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STRATEGIC PLAN
2013-2015

Contents

Executive Summary

LIFE*Designs* is a nonprofit organization committed to providing the highest quality services to people with disabilities in south central Indiana. With the recent merger of Options and Christole, LIFE*Designs* was formed. The present strategic planning process was designed to ensure that the two companies come together to identify and address the issues LIFE*Designs* must face in the coming years. Through widespread input and feedback, LIFE*Designs* involved customers, funders, community leaders, staff, board members and families in developing plans for agency services and operations for the future.

Strategic Planning Group

The Board authorized a planning group consisting of board, staff, and customers to gather and evaluate information about trends in services, collect and analyze internal data; and make recommendations to the board regarding services and supports and quality improvement. Bert Clemons, Chief Operating Officer facilitated the group meetings and worked with LIFE*Designs* Board and Senior Leadership to craft specific objectives to meet the overall goals set by the committee. LIFE*Designs* is grateful to all who either provided input to or were directly involved in developing this plan.

Critical Issues

Based on a review of agency strengths and weaknesses and a scan of the internal and external environments, LIFE*Designs* came up with the following critical issues which are addressed in the strategic goals.

Funding

- Funding for services will significantly change through the next three years as the state shifts systems to home and community based waiver from group home.
- It is likely that more people will be added to Waiver lists but will receive less service than in the past. There is a strong push to maintain individuals in their family's home.
- Indiana is strongly considering waiver services that would give customers control over finances and how they are spent.
- LIFE*Designs* remains highly dependent on Medicaid and must continue to diversify through its housing initiatives.
- Strategies to share administrative services will be more important than ever.

Customers and Services

- There will be more people, particularly seniors and those with autism, in need of services over the next three years. Those needing services will require more support.
- Accessible housing will continue to be needed and is scarce in all areas served.
- There will be a limited expansion of Waiver but only Family Support Waiver so fewer people will be able to live independently.
- The people being referred for services will have more support needs including medical, mental health and behavior support.

Infrastructure

- LIFE*Designs* must continue to become more tech savvy and increase its use of technology, to reduce administrative burdens and provide additional direct supports to customers.
- An electronic record system will be required in the near future.
- All our systems must be integrated as we must move to paperless systems quickly.

Employees

- Direct Service Professionals will continue to be difficult to find and retain. LIFE*Designs* must remain competitive by offering competitive wages and benefits and by enhancing the professionalism of all staff.
- Implementation of the Affordable Care Act will be an important focus for 2013 and beyond.
- Training requirements may increase for direct service and employment staff.

Next the committee established long term outcomes that matched the critical issue identified and took advantage of agency strengths and trends in services and supports. The following key strategies were identified to take LIFE*Designs* to 2015.

Leadership	Innovation	Foundations	Excellence
LIFE*Designs* is one of the most admired agencies in the industry	LIFE*Designs* employs pioneering strategies to solve problems and reduce barriers	LIFE*Designs* services lead to independence, employment, and full community participation	LIFE*Designs* has the best employees, systems, and community reputation

Mission, Vision, Values

Upon completion of the planning process, the board evaluated our mission, vision and values statements to ensure they were consistent with our direction. The following were outlined to best communicate the LIFE*Designs* path to 2015.

Vision…	Mission….
We envision communities that support all people, where each person is valued, and where everyone belongs.	LIFE*Designs*, Inc partners with people of all ages and all abilities to lead meaningful and active lives.

Our values….
- ✓ The goals and expectations of our customers and their families direct our actions.
- ✓ We design services to achieve independence, employment, and enrich lives.
- ✓ Every customer, employee and stakeholder deserves dignity and respect.
- ✓ Creativity and innovation are the keys to our success.
- ✓ Collaboration is essential to achieving our mission.

Strategic Planning Process

LIFE*Designs'* strategic planning process consisted of a comprehensive evaluation of internal and external factors that could impact the agency during the next three years. It involved a group of board, staff and customers gathering and analyzing research on trends in disability services, communities served, technology and the workforce. The following outlines the activities, committee structure and timeline for the planning process.

- Strategic plan process reviewed and outlined by the board at the January retreat.
- Planning committee formed in May.
- Research was conducted and reviewed at July and August meetings.
- Our vision and mission was refined based on research at the September meeting.
- Goals for the plan were finalized in October.
- The board approved the final recommended plan at their November meeting.

Strategic Planning Committee Meeting Schedule
1. August 15th – SWOT Analysis
2. August 29th – Recommended Goals for Plan Period
3. Sept. 12th – Review Staff Objective for Each Goal/Performance Measures/Goal Tree
4. Sept 26th – Working Meeting on Above Items
5. Oct 10th - Develop Communication Plan to Staff
6. Oct. 17th – Final Review of Strategic Plan Package/Summary

Strategic Planning Committee
- Phil Reinhard, Board Vice Chair and Parent
- Margie Rice, Board Member and Parent
- Brian O'Neill, Board Member
- Rachel Hodnett, Nurse
- Tiffany Pulkowski, Director of Residential Services
- Ginger White, Board Member
- Marianne Stemm, HR Director
- Janessa Gerber, Director of Community Services
- Bert Clemons, Chief Operating Officer
- Susan Rinne, Chief Executive Officer

Board Authorization of the Strategic Plan
The Board of Directors of LIFE*Designs*, Inc. authorized the strategic plan at their retreat in January 2012. The Board reviewed and approved the strategic plan at their November 2012 Board meeting.

Findings

Through the process of strategic planning, LIFE*Designs* collected much information about organizational capacity, trends in services and the environment in which we operate. This involved both an internal and external analysis. Through surveys and focus groups the committee gathered significant feedback from funders, civic leaders, customers, families, staff and board members. This information gathering ensured a complete scan of all environments so planning had a basis in fact and the personal experiences of key stakeholders.

LIFE*Designs* Internal Analysis

Over the course of the planning cycle, both the Senior Leadership Team (known as the Solutions Team) and the Strategic Planning Committee reviewed data related to the internal structure and health of the organization. The following areas were reviewed: finances, risk analysis, accessibility, staff data, and survey feedback.

Finances

Prior to merger, both Options and Christole underwent annual audits performed by independent auditors. In the past three years, no material conditions were cited for either agency. In looking at the past few years of financial data is was noted that major indicators met or exceeded benchmarks established by Crowe Horwath, an accounting firm that has provided assistance to LIFE*Designs* and several similar agencies. The committee determined that the agency holds a strong financial position relative to similar agencies based on this review. The only weakness noted is the amount of unrestricted capital available to the agency and the small size of donations compared with others. While the committee looked back several years, the following chart summarizes key ratios for 2012.

Ratio	2012	Benchmark
Current	4.33	3.64
Quick	3.38	1.5
Working Capital	$3 mill	$1 mill
Debt to Equity	.26	.20
Days AR	27	33
Salaries as % Expense	.78	.76
Admin expense as % Expense	.15	.168
Donations as % Revenue	.01	.015

Accessibility

With the merger, LIFE*Designs* added many properties and not all had been assessed for accessibility. Prior to starting the planning process, the Solutions team went to all new facilities to determine any issues that needed to be addressed. In addition, surveys were conducted of customers, staff, and community members to determine the level of access. Generally the office area is accessible and has all needed signage and lighting. Most of the nine group homes have accessibility issues. That said, a new group home

is being built and will be complete in 2013. That home will be totally accessible and have two ADA units for individuals with mobility issues. This will improve the entire systems access for those with physical disabilities. Customers, staff, and case managers generally note that access is good. The following are comments suggestions from surveys reviewed.

