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Introduction & Purpose

The Arc of Camden County is widely recognized in Southern New Jersey as an accomplished provider and coordinator of services for individuals with disabilities. Founded in 1956, the Agency is acknowledged as having provided true “public value” to the community for more than 60 years.

Primarily serving Camden County as their targeted service area, with some programs in Atlantic, Burlington, and Gloucester counties, The Arc is governed by an eleven-member Board of Directors and a paid management staff that has an average of 25 years of experience in the field of human services. The Agency is also supported by three volunteer committees (Circle of Family and Friends, Walk-a-thon Committee, Golf Tournament Committee) which is comprised of another sixty-seven individuals.

As of February 2016, there were 165 full and part-time employees working on behalf of the mission of the Agency which reflects a 6.25% reduction from FY2015. These dedicated and highly trained employees provide a host of individual and group supports and services to approximately 700 individuals throughout the three counties.

The Arc of Camden County has multiple funding sources totaling \$10M which support the continuum of services offered by the Agency. The New Jersey Division of Developmental Disabilities is the primary funder of the organization providing 95% of the total revenue.

An intricate web of services has been designed to meet the needs of its constituency. These services include the following:

- Adult Training Services
 - Community Integration Programs
 - Special Needs Programs
- Residential Programs
 - Group Homes
 - Supervised Apartments
 - Supportive Living Programs
- Occupational Training Center
 - Job Placement
 - Supported Employment

- Extended Employment
- Vocational Evaluation & Assessment
- Work Adjustment Training
- Contract Work

The Arc of Camden County has a long history of creating and implementing strategic plans as a means of conducting business. They recognize the impact of developing a blueprint for the future and "driving" the Agency through the peaks and valleys of the economic and political environments in a deliberate manner. This strategic planning effort, however, was conducted during one of the most significant federal and state government policy changes in the past 50 years. Four major issues have the potential of impacting The Arc of Camden in a major way in the near future.

1. Medicaid Comprehensive Waiver (provider agency competition and consumer choice)
2. Transition of State funding from a contract reimbursement system to a fee-for-service mechanism
3. Potential revision of Section 14 (c) of the Fair Labor Standards Act
4. The Final Rule-Centers for Medicare and Medicaid Services

These game-changing policy decisions reinforce the need for The Arc of Camden to remain vigilant in their strategic planning efforts while involving as many stakeholders as possible to share the critical thinking process in developing a vision and road map for the future.

This strategic plan provides the most current thinking as to how to address the sustainability and accountability of The Arc of Camden County for the coming three years.

SECTION I

Approach & Process

Approach:

Every strategic planning process is unique and tailored to the specific needs and desires of the organization. Ultimately, it is designed to create a footprint to navigate the pursuing months and years as they traverse the economic and political environment. Some non-profit agencies are more prepared than others to address this comprehensive process. The Arc of Camden County proved to be an experienced entity at strategic planning and was already comfortable with “thinking strategically” about the future and designing a comprehensive approach to the identification, implementation, and evaluation of specific strategies that afford the best opportunity for future success.

The Senior Management Team inherently understood the role that The Arc of Camden County plays in the community and consistently challenged each other in identifying and representing the needs of its constituency. They were particularly proficient at being sensitive to the national trends in language, service perspective and empowerment as the process unfolded.

Their sophistication in planning created a platform for guiding decisions and actions regarding major topics such as:

- Organizational sustainability
- Growth and development
- Accountability to all stakeholders (including funding sources)
- Changes and influences in the external environment
- Retrenchment and defensive posturing/managing risk and exposure
- Initiative implementation and successful timing

To accomplish this task, KDH Enterprises, LLC was retained to create a process and framework by which the planning efforts would take place. This professional consulting firm specializes in Strategic Management with a focus on the nonprofit arena. Based locally in Central New Jersey, KDH Enterprises, LLC has a strong history of leading organizations through complex processes of self-reflection, product-line development and improved outcomes that address sustainability and growth.

It should also be noted that this engagement was the result of an award to The Arc of Camden County from the New Jersey Department of Labor and Workforce Development, which was facilitated by Act-Cess USA, Inc.

The Planning Process:

The planning process was designed to channel specific information related to the organization and its environment, through a comprehensive analysis and synthesis in order to identify strategic goals and objectives.

The planning process included the following:

- the utilization of the **Senior Management Team** as a decision-making entity before Board approval
- the review and analysis of organizational **stakeholders**
- the identification of **organizational mandates**
- the review and revision of **mission, philosophy and organizational values**
- the gathering of **environmental information** from multiple sources
- analysis and identification of **emerging strategic themes and issues**
- the establishment of **strategic areas, goals and objectives**
- a process for **evaluating and updating the strategic plan**

The Senior Management Team:

The ten members of the Senior Management Team served as the focal point for key decisions throughout the planning process. The principal of KDH Enterprises, LLC worked closely with the Team in addressing the technical issues of the plan, scheduling of planning sessions, information gathering and synthesizing critical information. The Team were also relied upon for their program specific expertise which maintained the discussions at a very high level of critical thinking.

By design, a total of ten 4-hours sessions were held with the Senior Management Team beginning in February 2016 and concluding in May 2016. The regularly scheduled meetings and commitment from the Agency was more than adequate to complete the planning process.

The Board of Directors was always acknowledged as the ultimate authority concerning the approval of the final document and that the Executive Director would serve as the intermediary for information, questions and suggestions to and from the Board.

Please refer to Appendix I for a membership list of the Senior Management Team and the Board of Directors.

Stakeholder Analysis:

Attention to stakeholder concerns is crucial to the comprehensive planning process. The success or failure of a non-profit organization is dependent upon the satisfaction of key stakeholders that have a vested interest in the operation of the company.

A stakeholder analysis is a way for the organization's decision makers and planning team to immerse themselves in the networks and politics surrounding the organization. An understanding of the relationships-actual or potential-that help define the organization's context can provide invaluable clues to identifying strategic issues and developing effective strategies (Moore, 1995; Bryson, 2004b).

