



2020 – 2022 Strategic Plan

TABLE OF CONTENTS

LETTER FROM LEADERSHIP 3

GUIDING PRINCIPLES..... 4

CORE VALUES..... 5

OUR STRATEGIC PLAN DEVELOPMENT PATH 6

THE PLAN FOCUS AREAS - A Snapshot..... 7

STAFF DEVELOPMENT, RETENTION, AND PERFORMANCE 8

PROGRAM EXCELLENCE..... 12

COMMUNICATIONS..... 17

LETTER FROM LEADERSHIP

To The Arc of Ventura County's Community of Friends,

We are proud to share the Focus Areas and Strategic Actions developed for this 2020 – 2022 Strategic Plan. Over the next three years, we will enhance the delivery of services provided through our Community Integration Day Programs, Independent Living, and Supported Employment. We will also build foundational organizational skills to effectively assess the delivery of new services and programming as we respond to an ever-changing environment.

The future has exciting opportunities. We will continue to assure that individuals served are considered for their specific and unique needs. Advances in technology will support improved communications for people served, home management, and employment environments.

The Strategic Plan includes three Focus Areas:

Focus Area 1. Staff Retention, Development and Performance

Focus Area 2. Program Excellence

Focus Area 3. Communications

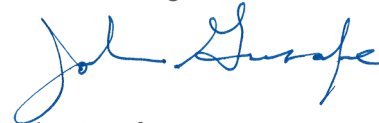
To achieve the goals identified in these Focus Areas, we will work to:

- Develop a Retention Plan for our dedicated staff that encourages advancement in the organization
- Support managers with a Professional Development Plan
- Track and respond to the preferences of the community served
- Build complete policies and procedures, along with other management supports
- Consider how technology can further support service delivery
- Develop feasibility studies around innovative service delivery ideas

We are very proud of our position in the community and delivery of services. Day Program participants are accessing their neighborhoods and contributing through volunteerism and community service. We have fully embraced Competitive Integrative Employment well ahead of funder mandates. Individuals are successfully employed at businesses throughout Ventura County, working alongside employees without disabilities and earning a meaningful wage. Our Independent Living Program empowers individuals to manage their self-care, finances, and household. We have set high expectations for our team members and the people we serve, and they are achieving major goals.

People served and their families desire innovative approaches to quality programming, while demographics are also changing. As such, The Arc will be hard at work over the next three years to achieve our goals in this Strategic Plan to continuously improve our performance and offer innovative services for individuals with intellectual and developmental disabilities throughout Ventura County.

With warm regards,



John Grisafe
Chairman, Board of Directors



Patricia Schulz
Chief Executive Officer

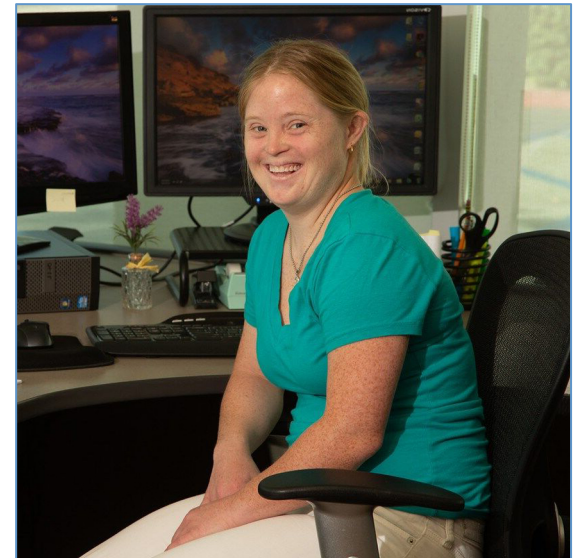
GUIDING PRINCIPLES

Vision Statement

Each individual is valued and experiences a genuinely satisfying life.

Mission Statement

The Arc of Ventura County provides services and support to people with intellectual and developmental disabilities to achieve their goals toward a life of opportunity, choice, participation, and contribution.



