



Strategic Plan FY 2019-2021

“Breaking through barriers for people with different abilities to contribute, connect and lead lives they choose.”



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JOIN US IN LIFTING THE LIMITS

"The Americans with Disabilities Act presents us all with an historic opportunity. It signals the end to the unjustified segregation and exclusion of persons with disabilities from the mainstream of American life. As the Declaration of Independence has been a beacon for people all over the world seeking freedom, it is my hope that the Americans with Disabilities Act will likewise come to be a model for the choices and opportunities of future generations around the world."

President George Bush, July 26, 1990¹

"We must promote--to the best of our ability and by all possible and appropriate means--the mental and physical health of all our citizens."

President John F. Kennedy, February 5, 1963²

In 1963, 15 years after the founding of CHI, President Kennedy called for a reduction of people in custodial, residential institutions and searched for ways for people with intellectual and developmental disabilities (I/DD) to return to the community. President Kennedy's policy resulted in deinstitutionalization and increased community services.^{3,4} Following decades of efforts to include people in the communities where they choose to live, President Obama in 2010 took a monumental step when he signed Rosa's Law, abolishing the use of the term "mental retardation" by the federal government.



At CHI, we believe in community inclusion and the integration of people with different abilities in every part of life. We live out our belief by **Lifting the Limits** - making sure that each person we support lives and works in places of their choosing, has relationships with people with whom they want, and enjoys experiences of being an active community member.

Friends of CHI know that we are working hard to overcome operating challenges in recent years. With new leadership, support from our board of directors and dedication of our staff, CHI turned the corner to renewed success – honoring the past while at the same time transforming to a brighter future.

Over the next three years, this new strategic plan will guide CHI to an even stronger position. CHI is once again becoming known as a quality, trusted, mission-driven organization. We are building a solid financial base to attract and retain quality staff. We actively involve people we support in our decision-making, and we are recruiting enthusiastic board members with diverse talents. And, we want everyone to know who we are and the exciting organization we have become.

Your partnership supports us in **Lifting the Limits**. Please join us!

John Pistolessi
Board President

Daphne Pallozzi
Executive Director

¹ **Citation:** George Bush: "Statement on Signing the Americans with Disabilities Act of 1990," July 26, 1990. Online by Gerhard Peters and John T. Woolley, *The American Presidency Project*. <http://www.presidency.ucsb.edu/ws/?pid=18712>

² <https://www.jfklibrary.org/JFK/JFK-Legacy/JFK-and-Disability.aspx>

³ https://en.wikipedia.org/wiki/Timeline_of_disability_rights_in_the_United_States

⁴ <https://www.jfklibrary.org/JFK/JFK-in-History/JFK-and-People-with-Intellectual-Disabilities.aspx>

EXECUTIVE SUMMARY

CHI MISSION

CHI is a non-profit agency located in Silver Spring, Maryland that supports people with intellectual and developmental disabilities with Supported Employment, Residential, and Adult Day Support programs and services. For nearly 70 years, since 1948, CHI has never wavered in pursuit of our mission of ***“breaking through barriers for people with different abilities to contribute, connect, and lead lives they choose.”***

Our distinct core beliefs advance our mission every day. We believe:

- Every person is a valued person who has the right to be treated respectfully and has an active voice in choosing what happens in their life.
- Every person deserves recognition as a person first and to not be defined and labeled by any limitations.
- We develop our staff to facilitate excellent quality supports for every person.
- We are about lifting limits and creating opportunities that would otherwise not exist.
- Our work will only be complete when each person with disabilities is living the life they choose.

STRATEGIC PLANNING PROCESS OVERVIEW

In 2015 CHI transitioned to a new CEO and, together with the Board of Directors, focused on re-establishing CHI as a quality, trusted service organization. In summer 2017, the Board of Directors initiated development of a new 3-year strategic plan to set the organization’s future course. This plan incorporates contributions from Board members, CHI Staff, people we support, and family members. All of these voices offered perspective and informed our strategic direction choices. The planning process included an analysis of internal operations and the external environment and many planning work sessions where we all worked together to agree on a plan that we are energized to implement.



STRATEGIC DIRECTION AND 3-YEAR GOALS: FY 2019-2021

The three fiscal years July 2018 through June 2021 is a period of strengthening our organizational core with six inter-dependent and equally important transformative goals. Each goal includes three to five key objectives. We will track specific success measures to document evidence of accomplishing each goal. We will develop an annual action plan detailing activity, assigning responsibilities, and indicating resource requirements to implement the plan successfully. The CHI Board of Directors approved this plan April 24, 2018.

STRATEGIC DIRECTION, GOALS, OBJECTIVES & SUCCESS MEASURES 2018-2021

STRATEGIC DIRECTION

CHI is making the next three years, July 2018 through June 2021 a period of strengthening our organizational core. Our focus is transformation – taking actions that stretch and grow opportunities for people with intellectual and developmental disabilities to positively influence the communities where they live and work, enrich our staff, expand financial and volunteer resources, improve operating systems, and expand our community partnerships.

This strategic plan consists of three Strategic Areas: Mission Services; Operation Sustainability and Community Connections. These three strategic areas comprise our six distinct, inter-dependent and equally important goals for growth. These six goals require organizational excellence and community involvement in many ways.



Mission: Breaking through barriers for people with different abilities to contribute, connect and lead lives they choose.

GOALS, OBJECTIVES & SUCCESS MEASURES

MISSION SERVICES

Mission
Delivery
Goal

CHI offers excellent supports that facilitate the participation of people with disabilities in the community and society.

