Options, inc

2011

*Annual Report to the Board*

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### Major highlights:

**Executive**

A majority of the work of the past year has been focused on evaluating the feasibility of and then implementing a merger with another local agency, Christole. After negotiations and considerable discussions with stakeholders, Christole and Options Boards and Members agreed to merge the organizations effective January 1, 2012. This created a new grassroots organization which was renamed ***LifeDesigns, Inc***, to provide quality services and supports to people with disabilities in south central Indiana. Our new name reflects our commitment to individualized supports so that people with disabilities design a life of living, working, learning, and participating in their community.

The Boards felt this partnership made sense since both agencies have the same basic mission and the same roots, families coming together to create opportunities for their son or daughter with a disability. Together we will be better able continue to provide quality services, create good jobs, and partner to build inclusive communities. With the merger, ***LifeDesigns, Inc*** will provide services in 8 counties to over 350 individuals and families and bring together resources to:

* Give consumers/customers a wider range of options for services, providing a continuum across ages served and types of services.
* Meet the needs of future customers by enabling the development of new services as a direct result of combining our expertise.
* Improve the overall stability of each agency by making more efficient use of all resources.
* Lead to other service improvements across existing residential and community services.

The Executive Team’s fundraising efforts were rewarded in 2011 with a 28% increase over the year before. Letting our community partners know our needs and requesting their assistance proved to be the key to our success. Starting the year off with a bang was the Art of Chocolate with over 250 people in attendance. We raised a record $28,000 through sponsorships, ticket sales and our 1st ever art auction. Grant writing went well with a 77% success rate. Grants from various sources; NAP, Wal-Mart, Duke Energy, City of Bloomington Jack Hopkins, Community Foundation of Bloomington and Monroe County, United Way agencies (Monroe County and South Central) and Psi Iota Xi were vital in helping us secure funds for programs that were terminated by the state or had revenues reduced. They were also used to purchase a new scanner and help on merger expenses.

At the Annual Picnic, it was announced that a new fund had been named in honor of Bill and Gale Cook, as part of the agencies endowment. Mrs. Cook who attended the picnic, graciously sent a gift to Options for the endowment fund. Also at the picnic, the development team launched the 30 for 30 Birthday Campaign. This initiative will run through year 2012. The goal is to get 5,000 supporters to donate $30 to raise $150,000. A display was created and set-up in the Winslow office lobby. Every organization and individual who gives will be recognized with a magnetic figure placed on the display. We hope to cover the board and then move it to a more public location. The Bloomington Moose Lodge#1081 got us off to a great start with $1,500 donation. The Moose Lodge has been a valuable community partner, offering meeting space for our CEO program, our staff meetings and our holiday party.

**Housing**

LifeDesigns has been able to diversify its funding resources through the introduction of affordable housing and the expansion into Housing Options II. With $945,000.00 in grants we have been able to secure funding to make this expansion possible and to begin discussion around permanent supportive housing projects. LifeDesigns staff actively participate in the Owen County Housing Taskforce and the South Central Indiana Housing Network. We are developing a reputation as the premiere low income housing developer in south central Indiana. Housing Options I on Covey Lane consists of 12 duplexes and successfully served 25 individuals in 2011. In the future we envision more housing in our catchment areas as we continue to develop new LifeDesigns Communities where accessibility and aging in place are the norm. We are confident that LifeDesigns will be seen as the community of choice.

**Operations**

Operations has been busy this year! In addition to the usual payroll, payables, receivables, financial statement preparation, and HR and IT functions, we were involved in a company-wide database conversion, a payroll conversion, and preparation for a merger! Here are some of the details:

A multidisciplinary Project Management team of Operations and Services staff met each week throughout the year for training on our new Casper System. During this time we made the many programmatic and operational decisions required in order to design a customized database for our organization. The outcome for all of this work will be a robust system that not only houses employee and customer data, but is a timekeeping and HR system as well. A few years ago, this type of program was a recommendation from CARF.

As we worked through the data transfer and setup issues along the way, we realized that customer goals and objectives were linked to employee work time entered, and these goals and objective must first be manually entered. To get us started, the team divided up the task and did the initial manual entry. The plan is to shift maintenance of the goals and objectives to the Team Managers and Coordinators, since they are the ones who formulate them.

Coming in to this, we knew that entering Notice of Actions would be a manual process, and with 150 or so Waiver customers, who also might have multiple services approved, this would be a big job. Interested in garnering the Indiana market, Quantum Solutions was there to help us, and they ended up building a customization to enable automatic downloading from the state.

Meanwhile, with customer and employee data entry and maintenance under way, we set up a pilot program with managers and a few direct service and office staff to test the time entry portion of the system. During this process we discovered that the Casper system is not truly web-based, and would require a program download and internet connection for staff to enter their time. Quantum Solutions is working on several ways to address these barriers, including a smart phone interface and a smaller version of the program loaded on flash drives to be distributed to staff. For this reason, completion of this project is on hold.

To address how we would handle payroll and benefits for our combined 400 employees, the decision was made to convert from WorkSmart to the Paylocity system, which Christole was currently using. This major difference in systems is that Paylocity is a payroll processing company, whereas WorkSmart is a PEO who brokers employee benefits and also processes payroll. Planning and setup began this year in order to get data transferred and ready to begin processing as LifeDesigns, Inc. in January of 2012!

With a possible merger on the horizon, Options was tasked with providing quantities of information to satisfy the due diligence requirements of our merger agreement. Although gathering the data was a lot of work, I am happy to say that all of our records were in order and all of our prior audits had favorable opinions!

**Services**

This year the state implemented Objective-Based Allocation (OBA), a methodology that prescribes the amount of Medicaid Waiver service each individual receives based on assessed behavioral and medical support needs, as well as living situation. Unfortunately for many, this means a significant reduction in the amount of service the state will fund. For individuals who do not live with family, service amounts under OBA rely heavily on shared living situations. This means that for most individuals who require 24/7 support, they now have to share support with 2-3 other individuals. Services staff worked diligently throughout the year to assist individuals to identify the best possible housemate matches, and in many cases, locate housing to accommodate a larger group of people living together. One of the major impacts of this change, outside of the fact that people now have to share services, was the reduction in staff. Overall we fell by 62 staff from 2010 levels. With this change, our turnover was much higher because staff who had been supporting just one individual now were working with 2 or 3. We are certain that some staff left because of this increased responsibility.

In February 2011, we hired Mark Ochsner, a behavior specialist, on a part-time salaried basis to provide behavior support services to customers who elected to choose Options as their provider of this service. Previously, we had a contracted behavior specialist, Fritz Kruggel, who provided support to five customers. Fritz continues on, in his contract role, and provides mentoring to Mark. Mark went full-time in August 2011, as a result of the high level of referrals. Overall, behavior support services grew by over 200% in the number of customers choosing Options as the provider of this service. In fact, currently Mark has a full caseload and we are discussing next steps to ensure we are able to meet the demand for this service.