CORE VALUES

We Are Safe

- Safety in our programs and in the community is our number one priority.
- We are trained in CPR, First Aid, and Crisis Prevention.
- We ensure that the people we serve have information to be prepared for an emergency.

We Advocate

- The Co-Advocates of Ventura County (CAVC) is open to all.
- Opportunities for leadership, volunteerism and civic activism are provided.
- We provide education and information about people with intellectual and developmental disabilities.

We Are Respectful and Inclusive

- People are encouraged to reach further, be creative, and set ambitious goals.
- Individual expression is supported.
- Personal growth and informed choices are promoted.

We Are Accountable

- The Board of Directors ensures our financial health.
- We cooperate and support each other.
- We strive for excellence in all programs and services.



OUR STRATEGIC PLAN DEVELOPMENT PATH

The Assumptions

- Person Centered Thinking
- Cultural Diversity
- Community Inclusion
- Financial Stability

The Decision Criteria

- Is the action suggested meaningful for staff and persons receiving services?
- Is the action or initiative positive and possible over the next three years?
- Can significant progress be made over the next three years with the organization's funding, staff and other resources?

Planning Process

The Mission, Vision and Core Values were reviewed and refreshed. These Guiding Principles were then the basis for a Strategic Plan that aligns with the organization's day-to-day work, considerations for the future, and ethical standards.

The process of planning for The Arc of Ventura County Strategic Plan 2020 – 2022 included leadership, management and staff contributing to an initial analysis of the organization's position through a SWOT (Strengths, Weaknesses, Opportunities and Threats) Analysis. The themes that emerged included:

- Pride of expertise in person centered thinking and practices as well as quality of current services
- Need for systems to support retention and advancement of staff, including training
- Emphasis on access to and content of policies and procedures and standardized forms
- Importance of communications in English and Spanish, updated publications, and a newsletter

Stakeholders, including the Board of Directors, persons receiving services and their families, community partners, and all staff were then invited to participate in an electronic survey, offered in English and Spanish. Results reflected categories similar to input from the SWOT Analysis including Career Development and Staff Retention, Training, and Program Management and Development.

THE PLAN FOCUS AREAS - A Snapshot

Strategic Focus Area 1

Staff Development, Retention and Performance

Definition:

A cohesive Human Resource Management Plan with elements of innovative recruiting, onboarding, performance review, training and retention strategies, based on Person Centered principles, will be implemented to support professional development at The Arc of Ventura County. The Plan will also prepare employees and the organization to adapt to changing methods of delivery of services.

Desired Outcomes:

1. Input of new and experienced employees, with the use of Person Centered Thinking tools, informs the identification of a Professional Development Plan, with the offering of training modules that support rapid advancement based on performance and knowledge acquisition.
2. An Annual Performance Review system is based on Job Descriptions that are aligned with the Guiding Principles.
3. Retention increases incrementally over the next three years.

Strategic Focus Area 2

Program Excellence

Definition:

The Infrastructure of service delivery is effective and efficient, supporting exemplary and innovative programs.

Desired Outcomes:

1. Preferences of the service community, along with quality of service, are tracked on a continuing basis.
2. Standard methods of tracking goals and progress are in place.
3. Policies and Procedures, Program Managers Manuals and Case Managers Manuals are readily accessible.
4. Technology hardware and software resources for service delivery include access to communication devices and innovative strategies such as relevant applications, robotics and document access.
5. A method for analyzing and evaluating feasibility of program expansion and innovation results in implementation of new ideas.

Strategic Focus Area 3

Communications

Definition:

Members, family, donors, staff and the community are informed regularly through publications, social media, and other electronic communications that promote the agency's mission, services and achievements.

Desired Outcomes:

1. Social media, publications, and electronic communications increase the organization's visibility.
2. Communications are delivered in English and Spanish.
3. Community education conveys messages of inclusion and respect for individuals with intellectual and developmental disabilities.

