

**HELP FOUNDATION**

**STRATEGIC VISION 2017**

**MAY 11, 2012**

**STRATEGIC PLANNING COMMITTEE**

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## INTRODUCTION

The HELP Foundation (HELP) has been a leading provider of residential services for children and adults with intellectual and developmental disabilities (IDD) since 1965. Beginning with a few dedicated families and one children's home, HELP has grown to care for more than 500 individuals each year in 25 locations. From the beginning, HELP's founders knew they were making a difference. In 1965, people with intellectual and developmental disabilities were not expected to live long lives, nor were they afforded the opportunity to live their short lives in their own way. Through the efforts of HELP's founders and other dedicated advocates, changes have occurred in how people with all types of disabilities are viewed, cared for, and supported. The revolution in support systems has itself created new challenges as older adults who have lifelong disabilities now face the added complications of aging.

By 2011, HELP's statement of mission had evolved to *ensuring that people with IDD have the homes, environments, and opportunities to be valued members of their communities*. In serving this mission, the organization provides Residential Support Services in Cuyahoga, Lake, and Summit counties, as well as a Summer Program for Children with developmental, behavioral, and medical disabilities and an Adult Day Support Program. All programs are dedicated to providing the best quality services to consumers, based on their needs and desires, so that they might live the best life they choose.

For families who have children with intellectual and developmental disabilities, caring for their special child is a lifelong responsibility. HELP becomes an active partner with many families in supporting the needs of their loved ones. For a growing number of older consumers whose families are not as involved in their daily lives, HELP staff become their extended families. The provision of a full, compassionate life for consumers—particularly those who have no direct family contact—is a point of great professional and personal pride for all those associated with HELP.

HELP is in a strong and sustainable position which allows the organization to explore new ways to meet the changing and growing needs of those with intellectual and developmental disabilities. The organization is constantly exploring smart partnerships with local governments, other agencies, and local school districts. The organization's partnership with the Cuyahoga County Board of Developmental Disabilities is critically important to HELP's continued success. Likewise, the organization's long-term relationships with the County Boards of Lake and Summit Counties provide stability for HELP's operations in those areas. HELP has had great success with its Adult Day Support Program in Euclid, building on already strong relationships with the city and local agencies. Most recently, HELP has partnered with the Cleveland Municipal School District to host and expand the organization's Summer Program, demonstrating a remarkable collaboration between the school district, HELP, and the Cuyahoga County Board of Developmental Disabilities.

During summer 2011, board and staff leadership concluded that several converging factors required HELP to develop a new, five-year strategic plan. Chief among these converging factors were:

- The currently existing strategic plan—which had served HELP well over the past five years—was increasingly less useful as strategies had been accomplished and/or external environmental trends had changed dramatically.
- Governmental funding patterns were changing significantly, requiring the organization to think increasingly strategically regarding its sources for future financial support, including policies and practices related to reimbursement for services provided.
- Given the changing economic conditions and demographics of Northeast Ohio, it was perceived to be timely to revisit HELP’s mission and articulate more clearly a shared vision regarding the organization’s programmatic and/or geographic mission-related growth and expansion.
- There was increasing funder emphasis for all nonprofit organizations to be open to new opportunities for partnering with a variety of other organizations.

In identifying its expected outcomes of a strategic planning process, HELP board and staff leadership expressed its desire for the developed plan to be more strategic than operational, a plan that would enhance the organization’s urban identity and affirm the importance of succession planning for board and staff positions. As with many other nonprofit organizations, HELP leadership viewed the strategic planning process as an excellent vehicle for developing even stronger teamwork between board members and the organization’s staff leadership group.

## **STRATEGIC PLANNING PROCESS OVERVIEW**

HELP utilized a Critical Issues Strategic Planning Model for this important planning endeavor. Co-facilitated by consultants Dr. Susan Eagan and Dr. John Yankey, the process included a (a) Planning-To-Plan Phase, (b) Discovery/Analytic Phase, (c) Committee Deliberation Phase, and (d) Plan Development and Review Phase. A 17-person Strategic Planning Committee, chaired by HELP Board member Michael C. Brink, was established. Composition of the committee included the board president, other trustees, staff, parents of HELP's consumers, representatives of County Boards of Developmental Disabilities, and community leaders with expertise in developmental disabilities service delivery and management. The planning process began in September 2011 and concluded in May 2012.

