2021-2025

Strategic Business plan

“A community-based health care provider”

Executive Summary

Administrative leaders and staff of Pathways developed this Strategic Plan to provide Pathways with a five-year roadmap for its support services and organizational development. The Director will review its progress ongoing, as well as update the plan annually as needed. The plan was developed with broad involvement, guidance from staff, and input from persons served and agency stakeholders. Pathways met to reflect on the mission, vision, core operating values and assumptions underlying the organization’s approach to its work. These meetings set the stage for a work session during which the organization’s strategic direction was defined. The staff helped coordinate the planning process and provided important support and analysis to complete this plan.

Pathways provides Innovations Services to individuals whose primary diagnosis is a MR/DD. We became nationally accredited by CARF International as a employment and community service provider. In doing so, this gave us the credentials to provide services in all of Trillium Health Resources catchment area. Currently, we are only providing services in less than ten counties but aim to expand to more.

The strategic plan outlines the goals for Pathways in the coming years and then it turns to the SWOT Analysis to evaluate the strengths, weaknesses, opportunities, and threats. Next, we have our marketing plan to talk about different areas that we could market ourselves in. Near the end you will see a performance improvement plan that outlines areas of improvement in terms of efficiency, effectiveness, access, and satisfaction, which align with CARF Standards.

Mission

Pathways mission is to honor God by providing an atmosphere of teamwork, optimism and honesty to help anyone with a disability achieve a greater quality of life.

Legal Structure

The owner established the business as a for profit C-Corporation, Pathways Behavioral Health Service Inc, to provide services to individuals with intellectual and developmental disabilities.

Service philosophy

Our philosophy is to use the person centered plan and active participation as a guide for teaching and training. It is important to us for participants and families to be offered the opportunity to learn their potential in areas such as: daily living, socialization, community integration, self-advocacy, and enjoyment of life by choice and decision making.

We help provide a supportive environment; while encouraging, strengthening, expanding skills and providing physical assistance when needed. By doing these things the participant and family increase: life satisfaction, health, welfare, and self-determination.

Corporate Values and Beliefs

**Diversity and Pluralism.** Pathway’s board, staff, providers, consumers and the communities it serve are enriched by inclusion, cooperation, and partnerships across the lines of race, ethnicity, class, nationality, religion, and many other characteristics that often divide people and groups. Pathways is effective because it strives to ensure that its board, staff, care providers, consultants, and persons served reflect and value varying backgrounds and experiences.

**Commitment to Empowerment**. Pathways recognizes that the ability and leadership potential of individuals should not be solely related to their level of education, access to resources, or other social advantages. Therefore, the organization’s special commitment is to strengthen and support the persons served through individualized support plans and programs, whereby they are empowered with the skills necessary for becoming productive members of society.

**Ethics and Integrity**. As a social change organization, Pathways must hold itself to the highest possible standards of ethics and integrity. The organization and the individuals who are part of it will behave ethically in all aspects of their work and show integrity in consistently standing by those ethical values.

**Teamwork and Collaboration.** Pathways works in teams involving both the staff, consumers, and their case managers and encourages collaborative networking within the organization and the community. This approach, which includes cross-sector collaboration, enriches and strengthens Pathway’s work and models an operating style that is effective for all consumers and the community in general.

**Commitment to Social Justice.** Pathways believes that all individuals have the right to freedom, a safe environment, the basic necessities of life, and the opportunity to develop to their fullest potential. The life opportunities of individuals should be determined by their capacities and efforts, not by social barriers and conditions beyond their control. The organization provides the tools necessary so the persons served can face their daily challenges with pride, dignity and independence.

**Quality.** Unique Caring Network, Inc. is committed to excellence in its work. Teamwork and diversity help ensure the effectiveness of its treatment plans and other services provided. All its activities are designed to meet the specific needs of individual person served. Pathways’ reputation for consistent high-quality work is its best selling point.

**Respectfulness** – Pathways honors the choices of people with disabilities, encouraging each person to take control over his/her own life, and helps to shape these based on what is important to each consumer. We respect the role that families have in helping to shape these choices as well.

**Individualized Support** – Pathways knows that people’s needs vary significantly and can change over time; we seek to understand the individual consumer and cocreate the right supports for each person’s development.

**Diversity** – Pathways understands that people with disabilities are part of all races, ethnicities and religions; we seek to assist as many people as our financial resources support.

**Integrity and Accountability** – Pathways has the highest level of integrity in its administrative, service, and outreach activities; we tie these activities directly to our mission, and we maintain and report our records accurately.

**State of the Art Practices** –Pathways aims for excellent, high quality, state-of the-art approaches that people with disabilities and their families can always count on to be there.

