

BLUE RIVER SERVICES, INC.

STRATEGIC PLAN

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Blue River Services, Inc.

Strategic Plan

OVERVIEW

This document sets forth a strategic plan for Blue River Services, Inc. It reviews strengths, weaknesses, threats, and opportunities; presents a series of statements in relation to the vision, mission, values, and objectives of Blue River Services, Inc.; and outlines its proposed strategies and goals. This strategic plan was developed by the Blue River Services, Inc. Board of Directors and leadership staff. The document identifies a five-year plan for supports, services and organizational development. The Board of Directors and leadership will review and update the plan as needed or annually in July.

HISTORY

Motivation to serve the community is rooted in Blue River Service's beginnings. Founded in 1959 by six families who wanted to provide education for their children after the public schools deemed them unable to be educated because of physical and mental disabilities, these families joined efforts to begin a private school, which was first housed in the Conservation Building in Palmyra, Indiana. At the end of three years, 31 students were enrolled in the five-room Crusade School.

Over the years, services grew beyond the historical mission to meet the needs of other individuals with disabilities and address barriers to independence in all aspects of life within the communities served.

As services expanded and programs evolved, so did the agency name. The agency was re-named from the Harrison County Association for Retarded Children to Harrison County Council for Retarded Citizens in 1975, Blue River Developmental Services, Inc. in 1982 and finally, Blue River Services, Inc. in 1993.

Blue River Services staff work to ensure that all services maximize the potential and quality of life of each person served. Five concepts act as guideposts -- normalization, empowerment, integration, inclusion and independence. For more than 58 years, Blue River Services has consistently expanded its services to meet the needs of people from infants to seniors and of all levels of ability – from most to least restrictive – in all areas of life. Blue River Services is “People Serving People” by providing exceptional services to those in Southern Indiana with developmental disabilities and the public. The founding families’ insatiable drive to provide *all services possible for their children’s success* and the belief that *all people are capable of learning* has inspired the phenomenal growth of Blue River Services.

In FY 2017, the agency served more than 23,000 people in 33 Southern Indiana counties.

VISION STATEMENT

Keeping in touch with one's roots is the surest way to stay on the right path in the future. With respect for the original vision and energy of the six founding families, Blue River Services will continue to identify barriers to independence and offer a continuum of care that promotes maximum personal growth and development of all people at home, work, and in the community. As barriers to independence are discovered, Blue River Services will be prepared to overcome threats and respond positively to opportunities through sustainability, accountability and input from stakeholders.

To ensure sustainability, Blue River Services will continue to diversify programs and funding sources including service fees, government assistance, sales, contract and rental revenue, investments, fundraising, charitable contributions and grants. Blue River Services will be guided by a statement of values and Code of Ethics to maintain a culture of accountability and transparency. Programs will undergo independent reviews of financial procedures, controls and policies to provide strong financial safeguards. Additionally, self-evaluation will be conducted regularly to determine effectiveness of management, service delivery, and fulfillment of community needs. Planning will be based on input of stakeholders, which will serve as a guide for goals and objectives.

MISSION STATEMENT

To assist people with disabilities in realizing maximum personal growth and development in home, work and community by providing a continuum of individualized services and supports in settings least restrictive for the needs of the individual.

As an adjunct to these services, whenever possible, Blue River will serve the similar needs of the general community by providing its services in non-segregated, community-based settings which emphasize the integrated inclusion of people with disabilities into all areas of life which are enjoyed by members of the community.

Blue River Services mission statement is the guiding force behind decisions about services and supports.

CORE VALUES

The core values that serve as roots for Blue River Services' Codes of Ethics are:

- **Respect for Each Other**
Employees and board members will exercise thoughtful considerations of the needs of others - staff persons, board members, and persons receiving services.
- **Professionalism**
Employees and board members shall maintain a high level of professionalism in their work. Among other things, professionalism requires an employee to adhere to the performance and ethical standards of their profession; work in a courteous and efficient manner, undertake continuing efforts to improve relationships with the public, coworkers, and consumers; maintain a positive attitude toward their work; and at all times represent the agency well in their dealings with the public.
- **Honesty**
All employees and board members will deal honestly with other staff persons, board members, consumers, referral sources, and community partners.
- **Trust**
All employees and board members will strive to build confidence through teamwork and open, candid communication at all levels of the organization.