STAFF DEVELOPMENT, RETENTION, AND PERFORMANCE

STRATEGIC
FOCUS AREA

1

Defined as:

A cohesive Human Resource Management Plan with elements of innovative recruiting, onboarding, performance review, training and retention strategies, based on Person Centered principles, will be implemented to support professional development at The Arc of Ventura County. The Plan will also prepare employees and the organization to adapt to changing methods of delivery of services.

Desired Outcomes - What do we want to achieve?

1. Input of new and experienced employees, with the use of Person Centered Thinking tools, informs the identification of a Professional Development Plan, with the offering of training modules that support rapid advancement based on performance and knowledge acquisition.
2. An Annual Performance Review system is based on Job Descriptions aligned with the Guiding Principles.
3. Retention increases incrementally over the next three years.



How will we measure our success?

	Goals	2020	2021	2022
1.	Job Descriptions are based on duties and responsibilities that reflect the Guiding Principles .	Job Description templates for staff, management and directors are developed. Guiding Principles are clearly incorporated.	Job Description templates are populated for all staff, management and directors.	All Job Descriptions are completed and used in the Annual Performance Review Plan.
2.	An Annual Performance Review Plan is developed and implemented.	The template for the Annual Performance Review Plan is developed and approved.	Finalized Job Descriptions incorporating the Guiding Principles structure the elements of performance review.	The Annual Performance Review Plan is fully implemented across the organization.
3.	A Retention Plan with onboarding, orientation and training elements is developed and implemented, including: <ul style="list-style-type: none"> • Orientation • Rapid Advancement Initiative • Leadership Training Program 	<p><i>Person Centered Group Conversations</i> are facilitated across the organization to gather information about the first six months on the job.</p> <p>A Leadership Training Program is structured.</p>	<p>A Retention Plan is built based on input of all staff.</p> <p>The Leadership Training Program is piloted around a curriculum developed for advancement to management.</p>	The Retention Plan is fully implemented with revision of onboarding, orientation, Rapid Advancement Initiative, and Leadership Training Program.
4.	A Professional Development Plan for managers is identified.	Topics for Leadership Training are selected and approved (from community resources.)	Leadership Training Programs identified according to preferred curriculum offerings.	The Professional Development Plan is implemented.

How will we achieve our success?

Goal 1

Job Descriptions are based on duties and responsibilities that reflect the Guiding Principles.

Strategic Actions	Accountable Group
a. A Job Description template is developed that is based on the Guiding Principles.	Human Resources & Subject Matter Experts
b. Guiding Principles Job Description templates are populated for all staff and management positions with clear delineation of levels of responsibilities.	Human Resources

Goal 2

An Annual Performance Review Plan is developed and implemented.

Strategic Actions	Accountable Group
a. A Template for Performance Review Summary is developed with content of the revised Job Descriptions and incorporation of operational and strategic goals.	Human Resources & Subject Matter Experts
b. An Annual Performance Review Plan is developed and implemented.	Human Resources

Goal 3

A Retention Plan with onboarding, orientation and training elements is developed and implemented, including:

- Orientation Plan
- Rapid Advancement Initiative
- Leadership Training Program

Strategic Actions	Accountable Group
a. A plan for logistics of in-person group meetings, <i>Person Centered Group Conversations</i> , across the organization is developed.	PCP and DSP committees
b. <i>Person Centered Group Conversations</i> Plan is implemented with the intent of to learn about the employee's experiences at The Arc of Ventura County focused on input regarding the first six months of employment.	PCP and DSP committees
c. The Orientation Plan is revised, reflecting input from Person Centered Group Conversations, and inclusion of training around primary expectations in provision of services.	PCP and DSP committees
d. A Rapid Advancement Initiative is developed to identify and cultivate emerging leaders. Criteria for excellence in performance are established for Direct Service Professionals and Managers. Brainstorming sessions are conducted.	Human Resources and Managers
e. A Leadership Training Program is developed with specified curriculum criteria for consideration promotion to management.	Human Resources and Managers

Goal 4

A Professional Development Plan for managers is identified.

