

Service Coordination, Inc.

Strategic Plan 2017-2019



**Board Approved
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Strategic Plan 2017-2019**

Table of Contents

EXECUTIVE SUMMARY2

SECTION I: ORGANIZATION IDENTITY.....4

MISSION STATEMENT 4

2026 VISION..... 4

CORE OPERATING VALUES 4

CORE COMPETENCIES.....5

THEORY OF ACTION 5

PRIMARY CUSTOMERS AND SUPPORTING PARTNERS.....6

SECTION II: STRATEGIC DIRECTION 2017-2019.....7

STRATEGIC DIRECTION & RESULTS 2017-20197

GOALS & OBJECTIVES 2017-2019..... 7

SECTION III. STRATEGIC PLANNING IMPLEMENTATION8

ACKNOWLEDGEMENTS9

EXECUTIVE SUMMARY

This executive summary presents a brief overview of the key elements in Service Coordination's strategic plan 2017-2019.

MISSION STATEMENT

Service Coordination provides quality case management services by helping people understand what their choices are and connecting them to resources in their communities in ways that respect their dignity and rights.

2026 VISION

People experience the quality of life they choose. They are connected to an array of quality supports and services that are tailored to each of their unique wants and needs. People are valued in and by their communities.

STRATEGIC DIRECTION AND RESULTS FY 2017-2019

Over the next three years, Service Coordination will continue to provide high quality case management services. We will continue to strengthen our role as a leader in the field by enhancing relationships with all customers. We will do this through navigational expertise, and by collaborating for improvements across various systems. Service Coordination seeks to grow by expanding our services both in and outside of Maryland by further investing in our organizational capacity with diversified resources.

Service Coordination will pursue this direction by accomplishing the following goals in areas of Quality Customer Services, Employee Development and Organizational Development.

GOALS FY 2017-2019*

QUALITY CUSTOMER SERVICES:

Service Coordination is a recognized leader of person-centered quality services by enhancing relationships with people we support, connecting them to valued resources of their choice, and collaborating with other primary and supporting partners.

EMPLOYEE DEVELOPMENT:

Service Coordination is an employer of choice by attracting, retaining, and developing an engaged workforce. We do this utilizing a positive strength-based approach.

ORGANIZATIONAL DEVELOPMENT:

Service Coordination has diverse, sustainable resources that strengthen the organization and the services it provides.

*SCI operates on a fiscal period that begins July 1 and ends on June 30 of the following year.

DETAILED STRATEGIC PLAN 2017-2019

INTRODUCTION

Our first strategic plan for the organization was developed in 2008 as a means to advance a three-year Strategic Direction. At the conclusion of each interval, it provides us the opportunity to review and update the plan which continues to evolve our organization. Towards this end, we convened a Strategic Planning Taskforce to help in the review and update of the plan including our mission and 10-year vision statement.

This detailed strategic plan is organized in three sections:

- **Section I** outlines the organizational identity of Service Coordination. An organization's understanding of its identity is the anchor from which all work flows, including its strategic plan.¹
- **Section II** outlines the strategic direction, goals, and objectives that will guide our work 2017-2019.
- **Section III** describes agreements between the Board and staff for using the strategic plan as a guiding organizational framework and briefly describes the 2017 strategic planning process.

¹Organization identity language and concepts are intended for use by Service Coordination in many ways, including public information materials, the design of programs, services, and day-to-day operations.

SECTION I: ORGANIZATION IDENTITY

MISSION STATEMENT

Service Coordination provides quality case management services by helping people understand what their choices are and connecting them to resources in their communities in ways that respect their dignity and rights.

MEANING BEHIND THE MISSION

Choices, Connections and Communities: We welcome all people who can benefit from our services. We help people understand options in a dignified and respectful way. We provide quality information and helpful options that can guide people to resources of their choice, ultimately supporting their decisions to connect to available services.

2026 VISION

People experience the quality of life they choose. They are connected to an array of quality supports and services that are tailored to each of their unique wants and needs. People are valued in and by their communities.

CORE OPERATING VALUES

Our core operating values guide the way in which our board members, employees, and volunteers want the community to experience our organization. We want to be known as resourceful, educated, and respectful. We want to demonstrate daily excellence by embracing and living out these core operating values in the way we work.

- **People come first** – Show respect and honor for ALL people in words and actions.
- **We drive solutions** – Persistently seek opportunities and overcome obstacles. Navigate systems masterfully to make possibilities a reality.
- **We build connections** – Because relationships are the foundation of our work, we share strong working relationships with each other and with those outside our organization.
- **We educate** – Raise awareness in communities to appreciate the similarities and unique gifts of each person. Explore choices with people we support.

CORE COMPETENCIES

RELATIONSHIPS- At Service Coordination we operate with an understanding that it is primarily through effective relationships that we are able to achieve positive change on the individual and systems levels.

NAVIGATIONAL EXPERTISE- At Service Coordination we listen closely to individuals telling us their dreams and goals. With this knowledge and our expertise, we provide resources, connections, and linkages to make dreams a reality.

THEORY OF ACTION

The following principles and beliefs guide the development of our programs and operations:

- It takes great expertise to find resources and to connect people to them. Success results from the quality of abundant creativity and resourcefulness.
- Positive working relationships reflect the commitment that we have to each other, the organization, and the people we support. Solid relationships are built upon trust and mutual respect.
- As a mobile workforce based in the communities of the people we serve, we focus our abilities to affect positive change in systems and within communities.
- All persons should be able to make choices that affect their life. Our role is to help people discover and explore possibilities, weighing the value of all available options.
- With an increased understanding of people with differences comes appreciation of the value all people bring to their communities.
- As a strength-based person-centered organization, we engage the people we support, their families, our staff, and others in making decisions, developing processes, and creating the structures that support the highest quality case management services.

