

# Strategic Plan Progress Report

1<sup>st</sup> Quarter 2026



## FINANCIAL

| Initiative                        | Actions Completed  |
|-----------------------------------|--|
| Manage allocation of waivers      | <ul style="list-style-type: none"> <li>Completed CY26 Waiver Plan.</li> <li>Collaborated on waiver waiting list and upcoming needs.</li> <li>Scheduled to meet at least monthly to monitor waiver waiting list.</li> <li>Reviewed monthly MEORC account statements to monitor local funds.</li> <li>Monitored utilization vs authorization when completing all annual PAWS.</li> <li>Utilized SRRC for 3 requests/approvals and completed 1 Level 1 waiver enrollment.</li> <li>Ensured Medicaid payor sequencing is followed for service requests.</li> </ul> |
| Explore new funding opportunities | <ul style="list-style-type: none"> <li>Created Funding Opportunity Tracker.</li> <li>Applied for Strong Families, Safe Communities grant for creation of Parent Mentor position to be shared with FCFC, BHC, and NL Schools.</li> </ul>  |
| Assess operational costs          | <ul style="list-style-type: none"> <li>[1 staff] Completed Lean White and Yellow belt training.</li> <li>Developed new process for obtaining new funding/grants.</li> <li>Initiated Postage Ad-hoc committee to look at reducing postage costs.</li> </ul>   |

## CUSTOMER

| Initiative   | Actions Completed  |
|--|--|
| Strengthen relationships with providers and partners | <ul style="list-style-type: none"> <li>Completed annual MUI reporting communication with 100% of active providers.</li> <li>Offered <i>New Superintendent Introduction Meeting</i> to all local providers. Met with those that responded: 4 ADS/NMT providers and 2 HPC providers.</li> <li>Joined Perry County Common Pleas Court Specialized Docket Mental Health Court Advisory Committee and attended first meeting to create another avenue to build relationships with behavioral health service providers and partners.</li> </ul>  |
| Expand community employment                          | <ul style="list-style-type: none"> <li>32 people employed</li> <li>14 people volunteering</li> <li>33 Business Partners</li> </ul>   |
| Grow self-advocacy                                   | <ul style="list-style-type: none"> <li>Revamped and enhanced entire ALAV program and started 2 groups and a total of 7 participants.</li> <li>[1 participant] Volunteered and worked <i>Handicapable</i> at Miller.</li> <li>Filled the last position on the 7-member PPEC committee.</li> <li>[4 PPEC members Participated in the Proclamation Signing with Perry County Commissioners.</li> <li>Increased PP first quarter participation (99 people attended meetings, 7 PCBDD staff, 1 natural support, and 4 HPC staff attended).</li> <li>Held <i>Handicapable</i> at Sheridan for the first time with 160 6<sup>th</sup> grade students participating.</li> <li>Held <i>Handicapable</i> at Miller with 320 students ranging from Kindergarten to 6<sup>th</sup> grade.</li> </ul> |

|  |  |
|--|--|
| Improve community education                        | <ul style="list-style-type: none"> <li>Implemented and successfully completed March Awareness activities.</li> <li>Attended 2 Career Fairs and connected with over 60 people/students.</li> <li>Connected with <i>Destination Shawnee Business Social</i> to present in June about PCBDD and raise awareness about our programs and services.</li> <li>Promoted the Blue Envelope Program at 3 events and distributed over 20 to community members.</li> </ul> |
| Improve approach to obtain feedback from customers | <ul style="list-style-type: none"> <li>Long-term initiative, progress has not been initiated.</li> </ul>   |

## INTERNAL PROCESSES

| Initiative  | Actions Completed  |
|---|--|
| Improve product and service offerings             | <ul style="list-style-type: none"> <li>Held meetings with Mt. Aloysius and ViaQuest to begin discussions around 1-residential services for people with intensive behavioral needs and 2-to further discussion [w/MA] around additional service needs they may be able to support (transportation, behavior support collaboration, and respite).</li> </ul> |
| Improve internal communication and feedback loops | <ul style="list-style-type: none"> <li>Developed and deployed Board Meeting follow up emails to All Staff cascading important information on motion approvals, etc.</li> <li>Increased frequency of Supervisor Meetings from quarterly to monthly to promote more effective, systematic, and consistent communication.</li> </ul>                          |