The number of customers rose by 5% overall just short of our 8% goal. We had exactly the same number leave services as 2010 and 6 of the 26 who exited did so because they no longer needed services (our ultimate goal). Because fewer than 200 people moved from wait list to Waiver service, there were fewer new customers there. The biggest gains came from those entering behavior support, which grew by 217%.

Community participation: The following are a few of the organizations where Options staff is involved and working on to increase awareness of our services and supports:

* 1. Diversity Works Steering Committee and Business Leaders
  2. Monroe/Owen Transition Council
  3. Morgan County Transition Council
  4. Networking for Support
  5. Brain Injury Local Support Network Advisory Board
  6. Centerstone Project CARE Advisory Board
  7. Bloomington Council on Community Accessibility
  8. Bloomington Rotary Club
  9. City of Bloomington Inclusive Recreation Advisory Council
  10. CASA Monroe County
  11. Lawrence County United Way
  12. Mental Health of America, Monroe County (Rinne is Treasurer)
  13. Monroe County United Way (Rinne is President)
  14. Owen County Housing Task Force
  15. Indiana University Department of Psychological and Brain Sciences Advisory Committee
  16. Bloomington Chapter of the American Business Women’s Association
  17. Southern Indiana Provider Network (SIPN) Rinne is President
  18. Women Inspire

State level participation: This includes the following:

1. INARF’s Community Supports Section
2. INARF’s Employment Supports Section
3. INARF’s Training and Professional Development Committee
4. Indiana Association for Persons in Supported Employment INAPSE
5. INAPSE Conference Planning Committee
6. INAPSE Policy Committee
7. Southern Indiana Provider Network Case Mgmt. Task Group
8. INARF Human Resources Group
9. INARF CFO Division
10. Association of Fundraising Professionals-Indiana Chapter
11. Indiana Employment First Team

National level participation:

APSE Network on Employment Board (Rinne is Secretary)

**Progress Report**

This section of the report provides a discussion of our progress toward the benchmarks we set for quality in the areas of staff development, customer service, and financial stability. This is a summary of statistics provided over the year from Executive, Operations, and Services Teams with an analysis of the trends they indicate.

### Staff Development

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Staff Development Statistics Summary** | | | | |
| **Overall** | **2009** | **2010** | **2011** | **Goals** |
| Average turnover rate | 54.16% | 43.44% | 54.7% | 25% |
| Average tenure in months | 35.82 | 41.6 | 47.1 | 36 months |
| Full time staff retention | 74.51% | 69.66% | 58.6% | 89% |
| Supervisor retention | 80% | 80.48% | 66.1% | 90% |
| Average % Full time | 61% | 60% | 61% | 51% |
| Total number of staff | 308 | 288 | 228 | 300 |
| Average staff meeting basic requirements | 92% Renewals  41% CE  99% CPR | 99%  Renewals  84%CE  100%CPR | 98%  Renewals  84% CE  90% CPR/FA | 85% |
| Workplace Accidents | 59 | 29 | 23 | 15 (or less) |
| Community members trained | 60 | 60 | 40 | 50 |
| Orientation dropout rate | 8% | 14% | 10.6% | <10 |

Training compliance remained high in 2011, with only 2% of staff not completing renewal training. Compliance with CPR was 90%. The percentage of staff able to obtain the required number of Continuing Education credits maintained the prior year’s level. These credits require that staff document and submit various training opportunities throughout the year for credit. Because each staff is responsible for documenting his trainings, collecting data for this can be quite a challenge.

Average turnover was up in 2011, at just over 54.7%. This is, in part, because of an overall reduction in staff as customers moved in together due to funding. Tenure continued to increase, again exceeding our goal. We know that the majority of the turnover is in part time positions. Last year, 56% of people working less than 36 hours left employment. Only 44% of people working full-time left the agency. Supervisor retention was lower in 2011 at 66%. This was likely due to some restructuring in the Networks as caseloads were reassigned and one network was eliminated.

To further analyze turnover, Figure 1 summarizes the reasons for terminations over the past 4 years. Looking at the 2011 data, the most frequent reason for termination was leaving to another job. This was a significant decrease from the prior year. Quitting without notice and disciplinary reasons tied for second, and third was a tie between moved and personal reasons. The next highest reasons were graduating, not working the minimum hours required and not finishing training requirements. Improvement is seen in the area of terminations as a result of not finishing training/meeting requirements.

**Figure 1**

Plans last year to improve turnover included a clarification of Options values, culture, and expectations. The focus in the coming year will be to implement those plans.

Work related accident numbers again reduced in 2011. According to Figure 2, the majority of accidents were related to customer aggression. All direct service staff are required to complete Crisis Prevention Intervention (CPI) training at hire and through renewal training. CPI focuses on strategies to safely respond to challenging behaviors. Additional behavior support and increased time to shadow in some settings have also contributed to reductions in injuries. The next highest area was lifting, sprains and strains, which reduced dramatically from the prior year due in part to aggressive emphasis on training and the proper use of equipment in settings where appropriate. The third highest area was falls and slips and mostly the result of weather conditions. A review by an ergonomic consultant was conducted for some office work spaces to avoid repetitive motion injuries and recommended equipment was purchased for these areas. One of the three vehicle accidents in 2011 resulted in a serious injury to a staff and impacted renewal rates for Work Comp insurance premiums. Due to the number of staff who provide transportation to customers on a daily basis, this area needs scrutiny to reduce risk. The Health and Safety Committee has taken a very active role in reviewing workplace injuries and making recommendations for future accident prevention. The agency instituted a Return to Work Program for injured workers to offer light duty work. This could include temporary office work and alternative direct service settings/responsibilities based on the restrictions set by the health care provider.

**Figure 2**

The following chart (Figure 3) provides the breakdown of the positions of staff involved in these accidents. Direct service staff injuries predominate but that is to be expected as they make up a substantial percentage (83%) of total accidents. Office staff injuries have generally been weather related (i.e. falls on ice in parking lot) or lifting.

