

**The Arc of San Francisco
Five Year Strategic Plan**

July 1, 2008



Approved by the Board of Directors August 26, 2008

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With thanks and gratitude for the voluntary efforts of Mr. Larry Melillo and for the support of his employer, KPMG LLC, without which this strategic plan would not have been produced.

Preface

From February through June 2008, The Arc of San Francisco (The Arc) undertook an exercise to develop a robust Five Year Strategic Plan beginning on July 1, 2008. The core requirements of this planning exercise were to develop a guiding document that:

- Is truly strategic (long-term) in nature.
- Reflects deep thinking about The Arc's positioning at a time when the demographic, policy, and fiscal environments are evolving rapidly.
- Will serve as vehicle to *enhance the integrity of The Arc's mission* during this critical period, and help us to measure and improve our performance.

The mission of The Arc of San Francisco is to serve people with developmental disabilities, individuals with similar needs, and their families by providing access to a full range of services that advance self-determination, dignity and quality of life.

This document represents our attempt to meet these requirements, by collecting input from the following internal and external stakeholder groups:

- Board of Directors
- Executive and Deputy Director
- Senior Managers (Directors of Accounting, Development and Human Resources)
- Service Directors/Service Managers
- Clients
- Families and Caregivers
- Golden Gate Regional Center
- California Department of Rehabilitation

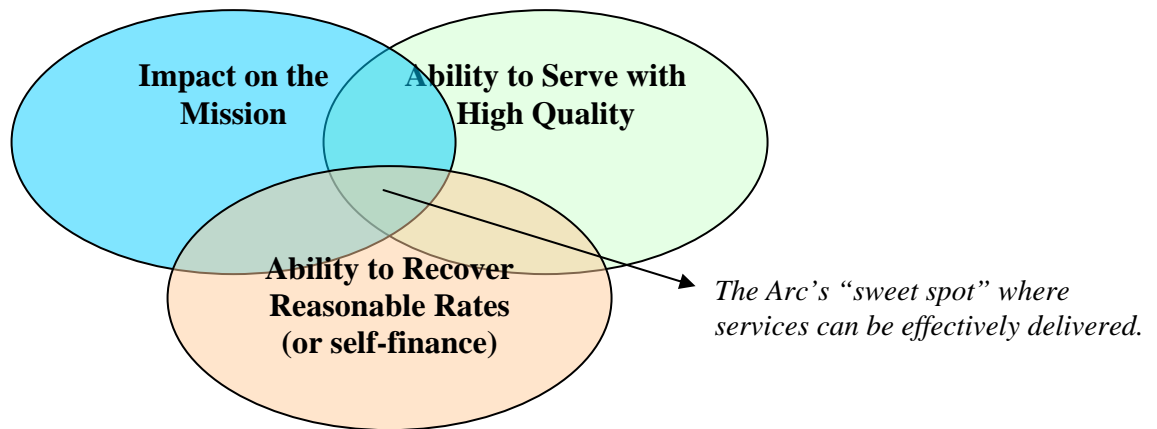
In addition to these conversations, prior survey data from staff, employers, clients, family members, and other stakeholders was reviewed and incorporated in the strategy.

It should be noted that the strategic initiatives discussed within the plan are generally referred to as “opportunities.” This term is deliberately used, as The Arc views the challenges associated with developmental disabilities as an opportunity to provide meaningful impact upon each client's life, as well as provide an enriching experience for its employees and other key stakeholders who contribute so critically to The Arc's success.

Strategic Plan Overview

As of the time that this plan is being developed, it is clear that the developmental disabilities “space” is in flux. Key trends influencing The Arc include 1) the increasing prevalence of autism, 2) the aging of the population with developmental disabilities, 3) increasingly higher expectations from the client base of their service providers, and 4) the potential for clients and their families to choose (self-direct) state-funded services to meet their individual needs.

This strategic plan is The Arc’s attempt to address these emerging trends by providing a foundation that can be used to guide decision-making. While not prescriptive, the plan suggests 3 inter-locked principles to apply when making decisions about The Arc’s operations as the future unfolds.



Key decisions (such as adding, modifying or terminating services) for The Arc must always be assessed in regards to their impact upon The Arc’s mission. Assuming that this first critical test is passed, the decision-making process must then ask if The Arc has the right capabilities (staffing, skill sets, physical assets) in place to serve these needs at the right level of quality. Finally, all services (new and old) must be continually assessed in regards to their ability to be financially viable, through state reimbursement, private pay, fundraising or some other form of self-financing.

Impact on the Mission

As a mission-driven organization, The Arc of San Francisco is committed to providing services that allow its clients to advance self-determination, dignity and quality of life. Guiding concepts that will support the assessment of new opportunities to serve clients include:

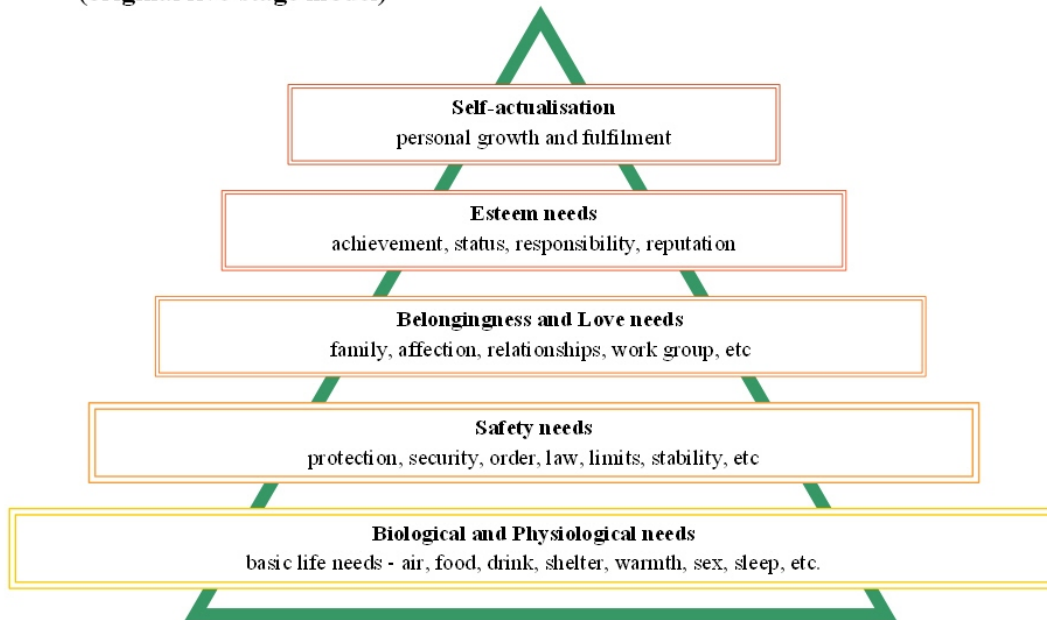
- The Whole Person
- Quality of Life

- Self-Determination (client-centricity)
- The Client Lifecycle

The Whole Person – The concept of the “Whole Person” is a critical consideration when determining that The Arc should pursue one opportunity over another. It includes a holistic view of a client’s life, above the more elemental needs associated with the lower levels of Maslow’s Hierarchy of Needs, as depicted below. Such basic biological, physiological, and safety needs are certainly important and are areas where The Arc will continue to provide assistance.

However, the Whole Person concept gives The Arc a framework to consider additional (more creative) opportunities for its clients to lead more fulfilling lives, including hobbies, travel, art, friendships and other types of relationships that make life worthwhile for all people.

