

ADAPT STRATEGIC PLAN - 2017

Planning Members:

Beth Miller, Peggy DeLaFuente, Michelle Aerts, and Don Cross

Mission Statement Review:

The mission statement was reviewed during the year and modification is not required.

Review of 2016 Goals:

Goal: Strengthen the In-Home Supports Programs. Progress: The In-Home CLS Programs in St. Joe and Branch Counties remain strong. Referrals are made at a manageable pace in both counties. As mentioned above, the In-Home staff in both counties received a \$.75/hour raise in December 2016. It is difficult to attract and keep good staff in these part-time positions that sometimes have odd hours. It is hoped that a wage increase will help with retention.

Goal: Expand Employment Services. Progress: Employment Resources (ER) remains open to providing additional sub-contractual work. There were no developments in the area of employment in 2016. The Employment Resources program has a new Job Developer. The goal is to increase employer contacts as well as the number of supported jobs in the community for consumers over the next year. The program worked with ISD transition students last year at Haylett's. For 2017, the transitional employment site is Big Lots.

Goal: Attain International Clubhouse Accreditation. Progress: Many activities occurred over the year aimed at educating the Clubhouse members and staff about the International Accreditation process. Administration met with the State of Michigan Clubhouse Consultant about the accreditation process, funding for training, and the rapid movement in the state toward international accreditation. The clubhouse has its first advisory board members: Shawn Talbot, Amy Short, Patti Daoud, Dave Mallott, and Phyllis Parson. A "sister" clubhouse that is already accredited has been assigned to mentor the Outlook clubhouse on the process over the next year. The goal remains to participate in international training and seek accreditation in the early part of 2018.

Goal: Maintain High Quality Residential Services. Progress: Management continues to look for opportunities to provide staff with recognition and monetary incentives. The improving local economy has made attracting qualified applicants more challenging. All direct care staff in both counties received bonuses in December 2016. Residential Aides received a significant increase in their hourly pay rate for the third consecutive year at the end of calendar year 2016. The pay scale between the two counties is now the same for Residential Aides. The In-Home Supports staff received a significant raise in December 2016 as well. Ongoing training is offered according to the needs and situation of each program/home. The annual staff survey was modified in an attempt to gather more specific information and details that might be helpful in improving conditions for employees. Adapt management remains open to the possibility of expanding services in either county as the need arises.

Goal: Continue to Provide High Quality Day Services in Both Counties. Progress: Adapt continues to work with both mental health agencies to remain responsive to CMH and regional affiliate requirements, as well as assessing activities and services to continue meeting consumer needs. The programs remain strong and continue to serve many consumers living in the community. The cooperative partnership between Adapt and both CMH agencies is vital, and efforts continue to maintain these key relationships. It appears that authorizations for this service have leveled out in both counties and there is less discussion about reducing the number of days consumers attend programs. Due to the requirements coming down with the Home and

Community Based Services (HCBS) waiver, the day programs will undergo significant changes over the next two (2) years. The focus is complete community integration and the usage of a facility may not be allowed. Adapt continues to communicate with each Community Mental Health (CMH) agency regarding the future of this program.

Goal: Seek Jobs for a Variety of Skill Levels in the Workshop. Progress: Finding jobs for a variety of skill levels remains challenging. The future of the workshop is unknown at this time with the federal focus on doing away with sub-minimum wage jobs.

Goal: Transition New Executive Leadership. Progress: Interactions with supervisors and administration in both counties have been positive in nature and continue to evolve, and positive feedback has been provided to the new director from various sources. The director has attended a couple of conferences, a one-day workshop in leadership and the MARO conference which focused on the major issues of the mental health field and supported employment. The director became a Coldwater Housing Commission board member in July 2016 and board member for the MARO worker's compensation fund in January 2017, and attended those worker's compensation fund meetings through 2016 with Tom. Adapt board meetings have been held on a quarterly basis, with strong member participation. Several meetings and routine training have occurred between the new and former director.

Goal: Review Written Organizational Materials. Progress: Various policies and written materials have been done over the year. As the agency prepares for CARF this summer, there will be more work done to ensure materials are up to date.

Goal: Modify the Corporate Compliance Program. Progress: The Compliance plan and the overall program were updated according to requirements outlined by Southwest Michigan Behavioral Health (SWMBH). The Compliance Officer has investigated a few issues over the year and the process appears smooth.

Goals for 2017:

The administrative team discussed long-term goals and objectives designed to achieve the goals. Using information gathered from program supervisors, the following goals were determined to be priority based on the needs of consumers, strengths of the organization, requirements by funding sources, and expected viability of programs. A one-year time frame applies:

Programs

GOAL: Maintain the In-Home Supports Programs:

Objective A: Pilot a referral/retention bonus program for In-Home Supports employees, similar to the residential program, but on a smaller scale.

