



STRATEGIC PLAN
2007 through 2010

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OVERVIEW:

PathWays is a non-profit agency that serves people with disabilities in their home communities in Sullivan and Lower Grafton counties. PathWays works with children, adults and their families to provide ongoing, individualized support. PathWays works with local agencies, programs and businesses to provide individuals with meaningful work, recreation, and community life.

MISSION:

PathWays is dedicated to expanding the opportunities that enrich the lives of people with disabilities. Our passion is working together with children, adults and their families to create their own desired future in their own community. We provide services in the spirit of partnership and respect.

PLANNING PROCESS AND PARTICIPANTS:

PathWays of the River Valley used a broad and inclusive process in the development of this strategic plan. Board, family councils, staff, individuals we support, families and community Members participated in the creation of this plan.

The process began with the management team completing an environmental assessment of the agency context in August 2006. This included an examination of agency accomplishments, a review of national and state-wide trends affecting the developmental service systems, an overview of data from various outcomes reports, a S.W.O.T (strengths, weaknesses, opportunities, threats) analysis, a review of the impact of the recent merger process on the agency and identification of some possible broad goal areas for the next plan. This provided a detailed description of the organizational and environmental context within which the agency is operating. A summary of this assessment is included as Appendix A.

The management team presented this environmental assessment to the Board of Directors, including its Family Support Council representatives, at their retreat in September 2006. The Board used this presentation as a basis for their development of a vision for the future of the

organization and the identification of broad goal areas for this strategic plan. These goal areas are detailed in Appendix B.

Each of these goal areas was then spun out to a multiple-stakeholder group for discussion and creation of concrete goals and objectives. Each of these groups was facilitated by a member of the management team and at a minimum included input from: a member of the Board; a member of the Family Support Council and/or other family representation; a member of the UpBeat Group, Upper Valley Neighbors and/or other consumer representation; staff, and community stakeholders. They met to develop a vision for each broad goal area, specific goals and objectives to reach this vision, identification of key people to enlist in the implementation of these goals and projected timelines for completion. An alphabetized list of work group participants can be found in Appendix C.

IDENTIFICATION OF KEY ISSUES IN THE REGION

Some clear trends began to emerge as we worked through our strategic planning process. Seven areas were identified and prioritized for action and a strategic initiative was designed for each of these challenges.

Over the past two years the agency has been enmeshed in a forced merger process which raised fears for some of the people we serve, created anxiety for our staff and consumed the time and energy of our board and management team. The good news is that we have made it through this period of time without a negative impact on the services we provide and stand prepared to move forward as a new agency-stronger and more diverse with many more talents and resources to bring to the challenges we face. We have a unique opportunity to reintroduce this dynamic new agency to the communities of Sullivan and Lower Grafton-Counties and will begin a strategic initiative to accomplish this. Creating a new identity, refining our mission and learning to better communicate with our stakeholders are some of the components of this new opportunity.

After years of level funding, rising infrastructure costs, an aging consumer base and low regional unemployment, developing a system of providing services that is sustainable over time is more important today than it has ever been. The recruitment, training and retention of quality staff and home providers to provide services has emerged as a significant challenge and will be addressed in this plan.

Despite external pressures and constraints, a vision of services that are more individualized, more responsive and increasingly controlled by individuals and their families remains strong. We have continued our work with the Institute on Disability on personal futures planning and have a number of families designing and directing their services. We need to continue our evolution of best practices and expand this from “pilot project” to systems change.

Family leadership is a key component of our service delivery system. The recent expansion of our region has presented us with both challenges and opportunities in this regard. We will focus a strategic initiative on family leadership which will include creating the optimal family support council and staff structure. Family leadership also goes beyond the council and staff and we want to focus some energy on creating many new ways for families to become involved with the agency. This will include exploring mechanisms for shared decision making at all levels and facilitating the development of advocacy and leadership skills. Empowered and informed families create a healthy tension in the area agency system which is necessary for our continued evolution towards providing better supports.

The continued evolution of a continuous quality improvement culture at the agency also emerged as an important issue. Several years ago we eliminated a quality assurance position and became the direct provider of substantially more services. We created a quality assurance committee that operates on a continuous quality improvement (CQI) model and includes the participation of each member of our management team. We also enhanced our external complaint investigation capacity. The recent consolidation of the two agencies has increased our size enough that we need to take a fresh look at these practices. We will begin a strategic initiative that will both look at and learn from the effects of our recent merger and will result in

the design of a quality improvement system that is most effective in the expanded region. Information technology systems are playing a larger role as the agency's catchment area has doubled in size. We will begin a strategic initiative that will focus on utilizing technology to share information and communicate with our stakeholders in a more efficient manner. Done well this can have the effect of shrinking the size of the region and making us more responsive to the people we serve and our staff.