Maslow’s Hierarchy of Needs
(original five-stage model)



As an organization known for being a thought-leader and passionate advocate for those with developmental disabilities, The Arc will continue to evaluate new opportunities in regards to better serving The Whole Person.

Quality of Life – A key element of The Arc’s mission and a common refrain from the stakeholders is that The Arc must continue to enhance the Quality of Life for its clients. As such, when evaluating an opportunity against its impact on The Arc’s mission, this concept must also be taken into account.

Before doing so, it is important to define Quality of Life and how it can be achieved. In accordance with The Arc’s mission, the following is offered to define key elements of Quality of Life:

What is Quality of Life?	How Can Quality of Life Be Achieved?
<ul style="list-style-type: none"> • Having and leading a life that is important to you (the client) • Having a purpose in life → an idea of what you want and going for it • Having independence • Feeling good about the things you are involved in 	<ul style="list-style-type: none"> • Having options, the information to choose effectively, and then having those choices met • Having good health, nutrition and fitness (or better yet – wellness) • Being able to be active • Having access to the things you like to do (for example, dancing, yoga, martial arts, listening to music) • Knowing what you want, asking for it, and getting it • Serving others, not just being served

As an organization that respects the needs of the individual, The Arc will continue to evaluate new opportunities in regards to its ability to improve the Quality of Life for its current and future clients.

Self-Determination (client-centricity) – Another key element of The Arc’s mission, self-determination can be defined as allowing decisions about services to be made by the client, based on their individual needs and desires. The goal of self-determination is to improve the outcome of services delivered, as defined by the client, himself or herself.

The benefits of self-determination (or “intrinsic motivation,” that is, doing something because it is inherently interesting or enjoyable¹) have been clearly documented in a variety of settings. Common examples of self-determination include students choosing their educational courses, workers defining their own career path within their organizations, and clients with developmentally disabilities choosing services that interest them.

In practice, achieving these benefits is not a simple exercise. People with developmental disabilities are entitled to a full panoply of constitutional rights including the right to terminate life-sustaining treatment, the right of procreative integrity and the right not to be involuntarily institutionalized.

However, the cognitive impairment of an individual who is developmentally disabled in certain cases may leave them without the ability to exercise these rights fully. As such, client self-determination must ensure that proper procedural

¹ [Am J Law Med.](#) 1989;15(2-3):333-61

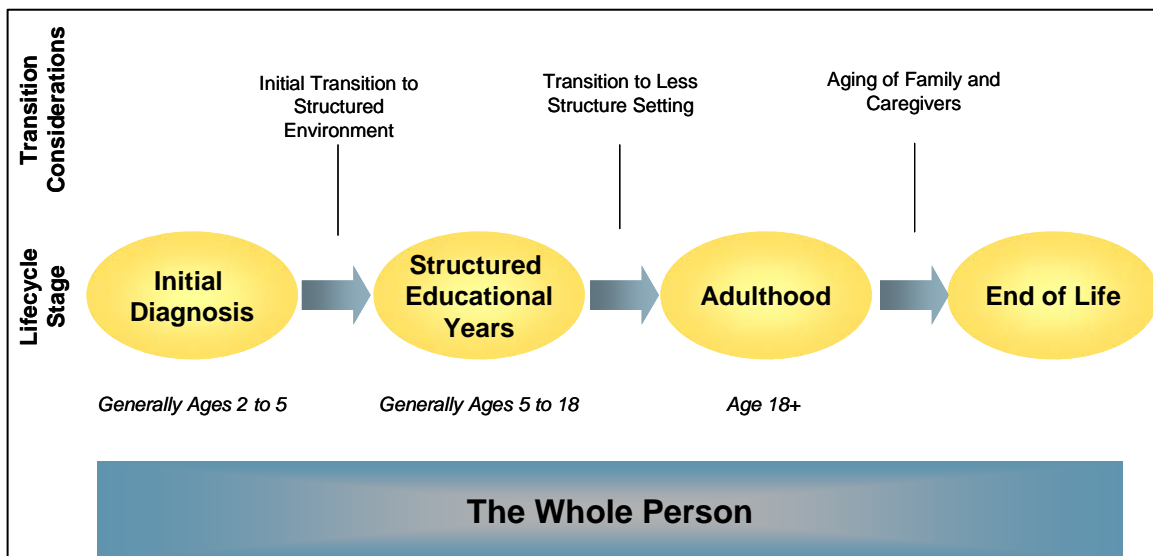
safeguards are in place to guarantee the exercise of these constitutional rights by individuals who are disabled.

These safeguards (such as the provision of a fiscal agent) need to be balanced on a case-by-case (client-centric) basis against the need for autonomy and control over the decision-making process, thus preserving the benefits of self-determination.



As an organization that wishes to promote self-determination, The Arc will continually look to balance regulatory requirements with the wishes of its clients to support the selection of individual services.

The Client Lifecycle – Another key element of The Arc’s strategic decision-making process (from a mission perspective) is to evaluate client needs in regards to the stage within the client Lifecycle. This lifecycle can be depicted as follows, along with key transitions that commonly take place along the high-level stages:



The client lifecycle is a grounding principle for determining 1) in what stage(s) of life it wishes to serve clients, and 2) how to most effectively manage the transition to each lifecycle stage. The challenges of transition pose an opportunity for The Arc to provide *targeted services* to clients as their needs change over time. Regardless of stage, the foundational concept of the Whole Person always remains.

In order to provide the highest level of service to its clients, The Arc will evaluate its clients' needs in regards to their stage within the client lifecycle and the challenges associated with transitions between stages.

Ability to Serve With Quality

Assuming that an opportunity to provide services fits with The Arc's mission, the next test that must be considered is whether The Arc has the capability to provide services at the appropriate level of quality. Key considerations for determining ability to serve with quality include:

- *Staffing* – Are appropriate staff levels in place to provide the service? Are client-to-staff and manager-to-staff ratios appropriate given the specific needs of each individual client?
- *Skill Sets* – Are staff currently trained to meet the needs of specific clients? If not, can training be provided in a timely fashion to bridge the gap?
- *Managerial Capacity* – Are managerial levels and skills in place to ensure desired outcomes?
- *Regulatory Constraints* – Can regulations (manager-to-staff ratios, required reporting, and more) that guide the provision of a service be complied with?
- *Physical (Operational) Assets* – Are the right physical assets (buildings, medical equipment, safety equipment, and more) in place to support the clients' needs?
- *Key Service Relationships* – When a client has very specific needs (for example, medical, behavioral, and more), can The Arc partner with another service provider (in coordination with the GGRC or DOR) to provide the right level of service to the client?

To ensure that The Arc focuses on the right opportunities, assessment of service quality will take into account the key factors noted above.

Ability to Recover Reasonable Rates (or Self-Finance)

Assuming that an opportunity to provide services fits with The Arc's mission, and that The Arc has the capability to provide services at the appropriate level of quality, the last test is whether The Arc has the ability to adequately finance the opportunity. As noted by the Board, "each client that walks through the door brings with her/him a responsibility for funding."

Key channels for funding include:

- State Reimbursement
- Grants
- Individual Donorship
- Corporate Donorship
- Private Pay
- Special Fundraising Events
- Planned Giving

This strategic plan assumes that there is no “silver bullet” in funding requirements and that the evaluation of funding alternatives will be an area of continual focus as The Arc grows. The plan outlines key mechanisms The Arc will likely pursue in order to meet its financial requirements over the five year plan horizon.

In summary, the Board of The Arc of San Francisco will work to execute the five year plan by focusing on opportunities that support the mission, can be executed with high quality, and can be financially sustainable.