**Partnerships** – Pathways works with a wide variety of partners and advocates for quality service by all partners.

**Advocacy** – Pathways educates the public and advocates for the long term bests interests of people with disabilities and their families.

**Financial Sustainability** – Pathways believes its work as an advocate and service provider will be needed for many years into the future. Therefore, we strive to deliver on our mission with thoughtful strategic choices that ensure we have sufficient financial resources.

Services Provided

**Community Networking**

Community Networking services provide individualized day activities that support the participant’s definition of a meaningful day in an integrated community setting, with persons who are not disabled. This service is provided separate and apart from the participant’s private residence, other residential living arrangement, and/or the home of a service provider. These services do not take place in licensed facilities and are intended to offer the participant the opportunity to develop meaningful community relationships with non-disabled individuals. Services are designated to promote maximum participation in community life while developing natural supports within integrated settings. Community Networking services enable the participant to increase or maintain their capacity for independence and develop social roles valued by non-disabled members of the community. As participants gain skills and increase community connections.

**AFL (Alternative Family Living) or Residential Support**

Residential Supports consists of an integrated array of individually designed training activities, assistance and supervision Residential Supports include:

1. Habilitation Services aimed at assisting the participant to acquire, improve, and retain skills in self-help, general household management and meal preparation, personal finance management, socialization and other adaptive areas. Training outcomes focus on allowing the participant to improve his/her ability to reside as independently as possible in the community.

2. Assistance in activities of daily living when the participant to participate in home life or community activities. Transportation to and from the residence and points of travel in the community is included to the degree that they are not reimbursed by another funding source.

**Community Living and Support**

CLS services are meant to help increase and maintain a person’s independence, support an individual’s achievement of their goals, and promote community participation and productivity through skills training and personal assistance. These supports are provided by paid staff to help adults who are dealing with serious mental illness or intellectual/developmental disabilities. These supports may also help families who have children with an intellectual/developmental disability or serious emotional disturbance.

**Respite**

Respite services provide periodic support and relief to the primary caregiver(s) from the responsibility and stress of caring for the participant. This service enables the primary caregiver to meet or participate in planned or emergency events, and to have planned time for him/her and/or family members. Respite may include in and out-of-home services, inclusive of overnight, weekend care, emergency care (family emergency based, not to include out of home crisis) or continuous care up to ten consecutive (10) days. The primary caregiver is the person principally responsible for the care and supervision of the participant and must maintain his/her primary residence at the same address as the participant.

**Supported Living**

he North Carolina Innovations waiver includes a Supported Living service definition that enables people with significant disabilities the opportunity to live in their own homes. Companions are hired specifically for the person and are jointly selected by the person, the provider and if applicable, family/natural supports.   Recruiting methods are tailored to meet the person’s staffing preferences. Supports are structured based on the person’s interests, preferences and needs. Each person may have a different staffing pattern, based on their scheduling needs and preferences. If two or more people live together, staffing supports may be able to be shared but should still reflect the specific interests and scheduling priorities of each person.

Goals and Priorities

The follow goals for Pathways Behavioral Health Service Inc over the next 3 years are the organizations response to the important issues identified in annual surveys completed by participants and other stakeholders. The outlined goals provide a roadmap for fulfilling the strategic direction of Pathways.

Priority Levels: One- within one to two years (urgent)

 Two- within two to three years

 Three- within three to four years

**GOAL: 1 Service Delivery**

Pathways will provide model supports for persons served with disabilities and their families, either directly or through partnerships with or referrals to other service providers.

**Priority Level:** One/ASAP

**Responsible Persons:** Director, QP, Direct support staff

**Timeframe:** 2022

Tasks:

* Increase partnership with businesses in the community such as: churches, food banks, salvation army, other organizations who help the same population, local dss.
* Increase advocacy efforts by ensuring all members of service plan attend ISP meetings for persons served
* Accessing and using community resources: Create Community Resource Guide

**GOAL: 2 Human Resources**

Pathways will develop a stable, highly qualified and motivated workforce that actively delivers the organization’s mission.

**Priority Level:** One/ASAP

**Responsible Persons:** Director, QP, Direct support professionals

**Timeframe:** 2022/ongoing

 **Tasks:**

* Ongoing staff training and development
* Ensure that performance evaluations and job descriptions are reviewed annually
* **1.6.c(1) through 1.6.c (4)** Performance management will include job descriptions that are reviewed annually and updated as needed. Job descriptions will be dated to validated their review or updating. Review annually the performance of all contract personal, performance of their contracts, ensure that they follow all applicable policies and procedures of the organization, ensured that they conform to CARF standards applicable to the services they provide.
* **1.8.a (1) through 1.8.a. (3)** Pathways will implement personnel policies that are accessible to applicable personnel, reviewed annually and updated as needed.