Organizational Mandates:

Both informal and formal organizational mandates consist of the numerous requirements and boundaries within which the company functions and performs its mission. Typically, mandates reflect all or some of the following: laws, rules, regulations, policies and procedures, ordinances, charters, articles, contracts, licensing manuals and accreditation requirements.

Identifying the universe of mandates allows the planning participants to increase their knowledge about the agency and respond to the development of strategic initiatives from an aerial perspective.

Mission, Philosophy and Organizational Values:

A strategic planning process routinely reviews the organization's Mission Statement, Philosophy Statement and Organizational Values in an effort to further justify its existence and focus on the purpose and expertise of the Agency. Clarifying purpose can eliminate unnecessary internal conflict and should be used to channel productivity.

Environment Scanning:

Two environmental scanning processes were addressed during the engagement. The first effort was to explore the outside of the organization and to take note of political, economic, best practice or forces and trends that affect the Agency from an industry perspective or related to a specific line of business/program/service. This serves as a backdrop for further discussions pertaining to the formulation of goals and objectives.

The second technique involved the use of a S.W.O.T. Analysis (Strengths, Weaknesses, Opportunities, and Threats) based on the continuum of care clusters and their related programs

and services. This strategy resulted in a critical understanding of the emerging themes and potential strategic initiatives.

Emerging Strategic Themes and Issues (Strategic Issue Identification):

Strategic themes and issues are fundamental policy questions or challenges affecting the organization's mandates, mission and values, product or service level and mix, clients or users, cost, financing, organization or management (Bryson, 2004). These fundamental policy questions frame the discussion regarding strategic goal identification.

The following eight approaches to the identification of issues were available to the consultant/facilitator during the engagement:

- Direct and Indirect approach
- Goals approach
- Vision of Success approach
- Action-Oriented Strategy Mapping approach
- Alignment approach
- Issues-Tension approach
- Systems Analysis approach

Strategic Areas, Goals and Objectives (Strategy Formulation):

Strategies may be thought of as a pattern of purposes, policies, programs, projects, actions, decisions, or resource allocations that defines what an organization is, what it does, and why it does it. Strategy is therefore an extension of an organization's mission, forming a purpose-driven bridge between the organization and its environment (Bryson, 2004). Typically, strategies are developed to deal with strategic issues that are faced by the Agency.

The strategy formulation process may include the traditional Five-Step process of responding to very specific questions, or the Action-Oriented Strategy Mapping process. Both are valid tools used to generate specific and measurable tactics that can be assigned (with timelines) to the appropriate individual or group of staff.

Evaluation of the Plan:

Evaluating and reporting on the status of the strategic initiatives preserves the vitality of the plan. An objective assessment of the measurable goals and objectives on a regular basis creates a process of accountability within the organization. All management tiers of the company should contribute to the evaluation process with the end result going before the Board of Directors for approval.

SECTION II

Analysis and Identification of Emerging Themes & Issues

Analysis & Results:

1. Stakeholder Analysis:

A Stakeholder Analysis was conducted during the second meeting of the Senior Management Team. The numerous stakeholders were analyzed to better understand the relationship that the Agency maintains with the entity and to determine the measurement of satisfaction and quality of the relationship.

The top five Stakeholders listed in priority order:

- a. Clients (Primary Consumers)
- b. Parents & Guardians (Secondary Consumers)
- c. Employees/Staff
- d. Funding Sources
- e. Community Employers (Client/Volunteer Opportunities)

It should be noted that The Arc of Camden County has a comprehensive process for soliciting input and measuring satisfaction from most of the above stakeholders.

Observations:

- *The Agency should further develop their process of soliciting information by garnering data and information from their funding sources, as well as the employers in the community that employ their consumers.*
- *Developing a Business Advisory Board would also serve as an opportunity to include local employers in formatting specific employment options in the future.*

2. Organizational Mandates:

The following organizational mandates were identified during the initial planning sessions with the Senior Management Team:

- DDD Day Service Program Standards
- DVR Chapter 1251
- DDD Supported Employment Program Manual
- Agency Policies & Procedures
- Residential Policies & Procedures--Consumers only
- 10:44A Standards
- OTC Policy Manual
- Adult Training Services Manual
- DDD Contract Reimbursement Manual
- Corporate Compliance
- Residential Issues (Staff issues)
- Municipal Ordinances
- DCA Fire Safety Codes
- Sanitary Inspections (local department of health)
- Department of Labor Regulations re: 14C
- DDD Policy Circular Manual
- Dept of Agriculture (Food Stamps)
- School Lunch Standards
- Agency Employee Handbook
- Articles of Incorporation

- Corporate By-Laws
- Family Leave Act (N.J.S.A. 34:118-6)
- Unemployment Compensation Laws (N.J.S.A. 43:21-8)
- Wage and Hour Law (N.J.S.A. 34:11-55a21)
- Equal Employment Opportunity (New Jersey Administrative Code 13:8-1,2)
- Minimum Wage Act (29 CFR 516.4)
- Occupational Safety and Health Act (29 CFR 1903.2 (a), (1))
- Agency Insurance Coverage-Automobile, Property and Casualty, Umbrella, Directors and Officers
- IRS Reporting (Form 990)
- Annual Agency Audits
- Workers' Compensation
- Americans with Disabilities Act
- Employee Retirement Income Security Act (ERISA)
- NJ Division of consumer Affairs-NJ Charities Registration and Legalized Games of Chance Control Commission
- The Health Insurance Portability Act of 1996 (HIPPA)
- NJ Department of Community Affairs-Life Safety
- Municipal Compliances (NJ Building Code/Fire/CO)

3. Mission, Philosophy & Organizational Values:

After significant discussion by the Senior Management Team, modest changes were made to the existing Mission Statement to better reflect the "purpose" of the Agency. The revised Mission Statement is as follows:

"The Mission of The Arc of Camden County is to collaborate with and enrich the lives of individuals with disabilities and our community."