AGENCY “SWOT” ANALYSIS

<p>STRENGTHS</p> <ul style="list-style-type: none"> • Qualified, long-term, dedicated staff • Reputation for meeting community needs • Compliance with regulations • Diversified services • 58 years of providing high quality programs have woven the agency into the fabric of the community • Support of local government and community 	<p>WEAKNESS</p> <ul style="list-style-type: none"> • Lack of flexibility, ability to change quickly • Lack of sub employees, use of overtime • Lack of connectivity between sites • Data analysis • Modest wage increases have been provided in 2014, 2015 and 2017, but are determined by program funding and not guaranteed.
<p>OPPORTUNITIES</p> <ul style="list-style-type: none"> • New consumers entering system • New programs • Can compete throughout state • Technology improvements • Increased focus and support of early education by government funding sources 	<p>THREATS</p> <ul style="list-style-type: none"> • Poor economy, decreasing jobs • Increasing costs • Cuts in funding • Competition from other providers • State and Federal regulations and changes to programs/funding • Indiana government privatizing services • Competition for funding sources • Instability caused by changes to personnel and priorities of government entities

STRATEGIC DIRECTION

1. Information Collection and Dissemination System

Communication is a key component in effective management, service delivery, and responsiveness to consumers. Blue River Services' management team will strive to maintain regular contact with consumer groups and facilitate communication among departments within the organization. Several methods will be used to collect information from consumer groups and disseminate information about services:

Leadership Committee

Blue River Services management will share and coordinate information through the Leadership Committee. The committee will meet once per month and membership will include departmental leaders and the President/CEO. Committee goals will be to improve communication between departments, problem solve common issues, and inform other members about services to broaden awareness and the potential for advocacy.

Subcommittees

Subcommittees of the Leadership Committee will be established as needed to address significant issues that affect several departments. Membership will include at least one department director, service managers and direct service staff, if appropriate. A list of all agency committees and committee members will be maintained by the executive assistant to the President/CEO.

Regular meetings with the CEO

Department leadership will attend regular one-on-one meetings with the President/CEO to share information, problem solve as needed and coordinate information about services.

Departmental and Manager Meetings

Departmental directors and managers will hold regular staff meetings and will be responsible for maintaining communication with employees to coordinate service delivery.

Input from Persons Served and Other Consumers

Each department will have established specific methods to facilitate communication with persons served and their family members, advocates, and guardians. The department director will be responsible for monitoring the service curriculums and regular functioning of these entities, which include but are not limited to consumer advisory councils, human rights committees, and regular contact with companies, contractors, and referral sources. Letters will be sent as needed to keep family members informed. Information will also be shared during case conferences.

Community Participation

Active involvement with local, state, and national organizations will be maintained to stay current with trends and issues related to services, keep the public informed about services, and promote the interests of persons served and Blue River Services. A complete list of staff participation in such associations and committees can be found in Appendix B of the Community-Based Planning Policy.

Communication of Strategic Plan and Other Activities

Blue River Services will seek to portray its services in an accurate manner. Information released through brochures, newsletters, annual reports the agency's website or other sources will be consistent with the results achieved through evaluation procedures and the strategic plan. The agency will use these publications and marketing tools to report on the strategic direction and achievement of the organization's objectives to the people being served, personnel, and other stakeholders. Marketing materials will preserve the dignity and rights of those served. Consents to release information will be obtained from individuals if their name or picture will be used. All information presented should use people first language and a positive image.

Legislative Issues

Membership and participation in agencies, such as the Indiana Association of Rehabilitation Facilities (INARF), Indiana Association for Home & Hospice Care (IAHHC) and Strategic Indiana Provider Network (SIPN), provide Blue River Services staff the opportunity for training, professional development and forums on government regulations and funding changes for human service programs.

Technology

The use of technology is ever-changing, but necessary to support daily operations and increase efficiency and effectiveness of service delivery to clients. The agency will continue to search for opportunities to expand upon the internal and external IT services of the organization.

Humans Resources

Blue River Services, Inc. will maintain a stable, highly qualified, and motivated workforce. The agency's objectives are to attract and retain qualified directors, managers and direct care staff, as well as ensure that all staff understands the meaning of the agency's mission and how their job contributes to achieving it.

2. Long- and Short-Term Planning

Long- (five years) and short-term (annual) planning is used to set goals within each department and for the agency as a whole. Planning and goal setting require analysis of evaluation methods and information collected.

When setting goals and objectives, the President/CEO and Department Director consider the following information:

- a. Results of the program evaluation system
- b. Satisfaction survey results
- c. Information collected from participation in community groups, state planning and input from consumer
- d. Strengths and weaknesses identified with the service
- e. Feasibility based on cost and available resources
- f. Contribution to the mission

Annual Goals and Objectives

Annual goals and objectives are established annually in June for the upcoming fiscal year with a semi-annual status report and evaluation at 6 months. The annual goals and objectives identify the accomplishments to be achieved for each department. Each goal is written to identify a measurable outcome, completion date, and the responsible party.

Five-Year Strategic Planning

The five-year strategic plan is developed by the Blue River Services, Inc. Board of Directors and leadership. The process involves developing a five-year plan for supports, services and organization development for each department and for the agency as a whole. The Board of Directors and leadership review and update the plan as needed annually.

3. Evaluation System

An essential step in remaining responsive to consumers is a self-evaluation system to determine effectiveness in management, service delivery, and meeting the needs of consumers.

Departmental Management Reviews

Each department has established a management review system that is completed at least annually to ensure that the service curriculum and licensure/accreditation requirements are timely and being implemented appropriately. Information collected from the review helps identify strengths and weaknesses in the service delivery system.