**GOAL: 3 Program Development**

Program improves which will result in more quality supports and services delivered to persons served.

**Priority Level:** One/ASAP

**Responsible Persons:** Director, QP, Direct support professionals

**Timeframe:** 2022

 **Tasks:**

* Have staff, stakeholders, guardians, etc complete surveys ongoing
* Suggestion boxes/online suggestion box
* Establish fund raising events.

**GOAL: 4 Organization of the Strategic Plan**

Ensure that Pathways strategic plan represents input for all agency stakeholders and is made available to all stakeholders.

**Priority Level:** One/ASAP

**Responsible Persons:** Director, QP, Direct support professionals

**Timeframe:** Summer 2021

**Tasks:**

* Review the strategic plan annually
* **C.1.** utilize data collected in satisfaction surveys in considering expectations of persons served and other stakeholders
* **C.3.a. through C.3.c.** share the strategic plan with persons served, personnel, and other stakeholders.
* Upload the strategic plan onto Pathways website: [www.pbhsinc.com](http://www.pbhsinc.com)

**GOAL: 5** Financial Planning & Management

Ensure that Pathways is financially solvent and remains profitable.

**Timeframe:** Annually

**Responsible Persons:** Director, QP, Direct support professionals, Finance

**Priority Level :** One/ASAP

 **Tasks:**

* **F.4.e** Pathways identify and review financial position, ongoing
* **F.10.** conduct an annual review of Pathways financial statements by a third party

**GOAL: 6 Performance Measures**

Pathways will ensure that all performances measures adhere to the CARF standards.

**Priority Level:** One/ASAP

**Responsible Persons:** Director

**Timeframe:** December 31st 2021

 **Tasks:**

* **M.1.a through M.1.d** Pathways will develop a written description of its performance measurement system that includes, at a minimum, the mission, programs/services seeking accreditation, objectives or the programs/services seeking accreditation, and personnel responsibilities related to performance measurement and management
* **M.2.a. through M.2.d.** Pathways will demonstrate how its data collection system addresses reliability, validity, completeness, and accuracy
* **M.3.a. (12) through M.3.d. (2) (c)** data collected by Pathways will include financial information, accessibility information, resource allocation, surveys, risk management, governance reports, human resources activities, technology, health and safety reports, strategic planning information, and service delivery. The data collected will address the needs of person served and other stakeholders and the business needs of the organization. It will also allow for the comparative analysis. The data collected will include business function objectives, performance indicators, and performance targets and written service delivery objectives.
* **M.4.** Pathways collects data about the characteristics of the persons served
* **M.6.a. through M.6.b (4) (b)** Pathways measures business function performance indicators and service delivery performance indicators for each program/service seeking accreditation in the effectiveness and efficiency of services, service access, and satisfaction and other feedback from the persons served and other stakeholders.
* **M.7.a. through M.7.d.** for each service delivery performance indicator, Pathways determine to whom the indicator will be applied; the person(s) responsible for collecting the data; the source from which data will be collected and a performance target based on a n industry benchmark, based on the organization’s performance history, or established by the organization or other stakeholder

**GOAL: 7 Performance Improvements**

Pathways will ensure that all performances Improvements adhere to the CARF standards. **Priority Level:** One/ASAP

**Responsible Persons:** Director

 **Timeframe:** 2022

 **Tasks:**

* **N.1.a. through N.1.c. (3)** Pathways will complete a written analysis at least annually that analyzes performance indicators in relation to performance targets, including business functions; service delivery including the effectiveness and efficiency of services, service access, and satisfaction and other feedback from persons served and other stakeholders; and extenuating or influencing factors. The annual performance analysis will identify areas of performance improvements, result in an action plan address the improvements needed to reach established or revised performance targets, and outlined actions taken or changes to improve performance.
* **N.2.a. (1) through N.2.d.** The analysis of performance indicators will be used to review the implementation of the mission and core values of Pathways, improve the quality of programs and services, facilitate organizational decision making, and review or update the organizations strategic plan
* **N.3.a. (1) through N.3.c.** Pathways will communicate accurate performance information to the persons served, personnel, and other stakeholders according to the needs of the specific group, including the format, content, and timeliness of the information communicated.

**GOAL: 8 Input from Persons Served**

Ensure that Pathways meets all requirements recommended during its 2021 CARF survey.

**Priority Level:** One/ASAP

**Responsible Persons:** Director

**Timeframe:** 2022

 **Tasks:**

* To be determined at a later date after CARF survey in July/August 2021

**GOAL: 9 Rights of Persons Served**

Ensure the rights of persons served are protected at all times.