Overview of Strategic Trends and Opportunities

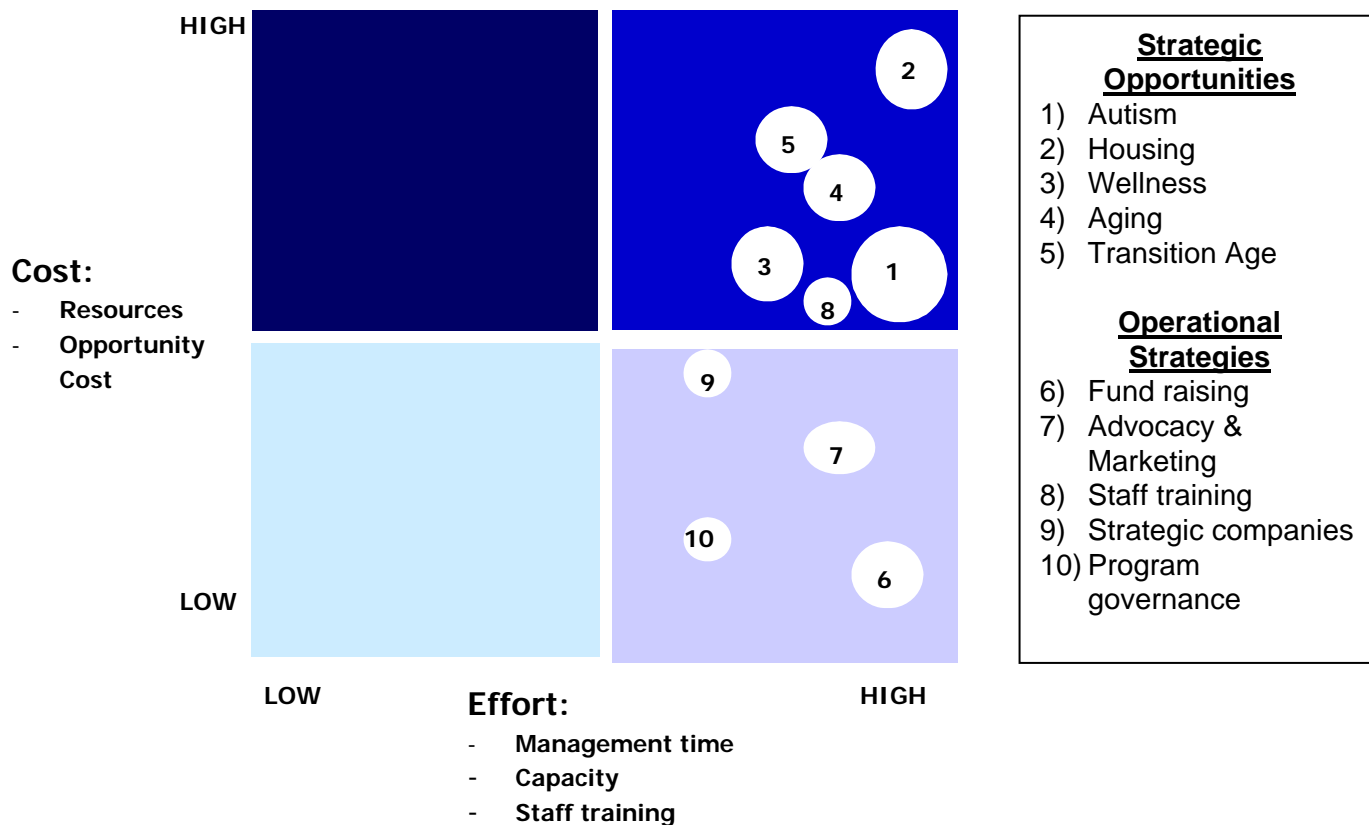
The following five *strategic opportunities* emerged based on discussion and analysis with key stakeholders of The Arc, and assessment of key trends impacting the developmental disabilities “space.”

1. **Autism.** The needs created by the increasing prevalence of autism.
2. **Housing.** The need to develop additional housing options.
3. **Wellness.** The emergence of the concept of wellness.
4. **Aging.** The need to provide services to aging (later in life) clients.
5. **Transition Age.** New services to support younger adults (ages 14 to 18).

Furthermore, the following five *operational strategies* are identified, supporting its strategic opportunities:

6. **Fund Raising.** The need to improve fund raising capabilities.
7. **Advocacy & Marketing.** The need to improve The Arc’s ‘brand’ through increased advocacy and marketing.
8. **Staff Training.** The need to provide additional staff training opportunities.
9. **Strategic Companies.** The need to maximize relationships with strategic companies.
10. **Program Governance.** Improved program governance (knowing when to *not* provide a service, or to discontinue one).

These 10 initiatives (several of which have already been started) can be placed on a matrix, which shows their impact upon The Arc’s mission, along with the cost and effort associated with implementing them. Because they are strategic, the opportunities and strategies identified below are all relatively high in regards to their impact upon the mission. The value of the matrix is to compare the cost and effort of one initiative to another.



As noted earlier, several trends are impacting the service area for people with developmental disabilities are assessed as part of strategic planning. Key trends are identified below, with a summary of The Arc’s strategic response. These responses helped identify many of the opportunities and initiatives noted within the plan.

Key Trend	The Arc’s Strategic Response
The rising prevalence of autism, in which over 1 in 150 children born are projected to have some level of autism.	Strategizing on autism-related services, based on targeted staff training and the provision of key facility-related items (for example, ‘quiet space’).
The aging of the client population, in which health and later-stage transitional issues become more complex and acute.	Increased focus on addressing the needs of aging clients and others with later-stage transitional issues.

Key Trend	The Arc's Strategic Response
Increased expectations in regards to self-determination of services, by both clients and their families.	Increased effort to identify client expectations. Improved relationships and communication with critical external stakeholders (GGRC or DOR, families/caregivers, complementary service providers, and more).
Higher expectations of clients and their families in regards to the execution of services provided by The Arc.	Improved relationships with clients and other key stakeholders. Increased effort on measuring service quality, aligning human and physical resources to support key services.
The desire for increased community inclusion and integration of clients, both from a work and social perspective.	Providing more social and recreational opportunities, identifying and working with employers to create more integrated work environments.
An increased focus on the concept of 'wellness', in which the concept of health evolves from basic treatment to preventative care and overall physical and mental well-being.	Continued education and communication related to the wellness concept. Continued education of healthcare providers (leadership of healthcare system reform effort).
Increased financial pressure due to federal, state and local budget cuts within the developmental disabilities "space".	Continued evaluation and prioritization of current/future services, based on budgetary constraints and the ability to finance services via other methods (for example, donorship, private pay, and more).

The following provides additional detail on the strategic opportunities, taking into account the key trends noted above.

#1 – The need to serve clients with Autism

Overview of the Opportunity – People with autism will significantly alter the disabilities landscape and impact most strategic issues facing The Arc. Their numbers alone will quite clearly overwhelm current funding, systems and staff. Their needs will be similar but different from the population served thus far. There is not enough State funding and support for innovation, development, and initiation of new services to meet the needs of people with autism. More resources must be devoted to plan for this population while we still enjoy the luxury of time. We must not plan to fail by failing to plan.

