

2018 – 2019

Strategic

Plan



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INTRODUCTION

Welcome to the Strategic Plan of Volunteers of America Mid-States. This document is the dynamic blueprint for the growth of the organization through the end of fiscal year 2019. It is the product of extensive input from staff, management and our Board of Directors. We now have a vision of where we want to go and measurable goals that will determine our success. We have validated the values that describe how we do business and affirmed the five pillars that provide the foundation of our organization: people, mission, financial sustainability, quality and community relations. The non-profit sector will continuously be faced with change and the opportunity is to proactively manage it and prepare for it rather than react to it. This plan is a focused and structured way of doing just that.

This planning process has provided us with a system to lead, manage, and move the organization forward in a well-planned, integrated manner based on our strategies. The systems approach also emphasizes collaboration and this will continue to enhance the way we do business day-to-day.

As we move forward from strategies to specific actions, every team member of Volunteers of America will have a chance to participate in fulfilling the strategic plan. This is an exciting and dynamic time for our high-performing, mission focused organization. The plan will ultimately benefit our most precious stakeholders –those we serve – and the communities in which we operate. Our mission to create positive change in the lives of individuals and communities through our ministry of service will be sustained through this plan.

HISTORY

Established in 1896, Volunteers of America Mid-States is one of the region's oldest, largest, and most diverse not-for-profit businesses. Today, we offer more than 40 distinct human service programs in Kentucky, Tennessee, West Virginia, Southern Ohio and Clark and Floyd Counties in Southern Indiana. Our programs are focused on housing for families, veterans and low-income seniors; addiction recovery services for men and women; care and support for individuals with developmental disabilities; and HIV testing and education.

Each program, regardless of its focus, shares our agency mission to create positive change in the lives of individuals and communities through a ministry of service. Last year, we reached more than 23,000 people through our services.

Volunteers of America Mid-States is a local affiliate of Volunteers of America, Inc. based in Alexandria, Virginia. Under a national charter, it provides services designed locally to address specific community needs.

Volunteers of America Mid-States is governed by a volunteer, 31 member Board of Directors and President & CEO Jennifer Hancock. We employ more than 580 staff members and engage approximately 1,900 volunteers each year.

Working in partnership with government agencies, businesses, individuals, local faith congregations, and other non-profit organizations — and supported by thousands of individual donors and volunteers — we address the most pressing social needs in the communities we serve.

Programs are funded through a diverse array of funding streams, including federal, state, and local grants and contracts; private foundations; and public contributions. In Fiscal Year 2018 nearly 83 cents of every dollar was spent on direct services.

Our MISSION

Volunteers of America Mid-States creates positive change in the lives of individuals and communities through a ministry of service.

VISION

Volunteers of America Mid-States strives to be the provider of choice, employer of choice, and community leader that cultivates passion, inspires others and creates positive change.

DEPARTMENT VISION STATEMENTS

HUD HOUSING

Volunteers of America Mid-States strives to be the provider of choice, employer of choice, and community leader that cultivates passion, inspires others, and creates positive change by providing community residents with a place they can truly call HOME.

OPERATIONS SUPPORT

Volunteers of America Mid-States strives to be the provider of choice, employer of choice, and community leader that cultivates passion, inspires others, and creates positive change by providing service to all departments to help facilitate our overall vision and mission.

MEMPHIS DEVELOPMENTAL DISABILITY SERVICES

Volunteers of America Mid-States strives to be the provider of choice, employer of choice, and community leader that cultivates passion, inspires others, and creates positive change with a person-centered approach that creates a work culture that values our team members, increases our community presence and motivates others to join us in helping those who need us most.

NORTHERN KENTUCKY DEVELOPMENTAL DISABILITY SERVICES

Volunteers of America Mid-States strives to be the provider of choice, employer of choice, and community leader that cultivates passion, inspires others, and creates positive change by improving the lives of the people we serve by providing exceptional person-centered care.

MIDDLE TENNESSEE DEVELOPMENTAL DISABILITY SERVICES

Volunteers of America Mid-States strives to be the provider of choice, employer of choice, and community leader that cultivates passion, inspires others, and creates positive change by establishing a culture that fosters collaboration, understanding, accountability and advocacy for those we support and our staff.