## LEARNING AND GROWTH

| Initiative                                | Actions Completed   |
|---|---|
| Define and promote organizational culture | <ul style="list-style-type: none"> <li>Implemented <i>Culture</i> as permanent QSC topic.</li> <li>Devoted entire session to <i>Culture</i> and deployed the formal PCBDD definition to all-staff at the Q1 QSC.</li> <li>Developed written leadership philosophy for PCBDD and shared approach and expectations at first all-staff QSC with 95% attendance.</li> <li>Refined and deployed new Career Development process.</li> </ul> |
| Promote HIPAA and IT compliance           | <ul style="list-style-type: none"> <li>Completed Annual Cybersecurity and HIPAA Trainings.</li> <li>[100% of registered staff] Completed CoPilot online training where PCBDD will receive TechCred reimbursement for cost of training.</li> <li>Implemented biannual requirement change of O365 password and received 100% compliance from FT/PT staff.</li> </ul>  |
| Integrate information management system   | <ul style="list-style-type: none"> <li>Defined and started the work of how PCBDD manages and stores information.</li> <li>Decreased Microsoft TEAMS from 179 to 70.</li> <li>Completed two new information management processes and initiated three in progress.</li> </ul>   |
| Improve employee satisfaction             | <ul style="list-style-type: none"> <li>Long-term initiative, progress has not been initiated.</li> </ul>  |

## Conclusions / Recommendations

PCBDD started Quarter 1 strong with a streamlined Strategic Planning Team who is laser-focused on consistent and systematic efforts to accomplish our strategic objectives. The team meets monthly and is rigorously developing and updating plans with an approach that is aligned more, now than ever, to our mission, vision, values, core competencies, and the Baldrige Framework.