**Figure 3**

Employee satisfaction: The staff survey was conducted in summer of 2011 and had a response rate of 194 better than any prior year. The format was unchanged from 2007 and is based on a survey developed by the Gallup organization (as described in First Break All the Rules, Buckingham and Coffman, 1999). This questionnaire has been used in hundreds of US companies, many of which are Fortune 500 businesses. Questions require staff to rate items stated positively in terms of their agreement with the statement. The survey has a five-point scale with 5 being **strongly agree** and 1 being **strongly disagree**. The higher the score, the better the staff member’s impression in that area. Results have been summarized in the next chart. The higher response rate is because it was incorporated into our staff renewal process so people had time during that training to complete the survey online. We will continue this strategy as it seem to work very well. The following chart summarizes the result and the positions represented in the survey.

|  |  |  |
| --- | --- | --- |
| Direct Service Professional | 76.8% | 149 |
| Services Administration | 14.9% | 29 |
| Operations/Executive | 5.2% | 10 |
| Other | 3.1% | 6 |

**Results**

The results show a decrease overall in satisfaction but it continues to be quite high in a number of areas. Overall the change is very minimal. It is likely that the decrease is related to the reductions in force that happened in 2010 along with the fact that we were unable to give raises then and only gave a small 2% raise in 2011. Also, staff have a great deal of difficulty with the shift from individual to group settings in community living. This increased their responsibilities at the exact time they felt they were not being compensated due to the small raise. The problematic areas are fairly consistent with prior surveys and include having someone with whom a staff can share concerns, receiving recognition, and feeling of job importance. Work expectations, having the chance to do the best every day, being able to give opinions and have them count, having the necessary training, and workload all showed improvements It is clear from the results that our training program is well received by all employees.

The leadership team reviewed the information and made recommendations to improve the overall satisfaction levels. This included instituting a new recognition program that focused on employees being able to recognize other employees for their work. It was launched in the fall and had some positive results but has since not been utilized very well. With the merger, some focus was taken off getting this going. We will be revisiting the program in the coming year to ensure that it still meets the need of the newly formed organization; make tweaks where needed; and do more promotion to get it out to all employees.

### Customer Service

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Customer Services Statistics** | | | | |
|  | **2009** | **2010** | **2011** | **Goals** |
|
| Satisfaction | 84.9% satisfied  1.4% dissatisfied  84.3% would recommend | 88% satisfied,  7%  dissatisfied,  93% would recommend | 98% satisfied,  2% dissatisfied,  96% would recommend | 90% satisfied |
| Survey return rate | 28% | 28% | 18% | 50% |
| Service growth: net new customers to last yr unduplicated count | 15% | 6% | 5% | 12% |
| CEO participation | 57 | 63 | 73 | 60 |
| Employment enrollment | 86 | 97 | 84 | 90 |
| Job placements | 14 | 23 | 20 | 20 |
| Respite Enrollment (state or county) | 58 | 32 | 34 | 100 |
| Respite hours provided | 5503 | 6397 | 3710 | 7500 |
| Customers >65yrs old | 17 | 15 | 14 | 20 |
| New Customers | 65 | 36 | 47 | 60 |
| Customers leaving | 25 | 26 | 26 | 10 |
| Number served, duplicated | 402 | 405 | 427 | 406 |
| Number served, unduplicated | 288 | 285 | 289 | 291 |
| Days from referral to intake | 19 | 14 | 36 | 20 |
| Days from intake to start | 13 | 28 | 29 | 20 |
| Behavior support | 5 | 5 | 23 | 15 |
| Quality Assurance Rating | 83 out of 100 | 85 out of 100 | 86 out of 100 | 95 |
| Percent working age with jobs | 28.7% | 31% | 34% | 66% |
| Percent adults with own home | 25.72 | 21% | 25% | 35% |

The number of customers grew overall by 5% in 2011. Behavior support services showed a dramatic increase from 2011, of 217%. We hired a full-time behavior specialist in the spring of 2011 and have been quite pleased with the response we have received, in terms of the number of new referrals for this service. Employment Services decreased by 16% and CEO increased by 13%. Other services such as Supported Living, Group Homes, Respite and Host Families showed little to no change. 47 new customers began services this past year, while 26 individuals exited Options’ services. 35% of those exiting left because they were either not in need of services any longer or their funding had been discontinued. Figure 5 outlines all the reasons given for exit.

**Figure 5**

| **Customer Reasons for Exit** | | | |
| --- | --- | --- | --- |
| **Reason** | **2009** | **2010** | **2011** |
| New provider | 10 | 6 | 8 |
| Moved out of area | 1 | 0 | 3 |
| State closed services | 0 | 11 | 3 |
| Health issues | 0 | 1 | 1 |
| Options served notice | 1 | 1 | 0 |
| No longer needed service | 8 | 3 | 6 |
| Other, unknown | 1 | 1 | 2 |
| Death | 4 | 3 | 3 |
| Total | 25 | 26 | 26 |

The figure below shows customer demographics as of December 2011. There was little change in the types of disability, age, ethnicity, or gender from 2010. Our primary customer group continues to be those with intellectual disabilities, which make up 59% of our customer base. The number of children served is lower than in past years. This is likely due to the state’s emphasis on providing more minimal services under the Support Services Waiver. That Waiver does not provide much in the way of residential service (only respite). Fewer than 200 people have moved from waiting lists which are well over 15,000 statewide.

**Figure 6**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Age** | **current** |  | **Gender** | **current** |
| *0-5* | 1% |  | *Male* | 58% |
| *6-17* | 15% |  | *Female* | 42% |
| *18-40* | 44% |  |  |  |
| *41-65* | 33% |  |  |  |
| *66-85* | 4% |  |  |  |
| *86+* | 1% |  |  |  |
| *Unknown* | 2% |  |  |  |
|  |  |  |  |  |
| **Race** | **current** |  | **Disability** | **current** |
| *Caucasian* | 87% |  | *Cerebral Palsy* | 7% |
| *Indian* | 1% |  | *Autism* | 21% |
| *African American* | 5% |  | *Intellectual Disability* | 59% |
| *Asian* | 1% |  | *Traumatic Brain Injury* | 3% |
| *Hispanic* | 1% |  | *Sensory* | 1% |
| *Unknown* | 5% |  | *Physical Disability* | 5% |
|  |  |  | *Mental Illness* | 4% |
|  |  |  | *Unknown* |  |
|  |  |  |  |  |

Reportable incidents: The number and type of state reportable incidents are seen below in Figure 7. A reportable incident is defined by the state and includes a number of categories. The state revised the reporting criteria in March 2011, and those categorical changes are reflected in the chart below. A major change was in the category of abuse/ neglect. Prior to 2011, all alleged abuse/ neglect incidents were reported in the same category, including incidents of peer to peer aggression. Incidents are now categorized based on the type of abuse. Another related change was that, in past years, the state required us to report any incident of customer aggression against staff, which fell into the “abuse” category. Even though we continue to document those incidents internally, they no longer require state reporting. This in part accounts for the marked decrease in total abuse/ neglect allegations (only 99 for 2011 as opposed to 341 in 2010). Of the 25 reported allegations of abuse/ neglect, only 5 were substantiated. It continues to be Options policy that any staff who are found to have abused or neglected customers are terminated and the incident reported to Adult/Child Protective Services. Another change was the way in which medication errors are reported. In previous years, the state only required a report for medication error that posed a danger to an individual’s health or safety. Under the new guidelines, ALL medication errors must be reported, resulting in quite an increase in reportable errors in 2011. A new reporting category for falls was added this year, requiring that all falls with injury, regardless of severity, is reportable, including minor scratches and bruises.