CLARK AND FLOYD COUNTIES IN SOUTHERN INDIANA DEVELOPMENTAL DISABILITY SERVICES

Volunteers of America Mid-States strives to be the provider of choice, employer of choice, and community leader that cultivates passion, inspires others, and creates positive change by helping those we serve have access to a better life, either directly or by supporting those who do it directly. We improve and elevate our clients' lives and provide a path to more valued roles. We measure every decision and provide every opportunity through the lens of "would it be good enough for me?"

ADDICTION RECOVERY, HIV AND HOMELESS/HOUSING SERVICES

Volunteers of America Mid-States strives to be the provider of choice, employer of choice, and community leader that cultivates passion, inspires others, and creates positive change by serving individuals and families who are facing homelessness, addiction and mental or physical health challenges by providing trauma-informed, client-centered, compassionate and comprehensive care to individuals and families.

VETERAN'S SERVICES

Volunteers of America Mid-States strives to be the provider of choice, employer of choice, and community leader that cultivates passion, inspires others, and creates positive change by uplifting and encouraging our veterans.

FINANCE

Volunteers of America Mid-States strives to be the provider of choice, employer of choice, and community leader that cultivates passion, inspires others, and creates positive change by providing excellent customer service and leveraging our expertise to increase value to program operations and the administrative team.

HUMAN RESOURCES

Volunteers of America Mid-States strives to be the provider of choice, employer of choice, and community leader that cultivates passion, inspires others, and creates positive change by working as a team to provide excellent customer service that aligns with and supports the organization's strategy through the attraction, retention and engagement of a talented and diverse workforce.

INFORMATION TECHNOLOGY

Volunteers of America Mid-States strives to be the provider of choice, employer of choice, and community leader that cultivates passion, inspires others, and creates positive change by achieving the maximum benefit from information technology through innovation, increasing capability and enhancing the support of administrative and operational functions.

EXTERNAL RELATIONS

Volunteers of America Mid-States strives to be the provider of choice, employer of choice, and community leader that cultivates passion, inspires others, and creates positive change by building partnerships, persuading leaders, energizing donors and mobilizing volunteers.

CORE VALUES

- **Commitment** - Dedication to excellence and being at your best in all you do
- **Justice** - Being fair and not judging a person or situation
- **Diversity** - Embrace and attempt to understand the differences in others
- **Integrity** - Display honesty and having a high work ethic
- **Compassion** - Respectful of others feelings, thoughts & decisions

STRATEGIES/MEASURES

PEOPLE

Objective: Volunteers of America Mid-States strives to be the provider of choice, employer of choice, and community leader that cultivates passion, inspires others, and creates positive change by working as a team to provide excellent customer service that aligns with and supports the organization’s strategy through the attraction, retention and engagement of a talented and diverse workforce.

INITIATIVE

1. Attract the best and the brightest talent through innovative outreach and consider promoting and incentivizing Volunteers of America as the employer of choice
2. Quality focus: Develop a shared vision around diversity and inclusion as it relates to our workforce and establish measurable goals to attain such
3. Create a comprehensive model of wellness and resilience
4. Develop highly skilled, accountable and engaged mission ambassadors through the development and implementation of the onboarding and Professional Development Program (PDP) process
5. Have supervisors at every level trained and developed to ensure strong leadership
6. Ensure the ministry is understood and represented in all that we do

PEOPLE			
Initiative	Objective	Tactic	Strategy Owner
Attract the best and the brightest talent through innovative outreach and consider promoting and incentivizing Volunteers of America as the employer of choice	<ol style="list-style-type: none"> 1. Develop partnerships with universities and colleges to incentivize students in pursuing a career at VOA 2. Restructure HR Recruiting position. 	<ol style="list-style-type: none"> a. Create new offer letter template and a benefit document that describes benefits, etc. (supervision, free training, etc.). Complete by 12/31/2018. b. Re-evaluate/rewrite all job descriptions, using industry best practices. Include working conditions and job leveling and ranges to job descriptions. Complete by 12/31/2018. c. Complete onboarding process for all locations with a 30, 60 and 90-day check-in from HR by 6/30/2019. 	Chief Administrative Officer