The Arc created a Committee on Autism, which developed and as is implementing the following strategy:

Strategy Summary

1. **Learn.** Identify and conduct site visits of schools, programs, and institutions that specialize in serving people with autism and researching autism.
2. **Integrate.** Avoid creating a specialized and exclusive autism-only program but integrate clients with autism into whichever program fits that individual best.
3. **Modify.** Identify the modifications we need to make in existing services, specifically One-To-One, Skills, Community Training, and Integrated Work to serve people with autism best.
4. **Train.** Offer continuous and focused training, support and specialized clinical referrals for The Arc staff who serve clients with autism.

Learn

- The Arc serves and has served people with autism for many years. We have a body of knowledge and a cadre of staff with experience and expertise. The Arc has to develop a methodology for routinely capturing and transmitting what we know and have already learned about autism.
- There also remains much to be learned by The Arc that has already been learned by other service providers. Much practical knowledge is possessed by providers who serve people younger than The Arc serves, which is where the prevalence of autism has been and will remain for at least for the next few years.
- Because the increase in incidence of autism is relatively recent, there is still a great deal of current research being performed, including academic and clinical research. San Francisco is one center of this research. The Arc must be an active participant in research, learning, adapting, applying and transmitting findings.
- The Arc must recognize, share and build on reliable evidence-based knowledge, innovations, interventions and therapies with proven, research-based and peer-reviewed track records of getting results.

Integrate

The symptomology of autism is indefinite and the autism diagnosis is commonly used to describe a wide spectrum of disabilities, hence the formal name Autism Spectrum Disorder. The Arc currently serves people with autism in all its current services. There has been no apparent need to serve clients with autism in their own program thus far and will likely be no need to initiate a new program exclusively for this population either.

Modify

- The Arc must develop a methodology for critical assessment of its success serving people with autism. This methodology must be applied to The Arc's existing track record serving people with autism.
- Because autism manifests in many different ways, it will be difficult-to-impossible to conceptualize any universal approach to the service needs of all clients with autism. The better approach is to develop a more thorough individualized assessment of each client with autism to identify the specific program modifications they need.
- The Arc must continuously improve its capacity to assess the specific developmental needs of people with autism, enroll them in the service that is most appropriate to meet those needs, and ensure that the service is modified to those needs on a fully individualized basis.
- Because many people with autism are reactive to change, program modification cannot be a continuous process. Program modifications must be individualized without distorting the basic design of the program, preserving the benefits of the design for clients who do not have autism.
- In addition to considering program modifications, The Arc must consider modifications to physical space. Because many people with autism also have sensory reactivity, consideration must be given to modifying sound, light, smell, touch and other stimuli in The Arc's buildings and facilities.

Train

- The Arc must identify specific competencies that are needed to meet the needs of people with autism and provide continuous and focused training to its staff to develop their competency.
- Staff of The Arc should participate in the process of learning more about autism, attending conferences and workshops and supporting each other in their service to people with autism. The Arc will create a dedicated group of its managers and staff with the interest and basic competency to serve as the core of this effort.
- The Arc must develop and provide to its staff outside resources of clinical consultation, referral and technical assistance for serving specific clients with autism in need of this extra level of support.

Next Steps – Elements of The Arc's autism strategy that remain to be more fully developed are: life planning, employment planning, social networking, family support, community awareness and self-advocacy.

The committee will act as a cross-departmental technical assistance group to implement the strategy and organize autism services at The Arc. Only selected Instructors will have special training on serving clients with autism.

The committee will create a group of 2 – 3 clients who become part of a special internal study conducted by the committee. The committee will identify the data elements it will collect and study about the group that will provide more information on how best to implement The Arc’s strategy

#2 – The need to provide Additional Housing Options

Overview of the Opportunity – A major concern of The Arc’s clients, families and caregivers is the desire for affordable and safe housing, a particular challenge as housing is expensive in the Bay Area. The need for housing alternatives is exacerbated by the challenges of transportation, as the ability of clients to effectively utilize transit is heavily impacted by their proximity to it. As such, the ability to provide adequate housing alternatives that are in close proximity to services they need to maintain residence in the community is a critical issue for both clients and The Arc.

Strategic Alternatives –

Alternative Description	Impact on Mission	Barriers/Risks
<p><i>Endowment</i> – Create an endowment for housing which will allow creation of new housing units owned by the Arc or provide rental subsidies. This would be supported by an endowment or capital campaign, which is noted below in the Fund Raising strategy.</p>	<p>The enormous demand for housing is indicative of the impact this alternative would have on the mission. Clients would benefit by solving basic needs in regards to shelter and safety, while having the opportunity to ‘self-actualize’ by having a residence in the community.</p>	<p>Will require substantial fundraising effort.</p> <p>Potential conflict between Arc being a subsidizer or owner of housing (a landlord) and also a service provider.</p> <p>Little expertise in housing development.</p>
<p><i>Housing Advocacy</i> – By developing deeper relationships with local housing developers (perhaps via the Board or the Housing Advocacy service), The Arc has the ability to influence the number of housing units available to those with developmental disabilities.</p>	<p>Would support many clients’ greatest need, which is to have affordable housing in a high-cost area (presumably near their families).</p>	<p>May need to coordinate with West Bay Housing (GGRC) and other housing developers.</p>

Alternative Description	Impact on Mission	Barriers/Risks
<p><i>Residential Services</i> – Continue providing Independent and Supported Living Services in residential units that are not directly owned by the Arc. This alternative is not mutually exclusive with Housing Advocacy.</p>	<p>Helps provide comfort that clients receive home-based support.</p> <p>Provides services necessary to maintain residences within the community.</p>	<p>Assumes that clients are able to obtaining affordable and safe housing in the first place.</p> <p>Independent and Supported Living Services needs to continue hiring, retaining and training talented people to take care of people with severe needs.</p> <p>Rate freezes impact the ability to sustain services.</p>
<p><i>Housing Donations</i> – An element of the fundraising (planned giving) strategy can include requests for real estate donations. Such donorship could provide estate planning and tax benefits, and make a long-term difference to people with developmental disabilities.</p>	<p>Part of the fundraising strategy, home donations would increase the number of units available to The Arc’s clients, with a relatively moderate investment.</p>	<p>Need to assess risks associated with obtaining and then readying donated housing units to meet building codes.</p> <p>Little expertise managing property.</p>

Summary – The Arc will continue having strategic discussions to determine which path or paths to select to provide more housing options for its clients.

#3 – The need to improve client Wellness

Overview of the Opportunity – The concept of Wellness is becoming more commonly accepted, as people want to move past acute or preventative medical care to be able to enjoy the benefits of an advanced state called “wellness.” Wellness is important to the mission of The Arc by promoting a more holistic approach to health care that targets the specific challenges of developmental disabilities, clients will live richer, more active and more meaningful lives.

From a strategic standpoint, it is clear that The Arc will continue to focus on the *non-clinical* aspects of wellness through health education and health advocacy.

Many people with developmental disabilities have significant challenges in regards to wellness:

- 1) They can't manage their own health care independently; they can't identify when they need care or schedule it appropriately.
- 2) They don't value screenings or preventative care.
- 3) They don't properly link what they do (smoking, over-eating, and more) to the health impacts of such activity.
- 4) They don't independently comply as expected when services are being provided, creating concern about adherence with the service providers.
- 5) Given the trend toward private pay in the broader medical industry, doctors don't take Medi-Cal in many instances.
- 6) They can't fulfill prescriptions or OTC orders if given by a doctor, lack prescription coverage and/or can't comply with the medication schedule.

