

**STRATEGIC PLAN
2009-2013**

Mission and vision

Mission

It is the mission of the Carroll County Board of Developmental Disabilities program to provide quality services to those living with developmental disabilities, supporting them, and their families to unlock their potential.

Vision

We believe that individuals and/or their families can and should decide what services they want or need, select their own providers, and coordinate their own services through informed choices.

We will foster self-advocacy and community inclusion, focus on personal outcomes and respect the rights of the individual to choose and experience life options, and encourage the individual to fulfill his/her responsibilities as a citizen.

We will advocate for the individual in a variety of ways by providing support and by facilitating change across service systems in the community. We will support informed decisions of the individual regarding life-style choices and enhance the ability of the individual to achieve a sense of belonging in his or her cultural setting and community.

We will offer children with developmental delays the opportunity to learn, grow and succeed in a supportive and nurturing educational and therapeutic environment. We will include parents of children with developmental disabilities as important members of the child's team and work with them so they are able to provide for the child's educational and overall well-being.

Planning Overview

The Board started the 2009-2013 strategic plan process as a way to deal with the poor economic conditions. The Accreditation process also played a part to look at all Board services and figure out more efficient and effective ways to provide services. The following activities were included in the review process:

- ✓ Analysis of financial trends.
- ✓ Analysis of customer satisfaction surveys.
- ✓ Feedback from management meetings.
- ✓ Feedback from all staff meetings.
- ✓ Accreditation self review.
- ✓ Feedback from the Ohio Department of Developmental Disabilities (ODDD) as part of a licensure review.
- ✓ Evaluation of federal, state, and local trends.
- ✓ Feedback from Board members.

Following the review the Management Team defined the strategic goals and supporting objectives in the plan. The Management Team consists of the Superintendent, Business Manager, Director of Adult Services, SSA Director, and Director of Educational Services.

Strategic Goals

- 1. Improve the quality, efficiency, and effectiveness of Board services.**
We will continue to review services and ask for feedback from stakeholders. We will also monitor other agencies for best practices and adopt them whenever possible. We will maximize revenue in order to serve as many eligible Carroll County individuals with developmental disabilities as possible. We strive to be good stewards of funds entrusted to us by tax payers.
- 2. Increase community education and awareness of the need for Board services.**
We will utilize media and be visible at community events to educate the public on Board services. We will strive to educate the public on the value of services provided to individuals with developmental disabilities.
- 3. Strive to be more consumer driven.**
We will elicit feedback from individuals served and stakeholders on service needs. Services will be changed, created, or eliminated based on individuals needs.

DD Financial Projections

The following pages provide an overview of 5-year financial projections for Carroll County Board of DD.

Because levy income remains consistent over the years while expenses change over time, the financial projections plan an annual surplus in early years of a levy cycle, creating a carryover fund that supports the projected annual shortfalls at the end of the levy cycle. However, the 10 year operating levy was passed with the agreement of not collecting the full 3.6 mills since it was a replacement levy, the Board had a \$1.8 million reserve, and to keep tax rates the same. The Board will have to spend the reserve down to collect the full 3.6 mills if necessary.

General Assumptions Regarding Income:

Projected income is based on the information we currently know. It includes the recent reduction on the subsidy from Ohio Department of DD.

The forecast assumes the successful passage of a 1 mill 3 year school levy to be placed on the ballot November 3, 2009 with collections beginning in 2010. The forecast also assumes the passage of the 1 mill 3 year school levy in 2012.

General Assumptions Regarding Expenses:

The insurance increase is expected to be 9% in 2010 and 9% throughout 2011-2013.

The average increase costs for staffing is 4.8% each year. Staffing increased costs will have to be managed through retirements and reduction in staff.

The non-personnel costs will have a 2% annual increase.

