

# STRATEGIC PLAN

2024

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## INTRODUCTION

This document sets forth a strategic plan that is reflective of the elements involved in operating Blue River Services, Inc. The plan was developed by the CEO and board of directors with considerations from other leadership staff, stakeholders, persons served and community partners. It is reviewed annually and updated accordingly. This plan includes a brief agency overview and its mission, vision and values that are the guiding force behind program, service and delivery choices.

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## **ABOUT BLUE RIVER SERVICES**

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 turned them away due to physical/developmental/intellectual disabilities, Blue River Services began as a private school 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 all individuals with disabilities, as well as the general public. These services address barriers to independence in all aspects of life.

Agency staff work to ensure that services maximize the potential and quality of life of each person served. Five concepts act as guideposts -- normalization, empowerment, integration, inclusion and independence. Today, the agency annually serves more than 15,000 individuals across 38 Indiana counties.

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# VISION, MISSION & VALUES

## VISION

With respect for the original vision of the six founding families, Blue River Services will continue to identify barriers to independence and offer a continuum of support that promotes maximum personal growth and development at all stages of life, level of ability, or income.

Blue River Services strives to reach its motto of “People Serving People” through exceptional services to all people, no matter the challenges they may face.

## MISSION

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 Services, Inc. will serve the similar needs of the general community by providing 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.

## VALUES

**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 for 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.

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## SWOT ANALYSIS – Strengths, Weaknesses, Opportunities, Threats

### STRENGTHS

- Staff: qualified, long-term, dedicated
- Reputation: meet community needs
- Compliance: regulations, laws, standards
- Diversified services
- Local and government support
- Established, competitive in 30 counties

### OPPORTUNITIES

- New service/program participants
- Program Development, enhancement
- Follow shifts in funding trends
- Improved technology for systems/program management
- Partnerships with local agencies
- Expand service area

### WEAKNESSES

- Little adaptability to quick change
- Employee turnover; sparsity
- Use of overtime
- Lack of connectivity between sites
- Inability to provide wage increases
- Limited marketing of services/brand

### THREATS

- Increasing costs
- Funding cuts; fewer and more competitive grants
- Competition from large, multi-state companies
- Loss of key personnel
- Changes in state/federal regulations, programs
- Privatization of services
- Pandemic/public health related shutdowns

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# STRATEGIC DIRECTION PRIORITIES

## Information Collection and Dissemination System

Communication is a key component in effective management, service delivery, and responsiveness to persons served at Blue River Services. Agency leadership strive to maintain regular contact with individual groups and facilitate communication among departments within the organization. Several methods will be used to collect information from client groups and disseminate information about services:

**Leadership Committee:** Management will share and coordinate information through the Leadership Committee. The committee will meet once per month and membership will include departmental leaders, the CEO and COO. 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 CEO.

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

**Departmental and Manager Meetings:** Program 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 Others:** 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, client 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 also will be shared during case conferences.

Additionally, quarterly evening meetings will be held at rotating locations that will be open to persons served and stakeholders. These town hall style meetings will allow Blue River Services to communicate changes within the agency and how those changes are being handled. It is also an opportunity to find out about the ever changing needs of the populations served and how Blue River is addressing those needs.

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**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 understand the meaning of the agency's mission and how their job contributes to achieving it.

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## **PERFORMANCE MEASURE PRIORITIES**

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 CEO and department director consider the following:

- Results of the program evaluation system
- Satisfaction survey results
- Information collected from participation in community groups, state planning, and input from persons served
- Strengths and weaknesses identified with the service
- Feasibility based on cost and available resources
- Contribution to the mission

### **Annual Goals and Objectives**

Annual goals and objectives are established each June for the upcoming fiscal year with semiannual status and evaluation reports every six months. The annual goals and objectives identify the outcomes 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**

A five-year strategic plan is developed by the CEO, Board of Directors and leadership staff. The process includes developing a five-year plan for supports, services and organization development for each department and for the agency as a whole. The CEO, Board of Directors and leadership staff review and update the plan as needed annually.

### **Evaluation System**

An essential step to remain responsive to persons served, a self-evaluation system determines effectiveness in management, service delivery and whether the goals and needs of persons served are met. This system includes:

#### **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.



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### **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 surveys 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 also is 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 have achieved during the fiscal year.