Customer	Staff
• Provide staff to assist with transportation • Plan for a time when there is a greater need for accessible housing among existing staff • Communicate with the community about the needs of customers • Provide staff training for adaptations and accommodations	• Work on staff expectations to be sure are consistent with our mission • Continue to focus on education and awareness • Help the community to meet the individuals we support • Create a knowledge base and make sure everyone is aware of local and other resources • Give others suggestions for how to be more accommodating • Keep assessing for accessibility regularly

Risk Analysis

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

Facilities   All former Christole Homes received an onsite visit in September 2012 by the Cincinnati Insurance Risk Manager. Minor modifications were noted. All were corrected within 30 Days. All former Christole and Options homes passed Annual Life Safety Code inspections by ISDH in each of the past 3 years. There is an ongoing maintenance plan for all facilities overseen by an employee.

Claims Experience   Based on a review of claims over the past five years, there has been one employee dishonesty claim, 3 incidents of property damage, one loss under the electronic data processing policy, 3 Equal Employment opportunity claims (all dismissed), one wrongful termination settled in LIFE*Designs* favor, one wrongful death also settled in LIFE*Designs* favor, and one vehicle accident. Insurance premiums remain low due to the agency's proactivity and its risk avoidance philosophy.

Information Technology   The agency experienced a server crash in April 2012. Normal IT operations were interrupted for 60 days until new servers were installed. No data loss was experienced. LIFE*Designs* is now moving toward off site data storage and cloud systems for routine operation.

<u>Workplace Injuries</u>   One of the most critical exposure areas for LIFE*Designs* is employee injuries. Workers Compensation comprises a large percentage of insurance premiums annually. Over the past several years the frequency of accidents has fluctuated and the year 2010 had the highest paid claims in the past 5 years. This has put the company at a disadvantage in regards to rates and to other potential insurers. In addition, state ratings for the industry have gone up substantially. The following is the experience for the past two years.

- In 2011 Christole and Options together reported 37 work related injuries.
  - 49% were due to combative customers
  - 16% were due to slips and falls
  - 6% were due to lifting
  - 16% were reported as miscellaneous
- In 2012 a total of 27 workplace injuries were reported
  - 56% due to combative customers
  - 26% due to slips, trips and falls
  - 8% due to lifting

LIFE*Designs* continues to work with Workers Compensation providers and Liability carriers to evaluate current practices and make revisions where needed. A Health and Safety Committee meets regularly to review injuries and establish a greater safety awareness for all staff and emphasize training to maintain integrity in our handling of client funds.

<u>Customer Services</u>   There are approximately 200 staff with responsibility for customer finances or funds. Training is provided to all staff who oversee customer finances. Supervisors check staffs work monthly. The fiscal department conducts random audits on the customer accounts and reports findings to supervisors. No incidences of Employee Dishonesty were reported in 2011 or 2012. Independent audits and Medicaid audits confirmed this.

Technology

As noted, LIFE*Designs* has made great strides in the area of introducing technology into the work environment over the past several years. In 2007, the agency moved to a server based network and hired a full-time information technology professional. Since then, there have been substantial upgrades to computer systems. An electronic time keeping and client records system was implemented in 2007 and is currently being upgraded to the latest version.

All supervisory staff have computers with email, internet, word processing software, spreadsheets, home finance software for customer finances and electronic customer records. Many offsite locations are equipped with kiosks that give staff access to electronic time recording and customer records. There are plans for 26 supported living settings to have kiosks in 2013.

The agency upgraded the phone system in 2012, installing a voice over IP phone system in. Presently LIFE*Designs* has 66 computers & 45 laptops/netbooks, 16 Kiosks (PC's), several copier/scanners and faxes. In the software arena, LIFE*Designs* is PC based running Windows XP\Windows 7. LIFE*Designs* has additional software for donor management, fiscal management and data bases. There are 2 - Cable circuits for main office (Internet /phone system) and 3 – DSL connections (Jefferson St.) and Broadband connection (Ida Lane, Park Lane, Fairlawn, Limestone, Rhinestone, Dunn, Winslow, Ridgeview,) The committee reviewed the agency's progress but also noted some continuing issues regarding communication.

Because the vast majority of staff work in the community either in educational programs, employment or home settings, it is often difficult to ensure consistent and timely communication. Potential solutions were discussed and include the use of personal digital assistants, netbooks and smart phones. Smartphone usage, for example, is expected to increase by 50 % to 75% over the next 3 years. Netbooks are smaller versions of laptops and may provide a great deal of computing ability in an inexpensive package. Currently the agency does not support personal computing devices and will need to develop policies to ensure portability does not create problems with confidentiality. The agency's software is running in a Windows XP environment and will change in the next year to incorporate new versions of the Windows operating system. The committee recommended improving communication with field staff through technology solutions. The remaining improvements are outlined in the agency Technology Plan which is updated annually.

With the merger of Christole and Options, LIFE*Designs* is in a good position to move forward and address the expected needs of its growing customer base. Services have now expanded reach over 300 customers in Brown, Bartholomew, Monroe, Lawrence, and Greene Counties. The number of staff services and supports has grown from 250 to 300. The use of technology to make the agency more efficient and accountable is at its highest advancement in the past five years. Technology in many forms will continue to enable LIFE*Designs* to support a growing number of service sites

Survey Feedback

LIFE*Designs* annually surveys customers, funders, board and staff to generate a wealth of feedback and recommendations. This past year there were responses from 115 employees, 13 case managers and 80 customers. This is a 40%, 80% and 25% response return, respectively. The LIFE*Designs* strategic planning group used that information to identify themes.

Customer satisfaction   The survey was conducted over the summer of 2012. There were 33 responses from a possible 347 for a response rate of only 9%. Possible reasons for the low response rate include the survey link only being sent out in a letter rather than electronically and persons not having significant time to consider the effects, if any, of the merger on the services they or the individual they represent receive. 39% of respondents were family members of those receiving services, 30% were legal

guardians, 51% were persons receiving services and 3% were advocates of customers. 63% of respondents have been involved with LIFE*Designs* 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 and compares to previous years.

Customer Satisfaction			
	% Agree / Strongly Agree		
Area	**2010**	**2011**	**2012**
Satisfied with services	88%	98%	97%
Dissatisfied with services	7%	2%	3%
Provide safe environment	97%	98%	97%
Are timely in responding	88%	92%	91%
I have control over things I do daily	95%	98%	94%
I have control over what is in service plan	93%	96%	91%
Treated with respect	97%	100%	97%
I learn new things	94%	89%	78%
I spend ample time in community	82%	77%	78%
Staff assist with equipment and accommodations	93%	66% (33% responded n/a)	76% (24% responded N/A)
Office is easy to get around in	95%	85% (13% responded n/a)	81% (7% responded N/A)
Emergency pager works for me	78%	42% (52% responded n/a)	71% (23% responded N/A)
LIFE*Designs* (2012) has made a difference in my life	96%	98%	100%

Following the survey, the low number of responses received was discussed. It was decided that a follow up survey would be sent out at a future time when customers, families, and others would have more time to decide on the impact of the merger, if any on their services and form their opinions. Also decided was that they survey would be sent out in more than one form. It is believed that a higher number of responses will be received if an electronic link is provided in an email to make accessing the survey faster and easier.

