: **ADMINISTRATIVE** - Monitor health care costs on a monthly basis in preparation for making decisions about Open Enrollment in May 2024.

**Objective R**: **ADMINISTRATIVE** - Monitor the workload of each Administrative employee to ensure optimum use of resources. Adjust schedules, pay rates, and positions accordingly.

**Distribution List:**

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