We are at an exciting time in the evolution of this organization. We have the opportunity to create together a new agency forged from the strengths and successes of two agencies with a combined experience of over 60 years. We have emerged from the past few years stronger, wiser and more committed than ever to our vision of a meaningful life in the community for the people we support.

Strategic Initiative One: PathWays will define itself as a dynamic new organization which has emerged from the merger of United Developmental Services and Developmental Services of Sullivan County.

Strategic Initiative Two: PathWays will excel at recruiting and retaining quality staff and home providers.

Strategic Initiative Three: PathWays will utilize information and technology systems to excel at sharing information and communicating with its stakeholders.

Strategic Initiative Four: PathWays will be a reflective learning organization that embraces a total quality improvement culture.

Strategic Initiative Five: PathWays will evolve best practices for the services it currently provides while exploring mission-compatible service expansion and resource diversification.

Strategic Initiative Six: PathWays will provide resources and support to enhance family leadership in Sullivan County and Lower Grafton County.

Strategic Initiative Seven: PathWays will proactively manage and maintain the facilities necessary to accomplish its mission.

Strategic Initiative One: PathWays will define itself as a dynamic new organization which has emerged from the merger of United Developmental Services and Developmental Services of Sullivan County.

Vision: We have a new identity which reflects the promise of this new organization.

Goal: Work with a consultant to create a name, tag line, logo and mission for the new agency- utilizing a process involving multiple stakeholders.

Vision: We will reintroduce our organization to the communities in Sullivan County and Lower Grafton County in a manner which creates excitement and enthusiasm.

Goal:

- ❖ Create mechanisms to share information about the agency
-

Vision: We communicate well with our employees, home care providers and the people we serve.

Goal:

- ❖ Improve internal communication systems and practices

Strategic Initiative Two: PathWays will excel at recruiting and retaining quality staff and home providers.

Vision: We have improved recruitment of new employees by becoming an employer-of choice.

Goals:

- ❖ Identify our potential employee market(s) by demographics, residence, and skill/competency set.

- ❖ Build a well qualified and diverse workforce that is engaged in the agency mission, and able to contribute a variety of talents.
 - ❖ Attend to the perception of the agency; enhance the positive view of the agency mission and the quality work experience offered.
-

Vision: All our employees work to reduce turnover and improve retention by creating and maintaining a rewarding and enriching employment experience for everyone

Goals:

- ❖ Meet or exceed employee expectations for clear and consistent communications and leadership
 - ❖ Recognize and demonstrate agency accomplishments by “blowing our horn” internally and externally
 - ❖ Welcome, orient and train new employees in a way that reinforces a positive work environment and experience
 - ❖ Provide a variety of forms of employee recognition; agency-wide, for teams, for individual employees
 - ❖ Utilize Staff Satisfaction Survey and Exit Interview data to improve the work environment
 - ❖ Provide a pleasant environment (workplace appearance)
-

Vision: We have expanded the availability of housing options in Sullivan County and Lower-Grafton County for our workforce.

Goals:

- ❖ Locate sources of affordable housing for employees
 - ❖ Agency support for community development efforts
-

Vision: We offer an excellent compensation package and have a well developed mechanism to inform current and potential employees of its value.

Goals:

- ❖ Attract and retain employees through a competitive and well articulated compensation design
 - ❖ Educate applicants regarding the compensation package
 - ❖ Provide an annual compensation and benefits statement to employees
 - ❖ Reinforce understanding and knowledge of the value of the agency benefits programs
-

Vision: Our employees are well trained and have the knowledge and skills to be successful in their role and to grow as individuals

Goals:

- ❖ Consistent internal and external opportunities for training
- ❖ Creative training designs which are comprehensive and best suited to the adult learner
- ❖ Team building and skill building opportunities to unify groups

Strategic Initiative Three: PathWays will utilize information and technology systems to excel at sharing information and communicating with its stakeholders.

Vision: There is an efficient flow of accessible and current information, linking stakeholders to the agency and community, empowering all to be more effective in broadening communication.

Goals:

- ❖ Clarify our current and future technologies with a focus on ensuring the point of service has all tools necessary to successfully support the individuals we serve
- ❖ Implement routine initial trainings and subsequent re-training relative to communications methods and technologies
- ❖ PathWays strives to communicate in the most efficient and appropriate manner.

Strategic Initiative Four: PathWays will be a reflective learning organization that embraces a total quality improvement culture.

Vision: We promote a culture of continuous quality improvement that encompasses current and future supports and includes individuals, families, employees, providers, and the Board of Directors.

Goals:

- ❖ PathWays will work in partnership with stakeholders to design continuous quality improvement measures that reflect the expanded region
- ❖ PathWays will assess the impact of the merger on service quality from a variety of stake holder perspectives and share this information with others.