Objective B: Continue to improve the STAR program (evening and weekend group activities in St. Joe County) by having an experienced person create the calendar and consistently coordinate and work the events.

Objective C: Continue attending local job fairs, including community college campus events, in an effort to recruit staff for the part-time positions in this program. Utilize appropriate websites in an effort to find qualified candidates.

Objective D: For St. Joseph County, continue to modify the assistant position in order to utilize this resource most effectively.

Objective E: Ensure all progress notes/goal documentation and timesheets meet the standards set forth by SWMBH and the respective CMH agencies to ensure all billed claims have supporting documentation. Program Supervisors need to regularly "spot check" notes submitted by staff members and offer ongoing education and training on documentation requirements.

Objective F: Ensure all staff members have vehicle insurance and have required emergency kits and plans in their vehicles while transporting persons served.

GOAL: Expand Employment Services

Objective A: Continue working with the St. Joe County Job Developer through open communication and regular in-person contact in an effort to improve Adapt's ability to adequately provide job coaching services.

Objective B: Share Employment related training opportunities with the St. Joe CMH Job Developer and the Adapt program supervisor in order to promote best practices and knowledge of this specialized service area.

Objective C: Employment Resources in Branch County has a transition employment site for the Transition Program for BSD students and is awaiting referrals. The job site is at Big Lots.

Objective D: A group of employees without disabilities and paid an hourly wage will be hired to work at the Wal-Mart Distribution Center. There continues to be an overflow of trailers that the current enclave cannot manage at their current productivity level. In an attempt to save this job site, the program supervisor devised the plan to hire people without disabilities or who can produce at a higher level. This appears has been an on-going issue and the situation is being monitored for improvement by Wal-Mart DC and Adapt..

Objective E: Employment Resources will renew efforts in making contacts with local businesses in this rejuvenated local economy, including participation in the local Chamber of Commerce. The new Job Developer will seek new contacts and nurture existing relationships.

Objective F: The Employment Resources supervisor will continue to have regular contact with Pines and MRS personnel in order to promote referrals and develop employment sites and resources.

GOAL: Attain International Clubhouse Accreditation (Required by September 2018)

Objective A: The new Advisory Board consisting of community members who have an interest in services for people with severe and persistent mental illness will begin meeting in the spring of 2017.

Objective B: Utilize the experience of Directors in the region who run programs that are already accredited or have been through the international training through phone calls, training opportunities, emails, and on-site visits.

Objective C: Investigate local businesses/employers that might be interested in a Transitional Employment (TE) site with the Clubhouse program. Strive to develop 1-2 TE sites over the next year.

Objective D: Complete the self-study required for International Accreditation. (The tentative plan is to seek accreditation and attend required training by the middle of 2018 to meet with the state's required date of September 30, 2018.)

Objective E: Transition a new Program Director at the end of 2017/beginning of 2018 as the current supervisor prepares to retire. Negotiate an acceptable salary during the recruitment process of the new Director and adjust the per diem charged for services to reflect the expanding requirements of International Accreditation required by the State of Michigan for all Clubhouses. The salary and training requirements will increase the overall cost of the program.

Objective F: Work with Pines and other CMH agencies contracting with Adapt for Clubhouse services to increase the number of appropriate referrals to the program in order to increase membership and promote a strong and productive program.

GOAL: Maintain Quality Residential Services while Meeting the Home and Community Based Waiver Services (HCBS) Transition Rule and Licensing Requirements:

Objective A: Continue to be responsive to the unique training needs of staff members in each home. Utilize the agency's in-house training resource as well as appropriate outside educational opportunities.

Objective B: Remain apprised of developments with the state HCBS Transition Plan related to the major changes expected with residential settings for consumers on this waiver program by reading updates presented by the state, MARO and MALA. Ensure compliance with Transition Plan requirements by the state-imposed deadline of 9/16/18.

Objective C: Update the admission and discharge paperwork, as well as the program description, to reflect current practices and meet the requirements of the State Transition Plan.

Objective D: Evaluate the physical condition of each home/property and make upgrades as appropriate.

Objective E: Continue to be responsive to each CMH agency with regard to working with consumers in need of residential services and providing the type of care/services requested to meet individual needs. Housing for individuals with chronic mental health issues seem is an area of need in Branch County and Adapt personnel would require a good deal of specialized training to work more effectively with this population.