5 Year Income & Expenditure Projections:

2009

The year 2009 began with a cash balance of \$1,868,000.00. At this point, the ODDD has already made 3 10% cuts from the county board subsidy. Though revenue from ODE will be less than projected (-\$43,500) and revenue from the levies will probably be much less due to the economy(est. -\$150,000), the carry over for 2010, should remain about the same if not increase due to the following reasons;

\$1,868,000

- Balance due from Countryview Manor, which includes four months, is brought current and remains current. + \$42,000
- Revenue from the ICFMR Alternative Residences Two, Inc. will be much higher than projected. + \$32,000

- Budget cuts at beginning of 2009 calendar year to create a balanced budget. Budget cuts included no raises for contract employees, freeze on over time, freeze on hiring full-time staff, eliminated paying for uniforms, reduction in cell phone reimbursement, and reduction in meal reimbursement.
- Carrollton Exempted Village School agreed to reimburse us for therapy services incurred this past 2008-2009 school year. + \$47,000
- The Community Facility Initiative grant for part of the HVAC replacement in the Carroll Hills School building. + \$30,000

We will probably start receiving stimulus money from the Federal Government in 2009, however at this point, we do not know how much.

Staff Expenses: \$3,181,500

Total Revenue:	\$4,050,000		
Total Expenses:	\$4,020,000	+\$30,000	\$1,898,000

2010

- Begin year with cash balance of \$1,898,000
- Enhanced Federal Medicaid Assistance Program (EFMAP) revenue and expenses not included in figures. All money generated will go to capital improvements and equipment. Therefore capital purchases are not included.
- Addition of 5 new L1 waivers generating approximately \$50,000
- School Districts reimbursing for all pre-school & school-age therapy, \$80,000
- No TPP tax of \$125,000 due to levy replacement.

Staff Expenses: \$3,334,212

Total Revenue:	\$4,018,000		
Total Expenses:	\$4,064,000	-\$46,000	\$1,852,000

2011

- Begin year with cash balance of \$1,852,000
- Eliminate paying for Early Intervention Therapy. \$25,000
- School reimb. Increase due to 2010 salary increase raises 3%=\$7,500
- Increase ICFMR rates by 3%. \$11,550

Staff Expenses: \$3,494,000

Total Revenue:	\$4,037,000		
Total Expenses:	\$4,213,000	-\$176,000	\$1,676,000

2012

- Begin year with a cash balance of \$1,676,000
- Restructuring of staff and attrition lead to reduction of 5 staff positions = \$205,000
- Due to the number of graduates at Carroll Hills School, no longer need two High School classrooms, therefore eliminating 1 Instructor and 1 Classroom Aide. Teacher retires. \$75,000
- Transportation reduced to minimum. Student transportation becomes responsibility of school districts. Continue contracting with Carroll County Transit for adult transportation. Eliminate about 75% of transportation costs. \$345,000. (\$222,000 of which is staff)
- ODDD reduction in county board subsidy and/or waiver allocation. Estimate \$350,000

Staff Expenses: \$3,135,000 (3,494,000-502,000*1.048)

Total Revenue:	\$3,687,000		
Total Expenses:	\$3,743,000	-\$56,000	\$1,620,000

2013

- Begin year with a cash balance of \$1,620,000
- Maintenance Coordinator at Carroll Hills School retires and not replaced. \$55,000
- SSA retires and not replaced. \$58,000
- ODE revenue reduced due to the graduating class and HS1 elimination. \$30,000
- 3% increase from ICFMR and schools. \$20,000

Staff Expenses: \$3,167,000

Total Revenue:	\$3,677,000		
Total Expenses:	\$3,787,000	-\$110,000	\$1,510,000

2014

- Begin year with a cash balance of \$1,510,000
- Mechanic retires and not replaced. \$55,000
- 3% increase from ICFMR and schools. \$22,000

Staff Expenses: \$3,261,000

Total Revenue:	\$3,699,000		
Total Expenses:	\$3,893,000	-\$194,000	\$1,316,000

Department Objectives

Goal #1: Improve the quality, efficiency, and effectiveness of Board services.