**Figure 7**

|  |  |  |  |
| --- | --- | --- | --- |
|  | **2009** | **2010** | **2011** |
| **Physical abuse** | 409 | 341 | 9 |
| **Sexual abuse** | 3 |
| **Emotional/ verbal abuse** | 3 |
| **Domestic abuse** | 1 |
| **Neglect** | 9 |
| **Peer to peer aggression** | 74 |
| **Exploitation** | 1 | 6 | 2 |
| **Death** | 5 | 2 | 4 |
| **Structural/ environmental** | 3 | 16 | 9 |
| **Res. Fire** | 0 | 0 | 0 |
| **Missing Person** | 3 | 2 | 2 |
| **Elopement** | 1 |
| **Criminal Activity** | 2 | 6 | 6 |
| **Med./Psych Treat.** | 70 | 86 | 82 |
| **Adm. To Nursing Fac.** | 3 | 2 | 0 |
| **Injury/Unknown Origin** | 7 | 10 | 5 |
| **Injury/Known Origin** | 9 | 12 | 9 |
| **Fall with injury** | Not previously reported | Not previously reported | 37 |
| **Med. Errors** | 73 | 27 | 107 |
| **Inadequate Staff Supp.** | 6 | 3 | Accounted for in other categories |
| **Inadequate Med. Supp.** | 1 | 0 | Accounted for in other categories |
| **Use of PRN** | 29 | 31 | 28 |
| **Use of restraint** | Not previously reported | Not previously reported | 8 |
| **Other** |  |  | 26 |
| **Total** | **621** | **544** | **449** |
|  |  |  |  |

All incidents are reviewed monthly by the Health and Safety Committee. In addition, abuse and neglect investigations involving staff are reviewed by the Human Rights Committee. The Service Development Committee of the Board also reviews incident reports bi-monthly. These multiple reviews help to ensure remediation is ongoing.

Progress on Employment Outcomes Through December 2011, there were 20 employment placements. This was a decrease from 21 employment placements in 2010. The average employment tenure year to date was 2.6 years, an increase from 2.4 years previously. The current percentage of customers receiving Supported Employment services who are currently employed was 50%.

The average time from intake to job placement is currently 477 days. This continues to be a problem area and the Supported Employment team will be putting new initiatives in place for 2012 to attempt to decrease this length of time. The average hourly pay rate is currently $7.85. Customer and stakeholder satisfaction surveys occurred over the summer. 98% of customer/guardians stated they were satisfied with services while 93% of customers/guardians reported they would recommend Options’ services to others. 100% of stakeholders reported being satisfied with Options’ services and 100% said they would refer others to Options.

Progress on Community Habilitation Outcomes For the year 2011, there were 74 customers who participated in Continuing Education Options (CEO) classes. 14 community members have participated in CEO activities this past year. For the last quarter, 50% of time spent in habilitation services was community based. For the year, an average of 62% of time was spent in integrated, community based activities. Customer and stakeholder satisfaction surveys occurred over the summer months. 98% of customer/guardians s stated they were satisfied with services while 93% of customers/guardians reported they would recommend Options’ services to others. 100% of stakeholders reported being satisfied with Options’ services and 100% said they would refer others to Options.

Customer satisfaction: The survey was conducted over the summer of 2011. There were 50 responses from a possible 289 for a 17% response rate. This is a significant decrease from the 28% response rate in 2010. Responses came from customers from all service areas. 44% of respondents were family members of those receiving services, 42% were legal guardians, 36% were persons receiving services and 8% were advocates of customers. 52% of respondents have been involved with Options for more than 5 years.

The survey requested respondents to agree or disagree with a series of statements and included open ended questions regarding future service needs. The following summarizes results.

**Figure 8**

| **Customer Satisfaction** | | | |
| --- | --- | --- | --- |
| **Area** | **% Agree/ Strongly Agree**  **2009** | **% Agree/ Strongly Agree**  **2010** | **% Agree/ Strongly Agree**  **2011** |
| Satisfied with services | 84.9 | 88% | 98% |
| Dissatisfied with services | 1.4 | 7% | 2% |
| Provide safe environment | 87.5 | 97% | 98% |
| Are timely in responding | 86.3 | 88% | 92% |
| I have control over things I do daily | 87.7 | 95% | 98% |
| I have control over what is in service plan | 83.1 | 93% | 96% |
| Treated with respect | 90.6 | 97% | 100% |
| I learn new things | 73.4 | 94% | 89% |
| I spend ample time in community | 75.3 | 82% | 77% |
| Staff assist with equipment and accommodations | 61.6 | 93% | 66% (33% responded n/a) |
| Office is easy to get around in | 69.9 | 95% | 85% (13% responded n/a) |
| Emergency pager works for me | 24.8 | 78% | 42% (52% responded n/a) |
| Options has a made a difference in my life | 84.7 | 96% | 98% |

At least 75% percent or more of the respondents agreed with all statements included in the survey and of particular note was the 10% increase in respondents who were satisfied with services overall. An additional choice of “not applicable” was added to the survey this year, skewing some percentages when comparing to previous years. Only 6% of people did not agree that the emergency response system works for them, a decrease from 22% in 2010.

Suggestions for improvements or additional services included:

* Work with employers to offer more full-time employment opportunities
* Broader subjects for CEO classes
* After school and summer activities for children
* Support with planning for the future for adults with disabilities
* Increased focus on teaching new skills
* More communication with families of individuals served

The leadership team reviewed the survey results and recommendations were developed as part of the goals for 2012.

Case manager satisfaction: Case managers and other funders were also surveyed in the summer of 2011. The ratings were from 1 (strongly agree) to 5 (strongly disagree). Figure 8 is a summary of results from 2009 and 2010.