The following provides the major themes from surveys from customers and other constituents and suggestions for improvements or additional services included:

Customer	Staff	Community	Funders
• Work with employers to offer more full-time employment opportunities • Broader subjects for CEO classes • After school and summer activities for children • Support with planning for the future for adults with disabilities • Increased focus on teaching new skills • More communication with families of individuals served	• Supervisor training • Better pay for direct service staff • More transportation • Having all positions filled • More support for supervisors • Computer classes • More day program options • Recreation therapy	• Make others more fully aware of the scope of services offered since the merger • Continue to raise awareness of services • Make sure to "tell the story" to everyone • Make it personal	• Some supervisors are not responsive to teams and need more support and training, others are exemplary • Most agree that the merger had little impact on the quality of services.

Strengths, Weaknesses, Opportunities and Threats

After analyzing all of the above, the committee came up with a list of LIFE*Designs* strengths and weaknesses along with the opportunities and threats we see from the external environment. These served as guide posts in developing the goals for the 2013-2015 plan.

Strengths	Weakness
Strong Executive Team Current IT Infrastructure Positive Board Culture Reputation in Most Communities IT Staff Educated Workforce Strong Balance Sheet Fundraising Experience and Outcomes Networks at State and Local Level Housing Experience and Reputation Experience with Family Services	Perceptions of Staff re: Support Aging IT Structure Overtime Costs Ability to Manage Hourly Services Staff Utilization of All Services Cash Reserves Undefined Dependence upon Medicaid Monitoring Service Revenues/Costs Per Unit Ability to Pay Higher Wages Lack of Access to Staff Housing Under Capacity

Opportunity	Threats
Shrinking of Tech Gap	Managed Care
Development of In Home Services	State Funding Rates
Wait list Reduction	Unknown State Service models
Ticket to work	Unstable Workforce
Johnson County Demographics	Unstable Political Environment
Overall Technology Utilization	Managed Care
Private Insurance Coverage for Autism	Medicaid Collection
Planned Giving	Inflation
Affordable Care Act	Funding for Group Homes and Children's Homes
Cloud Computing	
DSP Training Expertise	Economic Conditions Worsening
Applied Behavior Analysis	More Regulation re: Fraud, Waste, and Abuse
Housing Shortages for Low Income	
Wait list plan	New Governor
New Governor	
Move to Host Families	

Competitors

The Strategic Planning Committee looked at data on seven area competitors of significant sizes. Most evident was the overall reduction in funding across all seven agencies, similar to what LIFE*Designs* has experienced due to Medicaid cuts and the push for more shared services amongst individuals. Those providers involved in Affordable Housing services are performing the best, as are those with for-profit ventures. In comparing LIFE*Designs* to our competitors, the committee noted the following:

- Similar to our competitors, our Medicaid revenues have decreased.
- Our most profitable cost center is Electronic Monitoring.
- We ventured into Affordable Housing in 2007, while others had begun housing earlier in the decade and appear to be doing well as a result.
- Our niche: all of our services are community based, individualized services with flexible staffing.
- We have more experience in Supported Living than any other agency.

Detailed analysis of several key competitors is included as Attachment A.

Disability Service Trends

The following is a discussion of some of the major trends that will impact services to people with disabilities in the future.

Demographic Trends   Over the next 20 years the number of older adults with developmental disabilities and older family caregivers will increase considerably. Based on the 2010 Census, we estimate there are 850,600 people with developmental disabilities age 60 and older living in the community. By 2030 their numbers will swell to

1.4 million due to increasing life expectancy and the aging baby boom generation. Families remain the primary providers of care for people with developmental disabilities. In addition to the general "graying of America," the last fifty years have seen trends in the US toward more dual income households and families living in poverty. Each of these trends results in increased demands on families, especially parents of adults with developmental disabilities who provide periods of caregiving often extending into their own old age. Other important trends include the increasing number of ethnic minority families. The percentage of non-Hispanic Caucasians is estimated to drop from 75.6% in 2004 to 54% of the population in 2050.5 Cultural caregiving norms and language barriers often conceal the need for services that only becomes apparent when families are in a crisis situation.

Health and Function   Adults with developmental disabilities have a higher risk of developing chronic health conditions at younger ages than other adults, due to the confluence of biological factors related to syndromes and associated disabilities, lack of access to adequate health care, and lifestyle and environmental issues. The mean age of death for persons with developmental disabilities was 66 years in 1993, compared to 59 years in the 1970s and 33 years in the 1930s. The average longevity of people with Down syndrome increased from nine years in the 1920s to 31 years in the 1960s to 56 years in 1993. An Australian study reports the average age of death for people with mild and moderate intellectual impairment who do not have any chronic health conditions is 71 years. Information is beginning to emerge on select genetic and nonspecific neurodevelopmental conditions, linked to intellectual disabilities, which are affected differently by maturation and aging. For example, Down syndrome has been linked to premature aging, Alzheimer's disease, and certain organ dysfunctions. In addition to genetic disorders, specific health problems related to the older age trajectories of several common neurodevelopmental conditions such as cerebral palsy (e.g., osteoporosis and degenerative joint disease), autism (e.g., digestive system disorders and neuropsychiatric factors) and spina bifida (e.g., neuromotor and other organ system consequences) are of concern.11 There is a greater prevalence of obesity and a sedentary lifestyle among adults with developmental disabilities than in the general population. Their health concerns and lifestyle differences point to the need for health promotion interventions, exercise and nutrition programs, health behavior education, and health screenings. Also a need exists for education of health professionals, direct support professionals, and families and other caregivers in addressing the health issues of adults aging with developmental disabilities.

Community Participation   People of all ages with disabilities want to be part of their community, and such opportunities are especially important for older adults with developmental disabilities who may want to "age in place", i.e., remain in their homes or in their jobs with adaptations for age-related changes. Some adults may want to retire from their job or vocational training. The aging network can be a resource for linking older people with disabilities to community activities, including volunteer work that provides opportunities to explore new interests, develop new skills, and form new friendships.

Family Support   The majority of adults with developmental disabilities live with immediate family members or kin. One quarter live in their own household or with a spouse, and sixty percent, or nearly 2.9 million people, live with their family. Twenty five percent of family caregivers are age 60 and older, and another 35% are in the 41-59 age range. Only 12% of the 4.8 million Americans with developmental disabilities live in any type of formal supervised residential setting. Nationally, nearly 123,000 persons were estimated to be on waiting lists for residential services in 2009. Life expectancy gains indicate there will be growing numbers of two-generation elderly households of people with disabilities living with their parents. These families remain intact out of choice or due to the shortage of alternative residential options. Both generations will require supports to age in place. Often when parents can no longer provide care, siblings may be called upon to take over that role with little formal support provided to them. Although all states now fund family support in the form of cash subsidies and/or direct services, in 2009, national family support expenditures of $3.8 billion accounted for only 7% of total national developmental disabilities expenditures. Only 17% of families caring for a relative with a disability at home received family support. The gap between need and available public resources is expected to increase with the looming demographic challenges. These families often first come to the attention of the aging network through referrals from hospital discharge planners, friends, and neighbors, especially when the older parents need support due to age-related changes in health and function. In some households, the person with a disability may care for an aging parent. These families need to make informed decisions about their own support needs, as well as help the person with a disability plan for his or her future. (Source: Bridging the Aging and Developmental Disabilities Service Networks: Challenges and Best Practices Institute on Disability and Human Development University of Illinois at Chicago. March 15, 2012)

Workforce Trends   As we move into the next few years, the make-up of the workforce will be changing more dramatically than it has over the past several decades. As the Baby Boomers start to retire, there will be fewer new people of working age to replace them. Just in the position of caregivers, it is estimated that we will need at least a 40% increase in the number of DSPs. As the total population ages, more and more will need the assistance that direct support professionals provide. It is estimated that just in the area of Developmental Disabilities, by 2020 the need for DSPs will increase 37%, yet the population normally associated with caregiver positions will only grow 7%. Counter this with the decreasing number of DSPs overall and it is glaringly apparent that we must make changes now to make the field more attractive to potential employees.

