

### **STRATEGIC PLAN 2021 revision:**

Reason for an update:

Things have changed since the current launch of LADD's five year strategic plan in 2017. These changes include:

- 1) Recognition that infrastructure changes needed to accommodate growth are lacking in the first strategic plan
- 2) Waiting List revision: waiver to be given to immediate needs only, excluding funding for many people that have historically been our core competency—serving people that have the ability to be independent.
- 3) Managed Care: if Ohio goes to a managed care system (37 states currently are), we will be required to accurately estimate the cost of each service and define our services by outcomes achieved (vs. the current system that is based upon billable increments and reimbursement rates).

As such, we have assessed and revised the 2017 strategic plan to reflect the altered landscape.

Process:

Beginning in October 2018, The LADD Board Strategic Planning Committee was briefed by an outside consultant on his six month assessment of LADD's organizational structure and leadership. Additionally, the committee revisited LADD's finances and was briefed on managed care and the waiting list revision. The committee then met monthly to discuss and build consensus. The results are the below three year goals and objectives. Susan then brought the goals and objectives to LADD's staff leadership team, which developed timelines. The Strategic Planning Committee then met, did a last assessment and finalized revisions. Below are the results of this revision:

#### **Our vision:**

*LADD is a force that is building a better, more inclusive community and nation.*

*By 2025, we serve up to 1000 people with compassion, empathy, excellence, and efficiency, in integrated community settings through existing program expansion. And, through the successful innovation of a new technology-based service model that furthers independence and safety.*

*In the next three years, we ensure measurable improvements in the life of any person LADD supports. We are an effective and influential voice for equal opportunity in our region and a proud community partner, working so that all people with developmental disabilities have access to great services in Ohio now and into the future.*

**Goal 1: Growth:** LADD to increase the number of people served and continually improve quality of services and execution in programs that are financially sustaining and mission driven. (Amy, DJ, Brian)

**Objective 1:** Increase *net* revenue and number of people served of Academy, CCP and HLADD (Wylie, DJ)

#### **HLADD**

2019: 8.5% increase in revenue (\$2.2MM to \$2.6MM)

2020: 9% increase in (\$2.6MM to \$2.92MM) & 8% reduction of administrative costs evidenced by computerized invoicing, and documentation (as well as mileage, since paperwork will not have to be dropped off)

2021: 8.8% increase (\$ 2.92MM to \$3.32MM); expand from 3 counties to 5 counties

#### **CCP**

2019 19% increase in revenue with 109 participants in program.

2020: increase in revenue for 6.2% with 129 participants

2021: 7.5% increase in revenue with 149 participants

#### **Academy**

2019: Academy net: breaks even with all direct costs

2020: Academy net: breaks even to include indirect costs

2021: Academy net: 5% growth

#### **OTR Film Festival**

2019: Film Festival net: \$40K, create a 501(c)3 and operating agreement between LADD and the festival

2020: Film Festival net: \$50K, elect a board

2021: Film Festival net: \$100K

**Objective 2:** As we rely more on technology, we will prioritize ensuring LADD's culture retains and furthers our value of meaningful engagement grounded in love by adopting a scientifically sound training model that teaches employees to lead with empathy in day to day work. In other words, we may be tech heavy, but we maintain our family feel. (DJ)

2019: Identify models, draft a LADD specific vision and plan and identify potential funders and partners.

2020: Raise funds, launch at the end of the year

2021: pilot

**Objective 3:** Pursue excellence in programs that are mission critical but that may not have the ability to help subsidize other programs: (Amy, Wylie, DJ)

### **Health & Wellness (COO)**

2019: Launch pilot that includes wearables and measurable outcomes; continue to research and identify program models (16 people)

2020: Adjust and expand pilot

2021: be able to develop and track measurable wellness outcomes for people we support.  
*"When you receive services from LADD you are more likely to become healthier than not."*

### **Aging (Amy)**

2019: Research existing residential program models for aging adults with I/DD. Identify 3 programs for particular focus and further study. Complete VP renovation charrette and preliminary designs.

2020: Complete extensive research into 3 identified existing residential program models for implementation at VP. Based off of research, design a residential pilot program model to be implemented at VP for aging adults with I/DD. Begin fundraising.

2021: Begin implementation of new model at VP. Complete campaign, begin planning for construction.