		<p>d. New HR recruiting position should be selecting and interviewing candidates to determine top 3-4 candidates and then involving appropriate program level manager for interviews. Complete by 12/31/2018.</p>	
<p>Quality focus: Develop a shared vision around diversity and inclusion as it relates to our workforce and establish measurable goals to attain such</p>	<p>1. Define shared vision of diversity & inclusion and what makes people different within the organizations by 12/31/2018.</p>	<p>a. Lead senior team and then all layers underneath –through implicit bias, diversity and inclusion training, developing a shared vision, values and goals at each level in order to accomplish this goal. Complete by 12/31/2018. November Timeframe</p> <p>b. Ensure all recruiting and onboarding documents include information about diversity/inclusion by 12/31/2018.</p> <p>c. Create a 30-45 second video that will be shown on VOA website describing focus on diversity/inclusion by 12/31/2018. (Push out to 3rd Quarter) end of March 2019</p> <p>d. Conduct bi-annual trainings for all staff in understanding what diversity and inclusion means as an organization by 6/30/2019.</p>	<p>Chief Administrative Officer</p>
<p>Create a comprehensive model of wellness and resilience</p>	<p>1. Assess external benchmarks and best practices related to wellness and integrate into our Wellness Initiative Group (WIG) program.</p>	<p>a. Research what other organizations are doing in the area of employee resilience. Complete by 6/30/2019. (Delegate this task to an Intern)</p> <p>b. Participate in the Psychological Awards through Bellarmine University. Use data to help build a better wellness</p>	<p>Chief Administrative Officer</p>

		<p>program. Complete by 6/30/2019.</p> <p>c. Create focus groups on how to incorporate these ideas into wellness/integrate them by 6/30/2019.</p> <p>d. Using this info, do a “reset” for our Wellness Initiative Group by 6/30/2019.</p>	
Develop highly skilled, accountable and engaged mission ambassadors through the development and implementation of the onboarding and Professional Development Program (PDP) process	<ol style="list-style-type: none"> 1. Complete PDP process for all employees by 6/30/2019. 2. Create a consistent way of communicating the VOA brand 3. Educate and activate employees to act as mission ambassadors 	<ol style="list-style-type: none"> a. Identify potential DSP ambassadors for applicable programs by 12/31/2018. b. Develop a DSP ambassador program in each geographical area by 6/30/2019. c. Identify text or YouTube video method to communicate to employees in place of VOA Today by 6/30/2019. 	Chief Administrative Officer
Have supervisors at every level trained and developed to ensure strong leadership	<ol style="list-style-type: none"> 1. Expand onboarding plan to cover training in all departments by 12/31/2018. 	<ol style="list-style-type: none"> a. HR Chats – monthly management level training b. Utilize Elan’ training system and identify applicable trainings to help new leaders by 12/31/2018. c. Create a New Leaders orientation for anyone newly promoted or hired every quarter by 6/30/2019. 	Chief Administrative Officer
Ensure the ministry is understood and represented in all that we do	<ol style="list-style-type: none"> 1. Educate consumers, employees and other stakeholders to the unique structure and philosophy of Volunteers of America 2. Ensure ministry strategic plan is aligned and embedded throughout the organization 	<ol style="list-style-type: none"> a. Conduct a monthly “ministry call” where people can dial in and join by 12/31/2018. b. Do a lunch and learn in every area quarterly for people to learn more about our ministry by 6/30/2019. c. Within the first 90 days of employment, each employee will be able to have a face-to-face meeting with a minister to ask questions and understand what Ministry means to VOA by 12/31/2018. 	Chief Administrative Officer

MISSION

Objective: Volunteers of America Mid-States creates positive change in the lives of individuals and communities through a ministry of service.