**Priority Level:** Two

**Responsible Persons:** Director

**Timeframe:** 2022

 **Tasks:**

* K.4.a. through K.4.b. (3) Pathways will has a written analysis of all formal complaints conducted annually that determine trends, areas needing performance improvement, and actions to be taken

**GOAL: 10 Achieve Three Year CARF accreditation.**

Receive a 3 year re-accreditation with CARF

**Priority Level:** Two

**Responsible Persons:** Director

**Timeframe:** 2023

 **Tasks:**

* Continue to ensure that all standards of the CARF manual are in compliance through the systems, committees and audits being conducted.
* Obtain new manual each year for the new standards
* Ensure that the recommendations from the previous CARF survey are fully implemented into Pathway’s best practices

**GOAL: 11 Medical Records**

Update electronic health record for clients in the Pathways programs and client record areas. **Priority Level:** One

**Responsible Persons:** Office Manager

**Time frame:** 2021

**Tasks:**

* The undertaking of this goal will be primarily handled by the office manager with assistance of the Director. A more robust Therap system that contains more information on the clients will be implemented, including electronic MARs, detailed client information, etc.

**GOAL: 12 Health & Safety**

Ensure that Pathways meets all health & safety requirements

**Priority Level:** One

**Responsible Persons:** Director, QP, Direct support staff

 **Time frame:** 2022, ongoing

 **Tasks:**

* • H.10.a. through H.10.b. (8) A written analysis of all critical incidents will be provided to or conducted by the leadership at least annually that addresses causes, trends, actions, for improvement, results of performance improvement plans, necessary education and training of personnel, prevention of recurrence, and internal and external reporting requirements.
* H.13a. (1) through H.13.b. (3) Pathways comprehensive health and safety inspections will be conducted at least annually with recommendations for areas needing improvement, and actions taken to respond to the recommendations.

SWOT ANALYSIS

Strengths and Weaknesses

The following is a brief summary of opportunities, threats, strengths and weaknesses highlighted by the administrative staff of Pathways Behavioral Health Service Inc.

**Strengths**

Strengths- We continue to look for ways of improving quality of service delivery. Through ongoing planning we are able to identify ways of reducing risk and expanding our program and services. The services that Pathways provides are needed in the community. The company went through a period of downturn; however, we were able to cut costs and stay afloat. The determination and the commitment of Pathways administration team will help sustain an organization long-term.

Based on input from consumers, staff, guardians, and other stakeholders Pathway key strengths include the organization’s demonstrated ability to provide high quality, necessary services, which help people with disabilities live a fuller life in the community. Staff is committed, and the services and programs offered are monitored for quality. When there is a challenge, the organization meets it through innovation and quick response.

**Weakness**

Weaknesses – The ongoing changes that continue to impact provider agencies are evident throughout the industry. We need to continue to develop strategic partners that can assist us in the future. We also need to build our reputation.

Based upon the past CARF survey recommendations Pathways had several identified areas that need improvements. Including but limited to: monitoring how we measure input from persons served, revamping some of our HR policies and procedures, and redesigning our performance measures.

Strategic Direction Opportunities & Threats

Based on the administrative team’s understanding of Pathways mission, primary customer, core values, and the opportunities and threats in the current environment, the next three to five years will be a time of assessing and deepening its approaches to its work. Concurrently, Pathways will take more of a leadership role in working with a broader array of community resources.

* Pathways will review and deepen its existing direct supports and services over time to ensure that they are they are state-of-the art for working effectively with adults with disabilities. The model emphasizes consumer decision-making and community participation and integration.
* Pathways will further assess consumer and community needs to identify gaps or opportunities for shifts in service delivery. This assessment will serve as the basis for expanding or adding new services.
* Pathways will take a leadership role in working with a range of providers (not just disability providers and maybe some outside of the county) to identify and meet the needs of people with disabilities. The focus will be to ensure quality across services and eliminate duplication
* Pathways will emphasize building its discretionary financial resources to invest in providing quality services.

**Opportunities**

* *Strategic Partnerships*. There is opportunity for Pathways to establish new strategic partnerships and develop a solid roadmap for sustained growth. Pathways. will be able to identify other emerging markets in which to offer their services in North Carolina. There is an opportunity for the agency to develop new services or expand services. As a contracted provider of services through Trillium Health Resources, Pathways is in a position to provide services in all of the Trillium catchment counties through North Carolina. Currently, we are only providing services in less than 10 counties.

*Implications:* Pathways could offer new services and build strategic community partnerships

* *Increased visibility*, which could lead to greater access to other resources. The area has a range of resources including potential employees, community colleges for courses, and universities with students interested in working with people with disabilities—all of which could be better tapped.
* *New social & recreational activities.* There is an ongoing need for social and recreational opportunities for people with disabilities, including opportunities after the workday in the 3:00 to 6:00pm timeframe.