## FINANCIAL SUSTAINABILITY PRIORITIES

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

Resource/Funding Development	2024-2028	Staff Responsibility	Timeline
Goal 1: Increase financial stability of agency	<p>Action Plan:</p> <ul style="list-style-type: none"> <li>• Maintain best practices in financial record keeping</li> <li>• Identify opportunities to increase efficiency of operations</li> <li>• Evaluate service programs that have experienced a consistent period of financial loss (may result in major program changes or elimination of program)</li> <li>• Expand upon financially healthy services to increase funding abilities</li> </ul>	CFO, Program Directors, CEO, COO	<p>Ongoing</p> <ul style="list-style-type: none"> <li>• Annual Review of programs and services/gains and losses will take place by the end of the fiscal year on June 30.</li> </ul>
Goal 2: Research the feasibility of developing a BRS Foundation	<p>Action Plan</p> <ul style="list-style-type: none"> <li>• Research the feasibility of developing a BRS Foundation</li> <li>• Investigate the benefits and liabilities of starting a foundation</li> <li>• Determine requirements for setting up a foundation</li> </ul>	CEO, COO, Leadership Team	June 30, 2024
Goal 3: Increase agency revenue sources	<p>Action Plan</p> <ul style="list-style-type: none"> <li>• Increase grant applications submitted each year by identifying at least two new potential funders</li> <li>• Continue to build relationships with foundations</li> </ul>	Industrial Operations Director, Development Staff	June 30, 2024

	<ul style="list-style-type: none"> <li>• Increase contract revenue each year</li> <li>• Increase the number and financial impact of community fundraising events</li> </ul>		
Goal 4: Increase positive public awareness and visibility of agency to generate public and private	<p>Action Plan</p> <ul style="list-style-type: none"> <li>• Maintain current print and online information for all programs</li> <li>• Use local media, agency website and social media to share news and announce new programming and funding contributors</li> <li>• Participate in community social events</li> </ul>	Program Directors, Development Staff, COO	June 30, 2024

# WORKFORCE DEVELOPMENT PRIORITIES

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

Resource/Funding Development	2024-2028	Staff Responsibility	Timeline
Goal 1: Ensure that efforts are made to address and remove any “attitudinal barriers” within the agency.	<p>Action Plan</p> <ul style="list-style-type: none"> <li>• Ensure that policies and procedures and written practices within the H.R. department do not discriminate against all protected classes by reviewing written policies and procedures on an annual basis</li> <li>• Ensure that employment policies and practices do not discriminate against all protected classes by reviewing job descriptions for essential functions of each position.</li> </ul>	HR	June 30, 2024
Goal 2: Increase employee retention and engagement	<p>Action Plan</p> <ul style="list-style-type: none"> <li>• Work with the ERC to develop new employee engagement initiatives.</li> <li>• HR will encourage management staff with ideas to recognize staff with appreciation initiatives throughout the year, quarterly</li> </ul>	HR	June 30, 2024
Goal 3: Develop new recruiting efforts to attract talent.	<p>Action Plan</p> <ul style="list-style-type: none"> <li>• Implement at least two hiring events during the year.</li> <li>• Attempt to participate in community events to raise awareness of agency recruitment.</li> <li>• Develop career building relationships with local high schools.</li> <li>• Recruit HR intern to specifically assist in recruitment efforts.</li> <li>• Develop new recruitment efforts.</li> </ul>	HR	June 30, 2024