**Figure 9**

| **Case Manager Survey Results** | | | |
| --- | --- | --- | --- |
| **Area** | **% Agree/ Strongly Agree**  **2009** | **% Agree/ Strongly Agree**  **2010** | **% Agree/ Strongly Agree**  **2011** |
| Respondents | 46.2% Case manager  23% State Agency  30.8% Other | 37.5% Case Manager  12.5% State Agency  37.5% Other | 60% Case Manager  20% State Agency  20% Other |
| Number respondents | 13 | 8 | 6 |
| Years affiliated | 53.8% 5+ years | 62.5% 5+ years | 60% 5+ years |
| Overall satisfaction | 100% | 100% | 100% |
| Safety satisfaction | 91.7% | 100% | 100% |
| Staff timely in responding | 63% | 100% | 100% |
| Customers have control over things they do in the community | 81.5% | 100% | 80%  (20% responded n/a) |
| Customers have control over service planning | 81.5% | 100% | 100% |
| Treated with respect | 81.9% | 100% | 100% |
| Customers learn new things | 72.8% | 100% | 100% |
| Ample time in the community | 72.7% | 100% | 80% (20% responded n/a) |
| Staff provide accommodations needed | 81.8% | 100% | 100% |
| Office is accessible | 90.9% | 100% | 100% |
| Emergency pager works | 18.2% | 100% | 20% (80% responded n/a) |
| Would recommend | 81.8% | 100% | 100% |
| Difference for customer | 81.8% | 100% | 100% |

Satisfaction levels among stakeholders is very high, however, response rate has declined, in large part due to the case management entities’ decision to respond to the Satisfaction Survey as a whole rather than individual case managers participating. Overall satisfaction continued to be 100%. It should be noted that respondents had a long history with the organization and came from virtually all groups surveyed, state employees, case managers, and behavior specialists.

Service Outcome Reviews: More detail on outcomes for supported living, group home, host families, respite, employment and community habilitation goals along with 2012 goals for efficiency, effectiveness, services access and satisfaction for all services are outlined in Attachment A.

### Financial Stability

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Financial Statistics** | | | | |
|  | **2009** | **2010** | **2011**  **November** | **Benchmark/Goal** |
| Current ratio | 3.83 | 4.75 | 4.07 | 4.71 or higher |
| Quick ratio | 2.61 | 3.58 | 3.14 | 1.5 or higher |
| Working capital | $1,898,750 | $2,117,957 | $2,206,531 | $1,000,000 + |
| Debt to equity | .12 | .09 | .08 | .16 |
| Days in accounts receivable | 38 | 31 | 34 | 27 |
| Net assets to Total assets | .75 | .79 | .77 | 0.6 |
| YTD Net Income | $142,095 | $244,306 | $57,400 | $170,677 |
| Compensation to total expense | 81% | 81% | 80% | 73.35% |
| Benefits to salaries | 24.78% | 24.06% | 23.86% | n/a |
| Service revenue to total revenue | 91.78% | 93.20% | 94.22% | 94.27% |
| Admin expense to total expense | 13% | 12.35% | 14.29% | n/a |
| Contributions to total revenue | .7% | .09% | .5% | 2.18% |
| Investment income to total revenue | .6% | .05% | -.4% | -1.79% |
| Allowance for doubtfuls to gross A/R | 6.57% | 5.92% | 5.84% | 2.73% |
| Year end revenue growth/decline | -1% | -8% | n/a | -1.12% |
| Depreciation/amortization to total expense | 1.56% | 1.79% | 1.83% | 3.09% |
| **Executive Team Statistics** | | | | |
|  | **2009** | **2010** | **2011** | Benchmark/goal |
| Total local funding per financials | $59,616 | $72,934 | $100,702 | $150,000.00 |
| Endowment per financials | $264,968 | $301,397 |  | $ 1,000,000 |
| In Kind (value by donor) | 30,879 | 33,850 | 45,792 |  |
| Planned gifts | $25,000 | 25,000 | 25,000 | $ 50,000.00 |
| WOC | $33,770 | 23,114 | 27,125 | $ 40,000 |
| NAP | $6,200 | 6,100 | 13,000 | $ 50,000.00 |
| Grant hit rate | 83% submitted  72% $ requested | 88% or 7 of 8 submitted  72% of $ requested | 80% or 12 of 15 submitted  85% of $ requested | 50% |
| Grants dollars awarded | 230,170 | 111,222 | 983,913 |  |
| Options members | 243 | 218 | 229 | 200 |
| Volunteers | 87.95 | 33 | 45 | 300 |

The financial data is taken from unaudited financial statements for November. Crowe Horwath, Options’ accounting firm, provided the comparisons based on their reviews of other agencies in our industry, using 2010 data. In several areas we fared better than our counterparts, with Quick Ratio and Working Capital being the most significant. Also favorable was debt to equity. Although the full year’s net income is not reflected here, we can see a substantial difference (lower) than both the benchmark and the two prior years. The drop in net income was attributable to the drop in customer revenues resulting from the State reallocations. Affecting us positively, however, was the sale of our East Street property in Spencer, which added $40,533 to the bottom line.

Donations were up more than 28% and membership increased by 5%. The Week of Chocolate (Art of Chocolate) net was up 15% ($4,000) over last year. The grant hit rate was excellent at 80% with only 3 out of 15 grants not awarded. We were able to secure significant dollars for our Housing Options II project with $945,000 in grants and several grants specifically for programming: Work Experience, Continuing Education and Respite. We obtained a grant to pay for a commercial scanner and to help with expenses on the merger.

### Risk Analysis

Annually, through an analysis of all relevant data and after a review and onsite visit by an insurance company risk manager, Options assesses and develops a plan to manage inherent risks. Here are the major findings for the past 5 years.

* There has been one employee dishonesty claim in the past five years and three total incidents investigated. None were reported or investigated in the past year. The agency put a monitoring program in place several years ago that has been instrumental in ensuring any problems are caught early.
* There are approximately 55 staff with responsibility for customer finances. Training is provided to all staff who oversee customer finances. Supervisors check staffs work monthly. The Financial department conducts random audits on the customer accounts and report findings to supervisors.
* There have been 2 incidents of property damage in the past five years. One was for vandalism and one glass breakage on a vehicle. All were covered with deductible of $500-$1,000.
* There was one incident of loss under electronic data processing. Loss was covered.
* There were two EEOC claim in past five years. One claim settled at mediation for $500. And the other was determined not to have any merit by the EEOC judge. Christole had two EEOC claims and one was settled in mediation and one never followed up.
* There has only been one vehicle related accidents since 2006. The average per employee driver accident is .007 per year (based on an average of 150 drivers per year). Accidents per year were <1.
* There was one major accident involving a non-owned vehicle. This accident resulted in the death of a customer who was being transported by a staff member. The staff member was treated and released for her injuries. The police report determined the other driver to be at fault but noted that neither Options staff nor customer had seat belts on at the time of the accident. There is a lawsuit pending and the staff member received treatment under worker’s compensation.
* Over the past five years worker’s compensation claims have held steady with very little change between 2006 and 2008. In 2009 there was a significant increase primarily due to customer aggression in one setting. Since then, accident rates have returned to around 20-30 per year. The majority of accidents over the past 5 years have been customer aggression and slips, trips and falls.
* Prevention strategies have included ongoing staff development in crises prevention, better orientation processes, restrictions on some types of activities (staff are not allowed to help customers move furniture, etc.) and providing adaptive equipment.

