

*Options*  
*Final Report Summary*  
*2010*

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## Major highlights:

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Much of the focus of this year was dealing with the extensive cuts to all services. Revenue was reduced overall by \$500,000. This required reductions in staff, freezing wages, reducing all other expenses, and delaying plans for building expansion for the home office. Overall we lost 34 staff in administration and direct services. While we have been able to make it work, it has been an extremely trying time for the organization. With further cuts expected in Medicaid in 2011, it does not appear the belt tightening will be over soon. It makes it more critical than ever to find alternative funding and reduce our dependence on Medicaid. Our housing and technology businesses have been established and we will have to do more promotion in the coming year.

Along with the funding challenges noted above, customer growth slowed this past year for a variety of reasons. Net growth was only 6%, however 52% of the customers we lost over the past year left due to no longer needing services or no longer being able to access funding for services. The other 48% either moved to a nursing facility or other setting where their needs could be better met or they choose other providers for their services. In late 2010, Options applied to serve individuals moving from the State Operated Facilities in Madison and Evansville. The state is planning to move over 200 persons into the community and chose Options as one of only 35 agencies statewide to help with that transition. In preparation, we have hired a behavior specialist and nurse who will come on staff in 2011.

Just as it seemed we were figuring out how to operate under the reduced rates, we received word of a new funding structure, Objective Based Allocations (OBA). The state's goal in implementing OBA is to equalize levels of services across individuals based on assessed needs. We began receiving Budget Allocations for those with Annual Plans of Care beginning in January 2011 around mid November 2010. Very quickly, it was noted that the level of Allocations were quite variable and didn't always match up with customer's needs. We noted an overall decrease in budgets for those receiving 24/7 support but some increase for people with less support needs. The full impact of the OBA system will be seen over 2011. It will mean people living with more roommates, sharing staff and a change in how we structure our services administration. Along with education and advocacy, that will be the major focus in the next year.

In August, Options secured another 3 year accreditation from CARF. Despite the cuts, staff worked diligently to ensure all services were in compliance. We received only 5 recommendations out of hundreds of applied standards. In 2007, we had become the first agency to have its supported living program surveyed. This is not a state requirement so most agencies don't go to the trouble or additional expense. Because of the reductions, we opted out of that this year, saving \$6,000. We hope to build it back into our plans in 2013 when our accreditation expires again.

Housing Options has been doing well with less vacancies leading to a better bottom line. We were fortunate to receive a donation of land from an anonymous donor adjacent to our Bloomington Covey Lane apartments on Highland Avenue. In addition to the planned apartments, we will be moving the Ida Lane group home to that location. We are building a new facility that will be set up as a 3 bedroom duplex with shared space. Each of the 6 gentlemen currently at Ida will have their own bedroom and bath attached. We hope to start construction in late summer 2011.

Fundraising has gone extremely well despite the poor economy. During the fourth quarter, our community partners came through for us in a big way. We were able to secure funding for our "Work Experience" program that Vocational Rehabilitation Services cut in the summer. We had overwhelmingly positive outcomes program that had begun in mid 2009. Over 60% of the customers

we supported in Work Experiences were hired as employees by the company where they completed their internship. With Duke Energy's support we are challenging other corporations to help us reach our goal of \$25,000 for next year and we are more than halfway there. In addition, Options was one of a dozen non-profit agencies that received a \$4,000 donation from Old National Bank upon their announcement that they had merged with Monroe County Bank. Other donations held steady or improved.

Grants were another success story in 2010. The City of Bloomington's Jack Hopkins Social Service Fund and the Community Foundation of Bloomington and Monroe County, both came together to fund an Options' program called *PowerUP: Teaching and Supporting People with Autism*. This new initiative will use hands-on-training, videos and assessments to teach staff personal development curriculum for customers with autism. The grants helped to purchase a computer software program called Support Intensity Scale (SIS). It will help to assess the strengths and needs of each customer, measuring support needs in 8 life skill areas, as well as behavioral and medical areas.

This year we have become extremely active on the legislative front. We held a legislative forum in Indianapolis. Several self-advocates went to the General Assembly to meet with local representatives. It is going to be important to continue this effort so that we avoid any additional cuts. With the state revenue forecasts and the loss of stimulus funding, we have to maintain the priority on community based services. Work has already begun on the budget and fortunately, our legislators are keeping us well informed as a result of our connections.

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

1. Diversity Works Steering Committee and Business Leaders
2. Monroe/Owen Transition Council
3. Morgan County Transition Council
4. Networking for Support
5. Brain Injury Local Support Network Advisory Board
6. Centerstone Project CARE Advisory Board
7. Bloomington Council on Community Accessibility
8. Bloomington Rotary Club
9. Diversity Works Steering Committee
10. Diversity Works Indiana Business Leaders
11. City of Bloomington Inclusive Recreation Advisory Council
12. Boys and Girls Club YoMon Advisory Council
13. CASA Monroe County
14. Lawrence County United Way
15. Monroe County United Way (Rinne is Vice President)
16. Owen County Housing Task Force
17. Indiana University Department of Psychological and Brain Sciences Advisory Committee
18. Crane Learning and Employment Center for Veteran's with Disabilities Advisory committee
19. Bloomington Chapter of the American Business Women's Association
20. Southern Indiana Provider Network (SIPN) Rinne is President
21. Women Inspire

State level participation: This includes the following:

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

National level participation:

APSE Network on Employment Board (Rinne is Secretary)

## Progress Report

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

### Staff Development

<b>Staff Development Statistics Summary</b>				
<b>Overall</b>	<b>2008</b>	<b>2009</b>	<b>2010</b>	<b>Goals</b>
Average turnover rate	47.52%	54.16%	43.44%	25%
Average tenure in months	32.8	35.82	41.6	36 months
Full time staff retention	75%	74.51%	69.66%	89%
Supervisor retention	76.88%	80%	80.48%	90%
Average % Full time	63%	61%	60%	51%
Total number of staff	296	308	288	300
Average staff meeting basic requirements	96% renewals 93% CE 98% CPR	92% renewals 41% CE 99% CPR	99% Renewals 84%CE 100%CPR	85%
Workplace Accidents	20	59	29	15 (or less)
Community members trained	23	60	60	50
Orientation dropout rate	17%	8%	14%	<10

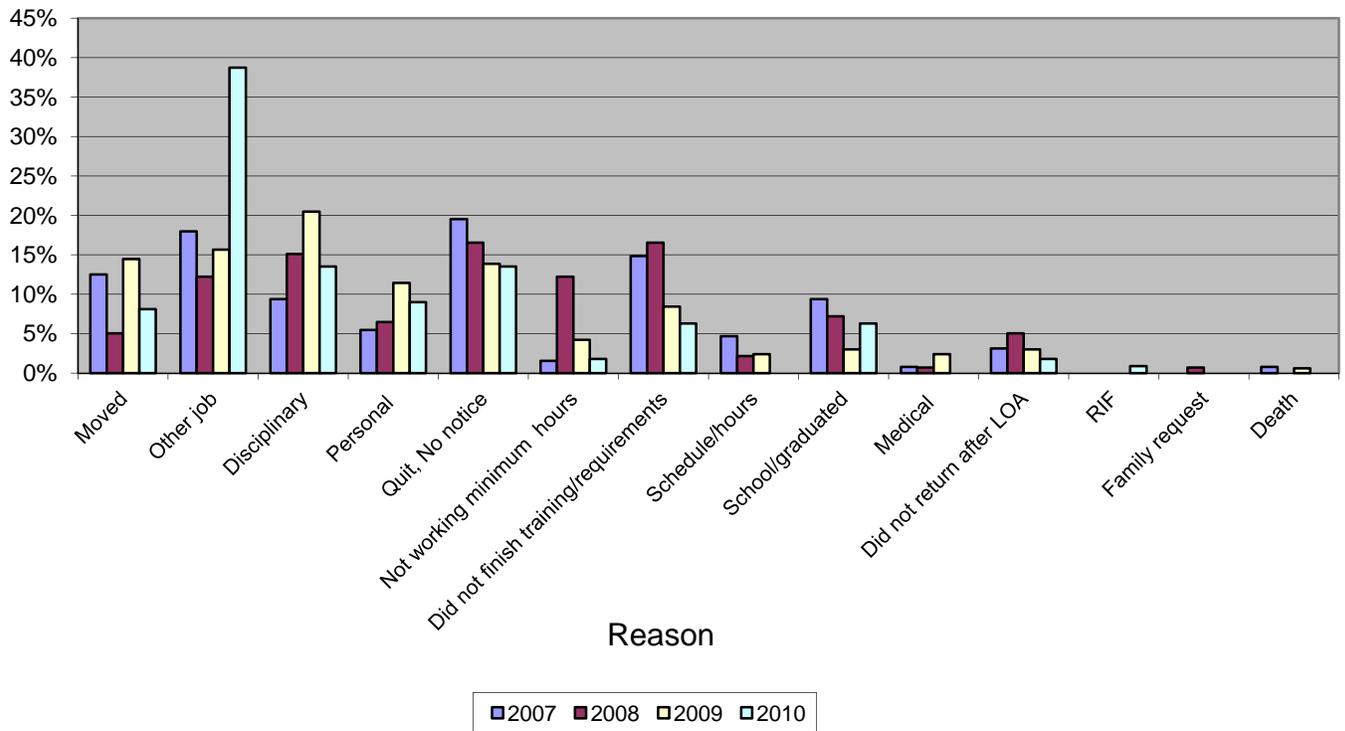
Training compliance was at an all-time high in 2010, with only 1% of staff not completing renewal training. Compliance with CPR was a remarkable 100%. The percentage of staff able to obtain the required number of Continuing Education credits was markedly improved from 2009. These credits require that staff document and submit various training opportunities throughout the year for credit. Because each staff is responsible for documenting his trainings, collecting data for this can be quite a challenge.