INITIATIVE

1. The ministry of service grows throughout organization in alignment with program development processes ensuring quality service delivery
2. Develop a comprehensive and formal business plan for growth that accounts for geography and line of business
3. Forecast future business models and evidence based practices that call for innovation in new business development
4. Qualify focus: Develop a shared vision around diversity and inclusion as it relates to our consumers and program development opportunities and establish measurable goals to attain such

MISSION			
Initiative	Objective	Tactic	Strategy Owner
<p>The ministry of service grows throughout organization in alignment with program development processes ensuring quality service delivery</p>	<ol style="list-style-type: none"> 1. By June 30, 2019, increase (from 4 in FY18 to 6 in FY19, 8 in FY20) the number of ministry activity options for staff to provide volunteer service projects VOA Mid-States programs or collaborating partners by. 2. By June 30, 2019, increase the number of church/faith-based organization partnerships by 20% and the number of in-kind/monetary donors by 20%. 3. By June 30, 2019, increase the quantity (4 in FY19, 6 in FY20, 8 in FY 21) and quality of diverse and culturally-competent ministry services to employee/clients by offering additional special 	<ol style="list-style-type: none"> a. Increase ministry activities available to clients and staff by adding activity options and increasing promotion efforts. b. Enhance marketing of services for potential clients and enhance knowledge of options for supporting VOA Mid-States (volunteering, in-kind or monetary donations, collections, provision of services) to churches/faith-based organizations via presentations, tabling events, collaboration opportunities etc. c. Enhance support of and engagement with employees/clients via participation in events/programming that 	<p>CEO and Affiliate Chaplain</p>

	emphasis events (wellness and self-care, grief recovery, etc).	honors and promotes the value of diversity and supports wellness and growth. d. Ministers will develop focus groups on a quarterly basis to learn how the ministry can be integrated for both staff and clients. Consider restructuring Ministry in response to learnings.	
Develop a comprehensive and formal business plan for growth that accounts for geography and line of business	1. Create opportunities that lead to more integrated processes and programming for consumers who have multiple complex needs that we can solve.	a. Program leadership and external relations will jointly plan and attend these focus groups to build and develop relationships and possible funding opportunities. b. On an annual basis departments/programs in all regions will meet with key leaders in the community to have an understanding of the community needs in each major market.	CEO
Forecast future business models and evidence based practices that call for innovation in new business development	1. Create a systematic way of ensuring innovation is driving program planning. 2. Integrate university partners into program planning process to consider research and development opportunities.		CEO
Quality focus: Develop a shared vision around diversity and inclusion as it relates to our consumers and program development opportunities and establish measurable goals to attain such	1. Leverage client and family input to determine how our programs can be more inclusive.	a. All management will complete implicit bias, diversity and inclusion training, developing a shared vision, values and goals in order to accomplish this goal. b. Incorporate language access resources into program budgets and marketing approaches.	CEO with Chief Administrative Officer

FINANCIAL SUSTAINABILITY

Objective: Volunteers of America Mid-States strives to be the provider of choice, employer of choice, and community leader that cultivates passion, inspires others, and creates positive change by providing excellent customer service and leveraging our expertise to increase value to program operations and the administrative team.

INITIATIVE

1. Improve financial position of the organization
2. Quality focus: Enhance processes to mitigate risk around compliance matters through increasing internal auditing capabilities
3. Increase the financial literacy of the organization
4. Improve budget process by ensuring it is inclusive of all program leadership and has a clear plan for sustainable growth year over year

FINANCIAL SUSTAINABILITY			
Initiative	Objective	Tactic	Strategy Owner
Improve financial position of the organization	<ol style="list-style-type: none"> 1. Document annual evaluation of sustainability and development of "watch out" list that includes sustainability plan. 	<ol style="list-style-type: none"> a. Evaluate monthly performance to budget to include forecast for balance of the year and develop plan to adjust to meet budget. b. Collaborate with External Relations to identify opportunities to increase and diversify unrestricted donor support growth. 	CFO
Quality focus: Enhance processes to mitigate risk around compliance matters through increasing internal auditing capabilities	<ol style="list-style-type: none"> 1. Create quarterly compliance review of program services to ensure that services remain in compliance with regulatory agencies. 	<ol style="list-style-type: none"> a. Share report with program leaders and jointly create a plan to identify agency risks and opportunities to improve services, including improvement of processes b. With implementation of new EHR system develop consistent monitoring processes that ensure compliance to state DDS regulations and mitigate risk of recoupment to no more than .1 percent (\$10K) of DDS budget annually. 	CFO