Plans for 2012 include developing an aggressive health and safety program with the help of our insurance carrier; supervisor training on both safety and hiring/firing; and ensuring all terminations are written appropriately, follow processes and are reviewed by a Human Resources professional before meeting with the employee.

### Accessibility Plan

Each year Options reviews the accessibility of our services and facilities. The Accessibility Plan is included in Attachment B and indicates the barriers identified for 2011 through employee and customer surveys and our progress toward addressing them. Through the survey process along with the annual accessibility audit, additional barriers were noted by customers, families, staff, and funders. The final column outlines the strategies for work in 2012.

This past year, Options provided the following accommodations for staff. None of these required substantial investment and most staff are still in the job where they required the support.

|  |  |  |  |
| --- | --- | --- | --- |
| **Date of request** | **Type of accommodation** | **Reason** | **Outcome** |
| 3/21/2011 | Temporary change in duties in setting | medical | Employee was restricted to work with non-aggressive customers. Employee performed modified work in regular position until released from medical restrictions. |
| 4/6/2011 | Temporary change in customer setting | medical | Employee was reassigned to alternate settings to accommodate lifting restriction until released from medical restrictions. |
| 4/11/2011 | Change in customer setting | medical | Employee was reassigned to alternate setting to accommodate the lifting/non-driving restrictions until released from medical restrictions. |
| 8/9/2011 | Temporary modified work | medical | Employee performed modified non-repetitive work in regular position until released from medical restrictions |
| 8/10/2011 | Temporary light duty | medical | Employee was reassigned to perform office work to accommodate lifting restrictions until released from medical restrictions. |
| 11/26/2011 | Temporary modified work | medical | Employee was assisted with lifting/transfers by co-workers until released from medical restrictions. |

### Technology Plan

During 2011 Options participated in a shared IT collaboration project through the SIPN group. Six different agencies are a part of the project and sharing IT resources. Options has also purchased a new Time & Attendance, HR, Case management software package called Casper. This new system will replace the current Accel / Provide software and provide many additional functions that were missing from the previous system. Options has also started to provide online training via Moodle to additional non-profit agencies via the SIPN group during this past year. Five new computers were installed at the main office this past year. During 2011 Options purchased and installed a new color printer / copier through Jim Gordon Inc. to help with marketing / development efforts. Fiscal / HR also received a new Ricoh printer to assist with scanning / copying and printing needs. All team managers at Options were provided with a netbook computer in 2011 to assist them in working remotely and being more efficient. Technology plans for 2012 & beyond include Implementation of the new Quantum / Casper software, Windows7 migration for all LifeDesigns, Inc. computers during 2012 is also being planned. E-mail will be converted to LifeDesignsinc.org during 2012. SIPN IT sharing collaboration will continue to be an important part of all technology plans moving forward for LifeDesigns, Inc. and participating SIPN members.

### Goals for 2012

With the merger, plans have definitely been changed to accommodate the activities needed for a smooth transition. Attachment C outlines all the goals for 2012. We will review and revise the strategic plan in light of the merger and new service areas in the coming months.

* **F**inancial results while meeting the mission,
* **A**ccountability for customer outcomes,
* **C**ulture within the work environment that promotes excellence,
* **E**mployees that are professional and well trained, and
* **S**ervices that make Options the provider of choice.

### Attachment A: Service Outcome Review

**Service Outcome Review**

**2011**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Measures** | **Applicable Service Areas** | **Data Source** | **Obtained By** | **2011 Goal**  **1/1/2011 – 12/31/2011** | **2011 Progress:** |
| ***Effectiveness*** |  |  |  |  |  |
| Percentage/Amount of Services Growth | CEO  Employment  All  Respite | CEO Customer Registration  Network Coordinator’s Monthly Report  Network Coordinator’s Monthly Report  Network Coordinator’s Monthly Report | CEO Team Manager  Supported Employment Coordinator  Directors of Services  Network Coordinators | 65 people will be participating in CEO.  100 customers enrolled in Employment Services  8% total Service growth.  50 customers enrolled in Respite. | 73 customers participated in CEO during 2012. This is an increase of around 9%.  84 customers were enrolled in Employment Services during 2011. The decrease is due, in part, to putting a temporary hold on referrals during the early part of 2011.  Services growth for the year was 5%.  As of 12/31/2011, 37 customers received Respite services during the year. |
| Percentage of customers of working age with jobs | All | Network Coordinator’s Monthly Report | Network Coordinators | 50% of customers of working age will have jobs. | Currently 34% of customers of working age are employed in community jobs. |
| Percentage of adult customers with their own home | All | Network Coordinator’s Monthly Report | Network Coordinators | 30% of adult customers will own their own home. | 25% of adult customers own their own homes. |
| Number of community members who participate in CEO activities. | CEO | CEO Team Manager’s  Network Coordinator’s Monthly Report | CEO Service Manager | 25 community members participated in CEO activities. | 14 community members participated in CEO activities during 2011. |
| Amount of time in community | CEO | Progress Notes  Attendance Records  CEO Curriculum | CEO Committee  Services Team | 70% of time of habilitation services was spent in the community. | An average of 62% of time in CEO was spent in the community. |
| Number of job placements | Employment | Supported Employment Coordinator’s Monthly Report | Supported Employment  Coordinator | 25 job placements. | There were 20 job placements during 2011. |
| Average employment tenure | Employment | Plan for Employment and Supports  Supported Employment Coordinator’s Monthly Report | Supported Employment Manager | Average employment tenure will be 2.8 years. | Average employment tenure was 2.6 years, an improvement from 2.4 years in 2010. |
| Average quality assurance rating | All | Monthly QA Review Process | Directors of Services | Average quality assurance rating of 95% or higher | Average Quality Assurance Rating was 86%. |
| ***Efficiency*** |  |  |  |  |  |
| Time from plan development to job placement | Employment | Plan for Employment and Supports  Supported Employment Coordinator’s Monthly Report | Supported Employment Manager | Average time from plan development to job placement will be 180 days or less. | Average time from plan development to job placement was 477 days. |
| Average hourly pay rate | Employment | Plan for Employment and Supports  Supported Employment Coordinator’s Monthly Report | Supported Employment Coordinator | Average hourly pay rate will be $7.95 an hour. | Average hourly pay rate was $7.85 per hour, an improvement from $7.75 last year. |
| Time from service delivery to submission of monthly paperwork by Host Family Agents | Host Families | Director of Services | Director of Services | 90% of monthly paperwork completed by Host Family Agents will be submitted by the 5th of the following month. | 93% of monthly paperwork completed by Host Family Agents has been submitted on time. |
| ***Service Access*** |  |  |  |  |  |
| Length of time from intake to start of services | All | Network Coordinator’s Monthly Report | Network Coordinator | Average time from intake to start of services will be 20 days or less. | Average time from intake to start of services was 29 days. |
| Percentage of customers receiving duplicated service | All | Network Coordinator’s Monthly Report | Network Coordinators  Directors of Services | 12% increase in customers receiving duplicated services. | There was a 9% increase in customers receiving duplicated services during 2011. |
| Respite hours provided | Respite | Network Coordinator’s Monthly Report | Network Coordinator  Director of Services | Annual Respite hours provided is 6500 hours or more | 3710 Respite hours were provided during 2011. |
| Number of customers over the age of 65. | All | Quarterly Demographics | Directors of Services | 20 customers served who are over the age of 65. | 14 customers served in 2011 were over the age of 65. |
| Percent of individuals of a minority population receiving services. | All | Quarterly Demographics | Directors of Services | A total of 12% of customers are of a minority population. | 8% of customers served are members of a minority group. |
| Percent of youth receiving services | All | Quarterly Demographics | Directors of Services | 18% of customers are under the age of 18. | 16% of customers are under the age of 18. |
| Percent of customers with Autism | All | Quarterly Demographics | Directors of Services | 20% of customers served have a diagnosis of Autism | Currently 21% of customers served have a diagnosis of Autism. |
| ***Satisfaction*** |  |  |  |  |  |
| Percentage of customers reporting that they would refer others to Options. | All | Annual Survey | Services Team | Maintain percentage of customers reporting they would refer others to Options’ services at 90% or above. | 93% of customers reported they would refer others to Options. |
| Overall customer satisfaction | All | Annual Survey | Services Team | Maintain satisfaction rating of 90% or above. | 98% of customers reported they were satisfied with Options’ services. |
| Stakeholder satisfaction | All | Annual Survey | Services Team/Executive Director | Maintain satisfaction rating of 90% or above. | 100% of stakeholders reported they were satisfied with Options’ services. |
| Percentage of stakeholders reporting that they would refer others to Options. | All | Annual Survey | Services Team/Executive Director | Maintain percentage of stakeholders reporting they would refer others to Options’ services at 90% or above. | 100% of stakeholders reported they would refer others to Options. |