Objective F: Encourage supervisors to take an active approach in retaining residential staff through ongoing and regular positive contact with individual staff members, resolving issues as they arise, engaging in team-building during monthly staff meetings, and highlighting the achievements/progress of residents. Home supervisors need to communicate areas of need to administrative personnel consistently.

Objective G: Remain apprised of licensing requirements with respect to the CLS (unlicensed/24-hour supervision) Homes. Determine which homes Adapt will seek to license, to close, and/or to change the scope of services.

Objective H: Attend Provider trainings and meetings regarding technical assistance on implementing the HCBS plan.

GOAL: Provide High Quality Day Services while Meeting the Home and Community Based Waiver Services (HCBS) Transition Rule

Objective A: Continue to offer activities of interest to consumers and desired by CMH agencies and other stakeholders by being responsive to recommendations and feedback.

Objective B: Promote a culture of positivity with day program staff in both counties by providing needed training and engaging in positive discussions with individual staff members and during staff meetings.

Objective C: The day program supervisor in St. Joe County will focus on planning larger community activities to benefit all Adapt consumers.

Objective D: In St. Joe County, there will be renewed efforts to rejuvenate volunteer opportunities for consumers.

Objective E: Ensure each program has the materials and resources needed to provide high quality services.

Objective F: Attend Provider trainings and meetings regarding technical assistance on implementing the HCBS plan.

Objective H: Talk with providers in other counties on how they are implementing the HCBS requirements for day services as services in the region transform to meet the rule.

GOAL: Analyze the Long-Term Viability of the Workshop

Objective A: Seek a steady job for lower-producing individuals, involving fewer tasks/steps for completion.

Objective B: Ensure all equipment is in good working condition.

Objective C: Continue seeking jobs for individuals with a variety of skill levels.

Objective D: Ensure a good working relationship with businesses through open and responsive communication.

Objective E: Search for new contacts in order to expand the number of jobs available to individuals with a variety of skill levels.

Objective F: Ensure all people working at sub-minimum wage receive the required career counseling per the federal Workforce Innovations and Opportunities Act.

Objective G: Determine if maintaining the 14c certificate (sub-minimum wage certificate) is in the best interest of the organization and the primary populations served through the Residential, Day Services, CLS services and supported employment services. (Certificate expires in September 2017)

Objective H: Ensure full compliance with the Department of Labor (DOL) relative to newer sub-minimum wage requirements.

Administrative

GOAL: Transition New Executive Leadership

Objective A: Maintain positive working relationships with program supervisors in both counties by demonstrating an interest in each program, highlighting positive attributes and achievements, and maintaining accessibility.

Objective B: Promote a positive working environment at all levels. Each administrative member will work on their own personal approach to promote positivity amongst employees by being supportive and acknowledging the work people do on a regular basis.

Objective C: Obtain training on budgeting issues, billing, various personnel issues, and workshop operations.

Objective D: Attend relevant conferences and association meetings in order to build knowledge base and network of peers.

Objective E: Hold Board of Directors meetings on a regular basis to ensure an exchange of information and utilize input from Board members as part of the training process.

Objective F: Maintain open and frequent communication with the Business Manager, Chief Operating Officer, and the Directors of Services in each county in order to learn as much about the operations of the organization as possible from the perspective of different roles within the agency.

GOAL: Review Written Organizational Materials

Objective A: Review all policies and procedures and update to ensure all applicable standards are met.

Objective B: Update the Organizational Manual.

Objective C: Continue to update all training materials and ensure the materials are utilized consistently between the two counties during the hiring/orientation process and on an annual basis, as required.

Objective D: Update employee health insurance and benefit information to be in full compliance with the law and to be a user-friendly resource for employees.

GOAL: Maintain the Corporate Compliance Program

Objective A: Utilize the new Corporate Compliance Plan and associated training materials to reflect SWMBH, CARF, and CMH standards, while ensuring the plan makes sense for Adapt. Update the plan as needed.

Objective B: Ensure the Corporate Compliance Officer has appropriate visibility, training and support to properly implement the Compliance program.

Objective C: Ensure all associated training materials are updated and easy to use, and all supervisors are aware of their ongoing training responsibilities.

Distribution List:

___ Richard Losinski, Board President	___ John Hutchinson, Board Member
___ Deb Shire, Board Member	___ Laura Sutter, Board Member
___ Dick Frost, Board Member	___ Bruce Sweet, Board Member
___ Mike Clark, Board Member	___ Jack Branham, Board Member
___ Michelle Aerts, Executive Director	___ Tom Kramer, Chief Operating Officer
___ Peggy DeLaFuente, Business Manager	___ Beth Miller, St. Joe Director of Services
___ Don Cross, Branch Director of Services	