



STRATEGIC PLAN

2020 -2023

Presented to the Community Living Services

Board of Directors

December 10, 2019

This Strategic Plan is intended to guide our organization's leadership, committees, staff and stakeholders for a period of three years. It ensures that all parties understand the mission, vision, values and goals. This document is a living plan and is subject to change.

Company Introduction

Background

Community Living Services (CLS) has over 30 years of experience providing services and supports to people with disabilities and their families, first as a state agency and then as a not-for-profit corporation (the transformation into a not-for-profit corporation occurred in 1991). CLS serves over 5,000 individuals in Wayne, Oakland, Macomb, and Kent Counties. The majority of the agency's budget comes from the provision of Medicaid funded home and community-based services (HCBS).

CLS is a progressive agency with a long history of providing person-centered and self-directed supports. CLS' successes with transitioning people from institutional and congregate care models to personal housing in local communities through a model of support called "Self-Determination" has differentiated them from their competitors over the last two decades. Changes in the disability service industry have posed strategic challenges to CLS' success more recently related to competitors entering the market and competing for sparse financial resources while also promoting substitute models of support more highly focused on healthcare integration. Fortunately, the leadership and Board of Directors at CLS are seeking to adapt their organization as needed to reposition themselves related to the new political, cultural, and economic pressures. CLS continues to believe that the values of community support, equality of all citizens, and the ability to control the costs of long term supports and services are fully within the scope of their existing vision and mission.

Community Living Services Mission

To assist and advocate for each person to have supports they want and need:

- To control and exercise authority over their own lives
- To live a life of freedom, opportunity and relationships, similar to their family, friends and neighbors.
- To share in full community membership and citizenship.

Community Living Services Vision

People will fully participate in their communities and have a quality of life which comes from freedom and its responsibilities, the authority to make their own life decisions, and the control of resources to implement them.

Community Living Services Values

1. Choice: Person-Centered Planning drives the services and supports needed and desired.
2. Control: People are seen as being in control and having authority over their own lives.
3. Relationships: Building a network of people who mutually care for one another.
4. Community: Belonging to one's own community, included and not segregated.
5. Contributing: Giving back to one's community, assisting others and doing what you can.
6. Responsibility: Being mindful of good citizenship, partake in responsible actions.
7. Dreaming: Finding and nurturing what people like and encouraging them to accomplish their goals.
8. Dignity and Respect: Using words and actions toward others in a kind and reverent manner.
9. Fiscal Conservatism: Being mindful of limited financial resources and spending responsibly.
10. Whatever It Takes: Looking for creative ways to achieve, even with limited resources.

Defining the Business

A goal of this strategic plan is to determine how the services provided by Community Living Services can be strategically aligned to impact the overall quality of life for the people they serve, while maintaining a competitive advantage in their ever changing service industry. Community Living Services is the third largest non-profit service agency in Michigan, so they have notoriety and influence within the world of service provision for people with disabilities.

Any actions that help advance the full inclusion of people with disabilities in the everyday life of our communities are not only good for the people with disabilities themselves, but are also good for all members in society as a whole by promoting diversity.

While CLS has a clear perspective on its' ability to transform lives historically through the de-institutionalization era, they must continue to assess their strengths and modify their operations to continue to facilitate individuals gaining empowered, self-directed lives. Most importantly, CLS is committed to the philosophies "Nothing about me without me" and "Whatever it takes." Their work is guided by the self-determined principles of freedom, authority, support, responsibility and confirmation with ultimate goal of assisting people to lead healthy, happy, and productive lives in their local communities.

Steps in the Strategic Planning Process:

The following steps were implemented as CLS developed their strategic plan and as they continue their journey of supporting individuals with disabilities to live fully as members of their community:

- Step 1: Engagement. Establishing a clearly defined agency purpose and understanding roles & responsibilities.
- Step 2: Gathering Information. Reviewing past strategic plans, describing current situations, considering new data sources, soliciting and considering stakeholder input through surveys and Listening Sessions, conducting SWOT analysis.
- Step 3: Prioritizing and Decision-Making. Determining priorities and choosing strategic direction.
- Step 4: Soliciting Feedback on Identified Priorities. Getting feedback on priorities from a variety of stakeholders. Conducting stakeholder surveys and focus groups.
- Step 5: Finalizing the Written Plan. Developing a plan that outlines priorities/goals, identifying measures and milestones for success.
- Step 6: Developing a Communication Plan. Communicating the strategic plan to all levels of the organization and other stakeholders.
- Step 7: Plan implementation. Monitoring by staff and board, reviewed regularly.