The demographics of current DSPs, for both residential and vocational assistance include:
- 81% female
- 59% white, 22% black, 8% Hispanic
- Average age is 35
- 30% have a college degree, with 50% having some college

Historically, wages for DSPs are low and turnover high, as much as 50-69% depending on the type of service provided. Our challenge is to find way to attract top talent and

keep them long term, emphasizing the non-monetary rewards of this field, and continue to lobby for increases to reimbursements that can then be turned into higher wages for direct service employees.

Another trend we expect in the next few years is an increased need for credentialed direct service employees. As compliance and regulations becomes more and more complicated, staff will need a deeper understanding of disabilities and behaviors, quality of service, and goal attainment. Lacking post-high school educational tracts in the area, we will we need to consider developing our own internal training to address these issues.

Locally things look pretty much the same except for the following:

Transition from Supervised Group Living Services (group homes) to waiver settings
The State of Indiana is beginning to reduce the number of residential settings in order to bring down the state's waiting list (approximately 19,000 statewide). Under the DDRS initiative, approximately 3,200 individuals will be transitioned to waiver homes. Additionally, DDRS has made a commitment to expand HCBS (Home and Community Based Services) by increasing slots under Family Supports waiver. The waiver currently serves approximately4,800 individuals and is projected to serve more than 11,000 by 2015 (Source: Balancing Incentive Program Application, Office of Medicaid Policy Planning, State of Indiana.) They have already begun discussions with agencies throughout the state to gauge the willingness of providers to go along with these changes. In addition, the State of Indiana is interested in establishing Health Homes, which center around developmentally individuals who have chronic medical conditions or serious mental illness.

Technology   The use of technology continues to be a key element to enhancing quality of life for persons with developmental disabilities. There are new and emerging devices and services that assist in communication, mobility, environmental control, activities of daily living, employment and recreation. Surveys have indicated that the only reason that people do not use these devices is lack of information about what is available and the cost. INARF, our state association will be working through its Leadership Development Committee to make providers more aware of these emerging technologies. In 2012, a two day conference was held to explore the interest of the membership. Because of overwhelming attendance, the committee will be planning another conference for 2013.

Prevalence of Autism   Another significant trend in disability services is the increase in the prevalence of Autism. In February 2007, the Centers for Disease Control issued a report based on a sample of 8 year olds, and concluded that the prevalence of autism had risen to 1 in 150 in American children and almost 1 in 94 among boys. By 2009, based on a similar sample, that incidence had increased to 1 in 110. And in 2012, using a similar sample, it was announced that the incidence had climbed to 1 in 88. Based on these latest numbers, 1 in 54 boys and 1 in 252 girls are being diagnosed with an autism spectrum disorder.

If the projected incidence rates are accurate, what does this mean for Indiana? Based on the estimated census data from 2011, Indiana is home to 6,516,922 citizens. At an

estimated rate of 1 in 110, there are potentially 59,245 individuals with a diagnosis on the autism spectrum. Remember these numbers are projected and only estimate the real occurrence of autism spectrum disorders in Indiana. No database exists in Indiana of the actual numbers of people on the autism spectrum.

Another example of the increase of those diagnosed with ASD is the child count data collected by the Indiana Department of Education, Department of Special Education. These data are collected from school districts across Indiana. According to the December 1 child count data, the number of students identified in 2009 was 10,643. During that year, the incidence rate was 1 in 101. By December 2010, that number had increased to 11,514 and as of December 2011 that count is 12,226. The number of students enrolled in Indiana's public schools during the 2011-2012 school year is approximately 1,041,196. Using that data and the incidence data from December 2011, approximately 12 in 1,000 students in Indiana have a diagnosis of an autism spectrum disorder. This year's identification rate is 1 in 83. The child count data does not include children who are not on special education service plans, and are homeschooled or educated in non-public schools.   All who have either an IEP or special education service plan are counted. (Dr. Cathy Pratt, BCBA-D, Director, Indiana Resource Center for Autism)

Persons Served   LIFE*Designs* currently serves individuals with disabilities and seniors who desire our support to live more independently. The chart below details the individuals we served in 2012 and those we project to serve in 2013, by service type.

Service	2012 Enrolled	2013 Projected
Supported Living	164	164
Supported employment	80	80
CEO	70	70
Residential	43	43
Housing	28	28
Respite	32	32
Electronic monitoring	7	7
Behavior support	25	25
Total	**449**	**449**

Disability and Community   Compared to the national average, the prevalence of disability in Indiana continues to be slightly higher than the nation as a whole, with 13.1% of individuals in Indiana having a disability compared to 12.1% of individuals across the United States. Disabilities impacting mobility are the most prevalent for the state, at 7.4% and for the nation, at 6.9%, with cognitive disabilities closely behind, at 5.2% for the state and 4.9% for the nation. The following summarizes the number of people with disabilities by age group in Bloomington MSA, Lawrence County, Owen

County and Bartholomew County. These counties are currently where the majority of LIFE*Designs'* customers reside.

Monroe County			
Age	Number	% population	% employed
5 to 17 years	648	1%	n/a
18 to 64 years	7517	6%	46.3%
65 years and older	4378	3%	n/a

Lawrence County			
Age	Number	% population	% employed
5 to 17 years	386	1%	n/a
18 to 64 years	5250	12%	42%
65 years and older	3281	7%	n/a

Owen County			
Age	Number	% population	% employed
5 to 17 years	189	1%	n/a
18 to 64 years	2308	11%	27.9%
65 years and older	1351	6%	n/a

Bartholomew County			
Age	Number	% population	% employed
5 to 17 years	770	1%	n/a
18 to 64 years	5326	7%	40.6%
65 years and older	3887	5%	n/a

The chart below details the number of individuals within and surrounding our catchment area on a Division of Disability and Rehabilitative Services Medicaid Waiver, along with the number of individuals on the wait list for such services. Additionally, it outlines the capacity of group homes and the number of providers within each county. Particularly of note was the fact that Johnson county and Bartholomew counties have the most individuals on the waitlist for services who reside in the areas with the fewest number of providers.