As part of the Discovery/Analytic Phase, a Perceptual Analysis Report was developed. Four groups of individuals were contacted to elicit their perceptions regarding HELP. These groups were current and former board members, HELP staff, organizational consumers, and key community leaders. A combination of methods—electronic survey, paper survey, consumer satisfaction data analysis, and telephone interviews—was utilized to gather perceptions from 16 current and former board members, 131 staff, 144 consumers, and 8 key community leaders.

The overall perceptions gleaned from this analysis suggest that HELP is well-positioned for a continuing role as a premier service provider and partner in the field of developmental disabilities. Its track record of strong, consistent executive leadership, high quality services, dedicated and committed staff, collaboration, and financial strengths are major assets. Like other organizations, HELP faces some challenges posed by changes in the characteristics of its consumer base, revenue diversification needs, board engagement, and wage/working conditions common to the human services sector. HELP does have resources, including a substantial base of good will internally and externally, that can be tapped to address these and other critical issues

An Environmental Scan was developed to inform committee members regarding those external trends likely to impact HELP over the next five years. This 43-page scan—with information drawn from a wide-ranging variety of local and national sources—provided committee members with trend information in the following areas:

- Economic
- Social/Demographic
- Political/Legal
- Funding/Philanthropic
- Technology
- Volunteerism

In addition, some broader trends regarding nonprofit organizations were included in the Environmental Scan. All of these trends, along with the results provided in the Perceptual Analysis Report, were very beneficial to the committee's reflecting on HELP's strengths, weaknesses, opportunities, and threats; identifying the most critical issues to be addressed by the organization; and strategizing about how to maximize the opportunities afforded HELP.

During December 2011 – April 2012, the Strategic Planning Committee engaged in a series of meetings to:

- Refine HELP’s mission statement
- Develop a shared vision for the future of the organization
- Reaffirm the organization’s core values and guiding principles
- Conduct an analysis of HELP’s strengths, weaknesses, opportunities, and threats (SWOT Analysis)
- Identify the most critical strategic issues confronting the organization
- Determine strategic goals and strategies to address the critical issues

The final phase of the planning process—Plan Development and Review Phase—occurred during April - May 2012. The consultants created an initial draft of the strategic plan based upon the conclusions emerging from the committee’s many deliberations. This draft was further refined in the last meeting of the Strategic Planning Committee. Following incorporation of these final refinements, the plan was submitted to the full board for further refinement and final approval.

## **MISSION**

HELP Foundation empowers individuals with intellectual and developmental disabilities—through residential, day support, vocational, and summer education programs—to choose services and opportunities as respected and valued members of the community.

## **VISION**

HELP Foundation will continue its 45-year tradition of quality and individualized services for people with intellectual and developmental disabilities. Through innovation and collaboration, the organization will identify opportunities for sustainable growth and act as a leader in accountable, flexible and responsive services.

## **CORE VALUES**

HELP Foundation highly values:

- ...Respecting the intrinsic value and rights of individuals
- ...Demonstrating integrity and ethical behavior in all that we do
- ...Utilizing a clinically based approach to individual needs
- ... Being fiscally responsible and resourceful
- ...Setting the standard for innovation and quality of service
- ...Connecting consumers, families, and the community in which we all take part
- ...Influencing the general public regarding the importance of those we serve

## **STRATEGIC GOALS & STRATEGIES**

### **Strategic Goal 1: Strengthen HELP's current program focus.**

The Strategic Planning Committee concluded that the current program focus is strong and relevant. At the same time, the committee affirmed the importance of ongoing review to maintain and enhance quality. It also recognized that technology can be used in additional ways to improve efficiency and effectiveness.

#### **Strategies**

- 1.1 Conduct an analysis of current technology use and identify future needs.
- 1.2 Perform consistent internal compliance reviews of programs, facilities, and financial systems.
- 1.3 Develop ongoing training programs to address issues identified by compliance reviews.
- 1.4 Utilize technology to achieve greater efficiencies in service delivery monitoring and in reimbursement billing.

### **Strategic Goal 2: Evaluate the sustainability of HELP's programs and facilities.**

While acknowledging current program strengths, the committee concluded that it is important to evaluate the sustainability of programs and facilities in the context of changes in government funding and the economic environment.

#### **Strategies**

- 2.1 Conduct an analysis of existing properties functionality for current and future use.
- 2.2 Examine service delivery models at each of the 25 sites to determine appropriate expectations for service revenue and the extent to which service delivery is optimally structured.
- 2.3 Evaluate the viability of alternative revenue streams (non-medical transport, respite care, training services).