Administration:

- ✓ Annually assess organization structure and staffing needs, adjust as appropriate.
- ✓ Continue evaluation of services to support continuous improvement.
- ✓ Assess policies and procedures to ensure they support efficient, effective operations.
- ✓ Purchase Quality Service System (QSS) from Mid East Ohio Regional Council (MEORC). QSS piece will allow for customer feedback through National Core Indicator Individual Surveys, Quality Assurance Review, Provider Compliance Review, and Accreditation Readiness.
- ✓ Evaluate management for ways to reduce cost and increase revenue. All eligible management staff should be billing Medicaid Administrative Claiming (MAC).

Adult Services:

- ✓ Ensure appropriate staffing to provide continuous active treatment to our individuals while remaining within budget.
- ✓ Reduce absenteeism and cost of overtime. Implement automated charting and documentation capabilities with link to billing and reports readily available to supervisors (in example: Care Tracker). Automate time & attendance functions.
- ✓ Continue the process of adopting the positive intervention culture.
- ✓ The Board should refinance the workshop through applying for Level 1 Waivers. Review the possibility of eliminating Title XX billing through Level 1 Waivers.
- ✓ The Board will continue workshop services. Changes are needed with improved options for downtime and habilitation programs. There should also be a focus on useful work and investigation into possible product development.

Children Services:

- ✓ Continue the process of adopting the positive intervention culture.
- ✓ The Board should continue early intervention services since it is a great utilization of tax dollars.
- ✓ A method to bill back therapy services to local school districts, Medicaid, and third party payer should be developed.
- ✓ The Board will continue preschool services based on the need of the community.
- ✓ The Board will continue school age service as long as the school levy passes and the community desires the service.

Service & Support Administration:

- ✓ Increase use of technology to reduce paper and postage cost and maximize staff time.
- ✓ Increase Medicaid dollars for TCM.
- ✓ Establish outcome based quality.
- ✓ A cost cap is needed for Individual Options Waivers.
- ✓ The Board will maintain the floor for IOW (62) and Level 1 waivers (5). The Board has 3 Martin Waivers from the Ohio Department of Developmental Disabilities.

Building & Facilities:

- ✓ Develop long term facilities plan to ensure facilities support our services and meet the needs of the individuals we serve (maintenance, capital improvements, renovations, landscaping, seasonal care).
- ✓ Long term facilities plan should have a list identifying age of buildings, roofs, HVAC, parking lots etc. and identify a replacement plan.
- ✓ A technology plan also needs developed to ensure servers, network connections, and computers remain up to date. The technology plan should also discuss when laptops should be used in place of desktops. Evaluate effectiveness of software and update or replace gatekeeper.
- ✓ All facilities should go “green” to be more efficient and environmentally friendly.

Transportation:

- ✓ Reduce the operating costs of transportation service.
- ✓ Eliminate the need to comply with Ohio Department of Education rules.
- ✓ Investigate ways to make services meet consumer demand.

Family Support Services:

- ✓ The Board will continue FSS based on the responses from surveys. However, the Board will investigate and may implement certain restrictions on FSS funds to ensure funds are used to benefit individuals with developmental disabilities.

Fiscal:

- ✓ Maintain long term financial viability of organization while remaining consistent with rules and regulations and meeting the needs of the individuals we serve and their families.
- ✓ Provide managers with appropriate information to enable them to identify opportunities for improvement within each department (costs of services, % billing, vacancies, etc.)
- ✓ Ensure all revenues due to board are received.
- ✓ Identify or confirm that all expenses are appropriate.
- ✓ Identify and address agency wide opportunities for improved efficiency.