		<ul style="list-style-type: none"> c. Create a tool for every program that synthesizes all regulations and standards from all regulatory and funding bodies d. Perform quarterly review of clinical program processes to evaluate and ensure compliance with clinical Medicaid regulation. e. On a bi-monthly basis perform internal audits with program staff and program support specialists to ensure all financial components of grants are being followed 	
Increase the financial literacy of the organization	<ul style="list-style-type: none"> 1. Program leaders are attentive to the financial impact of their decisions and will collaborate with Finance to create and implement a contingency plan to meet budget expectations. 2. Ensure all new leaders receive training in finance as part of the new leader orientation. 	<ul style="list-style-type: none"> a. Annual training for managers and leaders. b. Send quarterly financial summary communications to the Senior Team staff that denotes any positive or negative trends and establish cascading communication plan with clear accountabilities for follow up. 	CFO
Improve budget process by ensuring it is inclusive of all program leadership and has a clear plan for sustainable growth year over year	<ul style="list-style-type: none"> 1. Attain program performance as budgeted and recognize impact of unbudgeted financial decisions. Create plan for sustainable growth for each division with clear timeline. 	<ul style="list-style-type: none"> a. Create and distribute budget timeline to program leadership (Develop a backward timeline with all due dates for each program) b. Conduct planned meetings with each program to review submitted budgets to review details of plan and understand variances between current year and next year's budgets c. Create plan for each program to maintain sustainability or justify existence of agency match to maintain program services by 3/31/2019. d. Hold Finance and program leaders accountable to meeting budget review timelines e. Distribute approved budgets to program leadership by July 1 	CFO

		f. Add a step wherein each senior leader gets to see and give input to their colleague's budgets.	
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QUALITY

Objective:

Volunteers of America Mid-States strives to be the provider of choice, employer of choice, and community leader that cultivates passion, inspires others, and creates positive change by providing service to all departments to help facilitate our overall vision and mission

INITIATIVE

1. Integrate quality and continuous improvement systematically throughout the organization in all that we do
2. Improve technology systems to ensure more accurate and timely data to inform business decisions and enhance program delivery systems
3. Ensure facilities are well maintained and aligned with organizational direction and needs
4. Mitigate risks with comprehensive plan and enhance safety for consumers and employees

QUALITY			
Initiative	Objective		Strategy Owner
Integrate quality and continuous improvement systematically throughout the organization in all that we do	<ol style="list-style-type: none"> 1. Establish quality metrics in every department based on best practice benchmarks. 2. Completely integrate new Performance & Quality Improvement (PQI) goals by the end of year one. 3. Evaluate the appropriateness of additional accreditations to support program growth. 	<ol style="list-style-type: none"> a. Review and establish at least two metrics for each program. Identify metrics that have external benchmarks. b. Implement new PQI goals by June 30, 2019. c. Receive reaccreditation by January 30, 2019. d. Review and provide proposal for the implementation of Community on Accreditation on Rehabilitation Facilities (CARF) standards and accreditation for medical type programs. 	Chief Administrative Officer
Improve technology systems to ensure more accurate and timely data to inform business decisions	<ol style="list-style-type: none"> 1. Include assessment of opportunities to deliver new and enhanced services utilizing advanced technologies and new service lines. 	<ol style="list-style-type: none"> a. Assess opportunities to deliver new and enhanced services utilizing advanced technologies. 	Chief Administrative Officer With support from Sr. IT Director