*Implications:* Increasing social and recreational activities may draw in more consumers and increase their quality of life and community contact. To be successful here, Pathways could develop a greater partnership with The county Department of Parks and Recreation and the general community. Having transportation available will be vital for success. At present there is no funding for expanding these services, so this will need to be addressed.

* *Increased occurrence of children diagnosed with autism or mental illness*. The increasing number of individuals needing therapy may be a new consumer population for Pathways

 *Implications:* Pathways would require different skill sets, information, and facilities to serve this population. There is a different approach and need for different types of communication with families of children with these occurrences, so there would be a learning curve for building trust. Pathways could offer therapy specifically for the autistic population.

* *Other opportunities mentioned included*: Expanding family support especially, respite, and providing a broader array of services for youth transitioning to adulthood.

**Threats**

The threats considered most important included:

* *Dependence on government funding.* Funding, particularly the residential funding stream, doesn’t keep up with needs.

*Implications:* Pathways needs to assess the real demand for its services, increase private pay options, and be prepared to explore other opportunities for generating revenue.

* *Staffing challenges and the cost of providing good care.* It is hard to maintain a competent staffing pool, including staff that can speak another language.

*Implications:* Although increased efficiency and technology may help, high turnover, especially among direct support staff, leads to increased administrative costs. To respond, Pathways. needs to increase fund raising, empower employees and increase their opportunity for growth, and develop a pay structure for different services.

Succession Planning

In the event that something happens to Jimmie Hill and he is unable to perform his job duties as CEO, Charlene Hill will take over as CEO. However if both individuals are not able to perform their duties in the event of something happening, Charlene Davis, Crystal Hughes and Keola Perry will take over as owners. Details are laid out in Jimmie Hill’s will. Management succession planning is currently in progress.

Direction and Results

The strategic direction and goals included in this plan are Pathways response to its understanding of what its customers value most about the organization, current opportunities and challenges for offering a high quality system of support in the community for people with disabilities, and recommendations from CARF past survey. The three to five-year period of this strategic plan will be a time of assessing and deepening Pathways approaches to its work. Concurrently, Pathways will take more of a leadership role in working with a broader array of community resources, and will actively evaluate input from stakeholders in the ongoing review and updates to its strategic planning process. With a fresh perspective on its mission, understanding what it does well, and the environment in which it operates, Pathways will pursue the following strategic direction:

1. Pathways will review and deepen its existing direct supports and services over time to ensure that they are state-of-the art for working effectively with adults with disabilities.
2. Pathways will further assess consumer and community needs to identify gaps or needed shifts in service delivery. This assessment will serve as the basis for expanding or adding new services.
3. Pathways will take a leadership role in working with a range of providers (not just disability providers and maybe some outside of the county) to identify and meet the needs of adults with disabilities.
4. Pathways will explore the feasibility of expanding the organization’s visibility in the community.
5. Pathways will emphasize building its discretionary financial resources to invest in providing quality services. This includes exploring other types of revenue to ensure that we have capital reserves to meet the ongoing financial needs of the agency.

Monitor and Review Strategic Plan

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| Objective | Desired Outcome | Key performance indicator | Review Date | Changes in Market | Further Action | Responsibility | By When |
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Marketing Plan

Context

The changing operating environment poses new challenges for Community Service Organizations providing disability services. With people with a disability making purchasing decisions, organizations should consider:

* Communication and marketing challenges
* Competition from existing and new service providers
* Service quality from the client’s perspective
* Client relationships and client satisfaction.

A more competitive environment means that marketing is important to maintain and attract clients. An effective Marketing Plan clarifies the organization’s purpose, its expertise, range of services and the target client group. The Marketing Plan also develops strategies to promote services to a broad or targeted group of prospective clients.

As people with a disability have diverse needs, a community service organization may choose to direct the Marketing Plan to a particular ‘niche market’[[1]](#footnote-1) of people with specific service requirements for which the organization has specialist expertise. Other organizations may target a broader group with more general service requirements.

A Marketing Plan outlines the steps to ensure that services match the needs and expectations of the people who are using or might purchase those services.

Purpose

Effective marketing helps to retain existing and attract new clients, positioning community service organizations for sustainability and growth. The Marketing Plan aligns with the Strategic Plan (3-5 years) and supports the achievement of its objectives.

Market: Present and Future

**Present**

Pathways major customers are individuals receiving Innovation services. Pathways person’s served relationships stem from service provision based on the agency’s philosophy of being family friendly and consumer driven.