Agency Wide:

- ✓ Adoption of positive intervention culture.
- ✓ Reduce personnel costs.
- ✓ Assess automation of plan/documentation needs and options to improve efficiency.
- ✓ Achieve continued accreditation and licensure from ODDD, ODE, Medicaid, and ODH.
- ✓ Improve communications throughout the agency.
- ✓ Improve the operations to be as efficient and effective as possible at meeting the needs of the individuals we support and their families.
- ✓ Evaluate services/duties that may be more cost-effective as a contracted service.
- ✓ Develop culture where all employees focus on continuous improvement.
- ✓ Eliminate duplication of services.
- ✓ Management staff will attend meetings with like professionals to scan the environment for best practices.
- ✓ Each department will monitor for all eligible grants and apply to maximize tax payer dollars.

- ✓ Continue involvement with Family and Children First Council to share agency services.

Department Objectives

Goal #2: Increase community education and awareness of the need for Board services.

Adult Services:

- ✓ Offer opportunities for individuals served to be active in community through work, habilitation, and volunteer activities.

Children Services:

- ✓ Engage the community through school programs.
- ✓ Allow the public to utilize the school building for graduations, church events, basketball, etc.
- ✓ Continued use of the school for Special Olympic events for basketball games and banquets.

Administration:

- ✓ The Board will continue marketing of the program through quarterly newsletter, website, newspaper articles, and other forms of advertisement.
- ✓ Staff will be encouraged to attend community events such as the County Fair, Back to School Extravaganza, Summer Safety Kickoff, Agriculture Fair, and Information Fair.

Service & Support Administration:

- ✓ Encourage activities where individuals are engaged in community events.

Fiscal:

- ✓ Provide information and reports understandable to general public.
- ✓ Provide annual reports, annual action plan reports, and strategic plans.

Agency Wide:

- ✓ Develop presentation on DD story describing the spectrum of services from the point of view of individuals receiving services.
- ✓ Increase volunteer opportunities for the community within DD.
- ✓ Continually work on ways to improve communication both internally and externally.
- ✓ Continue to support Carroll Hills Council.
- ✓ Engage the community through annual rummage sale, spaghetti dinner, and annual Information Fair.

Department Objectives

Goals #3: Strive to be more consumer driven.

Administration:

- ✓ Purchase Quality Service System (QSS) from Mid East Ohio Regional Council (MEORC). QSS piece will allow for customer feedback through National Core Indicator Individual Surveys, Quality Assurance Review, Provider Compliance Review, and Accreditation Readiness.

Adult Services:

- ✓ Evaluate best options for day habilitation services for each individual.
- ✓ Continue the process of adopting the positive intervention culture.
- ✓ Establish a variety of community life experiences.
- ✓ Expand opportunities to enable individuals to access community activities and events that happen outside typical program day.
- ✓ Increase volunteer opportunities for individuals we serve.
- ✓ Improve the quality and effectiveness of services to remain provider of choice.
- ✓ Expand/refine services based on feedback.
- ✓ Continue to offer a variety of work options such as shredding, mowing, landscaping, janitorial, and production related contracts.

Children Services:

- ✓ Continue the process of adopting the positive intervention culture.
- ✓ Continue to exceed State standards.
- ✓ Continue working in a collaborative manner with local school districts.

Service & Support Administration:

- ✓ Continue to ensure individuals have full choice of providers.
- ✓ Improve communications with providers.
- ✓ Continue transition of eligible adults to waivers.
- ✓ Continue the process of adopting the positive intervention culture.
- ✓ Continue relationship with Carroll Housing Opportunities Incorporated (CHOI) to facilitate affordable housing options for individuals with developmental disabilities.

Building & Facilities:

- ✓ Continue to provide safe and secure facilities for individuals and staff.

Transportation:

- ✓ Participate in county wide transportation assessment.
- ✓ Refine services based on feedback from individuals served.
- ✓ Ensure flexible service options that meet needs.

Family Support Services:

- ✓ Communicate with families to devise ways to meet the needs of developmentally disabled individuals.

Fiscal:

- ✓ Maximize all revenue sources and reduce costs to ensure funding to eliminate or limit the need for waiting lists.

Agency Wide:

- ✓ Improve relationships with all providers.
- ✓ Identify gaps in service and ways to fill those gaps.