Average turnover was a significant improvement over 2009, at just over 43%. Tenure continued to increase, exceeding our goal. We know that the majority of the turnover is in part time positions. Last year, 66% of people working less than 32 hours left employment. Only 30% of people working full-time left the agency. Supervisor retention continued to improve. The restructure of 2008 has had a great influence on that statistic which has gone up from a low of 50% in 2006 to 80% this year.

To further analyze turnover, Figure 1 summarizes the reasons for terminations over the past 4 years. Looking at the 2010 data, the most frequent reason for termination was leaving to another job. This is a significant increase from years prior. Quitting without notice and disciplinary reasons tied for second, and third was personal reasons. The next highest reasons were moving; graduating; and not finishing training requirements. Improvement is seen in the area of terminations as a result of disciplinary action.

**Figure 1**

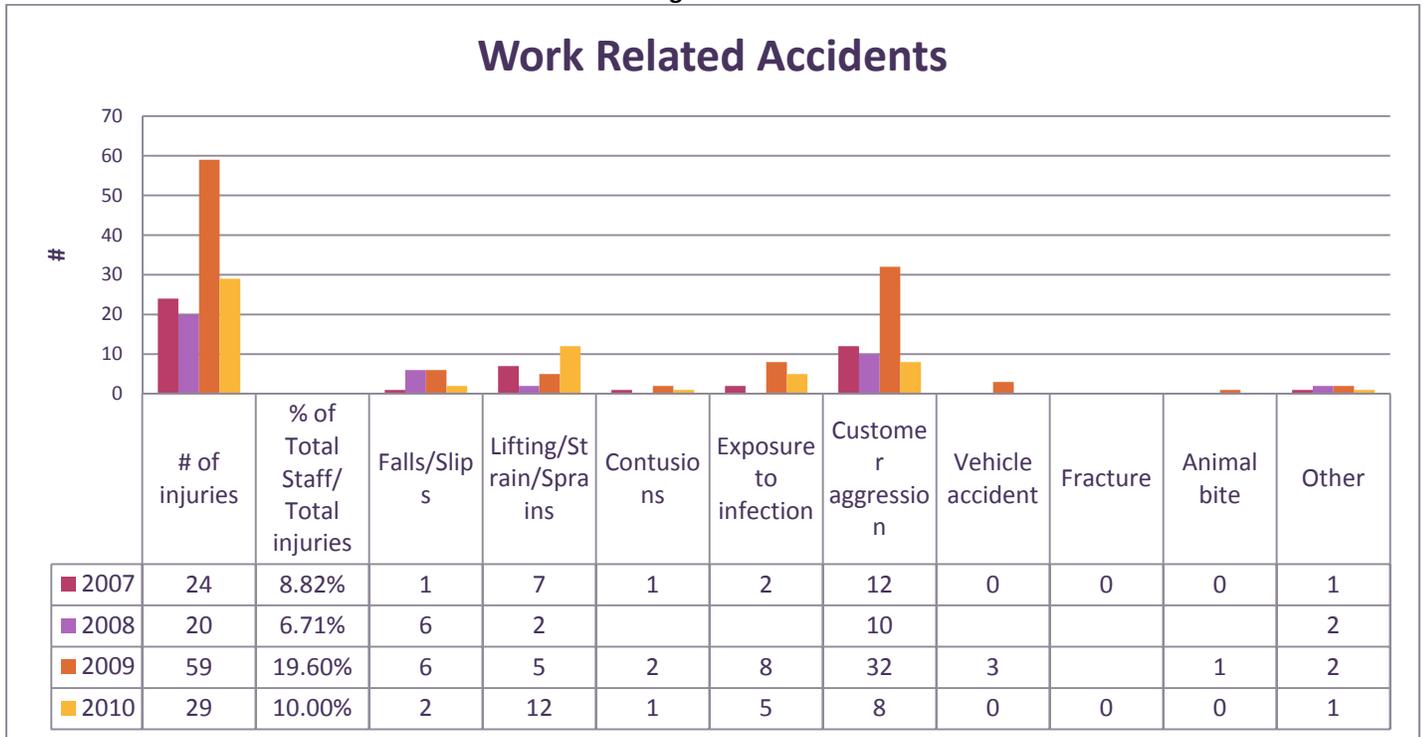
**Termination Comparison**



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

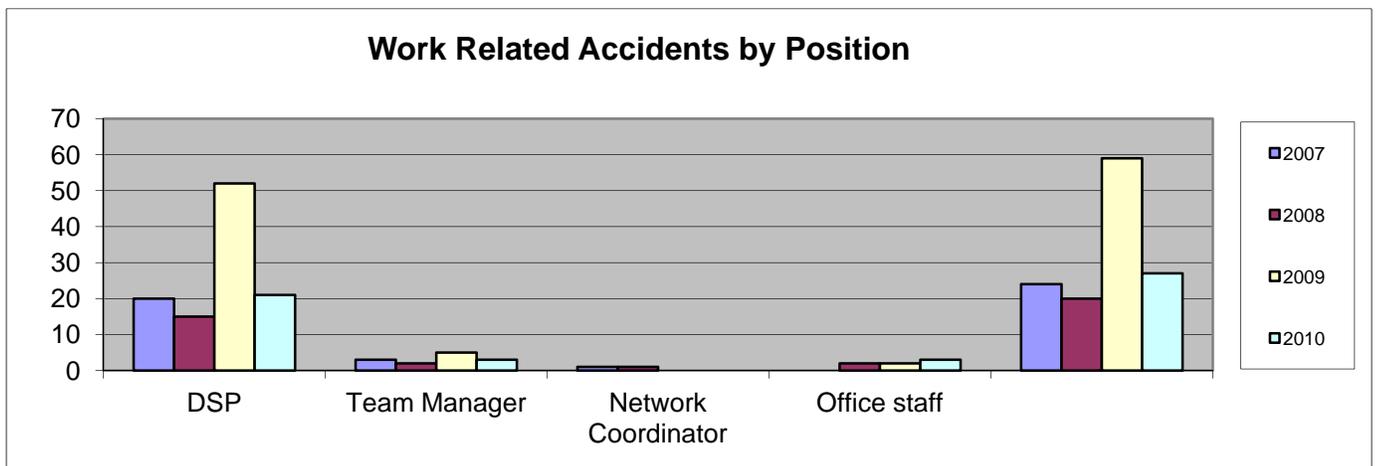
Work related accidents were significantly lower in 2010. According to Figure 2, the majority of accidents were related to lifting/ strains. The next highest area was customer aggression, which was quite a decrease from 2009, where the majority of injuries occurred in one particular setting. Staff in that setting have greatly reduced incidents over the year with crisis prevention training and additional behavior support services. The third highest area was exposure to infection. The Health and Safety Committee has taken a very active role in reviewing workplace injuries and making recommendations for future accident prevention.