Medicaid Waiver Details											
	Monroe	Owen	Lawrence	Greene	Morgan	Brown	Johnson	Orange	Bartholomew	Jackson	Marion	Total
Currently Served	279	36	86	60	92	17	231	46	218	97	1672	**2834**
On Waiting List	381	67	150	133	151	35	411	87	320	141	2949	**4825**
Data taken from FSSA website: http://www.in.gov/fssa/ddrs/3347.htm - on 7/27/12 by Janessa Gerber											

Group Home Details											
	Monroe	Owen	Lawrence	Greene	Morgan	Brown	Johnson	Orange	Bartholomew	Jackson	Marion	Total
Number of Providers	14	2	8	2	2	2	6	3	5	4	58	**106**
Capacity	87	14	56	14	16	12	48	22	30	23	420	**742**

Data taken from FSSA website: http://www.in.gov/fssa/ddrs/3347.htm - on 7/27/12 by Janessa Gerber

Communities   The Strategic Planning Committee spent some time reviewing demographics such as population, income, education levels, leading industries, unemployment rates, poverty rate and average pay rates for the 11 counties within and surrounding our catchment area to better understand the dynamics of the areas we serve. Those statistics are detailed in Appendix B. Of note to the committee were the following:

- The aging population is highest is Owen and Brown counties.
- The greatest number of youth reside in Johnson county.
- Monroe and Johnson show the highest level of population growth.
- The potential for the most educated staff is highest in Monroe and Johnson counties.
- The unemployment rate is highest in Lawrence and Owen counties.
- We are competing for staff with the manufacturing industry in Lawrence and Owen counties.
- Bartholomew County is the only county to have net growth in # of jobs in the last 5 years.

Housing   When it comes to affordable housing development Monroe, Owen and Bartholomew counties are communities of interest for LIFE*Designs* and fall within its service area. The City of Bloomington CPMP Plan reveals that Monroe County is willing to provide subsidies and construction loans to non-profit developers for construction or rehab of affordable owner-occupied homes.

The Owen County Strategic Needs Assessment indicates their goals are to improve the condition of existing housing, increase housing options for young families and create housing that is suitable for a range of seniors while including services for people with disabilities. Among those aged 65-74 who were surveyed, 43.2% reported a disability. Among those 75+ years old that were surveyed, 59.2% reported a disability.

Bartholomew County has recently prepared a Request for Proposal for housing needs assessment to look at affordable housing as part of the mix. The state's strategic priorities include comprehensive development; aging in place; ending chronic homelessness by providing permanent supportive housing for persons with disabilities; and high performance building by minimizing environmental impacts and operating costs. The Indiana Housing and Community Development Authority note that its interest for the next several years lies in the rehabilitation of long vacant housing to achieve many of these goals.

Critical Issues

Based on a review of agency strengths and weaknesses and a scan of the external environment, LIFE*Designs* came up with the following critical issues which are addressed in the strategic goals. The Solutions team, a group of senior leaders, identified issues facing the agency and trends in a number of areas over the next three years. These critical issues include:

Funding
- Funding for services will significantly change through the next three years as the state shifts systems to home and community based waiver from group home.
- It is likely that more people will be added to Waiver lists but will receive less service than in the past. There is a strong push to maintain individuals in their family's home.
- Indiana is strongly considering waiver services that would give customers control over finances and how they are spent.
- LIFE*Designs* remains highly dependent on Medicaid and must continue to diversify through its housing initiatives.
- Strategies to share administrative services will be more important than ever.

Customers and Services
- There will be more people, particularly seniors and those with autism, in need of services over the next three years. Those needing services will require more support.
- Accessible housing will continue to be needed and is scarce in all areas served.
- There will be a limited expansion of Waiver but only Family Support Waiver so fewer people will be able to live independently.
- The people being referred for services will have more support needs including medical, mental health and behavior support.

Infrastructure
- LIFE*Designs* must continue to become more tech savvy to further reduce administrative burdens and provide additional direct supports to customers.
- An electronic record system will be required in the near future.
- We have to establish a better technology replacement plan so all does not need replaced at one time.
- All our systems must be integrated as we must move to paperless systems quickly.

Employees
- Direct Service Professionals will continue to be difficult to find and retain. LIFE*Designs* must remain competitive by offering competitive wages and benefits and by enhancing the professionalism of all staff.
- Implementation of the Affordable Care Act will be an important focus for 2013 and beyond.
- Training requirements may increase for direct service and employment staff.

Mission, Vision, Values

LIFE*Designs*' Mission, Vision and Values statements were formally developed in 2013. The agency had operated as a merged entity effective 1 January 2012, having brought together Christole, Inc., primarily a residential provider, and Options, primarily a supported living and housing provider. The organizations had similar missions in serving persons with disabilities and both board and staff worked hard throughout 2012 to meld the mission, cultures, and activities of the two organizations into a single entity with one basic mission: to provide persons served with support that would eventually lead to their independence.

The mission, vision, and values statements below were discussed by the Board of Directors and finalized at the December 2012 Board meeting. Some of the important themes of the vision is that we expect everyone to be able to live, work and plan in their community and our job is to help the people we support and our communities to make that happen. Our mission reflects our interest in serving people with all types of disabilities: those who may need support as they get older and lower income people who only need housing support. The values are summarized from previous listing with an emphasis on the outcomes of services, our customer relationships, and organizational beliefs. All subsequent materials will utilize these themes.

Mission Vision and Values 2013-2015
Vision… We envision communities that support all people, where each person is valued, and where everyone belongs. **Mission….** LIFEDesigns, Inc partners with people of all ages and all abilities to lead meaningful and active lives. **Our values….** ✓ The goals and expectations of our customers and their families direct our actions. ✓ We design services to achieve independence, employment, and enrich lives. ✓ Every customer, employee and stakeholder deserves dignity and respect. ✓ Creativity and innovation are the keys to our success. ✓ Collaboration is essential to achieving our mission.

Goals and Performance Indicators

Before establishing goals and activities for the next three years, the committee looked at long term outcomes. By focusing on our mission, the committee came up with recommendations for overall goals and related performance measures. They address the questions: What goals should we set to address the critical issues facing us? What

activities must we be about to meet those goals? What are the desired outcomes of our activities? By what methods will we evaluate our success?

Next the committee established long term outcomes that matched the critical issue identified and took advantage of agency strengths and trends in services and supports. The following key strategies were identified to take LIFE*Designs* to 2015.

Leadership	Innovation	Foundations	Excellence
LIFE*Designs is one of the most admired agencies in the industry*	LIFE*Designs employs pioneering strategies to solve problems and reduce barriers*	LIFE*Designs' services lead to independence, employment, and full community participation*	LIFE*Designs has the best employee, systems, and community reputation*

After setting up the long-term or overall goals for the agency, the committee developed a detailed plan with four major goal areas, objectives and related activities and performance indicators for each objective. In this way, the agency will be able to track progress and change planned activities if they are not achieving the benchmarks established. The plan is designed to address four major goal areas that address the critical issues identified through the planning process. The goals and objectives in each of the four major goal areas are included in Attachment C.

Monitoring and Evaluating the Plan

LIFE*Designs* is committed to monitoring its progress toward achieving the goals outlined in the plan and evaluating the effectiveness of the goals at enhancing services and the organization's viability. The Chief Executive Officer will report on progress and the Board of Directors will review that information on a quarterly basis using the performance measures established during the strategic planning process. At least annually, the board will formally review results of planning efforts and determine if goals and strategies are still on track. This review may be more frequent depending on events such as major funding or leadership changes. The Solutions Team, a group of senior leadership, will review the plan quarterly at regularly scheduled meetings. LIFE*Designs* reconvenes a strategic planning group every 3 years to develop a new plan. The next planning process will begin in 2015.