PRIMARY CUSTOMERS

Our primary customers are people we support and their families needing case management services.

SUPPORTING PARTNERS

We work collaboratively with a wide variety of supporting partners to carry out our mission. Supporting partners include but are not limited to:

- Service Coordination staff
- Service Coordination Board members
- Nonprofit community organizations
- Elected officials
- Community leaders
- Media personalities and journalists
- Federal, state, and local government agencies
- Individual donors
- Professionals including educators, lawyers, medical personnel, police, and firefighters
- Universities, Colleges and School Systems
- Volunteers

SECTION II: STRATEGIC DIRECTION 2017-2019

Over the next three years, Service Coordination will continue to provide high quality case management services. We will continue to strengthen our role as a leader in the field by enhancing relationships with all customers and by collaborating for improvements across various systems. Service Coordination seeks to grow by expanding our services both in and outside of Maryland to people with disabilities and other groups, and by further investing in our organizational capacity with diversified resources.

Service Coordination will pursue this direction by accomplishing the following goals and objectives:

GOALS & OBJECTIVES 2017-2019²

QUALITY CUSTOMER SERVICES GOAL: Service Coordination is a recognized leader of person-centered quality services by enhancing relationships with people we support, connecting them to valued resources of their choice, and collaborating with other primary and supporting partners.

Objective A: Perform Quality Monitoring by spending time with people exploring options, including new initiatives and opportunities.

Objective B: Achieve high-level customer satisfaction including both primary customers and supporting partners.

Objective C: Develop and implement strength-based individual service plans that lead to accomplishing goals that are important to the person.

EMPLOYEE DEVELOPMENT:

Service Coordination is an employer of choice by attracting, retaining and developing an engaged workforce. We do this by utilizing a positive strength-based approach.

Objective A: SCI will attract & recruit exceptional candidates.

Objective B: SCI will develop & retain quality professionals.

Objective C: SCI will increase employee engagement.

ORGANIZATIONAL DEVELOPMENT: Service Coordination has diverse, sustainable resources that strengthen the organization and the services it provides.

Objective A: Launch new ventures to provide case management services in the private sector.

Objective B: Pursue new ventures to provide case management service in the state & federal government sectors.

Objective C: Achieve optimal corporate governance with excellent expenditure and asset management.

²Service Coordination, Inc. uses the Balanced Scorecard approach for its measures of success in the following areas: Customer, Employee Learning and Growth, Internal Processes, and Financial with reference to Niven, Paul, R., (2006) *Balanced Scorecard 2nd Edition*, Hoboken, NJ., John Wiley & Sons, Inc. These SCI Balance Scorecard metrics are aligned with each objective in the three goal areas of the Strategic Plan.

SECTION III. STRATEGIC PLANNING IMPLEMENTATION

This strategic plan serves as a management tool to guide Service Coordination's Board of Directors and staff as we work together to advance the organization's mission. Successful implementation of this strategic plan requires a commitment to shared leadership between the Board of Directors, the Executive Director and all staff of Service Coordination.

To support implementation of this strategic plan; Service Coordination's Board of Directors and Executive Director agree to:

- **Track, Improve and Communicate Performance**
 - Leadership will monitor internal performance through the use of the Balanced Scorecard.
 - The Board will review overall strategic plan implementation progress at least quarterly to acknowledge accomplishments and challenges.
 - The Executive Director's Report to the Board will regularly assess incremental progress towards achieving the goals of the strategic plan.
 - The Board will use the strategic plan as a framework for evaluating annual organization performance.
 - The Executive Director will use the strategic plan to annually assess and reward staff for accomplishments that support the strategic plan.

- **Align Financial Resources**
 - The annual operating budget will be developed to support strategic plan goals and objectives.
 - The Board and Executive Director will pursue funds to support new strategic initiatives in the plan and adjust the plan accordingly.

- **Align Operating & Board Capacity**
 - The Executive Director and Board will regularly review organizational skills and fill any gaps necessary to ensure successful implementation of the strategic plan. This assessment will drive decisions about organization leadership, new staff positions, and board member recruitment.
 - The Executive Director will advise the Board about changes in operating practices and resources necessary to support the organization's sustainability.

- **Track Progress and Update the Strategic Plan**
 - The organization will regularly seek input from people we serve, their families, colleagues, partner organizations, and other stakeholders about the direction of Service Coordination.
 - The Board will regularly review the strategic plan and provide recommendations for any necessary changes.
 - Leadership of the organization and the Board of Directors will complete a comprehensive review and develop an updated strategic plan for the organization in three years.

ACKNOWLEDGEMENTS

The Strategic Planning Taskforce represented a cross section of our organization. We met on May 24, 2016 and June 14, 2016 to set our new direction and develop a plan for getting there. Service Coordination extends its heartfelt thanks to the following Board and staff members who dedicated many long hours to creating this important roadmap for the future of the organization.

Allan Sheahen, Central Region Director
Amy Buhrman, Program Manager, Western Region
Ann Leibowitz, Service Coordinator, Western Region
Carl Hildebrand, President, Board of Directors
John Dumas, Executive Director
John McNamara, IT Director
John Whittle, Program Director
Marci Meredith, Supervisor, Western Region
Mindy Propst, Program Systems Director
Pamela Stell, Human Resources Director
Shayla Mitchell, Service Coordinator, Central Region
Sylvia Brown, Financial Analyst, Frederick
Tenneille Aleshire, Western Region Director
Teresa Hall, Program Manager, Central Region
Tom Evans, Finance Director
William Webster, Supervisor, South Central Region