**Service Outcome Review**

**2012**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Measures** | **Applicable Service Areas** | **Data Source** | **Obtained By** | **2012 Goal**  **1/1/2011 – 12/31/2011** | **2012 Progress:** |
| ***Effectiveness*** |  |  |  |  |  |
| Percentage/Amount of Services Growth | CEO  Employment  All  Respite | CEO Customer Registration  Network Coordinator’s Monthly Report  Network Coordinator’s Monthly Report  Network Coordinator’s Monthly Report | CEO Team Manager  Supported Employment Coordinator  Directors of Services  Network Coordinators | 75 people will participate in CEO.  100 customers enrolled in Employment Services  8% total Service growth.  40 customers enrolled in Respite. |  |
| Percentage of customers of working age with jobs | All | Network Coordinator’s Monthly Report | Network Coordinators | 45% of customers of working age will have jobs. | . |
| Percentage of adult customers with their own home | All Community Services | Network Coordinator’s Monthly Report | Network Coordinators | 30% of adult customers will own their own home. |  |
| Amount of time in community | CEO | Progress Notes  Attendance Records  CEO Curriculum | CEO Committee  Services Team | 70% of time of habilitation services was spent in the community. |  |
| Number of job placements | Employment | Supported Employment Coordinator’s Monthly Report | Supported Employment  Coordinator | 25 job placements. |  |
| Average employment tenure | Employment | Plan for Employment and Supports  Supported Employment Coordinator’s Monthly Report | Supported Employment Manager | Average employment tenure will be 2.8 years. |  |
| Average quality assurance rating | All | Monthly QA Review Process | Directors of Services | Average quality assurance rating of 95% or higher |  |
| ***Efficiency*** |  |  |  |  |  |
| Group Home Occupancy Rate | Group Homes | Monthly Census | Program Director | Average occupancy is 96%. |  |
| Length of time from referral to intake | All | Network Coordinator’s Monthly Report | Network Coordinator | Average time from referral to intake will be 30 days or less. |  |
| Length of time from intake to start of services | All | Network Coordinator’s Monthly Report | Network Coordinator | Average time from intake to start of services will be 25 days or less. |  |
| Time from plan development to job placement | Employment | Plan for Employment and Supports  Supported Employment Coordinator’s Monthly Report | Supported Employment Manager | Average time from plan development to job placement will be 180 days or less. |  |
| Average hourly pay rate | Employment | Plan for Employment and Supports  Supported Employment Coordinator’s Monthly Report | Supported Employment Coordinator | Average hourly pay rate will be $7.95 an hour. |  |
| ***Service Access*** |  |  |  |  |  |
| Percentage of customers receiving duplicated service | All | Network Coordinator’s Monthly Report | Network Coordinators  Directors of Services | 10% increase in customers receiving duplicated services. |  |
| Respite hours provided | Respite | Network Coordinator’s Monthly Report | Network Coordinator  Director of Services | Annual Respite hours provided is 4500 hours or more |  |
| Number of customers over the age of 65. | All | Quarterly Demographics | Directors of Services | 16 customers served who are over the age of 65. |  |
| Percent of individuals of a minority population receiving services. | All | Quarterly Demographics | Directors of Services | A total of 12% of customers are of a minority population. |  |
| Percent of youth receiving services | All | Quarterly Demographics | Directors of Services | 18% of customers are under the age of 18. |  |
| Percent of customers with Autism | All | Quarterly Demographics | Directors of Services | 25% of customers served have a diagnosis of Autism |  |
| ***Satisfaction*** |  |  |  |  |  |
| Percentage of customers reporting that they would refer others to Options. | All | Annual Survey | Services Team | Maintain percentage of customers reporting they would refer others to Options’ services at 90% or above. | . |
| Overall customer satisfaction | All | Annual Survey | Services Team | Maintain satisfaction rating of 90% or above. |  |
| Stakeholder satisfaction | All | Annual Survey | Services Team/Executive Director | Maintain satisfaction rating of 90% or above. |  |
| Percentage of stakeholders reporting that they would refer others to Options. | All | Annual Survey | Services Team/Executive Director | Maintain percentage of stakeholders reporting they would refer others to Options’ services at 90% or above. |  |
| Percentage of customers who report that respite services are available upon request. | Respite | Annual Survey | Services Team/Executive Director | 90% of customers will report that their respite services are available upon request. |  |
| Percent of CEO customers who report they have been given opportunities to increase their skills in the areas they desire. | CEO | Annual Survey | Services Team/Executive Director | 90% of customers will report that they have been given opportunities to increase their skills in the areas they desire. |  |
| Percent of Employment customers who report that they are pleased with their Employment Seeking process | Employment | Annual Survey | Services Team/Executive Director | 90% of customers will report that they are pleased with their Employment Seeking process. |  |
| Percent of Customers receiving Behavior Support Services who report that behavior plans developed meet their needs. | Behavior Management | Annual Survey | Services Team/Executive Director | 90% of customers will report that behavior plans developed meet their needs. |  |