Strategic Actions	Accountable Group
a. Training modules topics are selected that support supervisory training to ensure regular feedback, coaching and other managerial skills.	Human Resources and Managers
b. Training curriculum is approved.	Human Resources and Managers



PROGRAM EXCELLENCE

STRATEGIC
FOCUS AREA

2

Defined as:

The Infrastructure of service delivery is effective and efficient, supporting exemplary and innovative programs.

Desired Outcomes - What do we want to achieve?

1. Preferences of the community served, along with quality of service, are tracked on a continuing basis.
2. Standard methods of tracking goals and progress are in place.
3. Policies and Procedures, Program Managers Manuals and Case Managers Manuals are readily accessible.
4. Technology hardware and software resources for service delivery include access to communication devices and innovative strategies such as relevant applications.
5. A method for analyzing and evaluating feasibility of program expansion and innovation results in implementation of new ideas.



How will we measure our success?

Item	Goals	2020	2021	2022
1.	Develop annual survey of persons served and families, community partners and funders about preferences for and satisfaction with services.	Survey developed and ready for administration.	Survey administered and results are utilized in programs structure.	Survey results used annually for program quality and innovation.
2.	Develop system for tracking of goals of individuals receiving services, and monitoring of progress.	Method of tracking goals and monitoring progress is in place.	Method of tracking goals and monitoring progress is evaluated.	Method of tracking goals and monitoring progress is evaluated.
3.	Documentation resources, including policies and procedures, manuals for program administration, are available in print and electronically; case management notes are standardized.	Documentation Resource Plan is developed and includes objectives: <ul style="list-style-type: none"> • Development of Policies and Procedures. • Case Management documentation is evaluated for standardization. • Program Management documentation is evaluated for standardization. • Direct Service Professional reference manual is developed 	Program Managers Manual is developed. Case Managers Manual is developed. Accounting Procedure Manual is developed. Direct Service Professional reference manual is reviewed.	Documentation Resource Plan is fully implemented.

4.	A Technology Plan includes program objectives around hardware and software resources, access to communication devices, and relevant applications.	Phases of the Technology Plan are drafted and resources are considered. Priorities are determined.	Technology Plan is approved and Phases are implemented according to highest priority.	Technology Plan is evaluated for level of implementation and relevancy.
5.	A process is established for identifying trends in innovation and accommodating changes in the industry.	Feasibility study format developed and piloted.	Feasibility format evaluated. Topics evaluated as a result of access to the format are reported.	Feasibility format and review process of proposed ideas/initiatives is conducted quarterly.



How will we achieve our success?

Goal 1

Develop annual survey of persons served and families, community partners and funders about preferences for and satisfaction with services.

Strategic Actions	Accountable Group
a. Determine survey question categories for persons served and their families, community partners and other stakeholders (e.g. employers, residential providers, funders, donors)	Focus Area 2 Workgroup and other Subject Matter Experts
b. Create methodology to administer survey.	Focus Area 2 Workgroup and other Subject Matter Experts.
c. A query of transition-age youth and their Circles of Supports regarding program and service preferences is implemented to learn about expectations.	Focus Area 2 Workgroup and other Subject Matter Experts.

Goal 2

Develop system for tracking of goals of individuals receiving services, and monitoring progress.

Strategic Actions	Accountable Group
a. Determine the elements of the tracking document and the method of measuring and monitoring.	DSPs, Case Managers, Program Managers, Director of Clinical Services
b. Pilot a draft document.	DSPs, Case Managers, Program Managers, Director of Clinical Services
c. Determine method for electronic access and use.	Director of Operations

Goal 3

Documentation resources, including Policies and Procedures, manuals for program administration, are available in print and electronically; case management notes are standardized.

Strategic Actions	Accountable Group
a. Develop all Policies and Procedures in print and electronically for availability in all program sites.	Additional Resource
b. Create Direct Service Professionals Manual in print and electronically.	Additional Resource

c.	Create Accounting Procedure Manual in print and electronically.	Director of Finance, Finance Team
d.	Develop Program Managers Manual and Case Managers Manual in print and electronically.	Additional Resource
e.	Create system for regular review of Policies & Procedures, Program Managers Manual, Case Managers Manuals, and Direct Service Professionals Manual.	Additional Resource

Goal 4

A Technology Plan includes program objectives around hardware and software resources, access to communication devices, and relevant applications.