Figure 2



The following chart (Figure 3) provides the breakdown of the positions of staff involved in these accidents. Direct service staff injuries predominate but that is to be expected as they make up a substantial percentage (89%) of total accidents. Office staff injuries have generally been weather related (i.e. falls on ice in parking lot) or lifting.

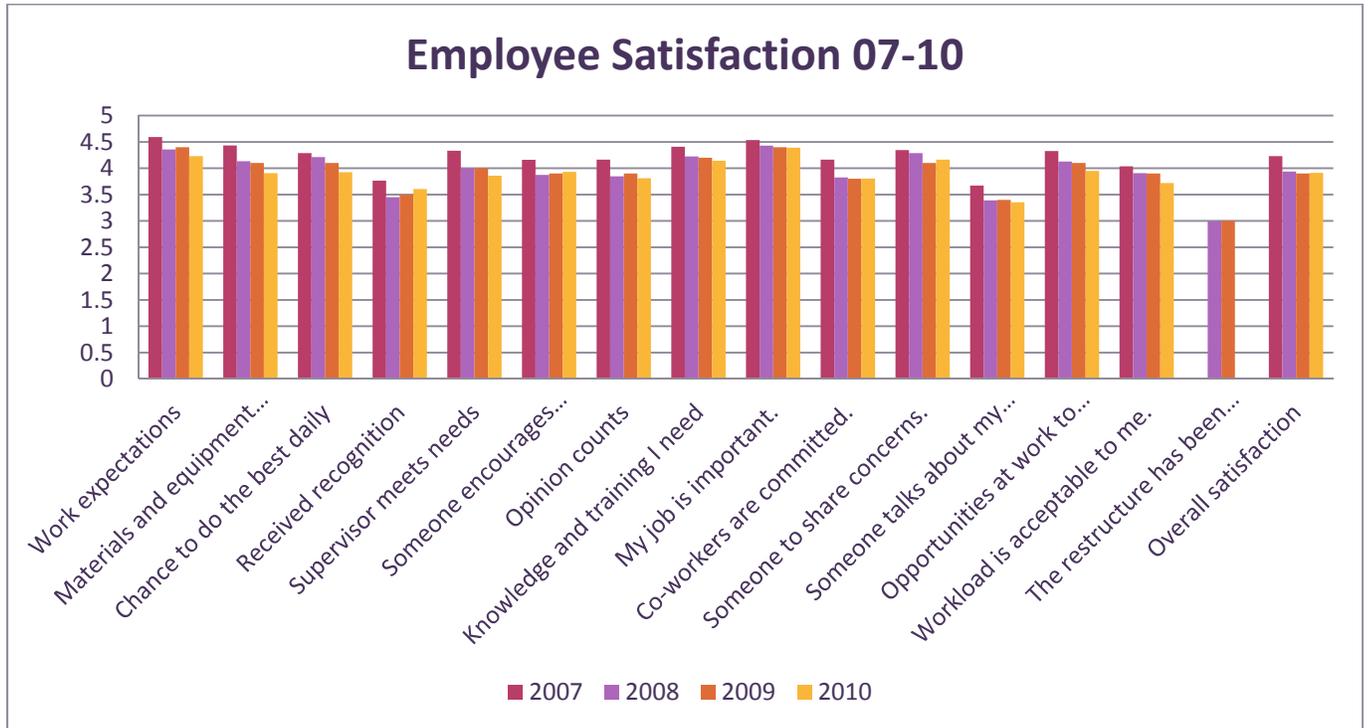
Figure 3



Employee satisfaction: The staff survey was conducted in the spring of 2010 and had a response rate of 114 respondents, which was a lower rate than 2009. The format was unchanged from 2007 and is based on a survey developed by the Gallup organization (as described in First Break All the

Rules, Buckingham and Coffman, 1999). This questionnaire has been used in hundreds of US companies, many of which are Fortune 500 businesses. Questions require staff to rate items stated positively in terms of their agreement with the statement. The survey has a five-point scale with 5 being **strongly agree** and 1 being **strongly disagree**. The higher the score, the better the staff member's impression in that area. Results have been summarized in the next chart.

Figure 4



The results indicated little change from 2009. Problematic areas include receiving recognition and feedback. This is consistent with previous surveys and suggests we have not yet been able to get a good feedback system in place. Much effort was placed on this in 2010 through redesigning the development reviews to focus on culture, and those will be fully implemented in 2011. The other area not rated as well as others was regarding the restructure that took place in 2008. There is still some concern about the amount of work given to the team manager position. This will be evaluated in the coming months to see if any adjustments are needed.

Some of the themes from employee comments are:

- Office supplies are sometimes out of stock
- Lack of consistency between supervisors
- Higher level work often gets put aside in day to day issues and emergencies
- Staff enjoy praise from customers and families they support
- Team meetings are appreciated and needed
- Workload has increased, and often timelines in which to complete tasks are too short
- Staff feel uncomfortable giving co-workers feedback yet are frustrated with poor performance
- Communication is a struggle and staff would like supervisors to respond timely

- In the future we need to focus on customer outcomes, expand continuing education, investigate services for the aging population, more programs for youth and create more recreational opportunities for our customers and staff.
- Increase leadership training opportunities for supervisors.
- Diversify funding to decrease reliance on Medicaid
- Provide more opportunities to educate the community on issues related to disability and accessibility

As in previous years, the leadership team has reviewed the survey and made recommendations which have been carried into the strategic plan.

## Customer Service

<b>Customer Services Statistics</b>				
	<b>2008</b>	<b>2009</b>	<b>2010</b>	<b>Goals</b>
Satisfaction	91% satisfied 2 % dissatisfied 98% would recommend	84.9% satisfied 1.4% dissatisfied 84.3% would recommend	88% satisfied, 7% dissatisfied, 93% would recommend	90% satisfied
Survey return rate	20%	28%	28%	50%
Service growth: net new customers to last yr unduplicated count	35%	15%	6%	12%
CEO participation	49	57	63	60
Employment enrollment	79	86	97	90
Job placements	16	14	23	20
Respite Enrollment (state or county)	55	58	32	100
Respite hours provided	2277	5503	6397	7500
Customers >65yrs old	11	17	15	20
New Customers	80	65	36	60
Customers leaving	22	25	26	10
Number served, duplicated	386	402	405	406
Number served, unduplicated	273	288	285	291
Days from referral to intake	30	19	14	20
Days from intake to start	6.7	13	28	20
Behavior support	4	5	5	15
Quality Assurance Rating	86 out of 100	83 out of 100	85 out of 100	95
Percent working age with jobs	25%	28.7%	31%	66%
Percent adults with own home	12%	25.72	21%	35%

The number of customers grew overall by 6% in 2011. Employment Services grew by 13% and CEO by 10%, while Supported Living grew 6%. Due to the state cuts in Caregiver Support Respite, along with our inability to continue to fund County Respite at the same level, Respite decreased by 45%, from 58 customers to 32. Others services such as Group Homes, Host Families and Behavior Management showed no little to no change. 26 individuals exited Options' services. 54% of those exiting left because they were either not in need of services any longer or their funding had been discontinued. Figure 5 outlines all the reasons given for exit.

**Figure 5**

<b>Customer Reasons for Exit</b>			
<b>Reason</b>	<b>2008</b>	<b>2009</b>	<b>2010</b>
New provider	10	10	6

**Figure 5**

<b>Customer Reasons for Exit</b>			
<b>Reason</b>	<b>2008</b>	<b>2009</b>	<b>2010</b>
Moved out of area	2	1	0
State closed services	0	0	11
Health issues	2	0	1
Options served notice	1	1	1
No longer in need of service	6	8	3
Other, unknown	1	1	1
Death		4	3
<b>Total</b>	<b>22</b>	<b>25</b>	<b>26</b>

The figure below shows customer demographics as of December 2010. There was no noticeable change in the types of disability, age, ethnicity, or gender from 2009. Our primary customer group continues to be those with developmental disabilities, which make up 53% of our customer base.