Pathways marketing approach is to network with MCO's and case managers of the clients that we serve. We also have revamped our website and updated our social media sites to share information about the services that we provide.

**Future**

The health and human services industry is one of the fastest growing industries. However, opening more innovations waiver slots depends on legislation funding more Medcaid. Pathways will need to market its services to state, local level human service agencies and consumers.

Business Environment

Although there are agencies that provide similar services in the community, Pathways will have to establish themselves with a competitive advantage of impeccable service and prompt response time in meeting client needs. The downside will be gaining the credibility of the community, which takes time.

External Environment

Pathways is focused on building relationships with other agencies in the community.

Target Market

We will continue to strengthen and cultivate positive relationships with county, the MCOs, Youth and Family Services, Schools, Churches, and other Community Based Organizations in order to continue to grow our agency.

Competitive Advantage

Pathways competitive advantage is its ability to provide Alternative Family Living Levels 1-4, Supported Living, Community Networking, Respite and Community Living and Supports to adults and children.

Disadvantage

Pathways has experienced a shortage of direct support provider to work with Level 3 or 4 clients. Because of the requirements to become a DSP and experience needs, it is hard to find individuals that meet that criteria.

Methods of Distribution

Pathways will directly target potential providers by contacting, schools, churches, participating in educational events, sending information to community organizations, and email blasts.

Promotional Activities

The planned nature and decision making process associated with individuals with disabilities requires a consistent approach with establishing relationships in the community with service organizations in the targeted markets. Pathways must have brand identity. An intentional marketing strategy that encompasses outreach to the targeted markets is important in building brand recognition.

Pathways marketing strategy should include the design and development of proposals and presentations that is reflective of the company’s logo. Promotional products such as pens and items that customers will remember should be created as a marketing tool.

The company is considering the following forms of advisements

1. Phone books- yellow pages and directories
2. Agency to Agency directories
3. T-Shirts
4. Bumper stickers
5. Vehicle Wraps

Community Involvement

Pathways continues to collaborate with area organizations to provide opportunities for persons served with intellectually disabilities that want to have community involvement.

Marketing objectives

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| --- | --- | --- | --- | --- | --- | --- | --- |
| Marketing Objective | Service/Product | Price | Form of Promotion | Tool/Action | Cost | Date | Responsibility |
| 1. Purchase Bumper stickers | Bumper stickers (50) | 100.00 | Advertising | Purchase from vista print | 100 | Due by Dec 2021 | Director |
| 2. Community networking | Brochure/Business Cards (500) | 20.00 | advertising | Purchase from vista print | 20 | Due by Dec 2021 | Director |
| 3. Vehicle Wrap Director van. | Vehicle Wrap | 1500-3000 | Mobile advertisement | Contract with local business to do this | 1500-3000 | Due by Dec 2021 | Director |
| 4. Research promo videos/website analytics with google |  | 0 |  | Research and apply information | 0 | Due by Dec 2021 | Director |

Monitor and Review Plan

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| Marketing Objective | Desired Outcome | Key performance indicator | Review Date | Changes in Market | Further Action | Responsibility | By When |
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Performance Improvement Plan

Performance Improvement

To stay on target at both strategic and tactical levels, Pathways will constantly monitor and assess its performance against a series of performance indicators and targets. Only by setting specific, measurable goals and tracking performance can the organization determine the degree to which it is achieving the desired service and business outcomes. Appropriate organizational and stakeholder representatives must review and analyze results to determine areas for improvement. This review and analysis continues to position the organization to develop and initiate quality improvement changes.

 A critical component of Pathways quality improvement is the implementation of performance measurements and management systems for both its business and service delivery that allows the organization to look objectively at how well it is accomplishing its mission.

Following the review and analysis of its performance measurements results, Pathways will continue to carefully evaluate the information learned so that it may be translated into focused actions to improve performance against targets. The evaluations wills continue to drive Pathways to engage in a dynamic, proactive process to review, renew, or revise its strategy and tactics, while ensuring alignment of organizational purpose, service and business practices, and organizational resources. Pathways realizes that achieving excellence requires a disciplined continuous improvement process that is reflective of ongoing strategic planning and self-evaluations.

**General Program Description**

Pathways is a community based organization in operation since 2000. Our main purpose is to provide innovations waiver services to individuals with disabilities. We offer Supported Living, AFL(Residential Supports), Community Networking, Community Living and Supports and Respite. Our administrative office is located at 594 Halls Creek Rd in Pamlico County, North Carolina. These programs are designed for adult men and women, ages 18 years or older with at least one diagnosis of intellectual or developmental disability.

Program vision and mission

Pathways vision is a community in which peoples potential and quality of life are not limited by their disabilities.