The Senior Management Team also recommended changes to the existing Philosophy Statement. The revised Philosophy Statement reads as follows:

"At The Arc of Camden County, our services enhance the lives of people with disabilities by providing opportunities to grow within the community. This is achieved by working together to discover unique strengths and talents. By identifying and breaking down barriers, we not only create opportunities for the individual, but for our community as well."

Regarding organizational values and standards, the Senior Management Team was very confident that the following documents were more than adequate to outline expectations. Therefore, no changes were suggested in this category.

- Urgency Responsiveness Ownership Communication (UROC)
- Standards of Professional Communication

- Standards of Cooperative Teamwork
- Code of Conduct (included in all job descriptions)
- Arc Principles

4. Environmental Scanning:

a. External Environmental Scan:

The Senior Management Team spent one planning session discussing the "external" environmental issues having a potential impact on the agency in the coming years. The following is an example of some of the areas of concern:

- Comprehensive Waiver--move to fee-for-services
- Demise of Section 14 (c) of the Fair Standards Act
- Final Rule-Centers for Medicare and Medicaid Services
- DVR changes in the extended employment program
- Workforce Innovation and Opportunity Act (WIOA)
- Community inclusion--non-facility based services
- Minimum wage--significant increase
- Affordable Care Act (ACA)-increasing health care costs and administrative requirements

b. Internal Environmental Scan (S.W.O.T. Analysis):

A S.W.O.T. Analysis was conducted on five clusters including Administration.

	<u>No. of Participants</u>
• Residential Services	10
• Adult Training Services	10
• Supported Employment	10
• Occupational Training	10
• Administration	<u>10</u>
	Total 50

A total of 50 duplicated individuals (the Senior Management Team) participated in the S.W.O.T. sessions which lasted approximately 3 to 4 hours each in duration. The principal of KDH Enterprises, LLC facilitated all of the sessions to ensure consistency in format and equal opportunity for input by all participants.

The raw data and information collected in each of the five internal S.W.O.T.'s is included in Appendix II.

5. Financial-Critical Performance Factors:

A review of the FY2011, 2012, 2013 and 2014 financial audits were reviewed by KDH Enterprises, LLC. The following "Critical Performance Factors" were noted:

Critical Performance Factors	FY2011	FY2012	FY2013	FY2014
Current Ratio (Current Assets/Current Liabilities)	0.84151	0.97206	1.13601	1.19385
Quick Ratio	0.80298	0.87258	1.01260	0.93200
Viability Ratio (Expendable Net Assets/L.T. Debt)	3.54081	3.89219	4.36935	5.22382
Change in Net Assets (Audit Page 4)	\$(44,846.00)	\$(413,436.00)	\$(171,288.00)	\$(13,447.00)

**Observations:*

- *Efforts should be made to continue to increase the Current Ratio in the future. The literature indicates that coverage of 1.5 is optimal and maximizes borrowing capability.*

6. Satisfaction/Expectation Surveys:

The results of the following 2014 Residential Satisfaction/Expectation Surveys, as well as the Family Surveys were reviewed by KDH Enterprises, LLC:

- Amherst Group Home
- Berlin Group Home
- Central Avenue Group Home
- Chandler Group Home
- Heathers Supervised Apartments
- Playa del Sol
- Sherwood Group Home
- Supportive Living Program
- Voorhees Group Home
- Residential Family Surveys

Observations:

- *All surveys were extremely positive and supportive of the efforts of the Agency in their attention to detail, communication, availability, etc.*

7. Outcome Management Reports:

The results of the Outcome Management reports for 2015 were reviewed by KDH Enterprises, LLC for the following programs:

- Adult Training Services
- Occupational Training Center
- Residential Services (3rd Quarter Results)
 - Amherst Group Home
 - Berlin Group Home
 - Central Ave Group Home
 - Chandler Group Home
 - Garden State Group Home
 - Heathers Supervised Apartments
 - Playa Del Sol Supervised Apartments
 - Sherwood Group Home
 - Supportive Living Program
 - Voorhees Group Home

Observations:

- *The Arc of Camden County has an excellent process of measuring outcomes throughout all of its programs and services. The outcomes are succinct, measurable and appropriate to the nature of the service/program.*

Emerging Themes and Issues:

Input from the following sources was utilized to identify emerging strategic themes and issues that are critical to the future direction of The Arc of Camden County.

- Stakeholder Analysis
- Organizational Mandates
- Mission Statement, Philosophy Statement, Organizational Values
- External Environmental Scanning
- Internal Environmental Scanning-S.W.O.T. Analysis
- Meetings with the Senior Management Team

Emerging Themes and Issues

1.	TECHNOLOGY: How do we best use technology to improve internal operations?
2.	TRAINING: How do we better prepare our employees and equip them with the proper skills to best serve our constituency in the future fee-for-service and employment paradigm?
3.	MARKETING: How do we maximize our external marketing efforts to communicate the full essence of our mission and uniqueness of our present and future services?

4.	STAFFING: How do we improve the employee hiring process to better accommodate vacancies throughout the organization?
5.	PROGRAM EXPANSION/GROWTH: How do we grow and expand our continuum of services to include sustainable funding sources?
6.	STRUCTURE CHANGE: How do we adjust our administrative structure to best accommodate the movement towards "consumer employment" within a fee-for-service model?
7.	STAKEHOLDER SATISFACTION-DEVELOPMENT: How do we better analyze the expectations of our stakeholders and implement strategies to include their input into the mission and vision of the agency?
8.	FISCAL POSITION: How do we plan for, evaluate, and establish capital renewal and discretionary income throughout the organization that meets our current and future needs?