**Figure 6**

<b>Age</b>	<b>current</b>	<b>Gender</b>	<b>current</b>
0-5	1%	Male	59%
6-17	14%	Female	41%
18-40	45%		
41-65	33%		
66-85	3%		
86+	1%		
Unknown	3%		
<b>Race</b>	<b>current</b>	<b>Disability</b>	<b>current</b>
Caucasian	93%	Cerebral Palsy	7%
Indian	1%	Autism	21%
African American	4%	Intellectual Disability	58%
Asian	1%	Traumatic Brain Injury	4%
Hispanic	1%	Sensory	2%
		Physical Disability	5%
		Mental Illness	3%

**Reportable incidents:** The number and type of state reportable incidents are seen below in Figure 7 below. A reportable incident is defined by the state and includes a number of categories. The largest increase was in alleged abuse/neglect incidents by staff. There were 41 allegations involving staff but only 6 of those allegations were substantiated after investigation. This is on par with previous years. It continues to be Options policy that any staff who are found to have abused or neglected customers are terminated and the incident reported to Adult/Child Protective Services. There was a notable decrease in alleged abuse/neglect by customers which includes customer to customer aggression and customer to staff aggression. Incidents decreased from 337 in 2009 to 249 in 2010. Another area of decrease was in Medication Errors. In 2009, we reported 73 medication errors. As

a result of the increase from 2008 to 2009 in Medication Errors, we implemented a more stringent progressive discipline and retraining program that included both direct support staff and their supervisors. It appears these changes were effective because the total number of medication errors for 2010 was 27.

**Figure 7**

	<b>2008</b>	<b>2009</b>	<b>2010</b>
<b>Abuse/Neglect</b>	373	409	341
<b>Exploitation</b>	4	1	6
<b>Death</b>	1	5	2
<b>Residential</b>	7	1	13
<b>Environmental</b>	6	2	3
<b>Res. Fire</b>	0	0	0
<b>Missing Person</b>	1	3	2
<b>Criminal Activity</b>	4	2	6
<b>Med./Psych Treat.</b>	57	70	86
<b>Adm. To Nursing Fac.</b>	1	3	2
<b>Injury/Unknown Origin</b>	17	7	10
<b>Injury/Known Origin</b>	8	9	12
<b>Med. Errors</b>	54	73	27
<b>Inadequate Staff Supp.</b>	37	6	3
<b>Inadequate Med. Supp.</b>	1	1	0
<b>Use of PRN</b>	17	29	31
<b>Total</b>	<b>588</b>	<b>621</b>	<b>544</b>

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

Progress on Employment Outcomes Through December 2010, there were 23 employment placements. This was an increase from 14 employment placements in 2009. State funding for Work Experiences was discontinued in April 2010 but prior to discontinuation, Options experienced a 60% success rate in employers hiring on those customers who participated in Work Experiences. We have been fortunate to secure donations via NAP credits, the United Way of Lawrence County and Duke Energy, so that we can restart the Work Experience program in 2011. The average employment tenure year to date was 2.4 years, consistent with 2009. The current percentage of customers receiving Supported Employment services who are currently employed was 42%.

The average time from plan development to job placement is currently 360 days, which was a slight improvement from 398 in 2009. This is well above our goal of 120 days but given the state of the economy and job market, we are pleased to have made any progress in shortening the time it takes to assist individuals in locating employment. The average hourly pay rate is currently \$7.59. Customer and stakeholder satisfaction surveys occurred over the summer. 88% of customer/guardians stated they were satisfied with services while 93% of customers/guardians

reported they would recommend Options' services to others. 100% of stakeholders reported being satisfied with Options' services and 100% said they would refer others to Options.

Progress on Community Habilitation Outcomes For the year 2011, there were 63 customers who participated in Continuing Education Options (CEO) classes. 21 community members have participated in CEO activities this past year. For the last quarter, 63% of time spent in habilitation services was community based. For the year, an average of 70% of time was spent in integrated, community based activities. Customer and stakeholder satisfaction surveys occurred over the summer months. 88% of customer/guardians stated they were satisfied with services while 93% of customers/guardians reported they would recommend Options' services to others. 100% of stakeholders reported being satisfied with Options' services and 100% said they would refer others to Options.

Customer satisfaction: The survey was conducted over the summer of 2010. There were 79 responses from a possible 276 for a 28% response rate. Responses came from customers from all service areas except for Electronic Monitoring. 47% of respondents were family members of those receiving services, 27% were legal guardians, 24% were persons receiving services and 2% were advocates of customers. 43% of respondents have been involved with Options for more than 5 years.

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

**Figure 8**

<b>Customer Satisfaction</b>		
<b>Area</b>	<b>% Agree/ Strongly Agree 2009</b>	<b>% Agree/ Strongly Agree 2010</b>
Satisfied with services	84.9	88%
Dissatisfied with services	1.4	7%
Provide safe environment	87.5	97%
Are timely in responding	86.3	88%
I have control over things I do daily	87.7	95%
I have control over what is in service plan	83.1	93%
Treated with respect	90.6	97%
I learn new things	73.4	94%
I spend ample time in community	75.3	82%
Staff assist with equipment and accommodations	61.6	93%
Office is easy to get around in	69.9	95%
Emergency pager works for me	24.8	78%
Options has a made a difference in my life	84.7	96%

At least 75% percent or more of the respondents agreed with all statements included in the survey and of particular note was the 20% increase in respondents feeling as though they were learning new things, the 12% increase in satisfaction related to Options making a difference in people's lives and the 10% increase in satisfaction related to providing a safe environment,

Suggestions for improvements or additional services included:

- More cross-training across staff in the event that regular staff are unavailable

- Broader subjects for CEO classes
- After school and summer activities for children
- Support with planning for the future for adults with disabilities
- Better communication
- Continued respite services

The leadership team reviewed the survey results and recommendations were developed as part of the goals for 2011.

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

**Figure 9**

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

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

Service Outcome Reviews: More detail on outcomes for supported living, group home, host families, respite, employment and community habilitation goals along with 2011 goals for efficiency, effectiveness, services access and satisfaction for all services are outlined in Attachment A.

## Financial Stability

Financial Statistics				
	2008	2009	2010	Benchmark/ Goal
Current ratio	3.91	3.83	4.75	4.71 or higher
Quick ratio	2.63	2.61	3.58	1.5 or higher
Working capital	\$1,833,989	\$1,898,750	\$2,117,957	\$1,000,000 +
Debt to equity	.14	.12	.09	.16
Days in accounts receivable	38	38	31	27
Net assets to Total assets	.74	.75	.79	0.6
YTD Net Income	\$876,835	\$142,095	\$244,306	\$170,677
Compensation to total expense	76.22%	81%	81%	73.35%
Benefits to salaries	22.12%	24.78%	24.06%	n/a
Service revenue to total revenue	92.34%	91.78%	93.20%	94.27%
Admin expense to total expense	12.93%	13%	12.35%	n/a
Contributions to total revenue	.92%	.7%	.09%	2.18%
Investment income to total revenue	-.46%	.6%	.05%	-1.79%
Allowance for doubtfuls to gross A/R	2.31%	6.57%	5.92%	2.73%
Year end revenue growth/decline	11%	-1%	-8%	-1.12%
Depreciation/amortization to total expense	1.48%	1.56%	1.79%	3.09%
Executive Team Statistics				
	2008	2009	2010	Benchmark/ goal
Total local funding per financials	\$79,774	\$59,616	\$72,934	\$150,000.00
Endowment per financials	\$202,505	\$264,968	\$301,397	\$ 1,000,000
In Kind (value by donor)	36,257	30,879	33,850	
Planned gifts	\$25,000	\$25,000	25,000	\$ 50,000.00
WOC	45,707	\$33,770	23,114	\$ 40,000
NAP	\$ 8,330	\$6,200	6,100	\$ 50,000.00
Grant hit rate	67% submitted 81% \$ requests	83% submitted 72% \$ requested	88% or 7 of 8 submitted 72% of \$ requested	50%
Options members	202	243	218	200
Volunteers	200	87.95	33	300

The financial data is taken from preliminary, unaudited financial statements. Crowe Horwath, Options accounting firm, provided the comparisons based on their reviews of other agencies in our industry, using 2009 data. In several areas we fared better than our counterparts. Quick ratio, and current ratio are very stable, with working capital more than doubling the benchmark. Also favorable were debt to equity, investment income to total revenue, and depreciation as a percent

of total expense. We exceeded our budgeted net income by almost \$14,000, and added an additional \$60,000 to our bottom line from a land gift. Areas to improve upon include compensation to total expense, service revenue to total revenue, and contributions to total revenue. Cuts at the state level caused another dip in revenue growth, and the same is expected for 2011.