Strategic Alternatives –

Alternative Description	Impact on Mission	Barriers/Risks
<i>Health Advocacy and Practitioner Education –</i> As referenced below, The Arc will continue to educate practitioners on the needs of people with developmental disabilities, who will commit to serving this community.	Will promote client health and wellness by creating a larger number of practitioners that are willing to treat them, and understand how to treat them successfully.	Lack of interest among practitioners (many of which don't accept Medi-Cal). Continued effort and expense associated with practitioner meetings and workshops.
<i>Client Education –</i> The Arc can provide clients with high-level guidance on the key aspects of wellness, stressing aspects such as preventive care, nutrition, exercise, leveraging Medi-Cal and other available funding sources, the need to have good relationships with their medical providers, and the need to be able to freely communicate any health issues to The Arc staff.	Would give clients an opportunity to look at themselves from a health perspective and take steps to more proactively care for themselves. Will improve health outcomes, by helping overcome cognitive resistance to visiting health care practitioners.	Would require investment to set up workshops and training classes.

Alternative Description	Impact on Mission	Barriers/Risks
<p><i>Staff Training</i> – The Arc will make investments to ensure that staff is able to have productive ‘health’ conversations with clients and understand when to differentiate between ‘guidance’ versus the need to escalate a potential issue.</p>	<p>Would allow staff to be able to have wellness discussions with clients, allowing potential issues to be identified quickly.</p>	<p>Significant investment in staff training.</p> <p>Need to have operational processes in place to document health discussions.</p> <p>Must ensure that Arc is not perceived as a health care provider, so as to not incur liability for any guidance given.</p>

Summary – In 2008, The Arc received a grant from The California Endowment to work with the San Francisco Department of Public Health, UCSF, Golden Gate Regional Center, and the Health Plan of San Mateo to propose reforms in the health care system for people with developmental disabilities. The preliminary strategy centers on the following:

- 1) How to train practitioners to work with people with developmental disabilities, so that unique health care issues are identified and accommodated? For instance, some clients will need a sedative in order to sit still in a dentist’s chair.
- 2) How to fund care for those with developmental disabilities? This includes advocacy so that more practitioners are willing to take Medi-Cal, allowing them to serve a segment of clients with developmental disabilities.
- 3) How to help ensure *positive outcomes* for people with developmental disabilities through research, policy and service delivery reform?

The Arc is actively working with its project partners to put together a pilot to demonstrate the proposed system reforms.

#4 – The need to provide specific services to Aging (Later Life) clients

Overview of the Opportunity – People with developmental disabilities are living longer, bringing a new set of health challenges associated with age. Furthermore, many people with developmental disabilities may need to deal with later-life planning with the passing of key caregivers (parents and more), creating major transition issues for them.

Strategic Alternatives –

Alternative Description	Impact on Mission	Barriers/Risks
<p><i>Later Life Transition planning</i> – The Arc can provide workshops with older clients (and their caregivers) to discuss key considerations such as:</p> <ul style="list-style-type: none"> • Estate planning • Dealing with assets to help with health issues • Living Wills/Advanced Directives • Coping with loss of key caregivers 	<p>Would allow clients to continue living with dignity and self-determination throughout their life cycle.</p> <p>Improved transition during end-of-life stages.</p>	<p>Would require The Arc to set up new services based on these needs.</p> <p>Would need to vendorize the service with GGRC.</p> <p>Inherent resistance to honest discussions on the subject of mortality.</p>
<p><i>Education</i> – From a staff perspective, more focus can be given upon understanding some of the key issues associated with aging clients (for example, the linkage between osteoporosis and those with Down Syndrome).</p>	<p>Would allow more aging clients to have a higher quality of life as they have an outlet for dealing with their specific issues.</p> <p>Would help combat stereotypes and age-ism.</p>	<p>Currently not a high level of expertise at the organizational level.</p> <p>Will require formal training and its associated cost/effort.</p> <p>Need to make connection to existing aging support systems/organizations.</p>

Summary – The Arc’s strategy for supporting aging clients should take into account staff training, practitioner training, and other investments. Wellness is a concept that should be continually applied to a client throughout their life cycle. For example, there appears to be co-morbidity between Down syndrome and osteoporosis. Thus, when developing the care plan for an individual with Down syndrome, health issues such as osteoporosis should be addressed proactively.

#5 – The need to provide new services for Transition Age clients (ages 14 to 18)

Overview of the Opportunity – As the prevalence of developmental disabilities increases, The Arc has an opportunity to serve clients that are still in their high school years. The Arc’s Howard Street facility is generally clear during the afternoons, providing an opportunity to provide additional services, perhaps even for private pay. As an added benefit, such a program would also put The Arc on the radar of younger people with developmental disabilities, who can then utilize The Arc’s services after they move through the education system and become adults.

Strategic Alternatives –

Alternative Description	Impact on Mission	Barriers/Risks
<p><i>Develop an After School Program</i> – The Arc can develop a targeted program for people ages 14 to 18, giving them an opportunity to continue developing practical skills themselves after the school day ends. Such a program would initially focus on less expensive investments (computers, art, and more).</p>	<p>Would allow The Arc to provide structure and socialization opportunities to younger people with developmental disabilities.</p> <p>Would help smooth the important transition from school to adulthood, and build awareness of The Arc at an earlier stage.</p>	<p>Need to structure the program, in regards to what will be offered and the costs associated with that program.</p> <p>Need to determine the funding model (private pay, GGRC reimbursement, and more)</p> <p>Need to ensure facilities are adequate to meet potential demand.</p> <p>Ideally, outside space would be available to allow for more outdoor recreational activities.</p>
<p><i>Communication</i> – As part of The Arc’s Marketing strategy, continued effort can be made to reach out the local schools and let people know of the After School program, as well as The Arc in general.</p>	<p>Would provide younger people with developmental disabilities the opportunity to explore The Arc’s services, giving them a potential path after their formal education cycle concludes.</p>	<p>Would require effort associated with presenting at different schools.</p> <p>May require additional training for staff to deal with specific issues associated with younger clients.</p>

Summary – The Arc will continue exploring the opportunity to provide After School services to transition age clients. The current belief is that the expertise, staff, location, facility are already in place. There is also an opportunity for The Arc to collaborate with other agencies that provide services to those with developmental disabilities.

Operational Strategies

The five operational strategies noted below are critical to achieving the strategic objectives contained within the plan.

#6 – The need to improve Fundraising Capabilities

Overview of the Opportunity – Because quality services cost more than the state is willing to reimburse, every client who walks through the doors of the Arc brings with them a funding commitment. To cover the shortfall of GGRC or DOR reimbursement and to pay for expenses that are not reimbursable, The Arc’s fundraising/development strategy includes:

- Service Reimbursements – By knowing actual service costs versus reimbursements, The Arc will continue advocacy with the State (GGRC and DOR) to obtain fair compensation for services delivered.
- Grants – The Executive Director and Board will continue to work with the Development department and staff to determine service areas deemed important to The Arc’s mission. Grants provide The Arc with the ability to pursue specific new opportunities as the developmental disabilities “space” evolves.
- Fundraising Programs:
 - Planned Giving Program – Provides the opportunity for families and caregivers to incorporate donorship into their estate plans. This can also include providing planned givers the opportunity to let friends and family donate to The Arc directly, in lieu of birthday/holiday presents, and more.
 - *Corporate Circle* – As part of The Arc’s strategy to focus on key corporate contributors, this program recognizes companies that have made a commitment to The Arc and people with developmental disabilities.
 - Capital Campaign – Associated with the strategy for developing and building new housing or other large-scale capital needs (facilities, remodeling, and more).
 - Household Recycling Program – In addition to the benefits of fee income and re-use of household goods, The Arc can build on relationships to increase individual donations. Mailing and distribution of the Household Recycling collateral and visibility of the pick-up trucks is an opportunity to increase brand awareness of The Arc.
 - Note: To help ensure that development and maintenance needs are met, the overall guideline for fundraising programs is to cover three times (3x) their projected cost. While such a guideline isn’t practical for every specific event, the 3x guideline can be used to help gauge whether a program is worthy of investment based on its intended financial result.
- Fundraising Events:
 - Arc Angel Breakfast –The Arc may consider attendance fees and not exclusively solicit contributions.