Strategic Actions	Accountable Group
a. Determine the effectiveness of current use of technology in programs, such as Digital Literacy.	Director of Operations, Direct Service Professionals, Program Managers, Case Managers, other Subject Matter Experts
b. Research opportunities for accessing innovative technology.	
c. Develop priorities.	
d. Develop the phases of the Technology Plan.	

Goal 5

A process is established for identifying trends in innovation and accommodating changes in the industry.

Strategic Actions	Accountable Group
a. Establish Innovation Steering Committee to research trends, such as remote access to programming, that reports to Managers and Directors semi-annually.	Directors
b. Develop Feasibility Study Format including financial, infrastructure and all other resources, for chosen projects.	Directors of Finance, Marketing, Clinical Services, Program Managers

COMMUNICATIONS

STRATEGIC
FOCUS AREA

3

Defined as:

Members, family, donors, staff and the community are informed regularly through publications, social media, and other electronic communications that promote the agency's mission, services, and achievements.

Desired Outcomes - What do we want to achieve?

1. Social media, publications, and electronic communications increase the organization's visibility.
2. Communications are delivered in English and Spanish.
3. Community education conveys messages of inclusion and respect for individuals with intellectual and developmental disabilities.



How will we measure our success?

	Goals	2020	2021	2022
1.	A Communication Plan is developed and includes: information and updates for staff, members, families, volunteers, donors and the community via a redesigned web site, social media (Facebook and Instagram) publications, and internal electronic communications.	Communication Plan is developed and approved.	Communication Plan is implemented. Website is redesigned. Services brochures are in development.	Communication Plan is reevaluated. Website is monitored and maintained.
2.	A process for ensuring that communications are translated into Spanish from English is developed.	Website is updated. General brochure and Annual Report is updated. Employment brochure is completed.	System is implemented for timely translations from English to Spanish.	System is reevaluated.
3.	An electronic newsletter is developed to inform and update the community.	Plan for resources is developed and approved. Establish dbase for email addresses for recipients (persons served, donors, partner agencies, funding sources)	Create the design and structure of content for the newsletter and electronic publication	Evaluate distribution and content.

How will we achieve our success?

Goal 1

A Communication Plan is developed and includes: information and updates for staff, members, families, volunteers, donors and the community via redesigned web site, social media (Facebook and Instagram) publications, and internal electronic communications.

Strategic Actions	Accountable Group
a. A Communication Plan is developed.	Communications Committee
b. Website design is updated and maintenance plan is created.	Communications Committee
c. Publications are updated. (TIL, Day Program, IL, Advocacy, Employment).	Communications Committee

Goal 2

A process for ensuring that communications are translated into Spanish from English is developed.

Strategic Actions	Accountable Group
a. Resources for translation are researched and identified.	Director of Operations, Director of Marketing
b. Develop system for planning of timely translation for emergency notices.	Director of Operations, Director of Marketing

Goal 3

An electronic newsletter is developed to inform and update the community.

Strategic Actions	Accountable Group
a. Develop the design and structure of content for the newsletter.	Director of Marketing and Subject Matter Experts
b. Subject matter experts are identified for content development	Director of Marketing and Subject Matter Experts



The Arc of Ventura County is a nonprofit organization dedicated to improving the quality of life for individuals with intellectual and developmental disabilities. Established in 1954, The Arc serves over 700 individuals in a variety of programs, including Adult Day Programs, Supported Employment, and Independent Living throughout Ventura County.

We are committed to empowering the individuals we support by offering opportunities that lead to greater independence and self-determined lives.

This Strategic Plan was prepared through facilitation and support from



Path Forward, Inc.

Patricia Forgey, MA MBA, Principal

<http://pathforward.consulting> | 805.455.6003

Planning • Coaching • Consulting