SECTION III

Strategy Formulation and the Establishment of Strategic Areas, Goals and Objectives

KDH Enterprises, LLC utilized two different academic strategies to identify strategic direction. The direct approach supported the identification of strategic issues after review of the organizational mandates, mission statement, organizational values and external environmental scanning information. The goals approach allowed for a continuous focus on the critical issues facing The Arc of Camden County that were clearly articulated at the onset of the planning process and represented intentional decision-making around projects and efforts already in motion. These two strategies made it possible to craft the themes and issues required for further synthesis into discrete goals and objectives.

All goals and objectives for 2016 to 2019 are captured within one of the eight Strategic Areas:

- Strategic Area I:** Technology
- Strategic Area II:** Training
- Strategic Area III:** Marketing
- Strategic Area IV:** Staffing
- Strategic Area V:** Program Expansion/Growth
- Strategic Area VI:** Structure Change
- Strategic Area VII:** Stakeholder Satisfaction--Development
- Strategic Area VIII:** Fiscal Position

Strategic Area I: Technology

Goal #1: Provide an appropriate number and types of computer devices needed for employee training and data collection within Footholds.

Number	Objective(s)	Responsible Entity	Year 1, 2, 3
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I/G1-1	Conduct an assessment of hardware needs to address full implementation of Foothold Technology software throughout the Agency.	Senior Management	Year 1
I/G1-2	Input all client data, including individual goals and objectives, into the Foothold software for 100% of the consumers.	Senior Management	Year 1
I/G1-3	Develop plan to implement billing module to Molina for Medicaid reimbursement.	Senior Management	Year 2

Goal #2: Use technology to address the tracking of consumers during the day as they transition from services, activities and locations.

Number	Objective(s)	Responsible Entity	Year 1, 2, 3
I/G2-1	Investigate hardware and software options that will address the daily movement of consumers in OTC and ATC throughout the continuum of care offered by the Agency. Present options to the Senior Management for discussion.	Assistant Executive Director	Year 2

Strategic Area II: Training

Goal #1: Increase the number of employees that will be trained in the Boggs Center job coaching series. Complete training before fee-for-service is implemented.

Number	Objective(s)	Responsible Entity	Year 1, 2, 3
II/G1-1	Identify 6 existing staff per year from the Adult Training Center staff to complete the training.	Director of Adult Training Services	Year 1, 2, 3

Goal #2: To review and identify systems pertaining to on-boarding that enhances the preparation of new employees to their position and to the Agency.

Number	Objective(s)	Responsible Entity	Year 1, 2, 3
II/G2-1	Develop a plan of action as to how the Agency will fully utilize the College of Direct Supports to support staff training needs.	Senior Management	Year 1

Goal #3: Ensure that all on-going employee training activities are fully documented in the personnel files.

Number	Objective(s)	Responsible Entity	Year 1, 2, 3
II/G3-1	Identify the specific training requirements per Agency service area (Division).	Department Directors	Year 1
II/G3-2	Develop and implement a protocol for the recording and documentation of on-going training (Master Training Record). Submit protocol to the Executive Director for approval.	Director of Human Resources	Year 1

Strategic Area III: Marketing

Goal #1: Market growth opportunities and vacancies to the network of Support Coordinators.

Number	Objective(s)	Responsible Entity	Year 1, 2, 3
III/G1-1	Develop a brochure/marketing material for residential services. Submit final draft to the Executive Director for approval.	Director of Residential Services Sr. Management	Year 1

III/G1-2	Conduct a direct mailing and individual communication to all Support Coordinators within the Agency service delivery area. Written and verbal communication should take place on a regular and scheduled basis.	Director of Residential Services Director of Adult Training	Year 3
III/G1-3	Attend 90% of all sponsored opportunities for direct communication and solicitation with referral entities.	Senior Management	Year 1, 2, 3

Goal #2: Address the utilization of social media to expand Agency visibility, recognition and support.

Number	Objective(s)	Responsible Entity	Year 1, 2, 3
III/G2-1	Identify social media applications that will maximize communication with the community, in addition to potential consumers and employees.	Coordinator of Supported Employment Admin. Assistant for Supported Employment	Year 2
III/G2-2	Senior Management to meet quarterly to discuss social media utilization and status.	Senior Management	Year 2, 3

Strategic Area IV: Staffing

Goal #1: Improve the system of hiring employees and filling vacancies in the residences.

Number	Objective(s)	Responsible Entity	Year 1, 2, 3
IV/G1-1	Develop and track metrics that improve the efficiency and financial sustainability of residential services. Submit results to the Executive Director on a monthly basis.	Director of Residential Services Director of Human Resources	Year 2, 3

Strategic Area V: Program Expansion/Growth

Goal #1: Expand residential services with a particular emphasis on the medical group home model.

Number	Objective(s)	Responsible Entity	Year 1, 2, 3
V/G1-1	Open one additional 4 person group home in the next 3 years.	Director of Residential Services	Year 2, 3
V/G1-2	Determine financial model related to the DDD funding tiers to establish minimum classification of consumers to support residential program financial sustainability.	Chief Financial Officer	Year 2
V/G1-3	Identify a more reliable staffing resource for CNA's, HHA's, etc.	Director of Residential Services Director of Human Resources	Year 1, 2

Goal #2: Identify financing options for new construction to support residential expansion.

Number	Objective(s)	Responsible Entity	Year 1, 2, 3
V/G2-1	Identify HMFA and NJDCA resources to support change of one existing two-story home to one single story home.	Director of Residential Services Chief Financial Officer	Year 1
V/G2-2	Identify HMFA and NJDCA resources to support the expansion of a 4 person medical group home.	Director of Residential Services Chief Financial Officer	Year 2, 3

Goal #3: To increase the number of consumers served in Adult Training.

Number	Objective(s)	Responsible Entity	Year 1, 2, 3
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V/G3-1	Establish individual relationships with Support Coordinators in an effort to increase enrollment 3-5% per year from a baseline of 187.	Director of Adult Training	Year 1, 2, 3
V/G3-2	Attend 90% of all sponsored opportunities for direct communication and solicitation with referral entities.	Director of Adult Training	Year 1, 2, 3
V/G3-3	Develop a marking strategy, including written materials, to support solicitation process for the increase of enrollment in Adult Training.	Director of Adult Training	Year 1, 2, 3

Goal #4: To develop a micro business that supports the mission of the Agency and employs consumers.