External Departmental Reviews

Many of the services provided by BRS are reviewed by external sources for accreditation, licensing, and/or funding. Most of the reviews will provide suggestions and are a resource for evaluation information. Information gained from the review process will be considered for short- and long-term planning.

Satisfaction Surveys

Information from satisfaction survey is used in the planning process when establishing annual goals and objectives for service delivery. The comments section of the satisfaction surveys will be used as a tool to help determine the expectations of the person served and of other stakeholders.

Program Evaluation

Information from the Program Evaluation system is also used in the planning process when establishing service goals. The evaluation system assesses the program's effectiveness and efficiency in meeting the goals and expectations of persons served. The SWOT report will be used to analyze the effect of the competitive environment on the services provided.

Progress Reviews

Semi-annual progress reports are completed on the annual departmental goals and objectives for the first half of the fiscal year in January. Annual progress reports are completed after the end of the fiscal year in July. Progress reports on annual departmental goals and objectives, as well as an annual review of the agency five-year Strategic Plan, provide a measurement of the accomplishments that each department and the agency as a whole have achieved during the fiscal year.

**Blue River Services, Inc.
Five-Year Strategic Plan Goals
and Action Plan 2014 – 2018**

Service Delivery

Blue River Services, Inc. will provide outstanding model services to improve the quality of life and remove barriers to independence for individuals with disabilities and their families, as well as other members of the community.

Goal 1: Gather information from individuals currently receiving services to determine any unmet needs that should be addressed.

Action Plan:

- Collect Satisfaction Survey information from consumers and their family members, guardians or advocates and referral sources annually
- Program Director will monitor service curriculums and facilitate communication with individuals served within each program

Goal 2: Expand service programs and areas as needed to meet the needs of people with disabilities and others with barriers to independence within the community

Action Plan:

- Maintain participation and membership in local forums and associations to learn more about the unmet needs of the community
- Regularly and diligently research data that may lead to new program services, considering all factors including service availability, gaps in service, facility requirements and viability of the program
- Sponsor the development and rehabilitation of safe, respectable and affordable housing in conjunction with promoting home ownership opportunities for individuals and families with low to moderate incomes, including persons with disabilities and seniors, by developing at least 26 additional rental housing units

Goal 3: Ensure continuous high quality service by providing comprehensive staff training.

Action Plan:

- Partner with other Strategic Indiana Provider Network (SIPN) members to establish a comprehensive online and classroom staff training program
- Maintain an accurate tracking system to record ongoing staff training participation that ensures all training requirements are met within established timeframes

Funding & Resource Development

Blue River Services, Inc. will maintain, improve and develop funding opportunities to ensure the organization remains financially stable.

Goal 1: Increase the Blue River Services Endowment Fund maintained by the Harrison County Community Foundation

Action Plan:

- Participate in all match incentive programs offered by the Harrison County Community Foundation
- Submit proposal for at least one endowment building grant source per year.
- Establish at least one fundraising event each year specifically designated for the Endowment Fund
- Establish minimum balance guidelines for the Endowment Fund to ensure that the fund builds annually

Goal 2: Increase financial stability of agency

Action Plan:

- Maintain best practices in financial record keeping
- Re-evaluate service programs that have experienced a consistent period of financial loss. Evaluation may result in major program changes or even elimination of program
- Expand upon financially healthy services to increase funding abilities

Goal 3: Increase agency revenue sources

Action Plan:

- Increase grant applications submitted each year
- Increase contract revenue each year
- Increase the number and financial impact of community fundraising events

Goal 4: Increase positive public awareness and visibility to generate public and private financial support

Action Plan:

- Maintain current information sheets for all programs to be used for public distribution
- Use local media and agency website to announce new programming and funding contributors
- Participate in community social events

Leadership & Administration

Blue River Services, Inc. will develop and maintain leadership and administrative practices that strengthen the agency.

Goal 1: Increase leadership development opportunities

Action Plan:

- Develop ability to offer competitive wages and benefits conducive to long-term job satisfaction and attracting and retaining quality personnel

Goal 2: Improve upon and broaden technical abilities of the agency

Action Plan:

- Work with other Strategic Indiana Provider Network (SIPN) members in the immediate area to employ a shared IT Manager
- Review current computer capabilities within the agency and develop a plan for established scheduled updates of computers and other equipment and software.
- Research the possibility of implementing cloud storage for agency electronic records
- Improve access and security of email and Internet communications
- Implement Web-based applications, such as HR recruitment screening and open enrollment processing

Goal 3: Continue to develop succession planning for leadership to carry out our mission, provide services and meet organizational goals

Action Plan:

- Knowledge transfer is a key component of the succession plan. We will ensure that core organizational processes are well documented. Whenever possible, the agency will ensure an overlap of time so the exiting employee can help orient and train the new employee
- Identify key positions within the agency and review succession options
- Implement cross training of departmental management staff when possible
- Promote from within whenever possible and all things are equal
- Test the market for other qualified applicants