

PERSON COUNTY GROUP HOMES, INC.

“Dedicated to enhancing lives while promoting independence”

STRATEGIC PLAN REVISION

Implementation: February/March 2020

1. Executive Summary

The Person County Group Homes (PCGH) Interim Executive Director and Management Team worked together to formulate a strategic plan that focuses on objectives that will affect the future of the company and will strive to ensure our mission. The Strategic Plan was developed with the consideration of the current environment of changes in the NC Medicaid system upon which our agency almost completely depends upon for payment of services. The Strategic Plan focuses on seven specific objectives that PCGH will work toward during the 2019 – 2023 fiscal years.

It is the joint objective of the PCGH Board of Directors, the Interim Director and the Management Team to not only survive as an agency during the planned Medicaid changes, but to expand services, better meet the needs of individuals with disabilities and plan for the future in considering both business planning and financial stability. It is our objective to become the provider of choice within our service area and be the employer of choice for those who serve those individuals.

Summary of the Plan

The strategic direction and goals included in this plan are a result of conversations between consumers served, community stakeholders, members of the Management Team and the Interim Director with input from the Board of Directors. The goals and objectives of the next 3 years are based on the Board, consumer, and stakeholder’s aspiration for the agency and each manager’s visions and goals. This plan was revised in February of 2020 and March of 2020. A goal was added and others were modified due to the current situation regarding a pandemic which was declared a threat to public health. As a provider of health care services, PCGH Management Team deemed the Strategic Plan goals and priorities needed to be modified. The Strategic Plan focuses on the following initiatives:

- **Maximize Services:** PCGH will emphasize enhancing the quality and effectiveness of our services by improving our Performance Management System. PCGH will investigate alternative service provisions that could be offered by the agency.

- **Increase and Sustain Community Partner Relationships and Create Awareness:** PCGH will create more awareness of our services and encourage stakeholders in becoming partners in our mission in order to create a stronger relationship between clients and their community.
- **Technological Advances:** PCGH will continue to investigate technological advances that will improve efficiency and increase security of protected information. PCGH will also look at using technology in making services more accessible.
- **Improve Financial Standing:** PCGH will strengthen its financial position by evaluating spending practices, debt load and possible options for revenues. PCGH strives to ensure prudent and effective financial management and improving and protecting our physical infrastructure.
- **Development and Support of Agency Staff:** PCGH will evaluate policies and benefits which affect staff throughout the agency. PCGH will continue to investigate ways to attract employees and support the staff already employed with the agency.
- **Increase Board Engagement:** The Board of Director will be actively engaged in the agency's activities and vigorously search out opportunities to be ambassadors and advocates for PCGH.
- **Maintaining Health and Safety of Those Served:** This goal was added to the Strategic Plan in February 2020 and priorities continued to be developed in March of 2020. PCGH, Inc. will make systematic changes as current situations dictate to maximize health and safety of all clients and staff.

2. Mission Statement and Core Values:

Mission Statement:

“Dedicated to enhancing lives while promoting independence”

Core Values:

- **Accountability:** Accepting the responsibility to set and obtain measurable goals
- **Mutual Respect:** Recognizing the value of each individual.
- **Person Centered Philosophy:** Creating opportunities to participate in one's treatment, explore choices and encourage achievements in their community.
- **Dedicated to excellence:** Always striving for best practices through self-assessment and revision in planning and structuring.

3. Summary of the Strategic Planning Process:

Meetings were held during the last week of August 2019 in order to review our agency's latest CARF review and the things that had been pointed out by the survey team as our strengths and weaknesses. As we went over both strengths and weaknesses with agency

Management Staff and staff within each facility or service area, long term goals were established, and business development was discussed. During an agency wide gathering that included Board members, the retiring Executive Director, the Interim Director, clients, guardians/family members of the clients and community stakeholders, the goals for the agency and continuation of successful service provision was discussed. Attendees were given the opportunity to give suggestions and input regarding the future of the agency and what goals would help the agency remain a stable provider of services during the transition after retirement of the Executive Director who had been in place for 35 years. This transition brought with it concern from the clients and stakeholders regarding if this would bring about a change in what they had relied on and felt comfortable with. The opportunity to talk with the new Interim Director and the out-going director about plans for the future helped to ensure the clients and stakeholders of our continued dedication in providing excellent care for those with disabilities in our community. The Strategic Plan was presented to the Board of Directors for review and suggestions for revision after Management Staff finished its development.