Number	Objective(s)	Responsible Entity	Year 1, 2, 3
V/G4-1	Investigate franchise opportunities of SE and present options to the Executive Director for decision-making.	Coordinator of Supported Employment	Year 2
V/G4-2	Develop a formal business plan to support the micro business franchise.	Director of OTC Chief Financial Officer	Year 3

Strategic Area VI: Structure Change

Goal #1: Identify, document and train the "Agency Paths to Employment" from Adult Training Services , to the Occupational Training Center, to Supported Employment.

Number	Objective(s)	Responsible Entity	Year 1, 2, 3
VI/G1-1	Maximize finances by identifying day habilitation opportunities within the employment process.	Chief Financial Officer Sr. Management	Year 2

Goal #2: Develop a partnership with a temporary placement agency to support consumer supported employment needs.

Number	Objective(s)	Responsible Entity	Year 1, 2, 3
VI/G2-1	Identify a minimum of three options for partnership and present financial analysis and outline for a potential business plan to the Executive Director.	Coordinator of Supported Employment	Year 2

Strategic Area VII: Stakeholder Satisfaction--Development

Goal #1: Increase consumer satisfaction by improving coordination between the rehab counselors and workshop supervisors.

Number	Objective(s)	Responsible Entity	Year 1, 2, 3
VII/G1-1	Train all staff on the "Employment First" expectations (approx. 10 employees).	Director of OTC	Year 1
VII/G1-2	Organize a case conference process for regular review of client status of job placement, hurdles to placement, satisfaction, etc. Review 100% of all consumers (137 per year).	Coordinator of Rehabilitation	Year 1, 2, 3

Goal #2: Individual Extended Employment Plans are specific to the consumer's employment needs with expectations of job placement.

Number	Objective(s)	Responsible Entity	Year 1, 2, 3
VII/G2-1	Place one consumer per month into a paid job of their preference.	Coordinator of Rehabilitation	Year 1, 2, 3

Goal #3: Establish a Business Advisory Board that supports the stimulation of employment related activities in the community.

Number	Objective(s)	Responsible Entity	Year 1, 2, 3
VII/G3-1	Identify a minimum of 4 community members to participate on the Board. Submit names to the Executive Director for approval.	Coordinator of Supported Employment	Year 1
VII/G3-2	Hold 2 meetings per year of the Business Advisory Board.	Coordinator of Supported Employment	Year 2, 3

Strategic Area VIII: Fiscal Position

Goal #1: To address all capital replacement needs throughout the Agency including facilities, vehicles, etc.

Number	Objective(s)	Responsible Entity	Year 1, 2, 3
VIII/G1-1	Develop a capital reserve fund as a result of the fee-for-service funding process. Get approval from the Executive Director for the financial model.	Chief Financial Officer	Year 2
VIII/G1-2	Forecast capital replacement needs for the agency and create annual budget for approval.	Chief Financial Officer Sr. Management Team	Year 2, 3

Goal #2: Determine program/service capacity through consumer assessment of needs and desires.

Number	Objective(s)	Responsible Entity	Year 1, 2, 3
VIII/G2-1	Assess each individual consumer to determine what array of services they want and what will benefit them. Conduct 200 assessments (100 per year).	Director of Adult Training Services	Year 1, 2

VIII/G2-2	Following the completion of the 200 consumer assessments, create a financial model to assist in identifying cost effectiveness and sustainability.	Chief Financial Officer Director of Adult Training Services	Year 2, 3
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Given the significant information gathered during the strategic planning process, and the need to set "reasonable and attainable" goal achievement for the next three years, the Strategic Planning Committee determined that the following goals would be set aside for future consideration. In the event that additional goals are required during the implementation process, these goal areas would be considered "high priority" and only implemented at the direction of the Executive Director or Board of Directors.

1. **Technology:**
 - Move Agency to a paperless environment as a "going green" initiative.

2. **Marketing:**
 - Develop a business plan that determines the feasibility of leveraging systems design and knowledge of SE, OTC, and rehab technology. Sell consulting services/support to other agencies.

3. **Marketing:**
 - Create a marketing budget for the Agency.

4. **Staffing:**
 - Increase administrative support to address expanded administrative needs
Establish and fund a new position where the responsibilities are 50% assigned to Human Resources and 50% to Marketing.

5. **Staffing:**
 - Create a financial differential/incentive upon new hire for education and years of related experience.

6. **Staffing:**
 - Align with local colleges and universities to identify potential part-time and full-time employees.

7. **Staffing:**
 - Develop a "Succession Planning" process.

8. **Program Expansion/Growth:**

- Develop a way to support consumer therapeutic needs with physical therapists, occupational therapists and speech pathologists. This is most likely an "outsourced" prospect at the beginning as opposed to hiring therapists directly as Agency employees.
9. **Structure Change:**
- Redefine employability by looking at day programming needs when consumers are not pursuing employment options.
 - Develop more community based opportunities for those consumers with higher skill sets.
10. **Stakeholder Satisfaction--Development:**
- Solicit private donations of homes to serve as potential group homes/apartments for consumer living.
 - Design an incentive system that reinforces positive work/employment efforts for consumers.
 - Increase revenues from the golf and walk-a-thon special events.
 - Organize a "Dinner Gala" for the organization.
11. **Fiscal Position:**
- Analyze how the agency uses space based on efficiency.

SECTION IV

Evaluation and Updating the Plan

The acceptance of the strategic plan by the Board of Directors signals the beginning of the implementation of the specific goals and objectives identified within the eight Strategic Areas. The implementation phase requires each objective to be broken down into specific "tactics" and assigned a timeline and responsible entity for completion within the 3-year strategic plan period. Once accomplished, funding for these objectives gets incorporated into the financial planning process of the agency.