Donations were up more than 20% even though membership declined somewhat. The Week of Chocolate net was down due with low sponsorships again but 2011 appears to be a better year. At the time of this report, it appears the WOC will raise more than \$28,000. The grant hit rate was excellent at 88%. We only had one grant rejected, one to the Ball Foundation. We were able to secure significant dollars for a program to improve our training around autism and to install a computerized assessment program called the Supports Intensity Scale. We again were awarded funding from United Ways in Monroe and Lawrence counties.

## Risk Analysis

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

- There has been one employee dishonesty claim in the past five years and three total incidents investigated.
- There are approximately 55 staff with responsibility for customer finances. Training is provided to all staff who oversee customer finances. Supervisors check staffs work monthly. The Services Administrative Assistants conduct random audits on the customer accounts and report findings to supervisors.
- There have been 3 incidents of property damage in the past five years. One was for vandalism, one for water damage at Ida Lane group home and one glass breakage on a vehicle. All were covered with deductible of \$500-\$1,000.
- There was one incident of loss under electronic data processing. Loss was covered.
- There were two EEOC claim in past five years. One claim settled at mediation for \$500. And the other is still pending.
- There have been six vehicle related accidents over the last five years, much less than in prior years. The average per employee driver accident is .008 per year (based on an average of 150 drivers per year). Accidents per year were 1.2.
- There was one major accident involving a non-owned vehicle. This accident resulted in the death of a customer who was being transported by a staff member. The staff member was treated and released for her injuries. The police report determined the other driver to be at fault but noted that neither Options staff nor customer had seat belts on at the time of the accident. There is a lawsuit pending and the staff member received treatment under worker's compensation.
- Over the past two years worker's compensation claims have held steady with very little change between 2006 and 2008. In 2009 there was a significant increase primarily due to customer aggression in one setting. The majority of accidents over the past 5 years have been slips, trips and falls.
- In 2008 Options implemented a \$500 deductible for worker's compensation insurance. This greatly reduced the frequency of claims.
- Prevention strategies have included ongoing staff development in crises prevention, better orientation processes, restrictions on some types of activities (staff are not allowed to help customers move furniture, etc.) and providing adaptive equipment.

Plans for 2011 and beyond are outlined in the Strategic Plan Final Report.

## Accessibility Plan

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Each year Options reviews the accessibility of our services and facilities. The Accessibility Plan is included in Attachment B and indicates the barriers identified for 2010 through employee and customer surveys and our progress toward addressing them. Through the survey process along with the annual accessibility audit, additional barriers were noted by customers, families, staff, and funders. The final column outlines the strategies for work in 2011.

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

Date of request	Type of accommodation	Reason	Outcome
1/13/2010	Change in work station, mouse, keyboard	medical	Employee moved into a different office with a desk configuration recommended after a work station assessment, Options purchased an ergonomic keyboard and mouse and made alterations to the placement of the keyboard tray. Employee's chair height and armrest was adjusted.
1/13/2010	Temporary reduction of repetitive motions duties	medical	Restricted work duties were redistributed to other team members. Employee worked a shorter work schedule until released by doctor. Employee worked assumed other non-repetitive duties on a temporary basis until released from medical restrictions.
7/27/2010	Schedule, work from home	medical	Employee was allowed to work from home with a flexible schedule based on doctor recommendations
10/29/2010	Change in work station, mouse, keyboard	medical	Employee's desk was changed and work area reconfigured to avoid further injury to hands and wrists. An ergonomic mouse and keyboard were purchased.
10/29/2010	Temporary redistribution of workload	medical	Restricted work duties were redistributed to other team members. Employee worked assumed other non-repetitive duties on a temporary basis until released from medical restrictions.

## Technology Plan

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During 2010 Options started looking into a shared IT collaboration project through the SIPN group. At least 4 agencies have expressed a definite interest in being a part of the project and sharing IT resources. Options has also purchased a new Time & Attendance, HR, Case management software package called Quantum / Casper. This new system will replace the current Accel / Provide software and provide many additional functions that were missing from the previous system. Options has also started to provide online training via Moodle to additional non-profit agencies via the SIPN group during this past year. Five new computers were installed at the main office this past year and an additional wireless access point was installed for the training department. During 2010, all local office printers were removed and all office staff were redirected to printing to networked Ricoh copy machines. This resulted in significant toner cost savings per month. Options staff were also introduced to Google Apps for the first time during 2010 and moved away from using MS Exchange for email. Technology plans for 2011 & beyond include providing all Team managers with a netbook computer so that they can work remotely & be more efficient. Implementation of the new Quantum / Casper software will also be a major event moving forward. Windows7 migration for all Options computers during 2011 is also being planned. SIPN IT sharing collaboration will continue to be an important part of all technology plans moving forward for Options and participating SIPN members.

## Goals for 2011

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Options engaged in a strategic planning process in 2009 to identify strengths, weaknesses, opportunities and threats through 2012. Based on this internal and external analysis, Options set the following strategic goals. For the next three years, Options will use the FACES acronym to ensure that everyone in the organization is aware of the goals. In this way we will engage all staff in achieving the outcomes outlined. Annual goals for 2011 related to the below strategic focus are included as Attachment C.

- **Financial** results while meeting the mission,
- **Accountability** for customer outcomes,
- **Culture** within the work environment that promotes excellence,
- **Employees** that are professional and well trained, and
- **Services** that make Options the provider of choice.

# Options

## Final Report Summary

### 2010

#### Attachment A: Service Outcome Review

### Service Outcome Review 2010

Measures	Applicable Service Areas	Data Source	Obtained By	1/1/2010 – 12/31/2010	2010 Progress
<i>Effectiveness</i>					
Percentage/Amount of Services Growth	CEO	CEO Customer Registration	CEO Team Manager	60 people will be participating in CEO.	63 customers are participating in CEO.
	Employment	Attendance Records	Network Coordinators	90 customers enrolled in Employment Services	97 customers are receiving Employment Services.
	All	Network Coordinator's Monthly Report	Directors of Services	12% total Service growth.	As of December 31st, 2010, we had had a 6% growth in services.
	Respite	Network Coordinator's Monthly Report		100 customers enrolled in Respite.	32 customers are enrolled in Respite services but due to state funding constraints, access to services has been limited.
Percentage of customers of working age with jobs	All	Network Coordinator's Monthly Report	Network Coordinators	66% of customers of working age will have jobs.	31% of customers of working age have jobs.
Percentage of adult customers with their own home	All	Network Coordinator's Monthly Report	Network Coordinators	35% of adult customers will own their own home.	21% of adult customers own their own homes.

Measures	Applicable Service Areas	Data Source	Obtained By	1/1/2010 – 12/31/2010	2010 Progress
Percentage of customers who participate in an average of nine community activities per month.	Supported Living Group Home	Network Coordinator's Monthly Report	Network Coordinators Team Managers	90% of customers will participate in an average of nine community activities per month.	Discontinued due to difficulty with measuring outcome.
Number of community members who participate in CEO activities.	CEO	CEO Team Manager's  Network Coordinator's Monthly Report	CEO Service Manager	25 community members participated in CEO activities.	21 community members participated in CEO activities over the course of 2010.
Amount of time in community	CEO	Progress Notes  Attendance Records  CEO Curriculum	CEO Committee  Services Team	70% of time of habilitation services was spent in the community.	The average percent of time spent in the community was 70%.
Number of job placements	Employment	Supported Employment Coordinator's Monthly Report	Supported Employment Coordinator	20 job placements.	There were 23 employment placements in 2010.
Average employment tenure	Employment	Plan for Employment and Supports  Supported Employment Coordinator's Monthly Report	Supported Employment Manager	Average employment tenure will be 2.8 years.	Average employment tenure was 2.4 years.
Percentage of customers experiencing 3 or more social roles per quarter.	CEO	Person Centered Plan  Social Role Map	CEO Team Manager  CEO Instructors	Complete as part of Annual Review process.	Social role assessments have taken place at intake and as part of the Annual Review process. 93% of customers who had social role assessments completed so far this year are participating in 3 or more social roles.