Considerations in Planning:

CLS Leadership discussed the importance of the following key organizational and environmental factors for consideration for Strategic Planning:



A survey process was implemented and stakeholder sessions were held to identify strategic priorities based on feedback from the CLS employees, people receiving services, Board of Directors, Independent Support Coordinators, and members of the CLS Citizens Advisory Council.

Based on the feedback received, there appears to be a much stronger focus needed on the workforce at Community Living Services. The challenges and threats identified later in this report confirm that the CLS workforce has been dramatically weakened over the last year in particular, both at the direct service level (Support Coordination) and at the management / leadership level. In order for CLS to function effectively for the people they serve, the need for a skilled and stable workforce cannot be ignored. Therefore, this strategic plan will include more workforce related initiatives than seen in prior strategic directions. There is also an increased focus needed on overall business design, roles / responsibilities, and financial sustainability, given the changing funding models and the upcoming state redesign (projected for 2020).

CLS Leadership agreed on the importance of the following principles and their application to CLS' strategic plan as a quality organization:

- The written strategic plan will outline key direction, actions to be taken, and measures of progress/success.
- The plan will be written, approved by the Board, and updated as necessary. It will be designed to set a course and a roadmap for the future.
- It will not be a “static” document that sits on a shelf, but will be revisited and updated as needed according to the rapidly changing environment.
- The plan should drive organizational measures and performance indicators. As an organization, CLS will measure what's important and hold itself and its staff accountable for performance.
- The strategic plan will recognize rapid advances in technology, payment structures, political environments, regulatory requirements and financial stressors while holding to key principles that endure these changes.
- CLS will remain mission-and values-driven regardless of other shifting elements.
- The plan will be reflective of and shaped by what is understood about the needs and desires of the persons served.
- CLS understands the market forces at play and will be intentional in considering its competitive advantages and service offerings.
- CLS will not become stagnant, but will continue to be a leader, pursuing opportunities for growth, expansion within its proven competencies.
- CLS will remain cognizant and responsive to financial threats, regulatory and compliance requirements
- CLS will continue to nurture relationships with key stakeholders.
- CLS' strategic plan will be informed by and communicated to those who have a “stake” in the organization's success - first and foremost the individuals receiving support.
- CLS will continue to implement data driven systems by leveraging technical and operational systems in support of the strategic plan
- CLS will continue to implement solutions that are outcome driven with help of measurable outcomes that are well-monitored, support our mission of managing the services to individuals served, their families and community.



CLS utilized a consulting firm in the past, TBD Solutions, for Strategic Planning purposes. TBD provided an overview of how the Strategic Plan process functions effectively within an organization, with Board Members, Executive Team and Staff all having unique roles in the process:

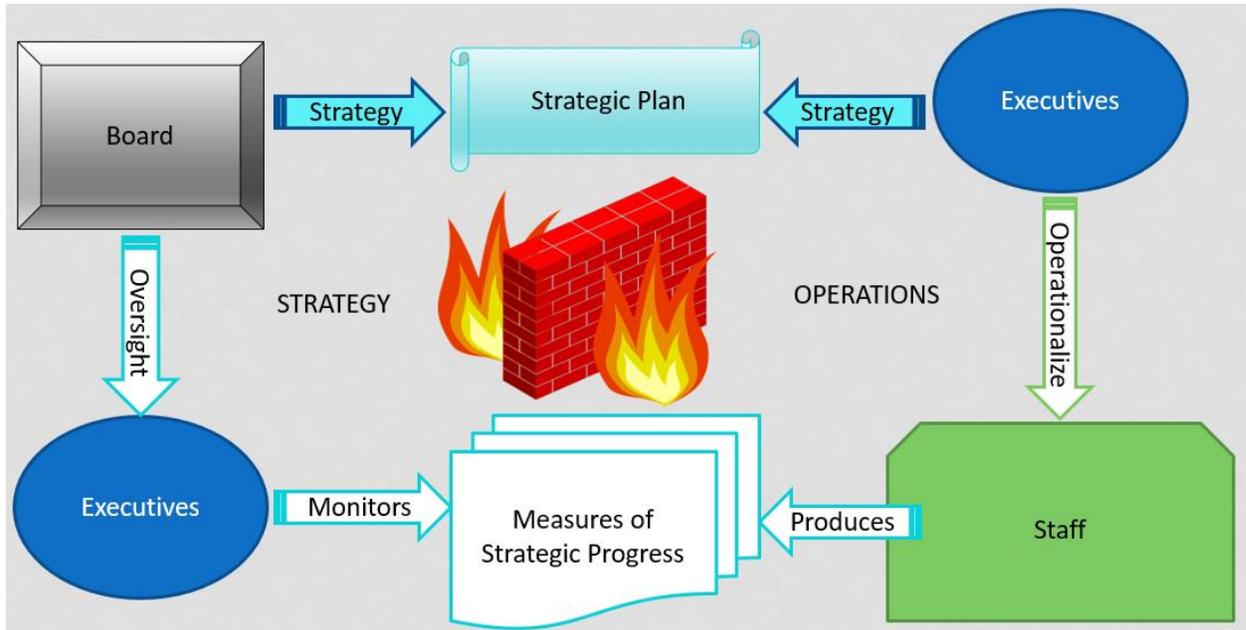


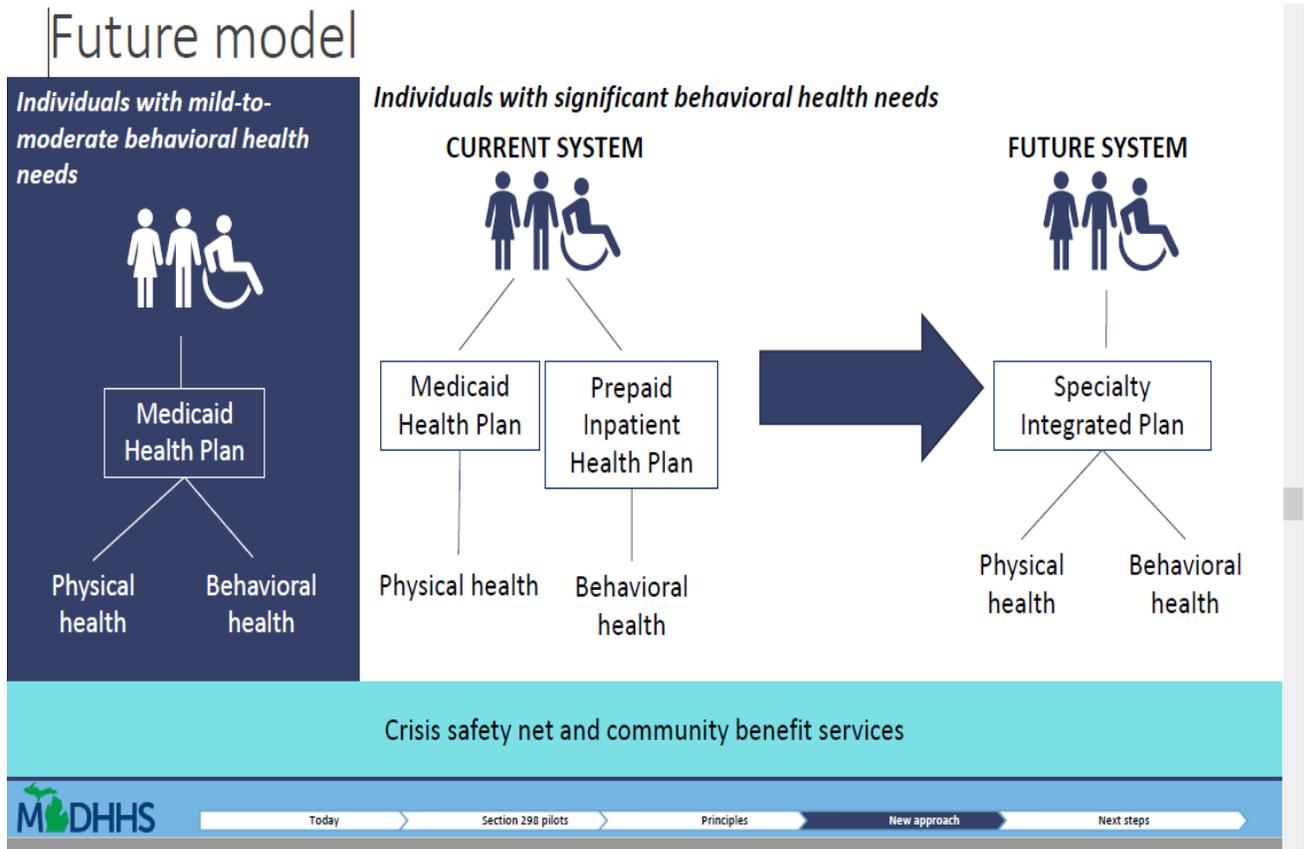
Figure 1: Roles in Strategy & Operations, TBD Solutions LLC, © 2016