The responsible entity for a specific tactic (or multiple individuals sharing a tactic) leads the endeavor until completion. Although the specific steps of accountability and evaluation were not discussed in full during the planning engagement, it will be incumbent upon the Senior Management team to design and implement an evaluation process acceptable to the organization. In general, updates regarding all applicable goals, objectives and tactics should be addressed during weekly or monthly staff meetings. Status updates should be provided to the Executive Director on a quarterly basis, at a minimum.

The full Board of Directors should receive updates during scheduled Board meeting (when necessary) and an annual summary should be included in an Annual Management Report.

It should be noted that the strategic plan reflects the best alternatives and priorities at the time of the planning process and should be viewed as a document that is not "written in stone." The process outlined above suggests a framework for addressing possible changes and adaptations to the timelines and plan in order to remain "fluid" and responsive to the changing environment. Opportunities may present themselves during the 3-year cycle that will require modifications and realignment based on the mission, philosophy, and values of the organization, as well as funding opportunities.

The next strategic planning cycle should begin a minimum of six months prior to the end of this document.

Strategic Plan Start Date: July 1, 2016
Strategic Plan End Date: June 30, 2019

New "Planning" Start Date: January 1, 2019

Appendix I

Senior Management Team:

Margaret Englebert, Executive Director
Daniel Ravasio, Assistant Executive Director
Thomas Mannion, Chief Financial Officer
Jo-Ann Rusnak, Director of Adult Training Services
Mary Sharkey, Director of Residential Services
Dawn Parker, Director of Human Resources
Magnus Cassell, Quality Assurance Specialist
Julie Walz, Coordinator of Supported Employment
Diana Boltz, Coordinator of Vocational Rehabilitation
June Kushner, Office Manager
Joseph Conroy, Production Manager

Board of Directors:

Frank Vesci, President
Law Enforcement
Don Foulk, CPA, Vice President
Certified Public Accountant
Ruthmarie Weinberg, Secretary
Retired
Edward Sincavage, Treasurer
Certified Public Accountant
James Classick, Past President
Engineer
Susan Jacobucci, Esq.
Township Manager
Andres Zonay
Retired
Daniel Molloie
Self Advocate
Barbara Coppens
Advocate Assistant/DRNJ
Alfred Loatman
Sr. Member Services Representative
Amanda O'Keefe
Law Student

Appendix II

S.W.O.T. Analysis (Strengths, Weaknesses, Opportunities, & Threats)

The following S.W.O.T.'s were conducted during the planning process and are included in their entirety:

1. Residential Services
2. Adult Training Services
3. Supported Employment
4. Occupational Training
5. Administration

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S.W.O.T. Analysis

Date: March 7, 2016

Topic: Residential Services (10 Participants)

Supported living	16
Supervised Apts.	12, 4
Group homes	7 homes (39 los.) (2 are medical group homes)
LPN as manager and asst. manager	

Strengths:

- how our residents present themselves in the community (grooming, etc.)
- staff take ownership of their program (particularly the managers.... family parties, dinners, etc.)
- staff ability to navigate difficult issues.... educating consumers to make good decisions and choices (medications, food)
- administration gives staff the ability to make program decisions...staff feel invested
- administration does not diminish their positions. We tell them they are important...miracle workers
- practice "team" processes (QA has positive impact and relationship)
- residential staff don't perceive this to be a job...they enjoy their work, involved
- staff longevity
- little turnover with management staff
- stable scheduling of shifts allows staff to plan better for child care and school
- consumers know the staff schedule which is reassuring (comfort factors)
- who's homes are they? The residence belongs to the consumers.... privacy issues

- agency programs work well together...celebrate birthdays
- respond well in emergencies.... houses take care of one another
- maturity of the management staff
- case management on staff, along with QA
- we are all in this together
- foster individual relationships between the staff and the consumers (relationship with boundaries)
- acknowledge that some consumers and staff may not get along and accommodate changes
- community welcomes them into that community activities
- we are good neighbors
- balance of activities for individuals with special needs v. community
- houses have internet access
- positive feedback from parents/guardians
- continuum of residential services
- great reputation with funding agencies
- excellent response from licensing (and results)
- solutions get resolved very, very fast
- grievances don't seem to have to go to the highest level of resolution
- agency does not have the middle management positions
- open door policy with all administrators
- call the agency and ask for Peg...they don't ask for your name
- looking for solutions not to blame
- meetings with managers every two weeks
- culture of no hands on, no abuse
- staff comfortable with HR... very welcoming

Weaknesses:

- longevity of staff works against us.
- no middle management is a weakness. limits opportunities for staff
- communication with OTC staff or day program staff re: medications
- not enough balance with work and personal life for staff (mostly economic issues)
- first real job for many of the staff, they don't know how to work in the real work environment
- "teamwork" works against us.... people say yes and push themselves
- not enough support staff. HR, fiscal, admin assistants
- no person dedicated to technology, or fund raising
- low staff salaries
- on-going training, staff availability for training
- many staff have other jobs
- shadowing for a week may not be long enough
- difficult filling vacancies, finding people to apply
- majority of staff have children

- staff knowledge of technology
- EMR system and technology comfort of staff
- homes/facilities are getting older
- no real solutions for capital replacement needs

Opportunities:

- flexible scheduling for entry level staff
- use of computers for training. College of Direct Supports
- communication email capability with all staff through Foothold
- additional medical homes depending on the money
- pool of 500-600 families, consumers can make their own decisions
- possibly consider financing for expansion
- private donations of homes/property
- developing protocols/process to efficiently fill vacancies (staffing and consumers)
- Marketing
- More effective use of the web site
- Use of social media-different per program
- Change janitorial and preventive maintenance
- Capital renewal
- part time individual.... half HR, half marketing
- create differential upon hire for education, experience, etc.