Measures	Applicable Service Areas	Data Source	Obtained By	1/1/2010 – 12/31/2010	2010 Progress
<b>Efficiency</b>					
Time from plan development to job placement	Employment	Plan for Employment and Supports  Supported Employment Coordinator's Monthly Report	Supported Employment Manager	Average time from plan development to job placement will be 120 days or less.	Average time from plan development to job placement has been 360 days.
Average hourly pay rate	Employment	Plan for Employment and Supports  Supported Employment Coordinator's Monthly Report	Supported Employment Coordinator	Average hourly pay rate will be \$7.95 an hour.	Average hourly pay rate is \$7.59 an hour.
Time from service delivery to submission of monthly paperwork by Host Family Agents	Host Families	Director of Services	Director of Services	Monthly paperwork is submitted by Host Family Agents by the 5 <sup>th</sup> of the following month.	80% of monthly paperwork was submitted by the 5 <sup>th</sup> of the following month.
<b>Service Access</b>					
Length of time from referral to intake	All	Network Coordinator's Monthly Report	Network Coordinator	Average time from referral to intake continues to be less than 20 days.	Time from Referral to Intake was 14 days.
Length of time from intake to start of services	All	Network Coordinator's Monthly Report	Network Coordinator	Average time from intake to start of services continues to be less than 20 days.	Time from Intake to Start of Services was 28 days.
Percentage of customers receiving duplicated service	All	Network Coordinator's Monthly Report	Network Coordinators  Directors of Services	12% increase in customers receiving duplicated services.	There has been a 10% increase in customers receiving duplicated services, mostly in CEO and Supported Employment.
Respite hours provided	Respite	Network Coordinator's	Network Coordinator	Annual Respite hours provided is 7500 hours.	6296.75 respite hours have been provided, thru December 31, 2010. State funding

Measures	Applicable Service Areas	Data Source	Obtained By	1/1/2010 – 12/31/2010	2010 Progress
		Monthly Report	Director of Services		constraints limited access to this service, from July 2010 on.
Number of customers over the age of 65.	All	Quarterly Demographics	Directors of Services	20 customers served who are over the age of 65.	We currently serve 15 customers who are over the age of 65.
Percent of individuals of a minority population receiving services.	All	Quarterly Demographics	Directors of Services	A total of 11% of customers are of a minority population.	Currently 10% of customers are of a minority population.
<b>Satisfaction</b>					
Percentage of customers reporting that they would refer others to Options.	All	Annual Survey	Services Team	Maintain percentage of customers reporting they would refer others to Options' services at 90% or above.	93% of customers reported that they would recommend Options' services to others.
Overall customer satisfaction	All	Annual Survey	Services Team	Maintain satisfaction rating of 90% or above.	88% of customers reported that they are satisfied with services.
Stakeholder satisfaction	All	Annual Survey	Services Team/Executive Director	Maintain satisfaction rating of 90% or above.	100% of stakeholders reported they are satisfied with services.
Percentage of stakeholders reporting that they would refer others to Options.	All	Annual Survey	Services Team/Executive Director	Maintain percentage of stakeholders reporting they would refer others to Options' services at 90% or above.	100% of stakeholders reported that they would recommend Options' services to others.
Percentage of customers who report that respite services are available upon request.	Respite	Annual Survey	Services Team/Executive Director	90% of customers will report that their respite services are available upon request.	83% of customers receiving respite services reported that respite services are available upon request.

### Service Outcome Review Goals 2011

Measures	Applicable Service Areas	Data Source	Obtained By	2011 Goal
<i>Effectiveness</i>				
Percentage/Amount of Services Growth	CEO	CEO Customer Registration	CEO Team Manager	65 people will be participating in CEO.
	Employment	Attendance Records	Network Coordinators	100 customers enrolled in Employment Services
	All	Network Coordinator's Monthly Report	Directors of Services	8% total Service growth.
	Respite	Network Coordinator's Monthly Report		50 customers enrolled in Respite.
Percentage of customers of working age with jobs	All	Network Coordinator's Monthly Report	Network Coordinators	50% of customers of working age will have jobs.
Percentage of adult customers with their own home	All	Network Coordinator's Monthly Report	Network Coordinators	30% of adult customers will own their own home.
Number of community members who participate in CEO activities.	CEO	CEO Team Manager's Network Coordinator's Monthly Report	CEO Service Manager	25 community members participated in CEO activities.
Amount of time in community	CEO	Progress Notes Attendance Records CEO Curriculum	CEO Committee Services Team	70% of time of habilitation services was spent in the community.
Number of job placements	Employment	Supported Employment Coordinator's Monthly Report	Supported Employment Coordinator	25 job placements.

<b>Measures</b>	<b>Applicable Service Areas</b>	<b>Data Source</b>	<b>Obtained By</b>	<b>2011 Goal</b>
Average employment tenure	Employment	Plan for Employment and Supports Supported Employment Coordinator's Monthly Report	Supported Employment Manager	Average employment tenure will be 2.8 years.
Average quality assurance rating	All	Monthly QA Review Process	Directors of Services	Average quality assurance rating of 95% or higher
<b><i>Efficiency</i></b>				
Time from plan development to job placement	Employment	Plan for Employment and Supports Supported Employment Coordinator's Monthly Report	Supported Employment Manager	Average time from plan development to job placement will be 180 days or less.
Average hourly pay rate	Employment	Plan for Employment and Supports Supported Employment Coordinator's Monthly Report	Supported Employment Coordinator	Average hourly pay rate will be \$7.95 an hour.
Time from service delivery to submission of monthly paperwork by Host Family Agents	Host Families	Director of Services	Director of Services	90% of monthly paperwork completed by Host Family Agents will be submitted by the 5 <sup>th</sup> of the following month.
<b><i>Service Access</i></b>				
Length of time from intake to start of services	All	Network Coordinator's Monthly Report	Network Coordinator	Average time from intake to start of services will be 20 days or less.
Percentage of customers receiving duplicated service	All	Network Coordinator's Monthly Report	Network Coordinators Directors of Services	12% increase in customers receiving duplicated services.
Respite hours provided	Respite	Network Coordinator's Monthly Report	Network Coordinator Director of Services	Annual Respite hours provided is 6500 hours or more
Number of customers over the age of 65.	All	Quarterly Demographics	Directors of Services	20 customers served who are over the age of 65.
Percent of individuals of a minority population receiving services.	All	Quarterly Demographics	Directors of Services	A total of 12% of customers are of a minority population.

<b>Measures</b>	<b>Applicable Service Areas</b>	<b>Data Source</b>	<b>Obtained By</b>	<b>2011 Goal</b>
Percent of youth receiving services	All	Quarterly Demographics	Directors of Services	28% of customers are under the age of 18.
Percent of customers with Autism	All	Quarterly Demographics	Directors of Services	20% of customers served have a diagnosis of Autism
<b><i>Satisfaction</i></b>				
Percentage of customers reporting that they would refer others to Options.	All	Annual Survey	Services Team	Maintain percentage of customers reporting they would refer others to Options' services at 90% or above.
Overall customer satisfaction	All	Annual Survey	Services Team	Maintain satisfaction rating of 90% or above.
Stakeholder satisfaction	All	Annual Survey	Services Team/Executive Director	Maintain satisfaction rating of 90% or above.
Percentage of stakeholders reporting that they would refer others to Options.	All	Annual Survey	Services Team/Executive Director	Maintain percentage of stakeholders reporting they would refer others to Options' services at 90% or above.
Percentage of customers who report that respite services are available upon request.	Respite	Annual Survey	Services Team/Executive Director	90% of customers will report that their respite services are available upon request.
Percent of CEO customers who report they have been given opportunities to increase their skills in the areas they desire.	CEO	Annual Survey	Services Team/Executive Director	90% of customers will report that they have been given opportunities to increase their skills in the areas they desire.
Percent of Employment customers who report that they are pleased with their Employment Seeking process	Employment	Annual Survey	Services Team/Executive Director	90% of customers will report that they are pleased with their Employment Seeking process.
Percent of Customers receiving Behavior Support Services who report that behavior plans developed meet their needs.	Behavior Management	Annual Survey	Services Team/Executive Director	90% of customers will report that behavior plans developed meet their needs.