3-Year Measures of Success

- Increase annually in the number of people employed in the community.
- Increase annually in the number of people whose productive day is in the community (i.e., as we implement community-based person plans, fewer persons spend their day at CHI or begin and end their day at CHI).
- Every person has an active network of friends and other community connections.
- Every person has the opportunity to give something back to the community.
- Individuals and families report increased satisfaction with their CHI experience.
- Progress toward achieving the highest level of compliance with CMS requirements.

Objectives

1. Provide quality community-based activities of personal interest, including the following, drive every individual plan:
 - a. a job or volunteer work plan.
 - b. a social plan including regular community activity during non-working hours.
 - c. an opportunity to give back to the community plan.
2. Establish quality standards that guide every department and program in decision-making, carrying out responsibilities, managing risk, and facilitating community connections.
3. Research effective best practice models for community inclusion, and consider recommendations to adapt to CHI.

Self-
Advocates
Goal

CHI creates an environment that grows empowered self-advocates.

3-Year Measures of Success

- Every person we support knows how their voice makes a difference in the organization.
- Every person can participate in internal and statewide advocacy initiatives.

Objectives

1. CHI's organizational structure and operations include self-advocates' on all operational and Board of Directors' committees.
2. Model and practice engagement with self-advocates to the extent feasible in all departments and programs (i.e., interview applicants for staff positions, input into policies and procedures, experience in leadership roles, and regular opportunities to give input and learn about what's happening around CHI.).
3. Teach and mentor every interested person how to be a self-advocate.



Staff
Goal

CHI is an exemplary employer respecting staff and valuing professional and personal development.

3-Year Measures of Success

- Increase annually in staff retention statistics.
- 80% of staff demonstrate growth as a result of implementing professional development plans.

Objectives

1. Strengthen CHI's teamwork, trust, appreciation, and professional development culture.
2. Develop a comprehensive multi-method organization-wide approach for staff professional development aligned with community inclusion.
3. Develop a tiered staffing model for direct care positions.
4. Establish a staff wellness initiative.

OPERATION SUSTAINABILITY



Finance
Goal

CHI manages resources effectively and grows its financial capacity.

3-Year Measures of Success

- Annually balance the budget including contributed funds and foundation grants.
- Three months of payroll in reserve (\$1.5 million).
- Three months of operating budget in reserve (\$4 million).
- Financial documentation/controls in place.
- Maintain current ratio 1.0 or above assets to liabilities.
- \$250K free outside of the line of credit for new opportunities.
- Sufficient capital maintenance funds (for four houses, Hillandale and Jones Center).
- Convert selected properties into cash assets.
- \$140K contributed funds through donations by year 3 of the strategic plan.

Objectives

1. Develop, document and implement a robust financial oversight system including budgeting, reporting, and internal controls that support ethical financial practices and communications.
2. Build and carry out a viable plan to obtain and maintain financial stability.
3. Develop and implement a plan to diversify revenue.
4. Develop an action plan for improving staff wages and benefits.



Board
Goal

CHI's volunteer Board of Directors comprises qualified leaders who apply accepted standard practices and policies to oversee the organization's high performance.

3-Year Measures of Success

- A *BoardSource* Board Self-Assessment in FY19 establishes a baseline, and every other year after another assessment shows continuous and sustained improvement.
- A fully constituted, highly-engaged (i.e., level of participation – meetings, committees, financial support, connections with staff and persons, advocacy), and well-informed Board of Directors provides diverse perspectives and talents.
- The Board develops, documents and implements repeatable processes that facilitate board development.

Objectives

1. Set direction, outline strategies for achieving organizational goals, and stretch CHI to achieve strategic plan goals.
2. Ensure CHI has a robust program to identify, onboard, develop, and retain highly qualified board members.
3. Provide oversight of financial, program, and CEO leadership.
4. Ensure Board governance, structure and operations enhance Board and organizational performance.
5. Ensure board members are visible and accessible within the CHI community where people we support work and live.

COMMUNITY CONNECTIONS



Community
Partner
Goal

CHI is visible and a welcomed community partner.

3-Year Measures of Success

- CHI's website and social media attract many followers.
- Tools in place support consistent, effective communications.
- Team meetings reflect families who are happier than in the past.
- Initiative among staff to share stories where they are ambassadors for CHI and self-advocates.
- Increase in the number and quality of relationships and connections persons and CHI has in the community.

Objectives

1. Grow pride and enthusiasm for CHI's mission among staff, people we support, and families.
2. Build partnerships with the business community.
3. Develop a broad internal and external communication and marketing plan that expands community relationships.
4. Plan a dynamic branding and name change strategy.

ACKNOWLEDGMENTS

We extend our heartfelt thanks to the CHI Self-Advocates, Families, Staff, and Board Members who contributed to creating this roadmap to guide our work FY 2019-2021.

Self-Advocates, Families & Staff

Staff facilitated discussion groups with self-advocates, families, and staff December 2017 through January 2018. A total of 51 voices offered invaluable input into this strategic plan. There was a total of 12 input sessions: four groups with 30 self-advocates; five groups with eight family members, and three groups with 13 staff.

CHI Board of Directors

John Pistolessi, President
Stephen Friedman, Vice-President
Geraldine Fowlkes
Cathy Lyle
Marylove Moy
Nandini Natarajan
Lynn Richardson
Darlene Richeson
Larry Skok

CHI Senior Staff

Daphne Pallozzi, CEO
Kim Dennie, Director Quality Assurance
Kris Fitzpatrick, Facilities Manager
Bernice Guity, Director Human Resources
Susan Harrison, Director Residential Services.
Gail Singletary, Director
Joyce Sun, Director of Nursing
Shawnteé Wilson, Executive Assistant