### **Strategic Goal 3: Explore and pursue appropriate opportunities for expansion.**

HELP is open to opportunities where it can add value and provide innovative services that address unmet and/or newly-emerging needs. However, it is not seeking growth for growth's sake.

#### **Strategies**

- 3.1 Conduct an analysis of the benefits, risks and financial impacts of potential growth on the agency's mission.
- 3.2 Delineate and prioritize the types of services and their geographic location that address important current or emerging needs.
- 3.3 Explore—and pursue if feasible—collaborative opportunities or joint ventures.

#### **Strategic Goal 4: Develop and implement a comprehensive communications plan for HELP.**

While well-known by organizations and individuals in the field of services for the intellectually and developmentally disabled, HELP is less well-known in the broader community. HELP seeks to increase its visibility in order to enhance its capacity to deliver high-quality services. It also seeks to share its expertise to build greater understanding of services needed by people with intellectual and developmental disabilities.

##### **Strategies**

- 4.1 Improve board and staff's understanding of the full range of HELP's services so that they can effectively promote HELP's mission and role in the community.
- 4.2 Deepen the knowledge about and visibility of HELP's programs and services with specifically identified entities, e.g., government leadership bodies, funders, school districts, and government disability agencies.
- 4.3 Educate media professionals regarding HELP's mission and expertise.
- 4.4 Position HELP as a primary source of expert analysis and information on issues related to developmental disabilities.
- 4.5 Encourage and promote the involvement of HELP's board members and staff in community events and organizations.

#### **Strategic Goal 5: Increase and diversify HELP's revenue.**

As government funding and regulations continue to change, HELP should work to diversify its revenue base to maintain sustainability as an organization and to have the flexibility to provide the mix of services which best meet consumers' needs.

##### **Strategies**

- 5.1 Diversify HELP's revenue mix, including government funding, corporate support, foundation grants, annual fund, and special events.
- 5.2 Strengthen fundraising by leveraging web-based technology.
- 5.3 Increase the focus on the planned giving program.
- 5.4 Increase board members' engagement in fundraising, including the use of "give or get" targets.

#### **Strategic Goal 6: Strengthen HELP's governance structure and operations.**

A strong and engaged board is essential for HELP to maintain its standing as a premier service provider and financially sound organization.

##### **Strategies**

- 6.1 Recruit and attract board members who are committed to HELP's mission and bring skills and perspectives that will enhance HELP's governance.
- 6.2 Revamp the orientation and ongoing education programs for board members.
- 6.3 Clarify and communicate expectations and responsibilities of board members.
- 6.4 Institute mentoring of new board members by more experienced members.

- 6.5 Create a succession plan for board leadership positions.
- 6.6 Conduct an annual evaluation of individual board members and the collective performance of the board.

**Strategic Goal 7: Enhance recruitment, retention and recognition of HELP's human resources.**

HELP is reliant upon the quality of its executive leadership, management, direct service workers and other staff to carry out its mission and maintain its standard of excellence in service delivery. It is critically important that HELP pursue a variety of human resource strategies to achieve these ends.

**Strategies**

- 7.1 Enhance training programs for staff education within the agency and continue to provide advancement opportunities.
- 7.2 Improve communication among all members of the organization.
- 7.3 Strengthen activities and incentives to reward and recognize management and staff accomplishments.
- 7.4 Create a succession plan for management positions.
- 7.5 Increase partnerships with colleges, universities and businesses.

## CONCLUSION

HELP Foundation has a storied history of making a difference in the lives of those served. **Strategic Vision 2017** positions the organization to continue this remarkable story of service. The plan provides a road map for HELP board and management over the next five years, instructing the organization how to focus its resources to build on the capacities developed since its inception. The implementation of the strategies will enable HELP to remain among the premier nonprofit organizations serving individuals with intellectual and developmental disabilities and their families.

Given the continually changing environment in which HELP operates, board and staff leadership must share the responsibility for implementing, monitoring and modifying the plan as circumstances dictate. To be most helpful, the plan should be revisited and modified annually to reflect changes that will occur in the organization's internal and external environments and input from consumers and their families. While the challenges facing the organization will be significant, opportunities abound. *Strategic Vision 2017* provides the direction and foundation for HELP to take full advantage of these opportunities as they arise.