- Other Events – The Arc will continue such events and analyze outcomes for profitability. Considering volunteer and other resources, events will be planned with the goals of raising awareness, providing social opportunities for the clients, and raising funds. The objective will be an income target, and ideally they are structured in a manner that at least allows them to be self-funded (via contribution, donation, and more).
- Individual Donors:
 - Quarterly Direct Mail Campaigns – Targeting past donors, this requires the maintenance of an adequate donor database. Objectives for each campaign should be formally documented in advance, highlighting key goals such as audience reach, level of contribution desired, and campaign ROI. Results from each campaign should be reported upon after completion, including analysis of best practices that can be carried forward to future campaigns.
 - Matching Contributions – Working with key employers to promote matching gifts for their employees’ contributions to The Arc.
 - Online Contributions – Online opportunities (blogs, Facebook, good2get, and more) for the cultivation of individual donors will be explored and utilized whenever possible. To increase effectiveness, project themes will be mirrored in The Arc’s online platforms.
- Board Fundraising – The Board Leadership Committee will cultivate potential board members who bring the capacity to “open doors” for The Arc and bring skills which enhance its resources. Working through the Board Resource Development Committee, establishing specific annual fundraising commitments may be explored as part of the requirement for joining or remaining on The Arc’s board. Furthermore, an associate board membership committee may be formed for those given the express purpose of generating funds.
- Private Pay – The Arc may consider establishing services that clients can privately pay for, providing more control over its fiscal destiny. Such services must be priced appropriately so that they can be accessed without GGRC or DOR authorization.
- Facilities Rental – In cases where The Arc’s facilities have downtime, additional revenues can potentially be raised by renting the facilities. This requires that appropriate insurance and liability risks, along with maintenance and utility costs, are adequately managed.

Summary – The Arc’s fundraising strategy will continue to evolve, and will be owned by the Board, the Executive Director and the Development department. Decisions related to the fundraising strategy will be made using a closed-loop process:

- Fundraising requirements are developed during the annual budgeting process, including the establishment of a separate stretch goal.

- Annual fundraising activities (mailings, projects, events) are scheduled in advance, each with a clear level of contribution to the overall fundraising goal.
- The Board will approve the overall fundraising strategy and calendar as part of the budgeting process.
- An objective will be developed for each fundraising program/event, including the event strategy, resource requirements, financial outcomes, ROI, and timing.
- The results of each program/event will be evaluated against the stated objectives by the Board Resource Development Committee and staff on a quarterly basis and reported to the full Board.
- The Board Resource Development Committee and staff will discuss lessons learned and best practices will be discussed, to ensure that they are leveraged for future campaigns.
- The Board will endeavor to evaluate other non-profit fundraising strategies on an annual basis, to determine if there are other funding avenues available that The Arc may choose to pursue.

The Arc's fundraising strategy should incorporate clear understanding of the costs associated with non-reimbursable activities and unfunded clients.

#7 – The need to improve The Arc's Brand Through Increased Advocacy and Marketing

Overview of the Opportunity – Unless one is personally impacted by developmental disabilities, there is generally little public awareness of The Arc aside from the Household Recycling program or corporate involvement. *As such, the simple goal for marketing is that when people think of developmental disabilities, they should think of The Arc.* Advocacy and marketing should ensure that the community maintains a positive and accurate association with The Arc's brand.

Part of the issue associated with marketing The Arc is the need to correct myths regarding the abilities of individuals with developmental disabilities. Key to portray clients and The Arc in the best and most professional light are:

- *Brand Guidelines* – These guidelines will be referenced and followed whenever The Arc or its clients appear in print or visual media. The Development department should review content for brand compliance in any medium presentation made to the public.
- *Messaging* – Taking care (by adhering to the brand guidelines) in how The Arc presents its clients in key communication channels (newsletters, videos, grant proposals, solicitation letters, art shows, and more) to ensure that messages promote The Arc's primary values of quality of life, self-determination and dignity, clients' abilities, their value as individuals, and community inclusion.
- *Education* – Both in marketing materials and through educational forums, all messaging should be seen as an opportunity to promote the mission, to

The Arc's logo has an impact on the services provided. The ability of The Arc to generate awareness and the increased desire for self-determining clients to utilize its services should be driven by positive association with The Arc's logo.

Summary – The Marketing strategy will continue to be maintained by the Development department, with the goals of:

- Promoting the brand of The Arc of San Francisco and increasing public awareness.
- Based on The Arc's strategic direction, helping drive intake of new clients.
- Leveraging all communication channels (including public relations) as cost-effectively as possible, to support key fundraising events and programs.
- Searching for opportunities to partner with other established providers in the developmental disabilities "space" (Autism Speaks, Special Olympics, and more), in order to promote brand awareness.
- Continuing to provide new and exciting social opportunities, allowing clients, families and caregivers to have fun, and thus promoting positive association with The Arc.
- As the trend towards self-determination of services increases, adopting approaches that effectively reach out to key client constituencies including:
 - Clients
 - Influencers
 - Decision-makers
 - Economic buyers (either through private pay, GGRC, or DOR reimbursement)

#8 – The need to provide Additional Staff Training Opportunities

Overviews of the Opportunity – The most critical component of service quality is for The Arc to maintain staff that can effectively *teach, train, and guide* clients, address problems, and above all, help ensure that clients are safe and treated with dignity. The need to provide staff training is critical given the nature of the industry. Recruiting and retention of qualified staff is always a challenge for non-profit organizations like The Arc, as the compensation is relatively low. Staff often tend to leave after 2 to 3 years, creating the need to continuously train new staff.

Strategic Alternatives -

Alternative Description	Impact on Mission	Barriers/Risks
<p><i>Expand Upon Current Training Program</i> – Based upon the services provided, The Arc should create training structured around client needs. The overall program should address new employee orientation, periodic general staff training and service-specific training.</p>	<p>Would help ensure that clients received the highest quality of service.</p> <p>Will improve staff retention.</p>	<p>Substantial effort associated with developing training matrix and program structure.</p> <p>Need to find management time to conduct training programs.</p>
<p><i>Certification</i> – As the developmental disabilities field is not currently ‘professionalized’ outside of the NADSP, there is an opportunity for The Arc to develop a curriculum that allows for staff to gain an internal ‘certification’ based upon meeting specified criteria.</p>	<p>Would support longer retention of top employees, giving the clients the opportunity to interact with staff that understands their jobs well.</p>	<p>Would need to structure the certification requirements.</p> <p>May need to address turnover once certification is complete.</p>
<p><i>Career Path & Rotations</i> – Staff should learn about potential career paths within The Arc so they can have a development plan that meets their individual career objectives. There is opportunity to incorporate a formal “rotation program” in which select individuals are rotated throughout various functions. Such a program should encourage staff to build upon “business” skills (management, budgeting, analysis, and more), in addition to “functional” skills.</p>	<p>Again, would support longer retention of top employees, giving the clients the opportunity to interact with staff that understands their jobs well.</p>	<p>Would require substantial effort by Human Resources to develop and maintain career plans for each employee.</p> <p>Would require management to get more involved with staff to have career planning discussions.</p> <p>Large effort associated with developing a robust rotation program.</p>

Summary – Leveraging the effort that has already begun by the Committee on Quality Assurance, The Arc views staff training opportunities as critical to its ability to remain a leader. Continued efforts will be made to refine the training program, improve the delivery of training and to align training with the emerging needs of The Arc’s clients.