Communicating the Plan

Board   The strategic planning committee made a presentation to the full board on November 2012. Included in the presentation was a description of the process, key findings and rationale for strategic objectives. Board members received copies of all materials and approved the plan as recommended. The Board monitors implementation and progress through quarterly reports provided by the Chief Executive Officer, quarterly review by Executive Committee and annual updates.

<u>Staff</u>   Distribution to staff will begin with the Solutions Team. Each member of the Team has a copy of the goals, objectives, activities, measures and assignments. Services and Operations Team will build the plan and related goals into their respective ongoing reporting systems.

The staff newsletter is the venue for communicating the goals and ongoing progress. This monthly communication informs all staff of the how well the organization is doing on measures established by the planning process. In addition, Leadership Team, a group representing all service networks and administrative staff receive a copy of the complete plan document.

<u>Planning group and respondents</u>   The planning committee receives this final plan document along with an executive summary so that they can share with community members.

<u>Major stakeholders</u>   LIFE*Designs* provides an executive summary of the plan for donors, funders, customers, government leaders and other interested community members. In addition, a shorter version of the final report is put on the website and the complete document is available upon request.

<u>General public</u>   As noted above, LIFE*Designs* places the executive summary of the plan on its website to ensure all are informed about the future of the organization.

Attachment A: Competitor Profile

(available upon request)

Attachment B: Indiana Statistics
Market and Labor Force Statistics *(7/27/2012)*

GENERAL OVERVIEW													
	Monroe	Lawrence	Owen	Greene	Morgan	Brown	Johnson	Orange	Barth.	Jackson	Marion	**Indiana**	U.S.
Population	139,799	46,195	21,499	32,895	69,464	15,099	141,656	19,969	77,870	42,966	911,296	6,516,922	311,591,917
Rank	12	32	68	51	24	81	11	74	19	34	1	16	-
Population Growth	14.40%	0.50%	-0.90%	0.00%	3.30%	1.90%	21.10%	2.80%	7.50%	2.40%	5.00%	0.50%	27.30%
Rank	7	51	7	53	11	63	3	54	24	34	38	31	-
Net Dom. Migration	362	58	-97	-276	110	-113	770	146	320	140	-3,401	-9,059	-
Net Int. Migration	472	3	13	4	31	0	182	6	290	104	2,119	7,175	-
Labor Force	70,592	21,754	10,527	15,475	35,449	7,663	72,965	10,351	39,998	21,543	463,504	3,188,260	243,155,000
Rank	12	34	69	52	23	80	11	70	19	35	1	15	-
Per Capita Income	$30,042	$29,862	$28,994	$30,610	$36,413	$34,582	$35,228	$29,228	$35,335	$30,752	$37,732	$35,550	$41,663
Rank	60	62	73	54	11	20	15	71	14	52	9	41	-
Med. Househld Inc.	$38,137	$40,380	$44,285	$41,103	$55,427	$50,139	$61,629	$37,120	$52,742	$43,980	$43,540	$47,422	$50,740
Rank	85	69	53	67	12	30	6	91	19	32	78	36	-
HS Diploma + (%)	91.1	81	81.9	83.2	85	87.5	90.3	78.7	89.2	84.2	84	86.2	85.60%
Rank	6	82	75	67	48	18	9	87	14	60	61	29	-
BS Degree + (%)	42.7	12.5	8.3	11.1	13.9	21.2	26.2	12.5	26.7	13.8	27.3	22.4	30.40%
Rank	2	68	89	78	56	18	8	68	7	57	6	44	-
Unemploy. Rate	7.1	11.1	10	9.1	8.9	8.4	7.7	9.1	7.4	8.2	9.4	9	8.1
Rank	85	7	28	45	49	62	77	45	80	67	38	18	-
Poverty Rate	24.3	15.2	14.1	14	11.9	13.2	10.5	17.5	12.8	12.7	20.8	15.3	15.7
Rank	1	34	40	41	68	49	77	13	53	57	4	22	-
Largst Emp. Indstry	Hlth/Social	Hlth/Social	Manufact.	Retail	Retail	Accom/Food	Retail	Accom/Food	Manufact.	Manufact.	Hlth/Social	Manufact.	Manufact.
Average Pay	$38,541	$30,526	$47,839	$18,962	$22,262	$13,245	$21,609	$23,127	$64,223	$46,453	$50,240	$52,373	$68,200

Population and Housing Details

POPULATION DISTRIBUTION BY AGE (2011)													
	Monroe	Lawrence	Owen	Greene	Morgan	Brown	Johnson	Orange	Barth.	Jackson	Marion	**Indiana**	**U.S.**
Preschool (0-4)	4.60%	5.8%	4.6	5.9	6.10%	4.6	6.7	5.8	6.60%	6.50%	7.70%	6.6	6.5
School Age (5-17)	11.50%	17.3	15.60%	17.60%	18.5	15.6	19.3	18.50%	18.20%	17.90%	17.50%	17.9	17.3
College Age (18-24)	29.6	7.60%	6	7.5	7.70%	6.00%	8.3	7.70%	8	7.80%	10.20%	10.1	10
Young Adult (25-44)	23.9	23.30%	20.2	23.7	24.40%	20.20%	26.80%	23.20%	26.4	26.10%	29.10%	25.60%	26.5
Older Adult (45-64)	20.10%	29.3	35.60%	29.2	29.80%	35.60%	26.3	28.80%	26.60%	27.2	24.90%	26.7	26.6
Older (65 +)	10.40%	16.8	18	16.10%	13.50%	18	12.50%	16.00%	14.20%	14.40%	10.70%	13.2	13.3
Median Age	27.8	42	42.6	41.6	40.5	47.4	37.1	41	37.1	38.7	33.9	37.1	36.9

POPULATION DISTRIBUTION BY RACE (2011)

	Monroe	Lawrence	Owen	Greene	Morgan	Brown	Johnson	Orange	Barth.	Jackson	Marion	Indiana	U.S.
Am. Ind./Alskn. Nat.	0.30%	0.40%	0.40%	0.30%	0.30%	0.40%	0.30%	0.40%	0.50%	0.30%	0.50%	0.40%	1.20%
Asian Alone	5.60%	0.50%	0.40%	0.30%	0.40%	0.30%	2.10%	0.30%	3.70%	0.90%	2.10%	1.70%	5.00%
Black Alone	3.40%	0.50%	0.50%	0.40%	0.50%	0.60%	1.50%	1.20%	2.20%	0.80%	27.00%	9.40%	13.10%
Hawaiin/Pac. Islndr	0.10%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.10%	0.10%	0.10%	0.10%	0.20%
White Alone	88.30%	97.40%	97.90%	98.10%	97.50%	97.60%	94.70%	97.00%	92.00%	96.80%	67.80%	86.80%	78.10%
Two + Racial Groups	2.30%	1.10%	0.90%	0.80%	1.20%	0.90%	1.40%	1.10%	1.40%	1.10%	2.50%	1.70%	2.30%
Not Hisp/Lat (any)	96.90%	98.70%	98.90%	98.90%	98.70%	98.70%	96.80%	98.90%	93.70%	94.10%	90.40%	93.80%	83.30%
Hisp/Lat (any)	3.10%	1.30%	1.10%	1.10%	1.30%	1.30%	3.20%	1.10%	6.30%	5.90%	9.60%	6.20%	16.70%