The mission of Pathways is to honor God by providing an atmosphere of teamwork, optimism and honesty to help anyone with a disability achieve a greater quality of life.

As Pathways works toward achieving these goals, the organization is committed to the principles of continuous performance improvement in all programs, services and operations. To this end, Pathways has developed this Performance Improvement Plan that incorporates the CARF Standards on Performance Measurement and Management and Performance Improvement.

The purpose of the Performance Improvement Plan is to establish a methodology for collecting and analyzing information for business improvement and service delivery improvement in the domains of effectiveness, efficiency, satisfaction, and accessibility. Data will be collected from a variety of sources including patients, staff and other relevant agency reported identified herein.

A performance analysis will be conducted on an annual basis in order to:

* Identify areas needing performance improvement.
* Develop an action plan to address the improvements needed to reach or revise established outcome measures and improve the quality of programs and services.
* Facilitate organizational decision making with regard to progress toward fulfilling the mission and achieving goals; and
* Create a summary report that can be shared with patients, staff and other stakeholders in appropriate and meaningful ways.

Performance indicators have been identified as follows:

**1. Accessibility**: CARF’s definition of accessibility is a measure of individuals’ and community members’ abilities to procure services with relative ease. Pathways has identified barriers to services. Pathways plans to implement measures of accessibility to evaluate the success in meeting individual, community and stakeholder needs.

**Area needing improvement:** Pathways ensures that participants feel that the service was easily accessible and safe. If a barrier is in place that is affecting accessibility, Pathways addresses it immediately by following the accessibility plan and documents it through revisions of the accessibility plan.

**Objective:**

* Decrease barriers to individuals served.
* Ensure that participants take a survey to let us know if they have accessibility barriers

**Action Plan:**

* Pathways will distribute information on the accessibility plan and how individuals can report issues throughout the year
* Pathways will form an accessibility plan annually with the help of participants and other stake holders
* Pathways will distribute a survey before the accessibility plan is written to get information on any barriers that could be affecting individuals served.

**2. Efficiency:** CARF’s definition of efficiency is the relationship between resources used and results or outcomes obtained. Resources can include time, money, or staff/FTEs. This can apply at the level of the person served, program, or at the level of the organization as a whole.

**Areas needing improvement:**

Individuals served increased in 2020 despite the pandemic.

Succession planning in terms of who will own the company after the passing of Jimmie and Charlene Hill have been completed. Succession of key positions such as Directors and QP’s in the event of leaving or death have not been completed.

Our Monthly net income was not over 10% each month in 2020. Growing the company more will increase our net income, which we plan to do in the next 5 years by following the strategic plan.

In compliance with having an external audit performed annually, our insurance company Accident Fund performs one every January. One was performed in January of 2020 and indicated that we were owed money by Accident Fund.

In 2020 we implemented a new DSP competencies tracking system to go along with the performance evaluations. In 2020 we found that community networking, building and maintain friendship and relationships had a weaker score. We agreed that this was due to gathering limits set forth by local ordinances due to the pandemic. All other competencies were around the same level as the year before.

DSP’s receive monthly feedback through clinical supervisions with the QP. Due to the pandemic we had to utilize video chat and phone calls to complete most supervisions during 2020. During the supervisions, feedback is given to staff on how they can improve.

Our office manager tracks trainings that are due for renewal, we notify individuals of trainings that are due for expiration within 60 days so that they have time to get it renewed before expiring. In 2020, no trainings were due to expire.

Our office manager ensures CARF standards are met with client documentation. She reviews documentation and compares it to remittances for what we billed to ensure accuracy. She also ensures that the documentation is completely correctly.

**Objectives:**

* Increase individuals served by 30% by the end of 2021
* Do additional succession planning for Administrative Staff
* Monthly net income at least 10% for all months
* External audit performed annually
* Performance evaluations have 100% completion
* 100% Clinical supervisions performed monthly
* No staff are out of compliance with trainings
* 100% client documentation will meet CARF standards

**Action Plan:**

* In order to increase the number of individuals served by 30% by the end of 2021, we will follow our marketing and strategic plan to network in the community and make our business more visible.
* CEO and Director will have a meeting with all administrative staff to talk about succession planning and their wishes in the event of leaving or death. After the meeting the Director will write up succession planning documents and the CEO will sign them
* Increasing the number of people served will help get our monthly net income up to 10% each month. Increasing business visibility and networking in the community will help bring revenue up. Pathways is in the process of forming a group home in Pamlico county. This will allow two additional clients to be served by us.
* Pathways will work with external audit sources (insurance, financial, etc.) to ensure that the external audit is performed by someone other than our CPA.
* Pathways will do performance evaluations at the end of each year in December to ensure that employees get the feedback they need to thrive in their positions.
* Clinical supervisions will be performed monthly by QP to ensure the service plan is being implemented effectively and to ensure that employees get the support they need.
* Office manager will keep a data base of trainings to be renewed and notify the Director of when mandatory trainings will expire in the next 3 months. Director will notify staff before 60 days of trainings that need to be renewed.
* Office manager and QP will ensure that client documentation meet CARF standards by ensuring that it is filled out properly and that it matches billing records.