#9 – The need to maximize Relationships with Strategic Companies

Overview of the Opportunity – The Arc is fortunate to have several prominent San Francisco companies support the organization as:

- A conduit for jobs.
- A source of donorship at the corporate and individual levels (through matching programs).
- A source of volunteers for certain events.
- Able to advocate on behalf of The Arc and the developmental disabilities community in general, leveraging their organizational clout.

As the resources required to generate new employers, corporate donors and volunteers are limited, The Arc should focus its attention on a select number of organizations, in order to maximize their potential for supporting the Mission.

Strategic Alternatives –

Alternative Description	Impact on Mission	Barriers/Risks
<p><i>Focus and Communication</i> –The Arc should formally identify the key companies where strong relationships are maintained (or a relationship is desired). Working with staff and the Board, an “account executive” should be established for each company, with a formal plan developed that guides the strategy for maximizing that company’s potential contribution (jobs, donorship, volunteerism, and advocacy).</p>	<p>Would increase The Arc’s ability to serve its clients with high quality by increasing the levels of job opportunities, donorship, volunteerism and advocacy.</p>	<p>Will require effort to develop a manageable list of key companies, including:</p> <ul style="list-style-type: none"> • The identification of current (or desired) company contacts • The relationship history with the company • The go-forward strategy for each company <p>Will require significant focus by the Board and management to ensure that strategic company plans are being executed.</p>

Alternative Description	Impact on Mission	Barriers/Risks
A secondary goal is increasing communication among The Arc's different internal functions, so that duplicative or conflicting messages are not sent.	See above.	See above.
<i>Expand the Corporate Circle</i> – Linking with the fundraising and marketing (Development) strategy, the Corporate Circle may be expanded to ensure that such companies receive due praise for their commitment to The Arc and people with developmental disabilities.	Again, would increase The Arc's ability to serve its clients with high quality by increasing the levels of job opportunities, donorship, volunteerism and advocacy.	Would require effort to re-model the program to provide the right level of recognition for key companies.

Summary – The Arc's Board and management will continue identifying key companies, along with the processes and resource commitment required to effectively manage this strategy. Key companies will benefit from having a primary point of contact at The Arc in regards to proactively managing the relationship, as well as helping escalate major issues above and beyond a single service offering or functional area.

#10 – The need to improve Program Governance

Overview of the Opportunity - As the marketplace and the needs of people with developmental disabilities evolve, it is important for The Arc to establish a process for determining when to *not* provide a service, or to discontinue a current one that 1) does not fit the mission any more, 2) cannot be delivered with a high level of quality, or 3) can not be adequately funded. The need for such a process reflects the reality that The Arc cannot do everything well, and must focus its resources on areas that will have the highest level of impact for the greatest number of clients.

Strategic Alternatives -

Alternative Description	Impact on Mission	Barriers/Risks
<p><i>Client Segmentation</i> - Based on logical groupings of needs, The Arc's service offerings may be continually evaluated to determine appropriateness in light of the changing needs of people with developmental disabilities. These needs generally include:</p> <ul style="list-style-type: none"> • Basic Needs (Housing, Jobs and Health) – such needs will remain focus areas for The Arc going forward. • Advanced/Specialized Needs – Such needs (often required to move up Maslow's hierarchy) will be considered based on The Arc's ability to deliver the service in a quality and fiscally prudent manner. 	<p>Would help ensure that services are being provided based on emerging client needs and desires.</p>	<p>Requires continued monitoring of the developmental disabilities "space", including surveys of key internal and external stakeholders to determine which new areas require evaluation.</p>
<p><i>Operational Reviews</i> – All services should be evaluated by the Board and management on a periodic basis to ensure that they are being provided within The Arc's 'sweet spot,' as defined on Page 4.</p>	<p>Would support the overall mission of The Arc by ensuring that only relevant services are being delivered, in both a high quality and fiscally prudent fashion.</p>	<p>Will require substantial effort by the Board and management to evaluate service offerings in a consistent manner, allowing hard decisions to be made (that is, invest or disinvest?).</p> <p>When the decision to disinvest in a service is reached, the human consequences of ending that service must be taken into account at the individual level.</p>

Summary – Over the five-year horizon of this strategic plan, The Arc does not plan to focus upon on:

- People under the age of 14 (although this may be revisited pending the success of The Arc’s effort in serving the age 14 – 18 year old market)
- Client who require skilled nursing
- Clinical service delivery
- Those who possess such advanced physical and/or behavioral needs that clearly exceed The Arc’s capabilities (i.e., human resources and physical resources)

Going forward, The Arc’s board and management will consider the “sweet spot” to ensure that future opportunities are evaluated in regards to generating positive client outcomes (in accordance with the mission), service delivery and fiscal integrity. This concept will help The Arc answer:

- What it does “well,” where well is defined as providing a service that generates positive outcomes and meets other key measures of service quality (regulatory and more).
- What it can afford, after conducting a cost/benefit analysis.
- What it needs based upon alignment of a particular service or investment against the organization’s mission.

Operational Considerations

Operational considerations are Transportation, Human Resources, Information Technology, and Accounting & Finance. These functions are critical to ensuring that The Arc can continue providing services to an increasing volume of clients.

Transportation

The Arc's current transportation model relies on third party providers, contracted by the regional center through another vendor, transport clients between their home and their program site, at designated times. Transportation is essential because clients are not served when the system fails and The Arc cannot bill for services that are not provided when the client does not actually receive them.

While this model requires practically no capital commitment by The Arc, it often leads to problems with logistics and communications, such as missed pick-ups. The Arc spends significant time, effort, and money to resolve transit problems, but has little power over a system operated entirely by other parties. By not being able to provide its own transportation options, The Arc's clients must rely on families, caregivers and public transportation to attend social or other events outside of the regular program and transportation schedule.

Under the current model, the regional center contracts with a vendor to which all transportation issues are to be reported, but this system has not worked well. Transit problems are supposed to be captured and reported to GGRC on a regular basis, to ensure that there is visibility into the performance of transportation providers and that identified issues are corrected. This system has not been effective.

A potential model for The Arc to pursue is that of the Janet Pomeroy Center, which owns its own buses and has drivers as employees of the organization. The capital costs of pursuing this model are substantial, and a funding model associated with maintaining a fleet of vehicles must be developed.

Human Resources

Given the nature of the developmental disabilities field, there are inherent difficulties associated with managing the "employee lifecycle" (recruitment, hiring, orienting, training and career development, compensation, and benefits). The Arc is further constrained by the realities of a unionized workforce, requiring careful consideration of new employee policies, as well as constant communication with the union.

Recruitment and Retention

As the ability to compensate is limited, The Arc's recruiting and retention strategy requires focus upon:

- Resonating with people that have a sincere interest in supporting the developmental disabilities community.
- Having a reputation as a good place to work.
- Offering non-cash incentives such as training or deferred compensation packages that can help overcome compensation shortfalls.

As the needs of clients with developmental disabilities grow, an important recruiting challenge for The Arc will be to hire professionals (not paraprofessionals) such as therapists, nurses and direct service professionals that will serve the clients at the necessary level of quality.