# Options

## Final Report Summary

### 2010

#### Attachment B: Accessibility Assessment and Plan

Area	Barrier	Progress	2011 Goals
Attitudinal	<p>Continue focus on customer outcomes.</p> <p>Continue to promote customer achievements in community and secure additional resources for library.</p> <p><b>Responsible: All Teams</b></p>	<p>All surveys indicate excellent staff attitudes and respectful service provision.</p>	<p>Continue focus on customer outcomes.</p> <p>Continue to promote customer achievements in community and secure additional resources for library.</p> <p><b>Responsible: All Teams</b></p>
Architectural	<p>Install audio visual smoke detectors and reduce door pressure where needed at main office. Replace any doors knobs with levers where needed.</p> <p>Jefferson: pressure on doors, visual fire alarms, lavatories and soap dispensers made accessible.</p> <p>Ida: design an accessible house to locate within Bloomington in the next year. Obtain needed phone equipment.</p> <p>Bedford: Clear entrance for wheelchair access; get accessible spaces close to entrance; replace inaccessible door knobs, install accessible signs, lower dispensers.</p> <p><b>Responsible: Executive Team</b></p>	<p>All work was completed in time for CARF. There are no pending architectural issues in any facility.</p> <p>Options is developing some housing to replace Ida Lane group home and to ensure there is more accessible housing in Monroe County.</p>	<p>Complete housing development and focus on ADA accessible units.</p> <p><b>Responsible: Executive and Services Team</b></p>
Environmental	None noted	None	None

Area	Barrier	Progress	2011 Goals
Financial	<p>Fundraising efforts continue and a focus on securing local contributions from other counties began in 2007 and will carry through for 2010.</p> <p>Continue to expand housing, technology services, and services to different populations.</p> <p><b>Responsible: Executive and Operations Teams</b></p>	<p>Medicaid reliance has reduced but is still 84% of Options budget. Funding diversification includes adding housing and technology revenue along with new contracts with Area Agencies on Aging.</p>	<p>Continue focus on housing and technology as a way to diversify income.</p> <p><b>Responsible: Executive and Operations Teams</b></p>
Employment	<p>Options will work with DiversityWorks, the local business leadership network, to promote employment opportunities for people with disabilities.</p> <p>Options will collaborate with other service providers to recognize employers that have made extraordinary efforts to make their workplaces accessible by conducting an employer recognition event in March.</p> <p><b>Responsible: Services Team</b></p>	<p>Currently there are 3 Options customers working in Executive Team and Services Team.</p> <p>The percent of Options customers with jobs continues to be low but is still above the state average of 26%.</p> <p>Options has worked with other local providers to conduct a business recognition event. The second is planned for March 2011.</p>	<p>Work with the state's employment first initiative to increase the percentage of persons employed in the community.</p> <p>Assist the business leadership network to support and recognize local business efforts.</p> <p>Develop a promotional campaign and implement locally.</p> <p><b>Responsible: Services Team</b></p>
Transportation	<p>Maintain ability to provide accessible transportation.</p> <p><b>Responsible: Executive Team</b></p>	<p>Options now has three accessible vehicles and can provide lift equipped transportation in Lawrence, Owen and Monroe counties.</p>	<p>Maintain ability to provide accessible transportation.</p> <p><b>Responsible: Executive Team</b></p>
Communication	<p>Options will enhance the customer record to ensure all staff have access to timely, accurate information about customer support.</p> <p>Options will implement regular communication with customers, guardians, and funders to keep them apprised of changes in Options staff, policies or procedures.</p>	<p>Over the past year, Options has provided better access to customer records by ensuring all documentation is included in electronic customer records. This system was implemented in 2008 but expanded in the past year to most 24hour settings.</p> <p>Services administration has access to data via VPN.</p>	<p>Enhance customer information available in all supported living settings.</p> <p>Implement an integrated customer/hr/time and attendance system.</p> <p>Investigate the implementation of an intranet for staff.</p>

Area	Barrier	Progress	2011 Goals
	<b>Responsible: Executive and Leadership Team</b>	Customer and stakeholder communication has improved according to surveys.	<b>Responsible: Executive and Operations Team</b>
Other	<p>Ensure all supervisory staff are trained by the end of 2010.</p> <p>Continue to promote respite to families.</p> <p><b>Responsible: Services Team</b></p>	<p>A supervisory training has been outlined but not implemented.</p> <p>Respite has declined as the state cut rates and amount available to families.</p>	<p>Ensure all supervisory staff are trained by the end of 2010.</p> <p>Continue to promote respite to families.</p> <p><b>Responsible: Services Team</b></p>

## Attachment C: Strategic plan goals for 2011

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### *Vision:*

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

### *Mission:*

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

### *Our values*

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

### *Strategic Framework for Excellence Focus*

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The following summarizes Options strategic focuses, **FACES**:

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

### *Strategic Framework for Excellence Culture*

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The following summarizes Options culture: We expect staff to demonstrate:

- A **customer focus** where customers are always first
- **Professionalism** in all that staff say and do
- **Community orientation** by giving back to the communities that support us
- **Support and respect** for all Options stakeholders

*Financial: Optimize fiscal results while meeting our mission*

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**Objective A: Revenue is diverse and less dependent upon Medicaid**

Performance Measure	Activities 2011	Assigned
While maintaining current level of Medicaid and Medicaid Waiver dollars, other revenue increase comprise >25% of total revenue.		
Housing Options revenue increases to >10% of revenue.	1. Provide financial planning and analysis for Options building projects.	Operations Team Executive Team
	2. Construct 3 buildings on donated site and ensure viability of Housing services.	Executive Team
	3. Develop and implement housing projects outlined by Board Capital Committee.	
Local contributions increase to >5% of revenue.	4. Work to increase donations through a more direct and personalized approach.	Executive Team
	5. Encourage volunteers and former staff to become donors	Executive Team
County funding comprises >5% of revenue	6. Provide presentations to Councils in Monroe, Lawrence, Owen and Morgan counties.	Executive Team Executive Team
	7. Recruit a champion for a tax levy in Owen or Lawrence counties.	

Grant income comprises >5% of revenue	8. Secure grants for all major capital purchases	Executive Team
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**Objective B: All services are financially viable or have a plan to become so.**

Performance Measure	Activities 2010	Assigned
Overall positive bottom line for all services	9. Develop a model for establishing staffing limits at group homes.	Operations and Services (Danie) Teams.

**Objective C: Funds are available for research and program development.**

Performance Measure	Activities 2010	Assigned
Endowment that provides \$20,000 in net income annually to support research and development activities.	Hold till 2012	Executive Team
One or more corporate sponsor, business that commits to support the organization in each year for a number of years into the future.	10. Continue and expand corporate sponsor program.	Executive Team

**Objective D: Cash provides an increased return overall**

Performance Measure	Activities 2011	Assigned
Investment income provides an increased return.	10. Monitor cash and return on investments.	Operations Team

**Objective E: Options has a positive image in the community and agency services are well known.**

Performance Measure	Activities 2011	Assigned
More people know Options services as measured by community surveys.	11. Update website to provide resources for the community and to incorporate more story telling.	Executive Team
	12. Secure a complimentary partner to sublet space at Winslow office	Executive Team
More people choose Options for services as measured by growth rate versus target	13. Develop marketing plan for potential customers of senior, technology, and other services to include social media.	Executive Team

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

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**Objective F: Success is tied to regulatory compliance and customer outcomes and performance improvement is everyone's goals.**

Performance Measure	Activities 2011	Assigned
Average quality assurance rating of 95% or higher	14. Develop a regular reporting system with Leadership Team with established scorecard to provide process improvements.	Services (Janessa)

**Objective G: Employees are evaluated based on customer and team outcomes and feedback is consistent and ongoing.**

Performance Measure	Activities 2011	Assigned
Staff report high level of satisfaction with communication of expectations and feedback.	15. Monitor and improve the implementation of the new EPR and	Operations Team

90% of staff achieve their goals.