4. Strategic Priorities

- 1) Maximize Services** – PCGH, Inc. will emphasize enhancing the quality and effectiveness of our services and ensure all services are fully reimbursed.
 - **Revamp and revise, as needed, our Performance Management System to provide accurate, real-time measures of effectiveness of services provided and considering all current environmental and funding factors.**

- 2) Increase and Sustain Community Partner Relationships and Create Awareness** – PCGH, Inc. will search for, develop, and sustain partnerships with community stakeholders to increase agency and client involvement in their community.
 - Build partnerships with agencies and community groups in order to increase awareness and allow for more involvement in the community for our clients.
 - Increase donations and support from community groups in our county.

- 3) Technological Advances** - PCGH, Inc. will investigate technological advances that will improve efficiency, allow for continued move toward electronic healthcare records and provide an avenue for community involvement and remote healthcare.
 - **Install internet and purchase equipment for all facility locations.**
 - **Investigate and implement electronic payroll system.**
 - **Investigate and implement electronic onboarding for Human Resources.**
 - **Investigate and implement Electronic Health Care Records.**

- 4) Improve Financial Standing** - PCGH Inc. will strengthen its financial position by reducing debt-load, investigating funding sources, ensuring prudent and effective financial management and refurbishment of property.
- **Pay off mortgages on any properties and vehicle loans.**
 - **Investigate and apply for grants and available COVID funding/tax credits.**
 - **Increase financial reports to monthly and budget analysis to quarterly.**
 - **Identify needed property improvements and begin renovation on most critical aspects identified.**
- 5) Development and Support of Agency Staff** – PCGH, Inc. will look at effective means of communication, support and training during circumstances which do not promote interagency trainings and activities. (Goal modified in March 2020)
- **Investigate a platform for virtual trainings.**
 - **Support, train and keep staff updated through several different channels of communication.**
 - **Show support of staff financially through bonuses.**
- 6) Increase Board Engagement** – PCGH, Inc. will actively engage the Board of Directors in agency activities, promote the Board as ambassadors and advocates for the agency and involve the Board in the transition of the agency to meet future needs.
- **Board members will be involved in assessment of properties, the property's benefits for the agency and future plans for use.**
 - **Board members will be involved in the negotiations regarding insurance coverage and financial terms.**
 - **Board members will attend activities that will promote the mission of the agency and community engagement.**
- 7) Maintaining Health and Safety of Those Served** – PCGH, Inc. will make systematic changes as current situations dictate to maximize health and safety of all clients and staff. A shift in our focus occurred in February of 2020 due to an unprecedented global pandemic which threatened the health and safety of our clients and our community at large. A great deal of coordination and effort is going into the education and prevention of COVID-19 within our system. (This goal was added to the Strategic Plan in February of 2020)

- **Implement or revise policies and procedures as needed in order to address current public health threat.**
- **Emergency Response Plan is revised and amended as needed to address current public health threat.**
- **Ensure retention of needed supplies/medications as situations and supplies fluctuate.**
- **Ensure continued training of staff and clients regarding evolving situations concerning any public health threat.**

5. Financial Position

At the time of the development of this plan, the agency lacks savings in order to deal with unforeseen circumstances and found it difficult to manage months with three payrolls. Reliance completely on Medicaid service money found the agency not able to deal with the constant need for repairs and updates. PCGH, however, had many holdings within the community. These assets had not been evaluated for value or maximum use in order to help financially instead of being a burden or cost to the agency. PCGH was able to provide services consistently and fulfill its mission but has incurred long and short-term debt due to service payments not being increased by NC Medicaid in almost 10 years.

In the next 5 years, thorough financial planning will be needed in order to pay down debt and continue services at the current level. Each property should be evaluated to ensure maximum benefit for the agency or be liquidated. Properties should be assessed for repairs and updates and these prioritized and budgeted for. Within 5 years, short-term debt should be paid off and all long-term debt analyzed for best loan terms. Other opportunities for financial growth should be investigated that are apart from the NC Medicaid system.

Resources should be allocated for savings. An immediate thrust toward savings is necessary in order to ensure amounts that would cover several payrolls should there be unforeseen circumstances, months with three payrolls or recoupment of payments. This will also ensure the continued progress of technological advances, property upkeep and much needed raises for our staff.

6. Review Process

The PCGH Management team will review, assess and update the Strategic Plan annually or at such a time when situations change that require a review and change of priorities. The Management team will seek input from clients and stakeholders to be incorporated into changes in the plan at least annually. The Management Team will review any changes with

the Board of Directors when reviewing the Performance Management/Improvement Annual review.

This plan was reviewed and revised in February and March of 2020 by the Management Team. This revision was implemented to address the shift in focus of our agency in order to meet emergent needs related to health and safety which threatened public safety. As such, the agency was required to change focus and current business practices and priorities to meet current need.