<p>and enhance program delivery systems</p>	<ol style="list-style-type: none"> 2. Invest in digital marketing to improve brand recognition and consumer engagement throughout our geographic areas. 3. Convert and train on new incident management and facilities management systems. 	<p>Goal: Undertake 5 formal assessment processes over the next 12 months.</p> <ol style="list-style-type: none"> b. Utilize new technology to engage and mobilize employees and clients when appropriate. Goal: Deploy 5 new technology solutions over the next 12 months. c. Invest in digital marketing to improve brand recognition and consumer engagement throughout our geography. Goal: Invest 20% of overall marketing budget in digital strategies. 	
<p>Ensure facilities are well maintained and aligned with organizational direction and needs</p>	<ol style="list-style-type: none"> 1. Develop an annual facilities assessment, which includes new ideas for utilizing existing facilities and a maintenance/facilities management system that proactively addresses property condition and suitability for intended mission purpose. 2. Identify ideal staffing structure to ensure facilities are optimized. 	<ol style="list-style-type: none"> a. By the end of Q2FY19 implement a new facilities management software program to obtain real-time data to assess targeted areas of cost reduction (repair). b. Hire and train two higher qualified maintenance technicians by end of Q1FY19. 	<p>Chief Administrative Officer</p>
<p>Mitigate risks with comprehensive plan and enhance safety for consumers and employees</p>	<ol style="list-style-type: none"> 1. Ensure risk and safety program is embedded throughout every level of the organization. 	<ol style="list-style-type: none"> a. Reduce experience factor for workers compensation claims by 5 points. 	<p>Chief Administrative Officer</p>

COMMUNITY RELATIONS

Objective: Volunteers of America Mid-States strives to be the provider of choice, employer of choice, and community leader that cultivates passion, inspires others, and creates positive change by building partnerships, persuading leaders, energizing donors and mobilizing volunteers.

INITIATIVE

1. Enhance brand identity by expanding marketing and outreach in quality and quantity
2. Quality focus: Increase unrestricted revenue and general operating dollars by 10%
3. Enhance and mobilize regional advisory councils to connect with local faith based, corporate and community leaders
4. Advocate for policy change and program development/support at every level of government.

COMMUNITY RELATIONS			
Initiative	Objective	Tactic	Strategy Owner
Enhance brand identity by expanding marketing and outreach in quality and quantity	1. Develop a comprehensive marketing plan that can be disseminated to all stakeholders.	a. Develop a new sub-brand for every department/line of business and rollout in the first 6 months of FY19. b. Test all sub-brands for response to test audiences and consumer groups. c. Identify new media partners nationally, regionally, and locally (in each market) that can assist in garnering name recognition.	Sr. Director of Communications and Government Relations
Quality focus: Increase unrestricted revenue and general operating dollars by 10%	1. Identify new, unleveraged foundations and corporations in each major market outside of Louisville Metro that can support the mission. Apply to at least five (5).	a. Leverage employee connections to secure additional public support through a formalized system with measurable goals. b. Maximize relationships developed for the capital campaign and reengage those donors in annual giving.	Sr. Director of Development

<p>Enhance and mobilize regional advisory councils to connect with local faith based, corporate and community leaders</p>	<ol style="list-style-type: none"> 1. Establish measurable annual goals for each advisory council that uniquely speaks to their purpose. 2. Establish four (4) new relationships within each advisory council. 	<ol style="list-style-type: none"> a. Invite ER team to have a role with council to oversee the strategy for community outreach. Jamie Ogles oversees the Southern Indiana Council. Richard Wineland to oversee Middle, TN councils. 	<p>Sr. Director of Development</p>
<p>Advocate for policy change and program development/support at every level of government</p>	<ol style="list-style-type: none"> 1. Leverage employee, board, consumer and other stakeholder relationships. 	<ol style="list-style-type: none"> a. Create one additional direct relationship in each major market and targeted markets to influence policy or funding change at a local and state levels b. Obtain funding from at least one new government source. c. Influence at least one policy change or innovation that benefits the organization. 	<p>Sr. Director of Communications and Government Relations</p>

QUARTERLY ACTION PLANS

ACTION PLAN	FIRST QUARTER: July 1, 2018 – September 31, 2018	
Target Completion Date	Summary of Activity/Deliverable	Resources, Budget, Strategy Owner

ACTION PLAN	SECOND QUARTER: October 1, 2018 – December 31, 2018	
Target Completion Date	Summary of Activity/Deliverable	Resources, Budget, Strategy Owner

ACTION PLAN	THIRD QUARTER: January 1, 2019 – March 31, 2019	
Target Completion Date	Summary of Activity/Deliverable	Resources, Budget, Strategy Owner

ACTION PLAN	FOURTH QUARTER: April 1, 2019 – June 30, 2019	
Target Completion Date	Summary of Activity/Deliverable	Resources, Budget, Strategy Owner