EDR process.

**Objective H: Customer satisfaction is included in accountability systems.**

Performance Measure	Activities 2011	Assigned
Customers satisfaction is high as measured by the degree of satisfaction (agree or strongly agree are satisfied) overall and whether they would refer.	16. Conduct customer survey and report and analyze results.	Services (Janessa)
	17. Develop an improvement plan as needed	Leadership Team

*Culture: Create and maintain a great company culture*

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

Performance Measure	Activities 2011	Assigned
Staff turnover is lower than the regional average.	18. Work with services to design more full time positions	Operations Team Executive
	19. Create Options policy that promotes staff professionalism in communication and behavior	
Employee satisfaction is higher each year as measured each year through the annual survey process.	20. Develop an internal marketing campaign for our culture.	Executive Team
	21. Plan and conduct an event for DSP Appreciation Week.	Operations Team

**Objective J: Everyone in the organization is dedicated to holistic services and there is a priority on teaching independence.**

Performance Measure	Activities 2011	Assigned
Customers gain independence, as measured by functional assessment and goals achieved.	22. Celebrate customer outcomes in all agency communication.	Executive Team
Teams improve the percentage of customer goals achieved in plans.	23. Train team managers on setting and monitoring customer goals.	Services ( Danie, Janessa)

**Objective K: Options is known for its culture.**

Performance Measure	Activities 2011	Assigned
Job applicants list our culture (as defined above) as reason for coming to Options	24. Develop and implement strategies within the marketing plan for services to communicate Options culture in the community.	Executive Team with Leadership Team culture definition
	25. Develop a speaker's bureau with families, customers, board, and staff representatives.	Executive Team

*Employees: Select and retain great staff at all levels*

**Objective L: Build a full time DSP work force to ensure consistency and continuity.**

Performance Measure	Activities 2011	Assigned
DSP's 60% full time without increasing overtime.	26. Review and refine recruitment plan for full time employee to include graduate student spouses, seniors,	Operations Team

Performance Measure	Activities 2011	Assigned
	people with English as a second language, people completing basic education, and IVY Tech students.	
DSP turnover below regional average.	27. Hold for after recession	Executive and Leadership Team
Pay and benefits better than those in the area.		
Vacancy rate less than 8%	28. Create more full time direct support positions within networks.	Services (Danie)

**Objective M: Employees are satisfied with their jobs, expectations and morale is high across the agency.**

Performance Measure	Activities 2011	Assigned
More staff are referred by existing staff.	29. Establish a formal supervisor training program including professional communication.	Operations Team
Great employee satisfaction.		
Improved employee, customer, and stakeholder assessment of communication within agency as documented in surveys.		

**Objective N: Increase DSP skills, particularly in teaching techniques, for all learners.**

Performance Measure	Activities 2011	Assigned
Increased customer independence (as above).	30. Establish a service structure based on new realities of funding and increased oversight.	Services Team Operations Team
	31. Review and revise training for DSPs to	

include more instructional strategies.

**Objective O: Build a first class professional development/leadership program.**

Performance Measure	Activities 2011	Assigned
Improved supervisor and staff retention rate. More upward mobility from DSP to Supervisor.	32. Include a way for potential leaders to be identified and included in formal supervisor training.	Operations Team

**Objective P: Technology allows staff to perform tasks more efficiently and effectively.**

Performance Measure	Activities 2011	Assigned
Reduce administration to <13%. Paperless systems in place for all appropriate agency records.	33. Implement new software and enhance efficiencies in all areas of operations and communications.	Operations Team
Staff express satisfaction with technology methods used.	34. Train and support staff to implement new software.	Operations Team

*Service: Achieve excellence*

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**Objective Q: Services are the best in the area and Options is the provider of choice.**

Performance Measure	Activities 2011	Assigned
Average quality assurance rating of 95% or higher.	35. Transfer service records to new software and implement protocols for	Services Team (Janessa)

Performance Measure	Activities 2011	Assigned
	incident reporting, etc. and train all	
Options' group homes meet the needs of individuals living there.	36. Work to ensure new accessible house to replace the Ida Lane home meet customer needs	Services Team (Danie)
Market share is highest of all providers in the area in respite, supported living, and employment.	37. Implement strategies within the Comprehensive Development plan that address potential customers.	Executive Team

**Objective R: All services staff understand, accept and implement the idea of holistic services.**

Performance Measure	Activities 2011	Assigned
More customers have jobs supported by both employment and supported living staff.	38. Revise Options ISP process to ensure each all life areas are addressed quarterly.	Services Team (Danie)
Customers gain independence, as measured by functional assessment and goals achieved.	39. Train managers to have a stronger voice at ISP meetings (be more of an advocate for their customer).	Services Team (Danie)
Customers are connected in the community.		
Teams improve the percentage of customer goals achieved in plans	40. Team meetings include jobs, community participation, and home.	Services Team (Danie)

**Objective S: Continue to grow services based on need and available resources.**

Performance Measure	Activities 2011	Assigned
Growth rate of >6% in number of customers	41. Express interest in providing supported	Services Team (Danie)

Performance Measure	Activities 2011	Assigned
annually.	living services in northern counties.	Services Team (Janessa)
	42. Investigate money following person funding.	
Increased number of youth, minority and seniors served by 10% annually each.	43. Develop and implement a marketing campaign for target groups.	Executive Team
There are sufficient customers for a northern office.		
Increase numbers served with electronic monitoring services to 36.	44. Conduct a couple of seminars on electronic monitoring services for agencies, potential customers and case managers.	Executive Team
	45. Work with existing service providers to develop partnerships around Electronic Monitoring Systems.	Services Team (Danie)

**Objective T: Expand CEO and make available to youth and in all communities**

Performance Measure	Activities 2011	Assigned
Increase total number and youth served in CEO by 10% annually.	46. Develop a coherent strategy and structure for expanding the CEO program beyond Monroe County, ensuring consistency.	Services Team (Janessa)
CEO is available in Monroe, Lawrence, Owen, and Morgan.		Leadership team will develop the strategy and structure (Janessa)
	47. Implement new CEO structure and	Services team (Danie, Janessa)

Performance Measure	Activities 2011	Assigned
	strategy.	

**Objective U: Increase access to affordable, accessible housing in all areas served.**

Performance Measure	Activities 2011	Assigned
Affordable and accessible housing available in two counties served other than Monroe.	48. Evaluate and implement projects that enhance accessible housing in other communities.	Operations and Executive Team (financial goal above)

**Objective V: Make ancillary services more accessible to individuals and families.**

Performance Measure	Activities 2011	Assigned
Individuals and families report satisfaction with access to ancillary services.	49. Collaborate with other providers to establish a First Steps network.	Services Team
	50. Hire behavior consultant and expand behavior support services.	Services Team (Janessa) Services Team (Janessa)
	51. Implement health care coordination within the agency.	Services Team (Janessa)
	52. Investigate provision of home health services.	

**Objective W: Enhance the availability of respite services to families.**

Performance Measure	Activities 2011		Assigned
Increase the number of families that use respite.	53.	Hold until 2012	Services Team

**Objective X: Become experts in supporting individuals with autism.**

Performance Measure	Activities 2011		Assigned
Increase the number of persons with autism served by 10%	54.	Complete the Power Up training project to ensure access to training around autism	Operations Team Operations Team
	55.	Develop a library of written resources for staff and families.	
Become recognized for providing information to those individuals and families in the autism community.	56.	Become active in Autism Speaks.	Services Team (Danie)

**Objective Y: Implement more customer directed services**

Performance Measure	Activities 2011		Assigned
Increase number of people who are self-employed.	57.	Develop self employment support.	Executive Team
	58.	Research self directed waivers in other states.	Services Team (Janessa)
	59.	Continue to promote self-advocacy	Executive Team