**3. Effectiveness:** CARF’s definition of effectiveness is results achieved and outcomes achieved for persons served. Pathways utilizes the ISP goals to measure the level of achievement of the participants. At the end of the service plan we like to see an indication of maintaining or improving on most service goals. We also closely monitor our EHR system which collects data of goals achieved, hospital stays in the plan year, staff turnover rate, staff familiarity with emergency procedures, internal inspections, critical incidents and back up staff. All of these can effect the quality of service provided so we closely monitor each one.

**Area needing improvement:**

Achievement of service plan change some what in 2020 due to the pandemic. Most of the community based goals were not able to be obtained in some cases because of having to adjust to being more indoors and protecting the clients from the virus. We don’t feel this is necessarily an area of improvement because we were doing what was needed for the clients.

Hospital Stays, we had one individual that had a long hospital stay due to getting an infection in their wound. Upon entry to the hospital they were able to get it under control and after discharge we ensured that a nurse came to the home to care for the wound. The nurse also trained our staff on how to care for it. Our goal is to have no serious hospital stays during the individuals plan year.

Staff turnover was under the 10% goal for 2020.

Emergency response procedures were completed at 100% in 2020

An annual inspection was performed on the office location in 2020

Critical incidents were (if any) reported and analyzed quarterly.

Back up staff has been an issue for a select few of the people we serve due to the needs of the family. We are improved on providing back up staff in situations where we have proper notice but we could improve more.

**Objective:**

* Achievement of service plan, 100%
* Maintain less than 10% individuals needing to go the hospital during their plan year
* Maintain less than 10% turnover rate
* Maintain at least 90% drill testing completions
* Perform annual inspection on office location
* Maintain no critical incidents annually
* Provide back up staff at least 90% of the time.

**Action Plan:**

* QP will monitor the service plan by providing clinical supervision monthly
* Pathways will monitor individuals who needed to go to the hospital during their plan year and ensure that they get the care they need upon discharge from the hospital.
* Turnover rate for DSP’s are high in the united states. Pathways combats this turnover rate by offering high wages and mileage reimbursement, keeping our turnover rate less than 10% throughout the year.
* Pathways will perform drills annually to meet CARF standards for health and safety
* Pathways will do an analysis quarterly of critical incidents to maintain CARF standards
* Pathways will hire additional staff to provide back up in emergencies (such as care giver illness)

**4. Satisfaction:** Pathways values and uses the input from participants in the evaluation of the quality and effectiveness of services and operations. Pathways uses this information in a number of activities, including program/service modification and development, and performance improvement. On an annual basis, Pathways leadership meets, reviews, and analyzes input and feedback data from the satisfaction surveys and shares this information with agency staff.

**Area needing improvement:**

Favorable results on the satisfaction survey for 2020 are 95% Individuals complete the survey within the month it is administered. In addition, the survey was posted online to have access easily. More data was collected in 2020 than in 2019. Adjustment were made throughout the year to ensure we were going to receive feedback due to the pandemic.

In 2020, no complaints/grievance was submitted.

In 2020, Pathways had no discharges. This was a decrease from the year prior.

In 2020, Pathways gained 3 more individuals to serve throughout the entire year. Information and communication are shared via email, and social media as well as through mailing. If anyone were to submit a complaint or grievance they would be encouraged to attend meetings to address any issues and/or complaints.

**Objective:**

* Maintain 90% favorable level of satisfaction and complaint resolution.
* Maintain growth of individuals served
* Increase the number of individuals who attend meetings or submit feedback.

**Action Plan:**

* Satisfaction surveys will be provided through email, social media and by mail for easy access. Data will be analyzed and reviewed with administrative staff for ongoing improvements.
* Client or employee grievances are currently monitored as part of the agencies QI activities.
* Pathways grievances will by analyzed by Director and shared with CEO quarterly. Pathways quarterly goal will need to consist of at least one improvement recommendation.
* Promote Participant Meetings by posting meeting times and date on available social media pages and through email to provide ease of access. Educate staff so they can inform participants of the meetings.

Monitor and Review Performance Plan

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| --- | --- | --- | --- | --- | --- | --- | --- |
| Objective | Desired Outcome | Key performance indicator | Review Date | Changes in Market | Further Action | Responsibility | By When |
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