- ❖ All employees and providers for PathWays will participate in quality improvement measures, using these quality measures to explore best practices. All stakeholders will be informed and have the opportunity to participate in expanded quality improvement measures.

Strategic Initiative Five: PathWays will evolve best practices for the services it currently provides while exploring mission-compatible service expansion and resource diversification.

Vision: Every individual and family we serve is empowered to make informed choices and decisions, from a wide array of best service practices, in order to participate in developing the best services to meet their individual needs and desires for personal growth.

Goals:

- ❖ PathWays will commit to developing and implementing best practices, promoting a wide array of individual service choices and supports.
- ❖ PathWays will implement systemic changes to support and sustain the vision, including service redesign, collaboration with other entities, capacity-building, and development of alternative funding, service, and market opportunities
- ❖ PathWays will increase opportunities for individual/family direction and participation with a recognition and focus on personal growth as a highly-desired outcome.
- ❖ PathWays will develop high-level information, education, and communications tools and structures in order to promote informed decision-making.

Strategic Initiative Six: PathWays will provide resources and support to enhance family leadership in Sullivan County and Lower Grafton County.

Vision: We are working productively with one regional family support council which is representative of a family support structure that maintains the autonomy and control of local families groups.

Goals:

- ❖ The Sullivan County Family Advisory Council and the Upper Valley Family-Advisory Council will work with the agency to design a family support structure which is locally responsive and regionally representative.
-

Vision: Families and individuals served by PathWays of the River Valley will take a leadership role in the ongoing mission and direction of the agency by engaging the Board of Directors and agency staff in a broad range of cooperative planning and problem solving.

Goals:

- ❖ Families and individuals will provide enhanced leadership for overall supports provided by the agency as well as supports provided on an individualized basis.
- ❖ PathWays will work with families to broaden the approach to what is considered “family” and to develop means to provide ongoing opportunities for information, education, and decision making.

Strategic Initiative Seven: PathWays will proactively manage and maintain the facilities necessary to accomplish its mission.

Vision: We are operating residential and office facilities which enhance the implementation of our mission. These facilities are efficiently managed and adequately maintained.

Goals:

- ❖ PathWays will develop a plan for property management that is integrated with its serve redesign efforts.
- ❖ PathWays will explore the possibility of creating a holding corporation to manage its properties and make a decision on this option.
- ❖ PathWays will evaluate its current Claremont office location in the context of regional expansion and develop a plan to better address office space and parking needs.

Region 2 Area Agency

S.W.O.T. ANALYSIS

(Revised with additions from Board Retreat)

Presented By:

Andy Forbes	Director of Community Services-Lower Grafton County
Laura Hooley	Director of Human Resources
Anthony MacConnell	Director of Community Services-Sullivan County
Dora Markwell	Chief Operations Officer
Mark Mills	Chief Executive Officer
Cory Shomphe	Director of Family Services
Chris Stoddard	Chief Financial Officer

September 23, 2006

Strengths:

- ❖ Capable and highly skilled staff and home providers
- ❖ Increased management skill and experience
- ❖ Committed to supporting and appreciating staff
- ❖ Positive relationship with the Department of Health and Human Services
- ❖ What is known of our reputation is good
- ❖ Strong connections with other community resources
- ❖ Both Early Supports and Services teams provide model services
- ❖ Strong emphasis on self-advocacy-we support two groups
- ❖ Continuous quality improvement culture
- ❖ Have sustained the quality of services through the merger
- ❖ Strong commitment to the agency from the individuals and families we support
- ❖ Strong Board commitment to the agency
- ❖ We embrace change
- ❖ Our nursing services
- ❖ Sense of humor that creates a culture that is professional AND fun
- ❖ Very responsive to individual and family needs
- ❖ Strong, positive presence in state; "clout" with state leadership; we participate at many levels through various committees

Weaknesses:

- ❖ Staff turnover
- ❖ Communication
- ❖ Staff are stretched thin
- ❖ Staff and home care provider recruitment and availability
- ❖ Too many staffed residences
- ❖ Internal systems need refinement due to recent growth
- ❖ Lack of creativity in service design
- ❖ Multi-site locations impact communication and connection to the agency as a whole
- ❖ Aging physical structures
- ❖ Lack of staff and home care providers can result in service delivery compromises
- ❖ Lack of comprehensive plan for service development
- ❖ Limited availability of public transportation
- ❖ Staff training is at a basic level
- ❖ Family concerns/dissatisfaction on staff recruitment, family volunteer recruitment, family participation
- ❖ Board recruitment skill sets
- ❖ Need more flexible funding for creativity
- ❖ Mostly rural area with low unemployment
- ❖ Educational/literacy level of staff

Opportunities:

- ❖ Branding
- ❖ Revitalization of Claremont
- ❖ Expansion of our mission and service base
- ❖ Building on individual and family directed services
- ❖ Building on strengths and best practices of our increased resources
- ❖ Expansion of family oriented services
- ❖ We can become a leader within the area agency system and in the broader community
- ❖ We can make some advances in our utilization of technology
- ❖ We can retain our strong staff by enhancing compensation and professional development
- ❖ We can enhance our profile in the community
- ❖ We can better manage the waiting list
- ❖ We can better integrate the concepts of personal futures planning at all levels of our service delivery system
- ❖ We can enhance our management of employee safety
- ❖ Increase our efforts to utilize grant funding
- ❖ Improve and increase family voices and advocacy through our advisory councils
- ❖ Rich mix of colleagues in social services
- ❖ Rich mix of business, academic & health care community (Tuck, DHMC, etc.)
- ❖ Community grants – participate by being at the table and sharing

Threats:

- ❖ Forensics
- ❖ Implications of changes to life safety requirements
 - ◆ Impact on home care provider model
 - ◆ Financial implications
- ❖ Over regulation and inconsistent interpretations of existing regulations
- ❖ Shifting demographics including aging population, increasing medical needs and more folks with autism and multi-diagnoses
- ❖ Continued straining of Medicaid/Medicare funding and our over-reliance on a single source of funding
- ❖ Lack of qualified workforce
- ❖ Affordable housing
- ❖ Regional unionization of home providers and staff
- ❖ Cost of maintaining employee benefits
- ❖ Increased scrutiny of the expanded region
- ❖ Diminishing resources and increasing needs often put us in a reactive rather than proactive position
- ❖ Political scene
- ❖ Caseload growth
- ❖ Lack of public education and understanding of our needs
- ❖ Lack of funding; Program funding issues
- ❖ Energy drain (on families and on staff)
- ❖ NFP inter-competitive: diagnosis “splitting” resources
- ❖ Social devaluation and media portrayals
- ❖ Eligibility/criteria changes

Broad Areas from Board Retreat, September 23, 2006

Branding Project: This is a **Front-Burner Issue** that needs resolving and will impact the 5-year plan:

- ❖ Will give us closure on the merger
- ❖ Will answer the increasingly-urgent questions of who are we? What is our name? What is our mission?
- ❖ These answers will help us with employees and community
- ❖ Will also help us in Upper Valley where we feel we have relatively little presence (Bruce used to belong to rotary, etc.)
- ❖ Will help us create culture of unity
- ❖ Will help us with board membership
- ❖ Will develop Public Awareness of agency and issues

Communication: technology and process

Recruitment & Retention of Staff (and providers); benefits, compensation; training

Resource Development

- ❖ Alternative Funding
- ❖ Educate all staff on how to apply
- ❖ Develop a white paper
- ❖ Link to capacity building
- ❖ Cash and carry
- ❖ Synergy with existing funding streams (for example, school based funding)

Increasing leadership among families, the number of individuals who participate; develop an “educated” core of advocates. Evolve our organization towards shared decision-making, people integrated into our overall decision-making process. How to address the fatigue issue for families of consumers?

- ❖ Regarding the April Retreat discussion of developing one family support council - the board feels this still needs to be reviewed for pros and cons. No decision at this meeting.

Quality measurements & improvement Goals; expand measurements and quality to all efforts of the strategic plan

Broad Areas from Board Retreat, September 23, 2006 (continued)**Facilities Plan**

- ❖ Claremont office
- ❖ All residences
- ❖ Transportation
- ❖ Collaboration on future facilities with workforce housing, green housing (i.e. Twin Pines), etc. to take advantage of financial and social synergies
- ❖ NOTE: Regarding concept of central facility that was anticipated at April Retreat: the board now wants to look at alternatives especially taking into account improving technology such as new phones, computer access, etc. There are many pros and cons to the idea of a central HUB. Centralizing would help the administration, but not be as effective for the consumer. The new phones have really helped. Can we learn anything from the banking industry which faces this issue with "back office" and branches? What about Board meetings? Do we meet centrally or switch locations? Would teleconference and/or videoconferencing help? This is an evolving discussion. No decision at this meeting.

Program goals: Redesign on residential and day services; integration of future services, collaboration and expectations: for example: kids coming out of school have different expectations and so do their parents, than consumers who are older and did not experience the current school approach

Culture & Leadership

- ❖ Education
- ❖ Exploring best practices
- ❖ Fulfilling our mission

Participants in the Strategic Planning Process

Laurie Cummings-Bowen	Anthony MacConnell
Sylvia Dow	Kim Marble
Pat Dubois	Dora Markwell
Ella Erway	Kathy Marshall
Melissa Eastman	Jack McClay
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Cindy Harrington	Susan Parry
Kathy Hesch	Pam Sherman
Joyce Hinsley	Cory Shomphe
Bill Hodge	Christine Stoddard
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Debra Hopkins	Susan Truman
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Sherrie LaClair	Michael White

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