Threats:

- fee for service. tiers unknown (possible \$230K gap)
- NJCAT
- The CMS Final Rule
- New DDD training requirements
- minimum wage bill
- WAWA, Wal Mart paying higher
- health care coverage for clients...particularly specialists
- health care costs (just under 100 users limits health care records information)
- law suits (time, effort, etc.)
- Support Coordinators
- funding gap at fee for service
- consumer vacancies and no funding

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S.W.O.T. Analysis

Date: March 28, 2016

**Topic: Adult Training Services
(10 Participants)**

Strengths

- Customer service
- Individualizing programs
- Very dedicated staff that care about the individuals we serve
- longevity of staff
- Transportation system
- Most staff not dedicated to transportation v. other programs
- Already set up doing a 6-hour day
- Knowledge that the staff have regarding the clients
- 160 clients, dietary, behavioral ...ability to understand complex needs
- Natural redundant systems
- Communicate very well, between programs, parents/guardians, etc.
- Adequate space.... sometime too much space
- Space is clean
- Staff and consumers have a say in decor
- Renovated outside of the Atco Garvin location
- Positive communication between residential and Adult Training
- Staff are open to exchanges of programs for clients and staff
- Effective retirement options for consumers
- Allow flexibility in program placement

Weaknesses:

- Lack of technology.... staff not very comfortable
- Staffing: meet ratios but run very tight
- Some staff have accumulated large amounts of vacation due to longevity with the agency
- 75% LOS normal
- Switch to fee-for-service LOS will be an issue
- Communication not always perfect
- Need more referrals, presently rely on the State
- Cannot handle severely medical situations, or extremely aggressive individuals
- Longevity of staff
- Not many opportunities to advance
- meaningful community opportunities

Opportunities:

- Fee-for-service--increased revenue, different services, reimbursed for services we already do
- Opportunity to bring more people in
- Opportunity to redefine employability (day programming for days not pursuing employment)
- more community-based opportunities for the higher functioning (less structured or supported opportunities)

- Need for additional vehicles
- training of staff--job coaching
- hiring additional staff
- Align with colleges for part-time work
- Technology: notebooks, lap tops, etc. (moving away from paper)
- Pre-voc ...job sampling (where is it placed...SE or ATS) --have businesses to accommodate the sampling

Threats:

- Commensurate wage. Negative impact to the consumers
- Minimum wage in general (75% of staff below \$15/hour)
- Fee-for-service...cash flow and billing
- Other new agencies coming into NJ
- HMO managed care system
- The Final Rule

The Arc of Camden County

S.W.O.T. Analysis

Date: March 28, 2016

**Topic: Supported Employment
(10 Participants)**

5 Supported Employment Coaches (2 perform job development role)

Strengths:

- Getting consumers jobs
- Employers are sensitive and flexible to benefit restrictions
- Work well as a team--each job coach has a case load
- standard case load -20-25 low 15 high 30
- Good relationship with DDD and DVR
- Camden, Gloucester., Burl DVR referrals
- Providing a good amount of services under Easter Seals
- Good relationship with Support Coordinators (without marketing)
- Competitors: JFCS, Abilities Solutions, Goodwill
- Provide services to a wide range of difficult consumers
- Have lap tops, cell phones and tablets--staff are relatively comfortable
- Longevity of staff (employment specialists stay a couple of years)
- Willing to assist outside of the job (clothing for job...)
- Provide services on week-ends and evenings (including 3rd shift)
- Providing DDD long-term follow along services and supports
- Great administrative support, particularly with billing

- Job coach staff have a good understanding of employment needs, desires, job match, etc.
- Identifying consumer strengths, identifying support needs, linking to employment
- Good at job assessment
- Base of cooperative employers within the community
- Creativity
- Cooperative relationship between SE and Sheltered Workshop
- Adaptive devices
- Effective job club
- Effective community tours, job shadowing
- SE service can be requested from anyone... "job services on demand"
- Never established a waiting list

Weaknesses:

- Do not effectively focus on the efficient use of hours particularly from DVR
- Not good at documentation, tracking
- Not using Footholds--need tracking capacity and report capacity
- Large number of referrals from DVR...some clients drift off
- Large Caseload impacts
- Paperwork requirements with DDD follow along is massive.... constantly changing
- Misperception of follow-along services---DDD misunderstanding
- Job development is not bold enough
- Global perspective (staff)
- Transportation time not billed for (coaches getting reimbursed)
- Requirements for documentation not clear from funding sources...narrative v. technical
- Movement from current document system to Footholds (duplicative systems)
- Footholds has functional limitations
- Looking at SE from a medical model is a problem (Footholds)

Opportunities:

- Drive the process with Footholds for data and accountability
- Other referral sources-CBVI (authorized to work with them but very little output)-training issue
- Other referral source--Veterans Administration
- Become much more effective using OTC as a referral source
- Other referral source--Care Management Organizations
- Career and Disability Services Depts. at Universities--Rutgers Camden, Camden County College
- Setting up micro businesses where we employ consumers
- More... customized employment as a service--not the place and train model... "discovery"
- Serve approx. 170 clients
- Create a business advisory board/committee
- More sophisticated use of data and analysis
- Black and white expectations by employment coaches translated into money

- Look carefully at staffing and look more deeply at the use of part-time employees
 - hourly rate \$16/hour
 - internal movement for DSP's
 - internal marketing

Threats:

- Fee-for-Services
- Footholds
- Lack of service clarity from DDD and DVR (varies from counselor to counselor)
- Competitors
- Minimum wage increasing
- Funding from DVR
- Employers want employees to can do multiple tasks
- Seasonal hiring by employers
- DDD sending consumers to DVR first (consumers don't always want it)
- Opinions and reliability of one particular DVR counselor can have significant repercussions

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S.W.O.T. Analysis

Date: April 11, 2016

**Topic: Occupational Training
(10 Participants)**

Number of Consumers: 137 (with a 20% absentee rate)

Locations: 1

Contract Income: \$400,000.00

DVRS--Extended employment

Strengths:

- good at planning
- schedule things
- approx. 15-20 contracts per year
- \$400K income
- Very good at safety
- Sharp Cert. DOL designation (less than 10% have designation in NJ)
- Safety, health, awareness recognition program
- Diverse set of jobs (complex to simple)
- Can take complex jobs and make it doable--job set-up skills
- Ability to meet deadlines
- doing this since 1975

- multi-tasking
- Stable staff structure
- required to have a 1:20 staff ratio
- dedicated staff
- lowest ranking staff member 10 years
- Staff only provide supervision, very good teachers
- leadership of front office, get support of challenging issues
- level of respect and proper mind-set that staff have.... extremely respectful
- serve all disabilities
- staff are strong in understanding re: "real work"
- location is on a major bus route
- Contracted transportation system is positive
- Referrals from DVR is positive
- relationship between OTC and Supported Employment
- ability to use all layers of staff to resolve immediate needs--appreciation of roles
- Ability to trouble shoot and figure things out
- Not afraid to make mistakes...build on failures
- tremendous value to our contract customers...adds value
- viewed as a business partner
- dedication of the client work force

Weaknesses:

- Small work space--5-6K square feet
- insufficient contract work at times
- Work force is underutilized
- could use more staff (work shop staff)
- keeping track of piece-rate earnings
- disjointed system of information gathering...lots of duplication
- everything is hand written during the day
- fallen short on linking OTC to employment
- IEDP's lack the focus of moving clients to employment
- transportation
- consumers get too comfortable coming to OTC
- Don't do work adjustment training any longer
- job club does not drive other things....
- Funding source has altered the transition into employment
- should be doing a better job at training staff
- need to better analyze the finances/true cost of doing business
- lack of security--very wide-open space
- location...proximity to a main street

Opportunities:

- bar coding-tracking consumers going to different jobs

- create good worker of the month/week---use U Rock cards--can nominate each other
- Identify potential in consumers to move to employment from OTC (maybe challenge counselors to have more of a requirement to place to employment) ...start with one person at a time--develop internal fluency
- create a vibrant placement system
- look at job descriptions...job requirements (critical analysis)
- use day habilitation to fill in on days that the consumer is not employed
- improve technology (maybe foot holds) to support data collection
- marketing job set-up expertise (package and sell)
- Create a well thought out plan to reduce OTC and increase employment--pass through program....maybe put the agency in a better position to be able to pay minimum wage
- create micro businesses in the community
- develop partnership with a temp agency where consumers can go
- structure fee-for-services options at this location so that it becomes easier to satisfy the complete day needs of a consumer
- analyze how we use space
- become a temp agency

Threats:

- closing of the workshops
- sub minimum wage issue (14C)
- DDD power brokers
- transportation costs
- losing funding
- some companies don't know the Arc and what we do
- manufacturing is being outsourced out of the country; that makes our service less relevant.

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S.W.O.T. Analysis

Date: April 18, 2016

**Topic: Administration
(10 Participants)**

Strengths:

- Make it work attitude
- Years of knowledge
- most have worked their way through the ranks (direct care experience)
- very supportive of staff
- open door policy
- responsiveness to issues

- consumer centeredness
- mission focused
- don't allow barriers to get in the way
- creative
- creation of U Rock
- centrally located
- manage with a small group of people
- accessibility
- staff are allowed to experiment within reason (accomplish tasks in different ways) ... allow staff to make their own decisions
- we don't bug our staff
- Peggy, Dan, JoAnne and Mary--wealth of expertise in the profession
- team environment
- we value each other...strengths
- managers work well with the individuals that don't have disabilities
- shelter the DSP's from the external stresses
- not afraid to apologize to our staff for mistakes
- self-analyze and self-criticize very well
- very honest organization...don't hide things
- see mistakes as opportunities to improve
- well-connected politically
- very visible in the community

Weaknesses:

- length of time with the organization..."that's the way we always did it."
- need to communicate with staff better in terms of updating information, status, etc.
- don't take the time to refresh ourselves
- need more and better technology
- we don't utilize many things to the maximum...HR software
- short on administrative staff (could use a marketing staff person)
- Peggy very available to all staff
- periodic confusion with on-call protocols (residential)
- facility-not enough bathrooms, needs updating
- parking
- K.I.S.S. sometimes results in a weakness
- focused on not spending money
- back up staff for primary functions

Opportunities:

- succession planning
- talent management
- do more marketing for the programs
- use more technology

- expand residential
- Expand employment services
- expand day programs
- Support Service: OT, PT (maybe outsource at first), family support services, assistive technology
- rethink how we do training...on boarding, on-going training, need to formalize...we don't have a training manual.

Threats:

- fee-for-service
- changes in cash flow
- The Final Rule
- Wage and hour changes
- fewer and fewer personal relationships with State decision-makers
- Retirements
- overall economy
- future philosophy and priorities challenges reality of practice
- escalating cost of healthcare

Appendix III

Funding Sources, Licenses & Accreditations

Funding Sources:

- New Jersey Department of Human Services, Division of Developmental Disabilities
- New Jersey Department of Labor and Workforce Development, Division of Vocational Rehabilitation Services
- United Way of Camden County
- County of Camden Board of Chosen Freeholders
- New Jersey Department of Human Services, Commission for the Blind and Visually Impaired
- Veterans Services
- Individual School Districts
- New Jersey Department of Agriculture, Nutrition Department
- Interest Income
- Private donations
- SRECS (Solar Renewable Energy Credits)

Agency Licenses/Certifications:

- New Jersey Department of Human Services (Residential Licenses)
- New Jersey Department of Human Services, Division of Developmental Disabilities (Day Habilitation Certification)
- Fire Safety
- New Jersey Department of Community Affairs-Life Safety
- OSHA-Sharp Awards Recognition Program
- 14 (c) Certificate (wages)

Accreditations:

- CARF (formerly Commission on Accreditation of Rehabilitation Facilities)

This confidential document was prepared by:

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