CLS Executives believe that their experienced, diverse board and staff are well-aligned in achieving the distinctions of strategic and operational objectives. The CLS Board, in concert with its senior executives, continues to establish strategic vision for the organization that propels staff focus on operational tasks with appropriate oversight and monitoring. CLS has a clear vision of its place in Michigan via the provision of supports and services to individuals with intellectual and/or developmental disabilities, and is a recognized national leader in creating structures that afford persons served opportunities to lead empowered, self-directed lives. CLS is well suited to provide the “social determinants of health” advocates and funders now call for to support individuals with whole person care (all aspects of their health care needs).

Building upon this impetus is a rapidly-changing environment of health care reform, new federal programs, and continued improvements in supports and services requiring an inventory of new initiatives impacting on-going operations.

Review of Behavioral Health Initiatives:

The Michigan Department of Health & Human Services recently announced a redesign of the Michigan mental health service system. The timeline is aggressive with the anticipated redesign being completed by 2020. The redesign landscape is as shown in the Figure below.



The shifting landscape of perpetual change requires agile leadership to correctly distinguish opportunities and threats. From this foundation, CLS will best be positioned to retain and improve structures that keep supports and services for served individuals moving forward in collaboration with potential other large partner agencies.

Strategic Overview from Perspectives of Organizational Strengths & Weaknesses and External Opportunities & Threats (SWOT Analysis)

SWOT ANALYSIS



Figure – SWOT Analysis, Image courtesy of Wikipedia, 2016

Strategic Analysis

Internal Strengths and Weaknesses

Strengths

- ~Early Adopters of Self-Determination model, so they've had more time to build competitive advantage.
- ~Name recognition and loyalty. Solid reputation.
- ~Demonstrated growth in enrollment in all divisions.
- ~Strong presence in the four largest counties in Michigan.
- ~Demonstrated success in helping people reside in their own homes.
- ~Models of choice, person-centeredness, self-direction, and real home settings where people control their own front door are directly in line with state and federal requirements.
- ~Employment of people served is higher than competitors.
- ~Long history of excellent audit findings.
- ~ Very values driven Board and Leadership staff / Integrity.
- ~ Progressive and innovative reputation state-wide and nationally for providing proactive supports that support full inclusion of individuals into the community

Weaknesses

- ~Has focused solely on supports for people with intellectual and developmental disabilities for 30+ years, so employees may not have experience with other service populations, such as people with mental illness.

~Has focused on moving away from “the medical model” for decades such that the pendulum may have gone too far with a now increasing state and federal focus on health care integration.

~Reliant on inconsistent public funding, with funding and contract uncertainty (mostly in CLS’ largest division).

~History of being a very values-driven agency, but business savvy skills will now be tested to complete against hungry, for-profit competitors.

~Internal morale issues in recent years have led to a high level of staff turnover and labor disputes in one division.

~Support Coordination (Wayne) has experienced many years of high caseloads, high turnover, and difficulty with recruitment, onboarding, and retention.

~Leadership changes at the CEO and COO level can lead to uncertainty

OPPORTUNITIES	THREATS
<ul style="list-style-type: none"> • Turning threats into opportunities • Expanding geographic boundaries: i.e. state-wide expansion • Independent Supports Coordination • Promote Conflict-free Support Coordination • Improve Self-Determination practices • Expand Training Department scope • Promote Independent Plan Facilitation • Experience with MI for dually diagnosed individuals → Recovery Model • Assist others with HCBS challenges • Affiliations with other provider agencies • Develop relationships/partnerships with new leadership at MDHHS • Outcomes based payments – Oakland – performance-based strengths • Targeted Messaging → Communication Plan • Use of Social Media 	<ul style="list-style-type: none"> • Political dynamics at county and state level • Funders changing priorities and uncertainty <ul style="list-style-type: none"> ○ Assuming more services ○ Taking staff • Loss of MDHHS allies/ relationships • Inadequate relationships with likeminded providers • Financial sustainability with significantly reduced revenue • Relationship with Support Coordination staff and union representatives • 1115 Waiver and any potential reduction or loss of Habilitation Supports Waiver funding • Revenue unpredictability / Survival Mode • Direct Support Professional Shortage • Active competitors aggressively marketing