Training & Development

As noted above, the Human Resources strategy should address:

- Understanding which key skills are required in order to appropriately execute The Arc's services, and
- Developing a training program that provides the general and specific technical skills required to staff, ideally in coordination with the career plans.

Total Rewards & Incentives Package

From a compensation standpoint, the human resources strategy will pursue (in consideration of fiscal constraints):

- Improve benefits (M/D/V, sick/vacation, flexible work schedules, commuter benefits, retirement plans, and more).
- Improve bonus structures (company bonus, spot awards).
- Improve performance reviews and compensation analysis (structure salary ranges according to job functions and levels for annual performance review and salary increases).
- Develop growth ladders and career paths (retention tactic).

A critical element of the compensation program will be for The Arc to maintain a process for gauging staff performance. Such performance must take into account client outcomes, formal assessment of key metrics and evaluation of client and caregiver feedback on staff performance.

Information Technology (IT)

The objective of the IT function is clearly to support the information needs of The Arc in the most cost-effective fashion possible. Key focus areas for the IT function are expected to include:

- Implementing and supporting suitable technology to support the needs of the clients (internet access, and more).
- Investing in key internal systems (donor database, client database, relationship management tools, and more).
- Providing staff training so that there is awareness of the tools at their disposal, as well as the ability to effectively utilize such tools.
- Maintaining the inventory of all technology in use such as cell phones, computers, and more
- Conducting preventative maintenance (upgrades, patches, fixes, and more) as necessary to ensure adequate system performance and security.

In regards to ensuring that technology investments are made in a responsible fashion, management will develop a cost/benefit analysis for un-budgeted investments over **\$5,000**, subject to management approval. Such analysis should include the identification of different options and supplier sources, allowing investment decisions to be properly made.

Accounting

In addition to maintaining the books and cash position of The Arc, the Accounting department is expected to provide additional business support to the Executive Director and Deputy Director to aid decision-making. Examples of such support may include:

- Analyzing current and projected service costs and profitability, to determine how The Arc can adjust to other external and financial factors (for example, state budget changes, donor contributions, and more).
- Modeling the impacts of increased client volumes when provided with service rate, hours of coverage and funding alternatives.
- Modeling the impact of potential capital investments, such as the development of new housing facilities.
- Developing an annual operating budget that incorporates both worst case financial scenarios as well as best case financial scenarios.

Strategic Plan Governance

The Board is the overall custodian of the strategic plan. As noted earlier, the Board and Executive team will endeavor to evaluate The Arc's operations and future opportunities with regard to 1) adherence to The Arc's mission, 2) the ability to serve clients with high quality, and 3) the ability to adequately finance operations and key initiatives.

On a quarterly basis, the Board will assess The Arc's current ability to generate meaningful client outcomes. Such analysis may include assessment of key areas including:

- *Financial* – Revenues, expenses, fundraising
- *Clients* – Needs, demographics, satisfaction
- *Services* – Quality, volume, strategic services
- *Staff* – Retention, training, satisfaction

The goal of such balanced reporting is to allow The Arc to concentrate less on outputs and more on outcomes. Governance should identify how well strategic opportunities are being leveraged, how well operational strategies and tactics are working, as well as resolve non-strategic issues that will arise based on changing conditions or emerging trends in the developmental disabilities "space."

As the custodian for The Arc's strategic well-being, each member of the Board understands her/his purpose to include:

- Being an active ambassador for the organization
- Being a political advocate at the corporate or individual level
- Committing to fundraising objectives at the corporate or individual level
- Keeping abreast of key changes in the developmental disabilities "space" to ensure that The Arc remains relevant
- Being a willing volunteer of personal time, to ensure contact with The Arc's mission and its clients

Appendix

Key Definitions

Annual Budget – An annual projection of revenues and expenses used to identify and allocate the resources required to execute The Arc’s one-year plan.

Goal – A broad, long-term aim that defines accomplishment of the mission.

Mission – Establishes ‘why The Arc exists’, and provides a statement of overall purpose for the organization.

Objective – A specific, quantifiable, and realistic target that measures the accomplishment of a goal over a specified period of time.

Operating Plan – A more detailed description of activities required to achieve an objective, control a critical success factor, or overcome a barrier.

Outcome – A quantifiable measure of a change in the status, condition, or ability of a person over a specified period of time.

Output – A quantifiable measure of how much work is produced over a specified period of time in order.

Risks/Barriers – Existing or potential challenges that hinder the achievement of one or more objectives.

Strategic Plan – A broad document that defines how The Arc will achieve its mission over the next 5 years.

Strategic Position – Being driven by and responsive the needs of clients on an on-going basis.

SWOT Analysis – An analysis tool used to evaluate Strengths, Weaknesses, Opportunities and Threats associated with a specific business opportunity, allowing the Board and management to identify favorable and unfavorable factors required to execute against that opportunity.

Values/Guiding Principles – General guidelines that set the foundation for how The Arc operates.

Vision – Establishes how The Arc may serve its mission at some point in the future.

Board Metrics

Scorecard Dimension	Objective/ Initiative	Metrics	Metric Owner	Source System	Timing
I. Financial	Revenue	I.1. Actual vs. budget net revenue	Director of Accounting	Monthly Budget Report	Quarterly
		I.2. Revenue breakdown by department	Director of Accounting	Monthly Budget Report	Quarterly
	Operations Costs	I.3. Operations expense as a % of total revenue	Director of Accounting	Monthly Budget Report	Quarterly
		I.4. Comparison of Arc operations expense to external benchmark	Director of Accounting	Monthly Budget Report	Annually
	Fund Raising	I.5. Actual vs. target net fund-raising	Director of Development	Match-maker	Annually
		I.6. Projected grants versus attained grants	Director of Development	Match-maker	Quarterly
II. Clients	Number of Clients	II.1. Inflow, outflow, and number of total clients enrolled	Deputy Director	Client Database	Quarterly
	Young/Aging Clients	II.2. Number of clients by age enrolled	Deputy Director	Client Database	Quarterly
	Client Status & Satisfaction	II.3. Client Satisfaction	Deputy Director	Client Survey	Annually
		II.4. Number of Special Incidents reported	Deputy Director	Special Incident Reports	Quarterly
		II.5. Number of clients who offer public testimony in advocacy at state or local levels	Deputy Director	List	Quarterly
III. Services	Autism	III.1. Number of clients with autism	Deputy Director	Client Database	Quarterly
	Housing Advocacy	III.2. Number of clients placed in housing (in total, and as a % of total clients desiring housing)	Deputy Director	Client Database	Quarterly
	Employment	III.3. Number of clients placed in new jobs (paid employment)	Deputy Director	Client Database	Quarterly
		III.4. Average wage paid to clients currently working	Deputy Director	Client Database	Quarterly
		III.5. Employer satisfaction	Deputy Director	Employer Survey	Annually
	Wellness	III.6. Inflow of clients enrolled in wellness programs	Deputy Director	Client Database	Quarterly

Scorecard Dimension	Objective/ Initiative	Metrics	Metric Owner	Source System	Timing
IV. Staff	Staff Satisfaction	IV.1. Staff satisfaction	Director of Human Resources	Staff Survey	Annually
	Retention	IV.2. Inflow, outflow, and number of filled and vacant staff, manager, and Senior Manager positions	Director of Human Resources	List	Quarterly
	Training/ Certifications	IV.3. Number of staff who have earned College of Direct Support bonus	Director of Human Resources	List	Quarterly
		IV.4. Number of staff who have become members of National Association of Direct Support Professionals	Director of Human Resources	List	Quarterly