### **Bring remote supports in- house (Wylie)**

2019: Identify a vendor

2020: Execute at FAW and Geier

2021: Expand

### **Supported Employment**

Build employment program to specialize in non-traditional job placements (i.e. small business, administrative, corporate). ( Amy)

2019: 12 placements in non-traditional jobs

2020: 15 placements in non-traditional jobs

2021: 20 placements in non-traditional jobs

## **Forever, Home**

2019: Complete Blue Ash cluster and launch tech pilot

2020: Complete the Anderson Cluster

2021: Complete Forever, Home pilot and clusters; publish initial findings

**Objective 4:** Develop a cash flow management plan and policy that includes a timeline to achieve established cash reserve benchmarks (David in 2019)

**Objective 5:** (Molly) Achieve strategic fundraising goals, prioritizing the following:

1. “Forever, Home. “ Phase II & III (\$3.6MM in 2019 & TBD)
2. Empathy Training (\$250K over three years by first part of 2020)
3. Margaret B. Geier Society growth (5% annual growth)
4. OTR International Film Festival (\$650K a year)

**Goal 2: Sustain:** LADD to ensure flawless execution of internal processes and procedures and shift to an outcomes/data driven philosophy—in anticipation of a managed care model being adopted in Ohio and to achieve measurable improvements in people’s lives. (Amy, DJ, Susan/COO)

**Objective 1:** Identify, recruit and retain a qualified and diverse workforce/leadership and Board of Directors (Susan/COO)

2019: Become fully staffed and ensure CEO and leadership team go through diversity training; benchmark diversity goals. Form a board level Equity and Inclusion Committee to oversee progress and develop a strategy.

2020: Create incentives programs and build supports for staff, achieve staff and board diversity benchmarks

2021: Meet diversity goals for staff and board

**Objective 2:** Convert to outcomes based expectations and identify operational efficiencies throughout all programs and operations that will have a measurable impact on outcomes, quality assurance and/or expenses. (Amy, DJ, COO)

2019: Establish measurable quality assurance benchmarks for 70% of the people we serve and establish benchmarks for achievement. Benchmarks to include OT, utilization and expense to revenue ratio.

2020: Build an incentive program for high performing staff

2021: Achieve quality assurance benchmarks

**Objective 3:** Mechanize consistent processes and procedures throughout LADD (Wylie)

2019: Hire a project manager, scope the project

2020: Begin mechanization

2021: Complete file mechanization—all board members to receive tablets

**Objective 4:** Timely monthly financial management reports for every LADD program (David)

2019: complete

**Goal 3: Innovate:** LADD to develop a new model of service for the current population that LADD specializes in supporting (people who have the ability to be independent) and which may not receive waivers under the new Ohio rules. This new service model must be affordable and better incentivize independence. (Wylie)

**DRAFT Objective 1:** Create follow along remote supports for people with developmental disabilities. (Wylie)

2019: Tech home established

2020: Tech home launched

2021: follow along supports launched

**DRAFT Objective 2:** Strategically position LADD as a thought leader in service development among decision makers in the region including the State of Ohio, City of Cincinnati, county boards and among families of people with developmental disabilities who are teenagers and older, funders and HUD/CMHA. (Wylie)

2019:

- 1) Partner with HCDDS and CMHA to facilitate the housing placement of 100 individuals with I/DD into affordable housing using Housing Choice Vouchers (HCV).
- 2) Develop an outreach plan for families of people with developmental disabilities who are teenagers and older. Within the plan, establish measurable goals to define success.
- 3) Partner with OOD to further employment for adults with developmental disabilities
- 4) Ensure continued excellent communication with new DODD leadership and advocate for a smart living waiver and/or modification of existing waivers to support the new service model. Learn what it takes to get a temporary waiver.

2020:

- 1) Recognized as the premier provider of CMHA for those people with I/DD who are enrolled in HCV program. Recertify current HCV holders with 85 percent success rate (255/300).
- 2) Execute and measure outreach plan for families

3) Get elected officials and department heads to tour our smart home

2021:

- 1) Partner with CMHA for the administration of an additional 100 vouchers. Recertify current HCV holders with 90 percent success rate (360/400).
- 2) If needed for affordability for the service model, advocate for a Smart Living waiver or a waiver modification to accommodate follow along tech services.

**Objective 3:** Identify through the pilot, the technology with high ROI that should be strategically utilized in other sites. (Wylie)

2019: Finalize research team

2020: Begin research

2021: Release first findings, be prepared to begin putting technology in our other Forever, Homes.

**Objective 4:** Ensure sound financial and risk management for pilot programs, especially related to any potential software development (David/Wylie)

2019: Establish a budget for the pilot, identify risks and update the board regularly throughout the project

2020: Implement and report quarterly to the Finance Committee

2021: Continue to implement and report quarterly to the Finance Committee