<p>Goal 4: Maintain and update HR Procedures Manual for department directors and managers.</p>	<p>Action Plan</p> <ul style="list-style-type: none"> <li>• Update and maintain the current manual that includes procedures for handling personnel matters.</li> <li>• Review manual with all new directors and managers within 30 days of hire or placement.</li> </ul>	<p>HR</p>	<p>June 30, 2024</p>
<p>Goal 5: Maintain an annual employee satisfaction survey to improve engagement.</p>	<p>Action Plan</p> <ul style="list-style-type: none"> <li>• Generate annual survey</li> <li>• Develop incentives to increase participation</li> <li>• Analyze results and discuss with management any organizational changes that may be needed.</li> </ul>	<p>HR</p>	<p>Objectives 1&amp;2: February 20, 2024</p> <p>Objective 3: June 30, 2024</p>
<p>Goal 6: Enhance cultural competency and inclusion within the agency.</p>	<p>Action Plan</p> <ul style="list-style-type: none"> <li>• Provide ongoing cultural competency and inclusion training for staff.</li> <li>• Advocate for cultural competency in the broader community by sharing diversity related information on the agency website and other social media.</li> <li>• Ensure that recruitment advertising reflects images of a diverse community.</li> </ul>	<p>HR</p>	<p>June 30, 2024</p>
<p>Goal 7: Develop opportunities of professional development for management staff</p>	<p>Action Plan</p> <ul style="list-style-type: none"> <li>• Continue to implement a quarterly electronic management training with the learning management system.</li> </ul>	<p>HR</p>	<p>June 30, 2024</p>

## SERVICE DELIVERY PRIORITIES

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

Resource/Funding Development	2024-2028	Staff Responsibility	Timeline
Goal 1: Gather information from individuals currently receiving services to determine any unmet needs	<p>Action Plan</p> <ul style="list-style-type: none"> <li>• Distribute satisfaction surveys to persons served, family members, guardians, advocates and referral sources annually.</li> <li>• Analyze/compile survey results and respond if needed.</li> <li>• Monitor service curriculums and facilitate communications with individuals served within each program.</li> </ul>	Program Directors. Program Development Specialist	June 30, 2024
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.	<p>Action Plan</p> <ul style="list-style-type: none"> <li>• Maintain participation and membership in local forums and associations to learn more about the unmet needs of the community.</li> <li>• Regularly and diligently research data that may lead to new program services, considering all factors, including services availability, gaps in service, facility requirements and viability of the program.</li> <li>• 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</li> </ul>	Program Directors	June 30, 2024

	50 additional rental housing units.		
Goal 3: Ensure continuous, high-quality service by providing comprehensive staff training.	<p>Action Plan</p> <ul style="list-style-type: none"> <li>• Further develop and implement online training systems and continue partnerships with other Strategic Indiana Provider Network members to maintain a comprehensive online classroom staff training program.</li> <li>• Maintain an accurate tracking system to record ongoing staff training participation that ensures all training requirements are met within established timeframes.</li> </ul>	HR, Program Mangers, Directors	June 30, 2024
Goal 4: Conduct quarterly evening “town hall” meetings	<p>Action Plan</p> <ul style="list-style-type: none"> <li>• At rotating locations conduct quarterly meetings for persons served and stakeholders.</li> </ul>	Program Directors	January 31, 2024

## OPERATIONS AND INFRASTRUCTURE PRIORITIES

Resource Funding/Development	2024-2028	Staff Responsibility	Timeline
Goal 1: Improve upon and broaden technical abilities of the agency	<p>Action Plan</p> <ul style="list-style-type: none"> <li>• Review current computer capabilities within the agency and develop a plan for established scheduled updates of computers, other equipment and software</li> <li>• Implement cloud storage for agency electronic records.</li> <li>• Improve ongoing access and security of email and Internet communications.</li> <li>• Implement Web-based applications to improve recruitment and open enrollment processing.</li> </ul>	IT Professional Team	June 30, 2024
Goal 2: Maximize efficiencies through consolidation of administrative functions	<p>Action Plan</p> <ul style="list-style-type: none"> <li>• Transition administrative functions to RBR Alliance to reduce redundancies.</li> <li>• Consolidate accounting and HR systems, policies and procedures</li> <li>• Develop IT plan for consolidations of IT infrastructure</li> <li>• Create new properties management team to streamline facility maintenance and repairs remain up to code</li> <li>• Identify areas for sharing of programmatic operations across core programs.</li> </ul>	CEO, COOs, HR, Properties Manager	June 30, 2024
Goal 3: Identify new opportunities to share	<p>Action Plan</p>	COOs, Leadership Team	June 30, 2024



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expertise resources and best practices	<ul style="list-style-type: none"><li>• Update current facility to serve as single office space for administrative staff</li><li>• Review structure of performance measures</li><li>• Work more closely with departmental counterparts to become familiar with operations and improve success and support.</li></ul>		
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*People Serving People*