Top Strategic Priorities (as identified by survey results) Suggested by CLS Staff, Board of Directors, ISCs, and People We Serve

- Staff Morale / Retention
- Number of people served per SC / “Caseload” sizes / Support for the Personal Supports and Service Department (PSSD)
- Maintain Mission / Principles
- Raises / Pay
- Internal Communication / expectations / policies
- Training for staff and managers
- Financial sustainability / agency growth & expansion
- Leadership / Management Style
- Future of Self-Determination Contract (Wayne)

Healthy dialog occurred to distill these key areas into distinct new areas of strategic focus and priority. Baseline data will be collected, via survey responses, in January 2020 to allow for measurement of success in each strategic area.

~Financial stability

- Increase awareness and understanding of current contract models, structure based on what makes sense
- Strengthen our relationships with existing funders so our value is clear
- Identify areas for internal efficiencies
- Expand our funding sources

~Growth & Expansion

- Strengthen relationship with MDHHS leadership so we remain aligned with their future system redesign efforts
- Strengthen relationships with like-minded providers/future partners
- Expand service provision into other regions

~Support Coordination: Reduce the number of people each SC supports (Wayne)

- Implement Independent SC model to help with caseload sizes ASAP
- Evaluate SC roles / responsibilities
- Streamline functions to support SC tasks
- Management at all levels to understand challenges and assist

~Bring more joy to our workplace

- Increase connectedness to our mission and each other
- Talk more about our purpose and openly celebrate successes
- Acknowledge the need for more work- life balance
- Laugh more, smile often, have fun at work

~Increase communication, transparency and fairness in the workplace

- Assess and address perception of workload disparities
- Training for staff and management

- Examine performance evaluation process (consider employees reviewing the performance of their supervisors as part of the process)
- Open, honest, and routine communication

Goal areas to be carried forward from the prior Strategic Plan:

~ASSESS, MONITOR, ANALYZE LEGISLATIVE INITIATIVES AND REGULATORY TRANSFORMATIONS AT FEDERAL, STATE, AND LOCALLY LEVELS

- Monitor, assess/analyze the impact of HCBS Waiver Final Rule, Olmstead Compliance, 1115 Waiver changes, ACA Implementation, Excellence in Health Act – CCBHC, MDHHS Re-design.
- Assess the status of CLS as we are positioned to fulfil these regulatory changes and implementation initiatives.
- Assess the CLS organizational structure and geographic locations to facilitate the growth and expansion of our model.

~DEVELOP/STRENGTHEN RELATIONSHIPS WITH FUNDERS

- Strengthen relationship with the MDHHS and CMH funders as well as staff to ensure alignment with commitment to provide an excellent experience and service for members.
- Facilitate a review of the CLS marketing strategy, inclusive of new outreach strategies and data sharing on successes

~ASSURE STRUCTURAL/ORGANIZATIONAL/PROGRAMATIC CHANGES IMPROVE THE PERSONAL EXPERIENCE OF INDIVIDUALS SERVED

- Facilitate opportunities for individuals being served to express satisfaction (what is working?) with the delivery and type of supports they receive.
- Hold community forums and solicit feedback from individuals being serviced to present their concerns (what is NOT working?) and thoughts regarding the systemic changes occurring.

~ENSURE ALIGNMENT OF STAFF RESOURCES TO ACCOMPLISH OBJECTIVES

- Re-align resources to maximize effective utilization and management of workforce
- Assess current organizational structure and areas needing addressed.

Next Steps in Planning Process:

The CLS Executives will review its recommended strategic priorities with its Board of Directors to solidify its strategic plan for the next three years. Once approved by the Board, the plan shall be presented to stakeholders for additional input and feedback. After feedback has been incorporated, CLS will define specific goals and measures as developed by its executives and staff in support of the strategic plan. Goals and measures will drive the organization in a Plan-Do-Check-Act cycle, and the Board will routinely monitor all goals for evidence of progress on established priorities.

Next Steps



Reviewed and Approved by Community Living Services, Inc. Board of Directors on December 10, 2019