HOUSEHOLD DISTRIBUTION (2010)

	Monroe	Lawrence	Owen	Greene	Morgan	Brown	Johnson	Orange	Barth.	Jackson	Marion	Indiana	U.S.
Total Households	46,898	18,535	8,282	13,372	24,437	5,897	42,434	7,621	27,936	16,052	352,164	2,502,154	116716292
Family Households	52.70%	70.90%	74.80%	70.00%	77.90%	75.20%	74.50%	70.10%	71.80%	72.10%	60.60%	66.90%	66.40%
Married w/Children	17.50%	24.00%	25.90%	24.30%	29.40%	24.10%	29.50%	24.90%	25.80%	25.70%	18.40%	19.90%	20.20%
Married w/o Chldrn	24.20%	34.50%	36.40%	33.70%	35.80%	40.70%	32.50%	32.70%	32.80%	32.40%	22.80%	29.70%	28.20%
Single Parents	6.70%	7.40%	7.70%	7.50%	7.60%	5.80%	7.90%	7.50%	8.10%	8.00%	11.80%	10.00%	9.60%
Other	4.20%	5.00%	4.80%	4.60%	5.10%	4.70%	4.60%	4.90%	5.10%	6.00%	7.60%	7.30%	8.50%
Non-Fam. Houshlds	47.30%	29.10%	25.20%	30.00%	22.10%	24.80%	25.50%	29.90%	28.20%	27.90%	39.40%	33.10%	33.60%
Living Alone	32.40%	25.50%	21.30%	26.50%	18.40%	20.60%	21.20%	26.20%	24.00%	23.50%	31.80%	26.90%	26.70%
Avg Household Size	2.27	2.44	2.6	2.44	2.7	2.51	2.63	2.49	2.52	2.54	2.39	2.2	2.48
Avg Fam. Houshld Sz	2.87	2.91	3	2.92	3.06	2.89	3.06	3	2.98	2.98	3.03	2.5	3

Employment Details

COMMUTING PATTERNS (2010)												**Indiana**	U.S.
	Monroe	Lawrence	Owen	Greene	Morgan	Brown	Johnson	Orange	Barth.	Jackson	Marion	**Indiana**	U.S.
Largest Inflow	Lawrence	Orange	Monroe	Sullivan	Marion	Monroe	Marion	Lawrence	Jennings	Jennings	Hamilton	-	-
Largest Outflow	Marion	Monroe	Monroe	Monroe	Marion	Barth.	Marion	Lawrence	Marion	Barth.	Hamilton	-	-

BLS/BEA EMPLOYMENT STATS												**Indiana**	U.S.
	Monroe	Lawrence	Owen	Greene	Morgan	Brown	Johnson	Orange	Barth.	Jackson	Marion	**Indiana**	U.S.
Jobs	61,296	12,546	4,680	6,568	13,915	3,024	42,795	7,248	43,859	18,543	549,684	2,802,700	-
5-Year Change	-1,150	-910	-307	-902	-1225	-162	-280	-467	151	-1724	-30,440	21,805	-
5-Year Change (%)	-1.57%	-8.02%	-6.06%	-12.07%	-6.11%	-6.99%	-0.77%	-6.05%	0.35%	-8.51%	-5.25%	0.80%	-
% of US Avg. Wage	73.70%	72.50%	70.80%	65.20%	78.50%	46.40%	67.20%	83.90%	84.70%	80.80%	92.30%	81.70%	-

NOTES:

Educational Attainment data includes only persons over the age of 25.

Bureau of Developmental Disabilities Services Details

WAIVER DATA											
	Monroe	Lawrence	Owen	Greene	Morgan	Brown	Johnson	Orange	Barth.	Jackson	Marion
Total BDDS Wvrs active	279	86	36	60	92	17	231	46	218	97	1672
# of people on waitlist	381	150	67	133	151	35	411	87	320	141	2949

GROUP HOME DATA											
	Monroe	Lawrence	Owen	Greene	Morgan	Brown	Johnson	Orange	Barth.	Jackson	Marion
Number of Providers	14	8	2	2	2	2	6	3	5	4	58
Capacity	87	56	14	14	16	12	48	22	30	23	420

Data taken from FSSA website: http://www.in.gov/fssa/ddrs/3347.htm - on 7/27/12 by Janessa Gerber

Attachment C: LIFEDesigns SPG Summary

LIFE*Designs,* Inc Strategic Plan
2013-2015

Leadership: LIFE*Designs* is one of the most admired agencies in the industry

Goal	Activities	Outcomes	Evaluation Method
We have influence at the state and federal level on the services and supports that individuals receive.	• Communicate broadly to staff and customers (newsletters and social media) about opportunities to engage. • Support APSE, ANCOR, and other national organizations • Plan and conduct forums either in collaboration with others or alone • Teach problem solving and creativity to leadership team and practice • Investigate strategies that truly engages customers and their families or significant others in policy development.	• Development of new services or implementation of new strategies within current services • Customer engagement in providing input to LIFE*Designs* and state policy makers	• Number and frequency of LIFE*Designs* staff and customers that participate in state and federal initiatives • Customer satisfaction surveys • Community Leader Surveys
The general public is informed and supportive of the overall services that we provide.	• Improve social media practices • Make sure there is always an educational component in all events • invite all in geographic area to events utilizing community outlets for public • Plan and conduct events in Bartholomew • Improve and update communication plan as part of overall development	• Increased interactions from the general public in LIFE*Designs* events • Increased stakeholder assessment of our outreach in the community • Increased giving	• Number of donors and total amount of giving • Community Leader Surveys
Other community services are inclusive and provide our customers with access and choices	• Identify problem areas noted in community surveys conducted for strategic plan and design steps to address • Partner with other organizations to	• The organizations we partner with are open to those we support • Our customers report greater access to services	• Community Leader Surveys • Amount of giving • Number and type of community organizations where LIFE*Designs* is

Goal	Activities	Outcomes	Evaluation Method
	• ensure the inclusion of individuals • Participate in and support community initiatives in all areas to ensure inclusing of disability issues • Sponsor community events that will promote LIFE*Designs* and our mission	• Community and customer surveys show better understanding of our mission • Increased giving	represented
Staff and customers are considered leaders in local and state leadership initiatives.	• Establish role of leadership team in engaging customers and staff in community initiatives and forums • Investigate and disseminate information re key "stuff" to staff and customers • Provide incentives for participation and opportunity to share information with other customers and staff • Support customers and staff to participate in Leadership initiatives in their respective communities. • Develop a Leadership curriculum for customers to be implemented in CEO, etc.	• Increased networks and greater community presence • Participation in key program and policy development at federal, state and local level	• Number of staff and customer with participation or membership in local and state initiatives • Community survey indicates presence of *LIFEDesigns* representatives at important community events and forums staff

Innovation: LIFE*Designs* employs pioneering strategies to solve problems and reduce barriers