## Strategy Map

Updated 3.12.26

| Vision   | Community Without Barriers                               |   |  |   |
|--|--|---|--|---|
| Mission  | Making connections to promote abilities and enrich lives |   |  |   |
| Goals  | Objectives   | Initiatives   | Measures   | Targets   |
| <b>Financial</b><br>Fiscal<br>Responsibility   | Increase Revenue   | <ul style="list-style-type: none"> <li>Manage allocation of waivers</li> <li>Explore new funding opportunities</li> </ul> | <ul style="list-style-type: none"> <li>Waitlist meetings and updates</li> <li>Waiver plan</li> <li>New funding opportunities pursued</li> <li>New funding acquired</li> </ul>    | <ul style="list-style-type: none"> <li>Meet monthly</li> <li>Complete annual waiver plan</li> <li>Pursue three or more funding opportunities (avg. one per year)</li> <li>Acquire new funding from at least one source</li> </ul>   |
|  | Maximize Funding   | <ul style="list-style-type: none"> <li>Assess operational costs</li> </ul>  | <ul style="list-style-type: none"> <li>Program and service ROI</li> <li>Workforce productivity and efficiency</li> <li>Cost per person served</li> </ul>                         | <ul style="list-style-type: none"> <li>Establish benchmark data for programs and services</li> <li>100% of workforce engaged in position alignment</li> <li>Establish benchmark for non-SSA TCM</li> <li>Maximize TCM productivity for 50% of SSAs to achieve 60% target</li> <li>Establish ADLI for key processes</li> <li>LEAN White Belt Training for 100% of workforce</li> </ul> |
| <b>Customer</b><br>Exceed<br>Customer<br>Expectations  | Strengthen Customer Relationship                         | <ul style="list-style-type: none"> <li>Strengthen relationships with providers and partners</li> </ul>                    | <ul style="list-style-type: none"> <li>Voice of the Provider Process</li> <li>Relationships with Mental Health &amp; Providers</li> </ul>  | <ul style="list-style-type: none"> <li>Connect with 100% of Perry County providers</li> <li>Connect with 100% of Mental Health providers</li> <li>Achieve rating of 4 for customer satisfaction</li> </ul>  |
|  |  | <ul style="list-style-type: none"> <li>Improve approach to obtain feedback from customers</li> </ul>                      | <ul style="list-style-type: none"> <li>Customer Satisfaction Survey</li> </ul>   | <ul style="list-style-type: none"> <li>Fully implement the CSS process</li> <li>Achieve 60 responses annually</li> </ul>  |
|  |  | <ul style="list-style-type: none"> <li>Expand community employment</li> </ul>   | <ul style="list-style-type: none"> <li>Number of people employed</li> <li>Number of people volunteering</li> <li>Number of businesses who employ a person with DD</li> </ul>     | <ul style="list-style-type: none"> <li>Increase 5% annually</li> <li>Increase the number of people volunteering annually</li> <li>Add one new business as an employer of people with DD</li> </ul>  |
|  |  | <ul style="list-style-type: none"> <li>Grow self-advocacy</li> </ul>  | <ul style="list-style-type: none"> <li>Community Service Projects</li> <li>PP Tracking</li> </ul>  | <ul style="list-style-type: none"> <li>Increase attendance by 5%</li> <li>2 people with DD successfully complete ALA-V</li> </ul>   |
|  |  | <ul style="list-style-type: none"> <li>Improve community education</li> </ul>   | <ul style="list-style-type: none"> <li>Number of community events</li> <li>Social reach, including open rate, click rate, views, engagements</li> <li>Referral source</li> </ul> | <ul style="list-style-type: none"> <li>Identify ROI for current events</li> <li>Identify 3 new methods to connect with the community</li> <li>Increase EI Referrals</li> <li>Connect with partners and collaborators annually</li> </ul>  |
| <b>Internal Process</b><br>Improve<br>Efficiency &<br>Effectiveness  | Enhance Operations                                       | <ul style="list-style-type: none"> <li>Assess and improve product and service offerings</li> </ul>                        | <ul style="list-style-type: none"> <li>Program and service ROI (tied to 'assess operational costs')</li> </ul>   | <ul style="list-style-type: none"> <li>Establish benchmark data for programs and services</li> </ul>  |
|  |  | <ul style="list-style-type: none"> <li>Improve internal communication and feedback loops</li> </ul>                       | <ul style="list-style-type: none"> <li>Internal communication and feedback loops</li> <li>Culture Survey</li> </ul>  | <ul style="list-style-type: none"> <li>Develop and deploy new communications process</li> <li>Achieve rating of 4 for communication between staff and SLT</li> </ul>  |
| <b>Learning and Growth</b><br>Improve<br>Organizational<br>Culture   | Strengthen Workforce                                     | <ul style="list-style-type: none"> <li>Define and promote organizational culture</li> </ul>                               | <ul style="list-style-type: none"> <li>Culture Survey</li> <li>Succession Transition process created and implemented</li> <li>Succession Plan</li> </ul>                         | <ul style="list-style-type: none"> <li>Achieve average rating of 4</li> <li>Deploy Info Mgt Process across departments</li> <li>Succession transition process used for 100% of upcoming retirements or other known transitions</li> <li>Refine and integrate Succession Planning process</li> </ul>   |
|  |  | <ul style="list-style-type: none"> <li>Promote HIPAA and IT Compliance</li> </ul>   | <ul style="list-style-type: none"> <li>Tech Talk Sessions &amp; Tech Tuesdays</li> <li>PII System Scores</li> </ul>  | <ul style="list-style-type: none"> <li>100% Workforce has minimum ESS Score of 630</li> <li>IT Specialist provides minimum of 4 specialized IT trainings annually</li> </ul>  |
|  | Organize & Secure Data                                   | <ul style="list-style-type: none"> <li>Integrate Information Management System</li> </ul>                                 | <ul style="list-style-type: none"> <li>Information Management Process</li> </ul>   | <ul style="list-style-type: none"> <li>Develop and deploy new process</li> <li>Add new process to onboarding</li> </ul>   |
|  |  | <ul style="list-style-type: none"> <li>Improve Employee Satisfaction</li> </ul>   | <ul style="list-style-type: none"> <li>Culture Survey</li> </ul>   | <ul style="list-style-type: none"> <li>Achieve average rating of 4</li> </ul>   |
| <b>Values: Putting People First, Listening, Making Things Easier, Growing and Learning, Working Together, Promoting Creativity</b> |  |   |  |   |