### Attachment B: Accessibility Assessment and Plan

| **Area** | **Barrier** | **Progress** | **2011 Goals** |
| --- | --- | --- | --- |
| Attitudinal | Continue focus on customer outcomes.  Continue to promote customer achievements in community and secure additional resources for library.  **Responsible: All Teams** | All surveys indicate excellent staff attitudes and respectful service provision. | Continue focus on customer outcomes.  Continue to promote customer achievements in community and secure additional resources for library.  **Responsible: All Teams** |
| Architectural | Complete housing development and focus on ADA accessible units.  **Responsible: Executive and Services Team** | Options is developing some housing to replace Ida Lane group home and to ensure there is more accessible housing in Monroe County. Funding was secured and construction begins on February 20, 2012. | Complete housing development and focus on ADA accessible units.  **Responsible: Executive and Services Team** |
| Environmental | None noted | None | None |
| Financial | Continue focus on housing and technology as a way to diversify income.  **Responsible: Executive and Operations Teams** | 2011 was an extremely difficult year for Options financially. We lost approximately 1.2 million in revenue over the past two years. As a result staff has been cut, particularly in the administrative area.  Because of this we worked closely with another agency to see what economies there might be in combining administrations. The merger was effective 1/1/12 and has enabled the agency to reduce reliance on Medicaid Waiver. Housing will be the focus in 2012 and 2013 with two projects in development. This will provide a more diverse stream in the coming years through rents, subsidies, and developer fees. | Continue focus on housing and technology as a way to diversify income and ensure all services are viable or have a plan to be so.  **Responsible: Executive and Operations Teams** |
| Employment | Work with the state’s employment first initiative to increase the percentage of persons employed in the community.  Assist the business leadership network to support and recognize local business efforts.  Develop a promotional campaign and implement locally.  **Responsible: Services Team** | Currently there are 3 Options customers working in Executive Team and Services Team.  The percent of Options customers with jobs increased to 34%, well above the state average of 26%.  Options has worked with other local providers and Diversity Works the local business leaders group to conduct a business recognition event in October. The third annual event is planned for October 2012. | With the addition of several group homes for children as result of the merger we will place emphasis on transition to adult life and community employment, as well as, employment support for people with autism.  **Responsible: Services Team** |
| Transportation | Maintain ability to provide accessible transportation.  **Responsible: Executive Team** | Options now has three accessible vehicles and can provide lift equipped transportation in Lawrence, Owen and Monroe counties. | Maintain ability to provide accessible transportation.  **Responsible: Executive Team** |
| Communication | Enhance customer information available in all supported living settings.  Implement an integrated customer/hr/time and attendance system.  Investigate the implementation of an intranet for staff.  **Responsible: Executive and Operations Team** | With the addition of an electronic customer record and laptops and netbooks for all supervisors, we now have the ability to share changes in customer information almost immediately.  The customer and time and attendance system is in place and updated by services staff as needed.  We did not get an intranet implemented but will continue to work on that and expand to new staff in Brown and Bartholomew counties. | Enhance access to customer information in all LifeDesigns supported settings.  Implement customer information processes to continue to improve access and updates  **Responsible: Services and Operations teams.** |
| Other | Ensure all supervisory staff are trained by the end of 2011.  Continue to promote respite to families.  **Responsible: Services Team** | A supervisory training has been outlined but not implemented.  Respite has declined as the state cut rates and amount available to families. | Ensure all supervisory staff are trained by the end of 2012.  Continue to promote respite to families.  **Responsible: Services Team** |

### **Attachment C: Strategic plan goals for 2012**

#### Vision:

Options is a national leader providing services that result in active citizenship, rewarding employment, fulfilling relationships and inclusive communities.

#### Mission:

Options partners with people with disabilities and our communities to bring about self-directed and enriched lives through education, information and support.

#### Our values

* Customers are most important to the success of the organization
* The outcome of services are independence and enriched lives in the community
* All services are provided in the community and grouping is minimized
* Everyone deserves respect regardless of ethnicity, gender, disability, or severity of disability
* Decisions are driven by the mission of the organization
* People with disabilities have the same rights as people without disabilities
* Within the community Options serves as a resource, convener and connector
* The organization is a model for healthy lifestyles

|  |  |
| --- | --- |
| Strategic Framework for Excellence Focus The following summarizes Options strategic focuses, FACES:   * **F**inancial results while meeting the mission, * **A**ccountability for customer outcomes, * **C**ulture within the work environment that promotes excellence, * **E**mployees that are professional and well trained, and * **S**ervices that are the best making Options the provider of choice. | Strategic Framework for Excellence Culture The following summarizes Options culture: We expect staff to demonstrate:   * A customer focus where customers are always first * Professionalism in all that staff say and do * Community orientation by giving back to the communities that support us * Support and respect for all Options stakeholders |

Goals for 2012:

**F:** Optimize fiscal results while meeting our mission.

1. Ensure all services are financially viable or have a plan to do so
2. Focus on increasing employment outcomes across the agency and developing employment services in the Columbus area
3. Increase revenues from housing and technology options
4. Develop a long range plan for facility uses and needs

**A:** Ensure success through systems that report and celebrate customer outcomes.

1. Increase employee and customer satisfaction through the transition
2. Have a 95% or higher average quality assurance rating
3. Find a more objective functional assessment and report results regularly

**C:** Create a culture of mutual respect and support among customers and staff.

1. Blend the cultures of the agencies
2. Develop a strong brand that communicates the new culture
3. Ensure the HR department has resources to work for all
4. Actively work to reduce workers accidents and return staff to work quickly.

**E:** Select and retain great staff at all levels.

1. Develop a strong leadership team
2. Develop and implement a joint recruitment program
3. Ensure all areas have adequate staffing
4. Develop and implement standardized management training program

**S:** Achieve service excellence.

1. Develop autism services including investigating the provision of applied behavior analysis
2. Develop and implement an outreach program to increase referrals and reduce group home vacancies
3. Work with teams to enhance their ability to secure employment, particularly for those who are transitioning to adult services.