Goal	Activities	Outcomes	Evaluation Method
We employ leading edge services to support people toward independence.	• Investigate available technology to increase customer independence • Evaluate which individuals would most benefit from a technological device, develop methods to fund devices, and implement • Increase the number of people receiving electronic monitoring services • Enhance staff training in behavioral support strategies	• Increased customer base • Greater customer independence	• Number of sites with web access • Number of individuals using devices increases by 75% • Number receiving electronic monitoring services • Customer outcomes

We develop services or methods to support populations currently underserved or unserved and to meet changing state focus.	• Increase services to families by integrating staff schedules to ensure needs are met • Benchmark family services and how provided in other parts of state • Determine feasibility of Applied Behavioral Analysis (ABA) Services • Implement family caregiving trainings • Devise and implement a plan with the state to transition children's homes to Waiver	• Access for families • Families receive support for 95% of approved services • Seamless transition for children with minimal impact on their services.	• Family support utilization • Numbers of families supported • Customer survey
LIFE*Designs* has model technology so that stakeholders have the information they need when they need it in order to do their job.	• Develop facility with computer systems to document and streamline services • Create matching services so customers with limited supports can share hours • Implement the customer record system and resolve access issues • Develop and implement an integrated quality assurance program and begin providing scorecards internally • Conduct six training sessions for staff on the use of technology to improve their productivity	• Increased staff competency/knowledge in using technology applications • Fewer incidences of business interruption due to technology failures	• Customer and Employee surveys
LIFE*Designs* proactively researches, evaluates and implements technology supports and systems.	• Evaluate current systems and develop records storage systems for greater access and security • Work with our partners in the industry such as SIPN, INARF & other local resources to research and evaluate what technology is best for the organization. • Set up audit system between billing and progress notes	• Complete and thoughtful plans that incorporate the latest technology	• Employee surveys

	• Identify, tag and inventory all LIFE*Designs* property • Develop a ticketing system for facility and computer management		

Foundations: LIFE*Designs*' services lead to independence, employment, and full community participation

Goal	Activities	Outcomes	Evaluation Method
People we serve who are of working age are meaningfully employed.	• Assess current customers to identify those who are not currently employed and develop a plan for employment • Develop relationship with Bartholomew Co. VR • Retrain all supervisors on employment support and holistic support • Develop CEO employment curriculum • Regain Employment Network status • Develop structure and budget for Ticket to Work program	• Increase in number of people who are employed to 40%	• Percent of working age adults with employment

Core services expand to underserved areas and populations (people who don't meet level of care and seniors).	• Evaluate services administrative structure to maximize effectiveness and efficiency.
	  • Benchmark other agencies in supported living and family services
	  • Design services structure to prepare for growth
	• Use Columbus as a base and expand supported living and employment in northeastern counties
	• Assess viability of Home Health services
	• Do market research and develop a
		• Increased net growth by 10%
		• People receive services include those underrepresented groups
			• Numbers served by program and geography
			• Customer demographics

	business plan for providing services to seniors including an ongoing marketing approach.		
LIFE*Designs* Housing services promotes the development and availability of accessible affordable housing.	• Become CHDO in counties of interest to obtain access to more funding streams for housing and greater technical support • Develop affordable housing subcommittee within SCHN to look for development opportunities within catchment area • Increase number of affordable housing units available • Referral to community services through established relationships with other service providers • Explore establishment of tenant council • Explore use of various technologies to diversify or increase accessible housing options • Complete work on the Crawford apartments and bring tenants and services online	• Tenants report increased satisfaction • Increased availability of affordable housing in catchment area • Low vacancy/full occupancy rate for our housing • Greater access to services for tenants • There is a variety of accessible housing options for people with disabilities	• Tenant surveys • Assessment of housing stock • Occupancy rates in each housing project • Number of accessible unites • Tenant demographics
Customers report high satisfaction with their services.	• Administer customer/stakeholder survey in multiple formats at different times throughout the year to ensure high response rate • Provide forums to promote ongoing dialogue/feedback between LIFE*Designs* and customers/families. • Develop a specific plan for concerns identified in customer survey process	• Customer satisfaction is above 95% • Greater customer retention	• Customer satisfaction • Numbers exiting and why • Number of complaints

	- Provide a positive action plan for concerns noted in survey process in specific networks - Provide customer service training to all supervisory staff

Excellence: LIFE*Designs* has the best employees, systems, and Community reputation

Goal	Activities	Outcomes	Evaluation Method
LIFE*Designs* expects high performance from staff and provides tools for achievement.	- Develop and implement meaningful recognition programs - Review the employee development review process and ensure it is being utilized consistently - Work with SIPN on an online orientation process and implement - Establish a mandatory supervisor training and annual renewal process - Offer a variety of topics and training opportunities for staff to upgrade skills throughout the year - Establish an aggressive Health and Safety program to reduce worker injuries	- Greater staff tenure - Better performance review results - Lower accidents	- Staff turnover and tenure - Employee Surveys
LIFE*Designs* is recognized as the employer of choice.	- Enhance wages and entry for direct services staff and prepare for needed adjustments in 2014 to administrative salaries - Develop and utilize an ideal employee profile for recruitment - Identify employee benefits that are competitive, compliant and affordable - Develop systems and prepare for full implementation of the affordable care act in 2014	- Adequate number of applicants to fill openings - Stability in workforce - Higher staff morale	- Staff vacancies - Employee surveys

	• Implement recruitment plan targeting underrepresented populations • Review performance review process to ensure it is consistent with requirements and educate supervisors on implementation		

We have systems to meet positive financial results while achieving our mission.	• Seek additional ways to reduce administrative costs and enhance systems such as working with SIPN to collaborate in IT, HR and Fiscal services
	• Negotiate purchase of the Winslow office or pursue other options to stabilize our housing costs
	• Benchmark SIPN agency's service structure and evaluate changes to improve productivity, quality, and finances.
	• Develop systems for private insurance depending on results of ABA feasibility study
	• Significantly reduce manual processes and further automate information systems to produce better reporting
	   • Integrate Paylocity, Accel, and HP
	   • Streamline forms
	   • Investigate ways to go paperless in other areas
	• Ensure systems are set up for growth and change
	   • Learn more about new ACCEL system
	   • Set up systems needed for
		• A positive bottom line in all programs/services
		• Everyone is on the same timekeeping system
		• Integrated and automated payroll and billing systems
		• Fiscal forms are updated to reflect LIFE*Designs*' name and all staff are using them
		• Consistency in financial recordkeeping throughout the agency
		• Fewer adjustments to payroll and billing
		• Staff are trained to enter time and approve time correctly
		• Audits indicate excellence in fiscal operations
			• Financial reports
			• Quarterly activity reports
			• Audits
			• Employee surveys

	housing projects coming online
	• Attend SIPN and INARF meetings and trainings
	• Cross training staff
	• Ensure fiscal compliance
	  • Audit sample of customer funds quarterly
	  • Prepare for audits		

We are a model of stewarding community investments.	• Develop and implement a comprehensive development plan including a donor landscape to target fundraising efforts • Align marketing strategies with development plan • Investigate new strategies for getting to our target audience including internet advertising • Continue to build relationships with current and potential corporate and private foundations • Establish priorities for grant development and seek grants accordingly	• Increased giving overall • Grant success rate is high • A number of corporate donors is secured	• Amount of donations and number of donors • Grant success rate • Corporate sponsors • Donor evaluations