

Comprehensive Systems, Inc.

Strategic Plan

2010

Strategic Planning

The Strategic Plan is the basis for all the planning activities within Comprehensive Systems, Inc. The activities associated with the main components of the plan, when executed well, will yield tremendous benefits for our organization. It should *be* understood that to realize these benefits, there needs to be a commitment of time, resources, and effort.

Strategic planning is the ongoing process that guides, monitors, and improves the organization. The planning process is most effective when all respect our organization's roots and history, but remain open to the possibilities for future improvements. Strategic planning examines all components of the organization and identifies key issues, goals and objectives for those components based on the mission, vision, and available data. The process helps to manage the organization by utilizing outcome data. When required outcomes are identified and appropriate measurement data is gathered and utilized, it will have created an information based decision-making process.

The process of strategic planning is a three step process. Step One - is the development of the plan through analysis of SWOT, Satisfaction Surveys, and other input from stakeholders. Step Two - is to establish the processes whereby the plan will be monitored, strategies implemented, and reports produced. Step Three - is where data is analyzed, lessons learned are identified, and recommendations for any required changes are made. The process is ongoing and continuous. This process will make the difference between strategic planning being merely an activity that produces a document, or the tool Comprehensive Systems, Inc. uses to set direction, measure performance and monitor improvement.

As the Board and the Executive Team look to the future, they will also look to the past to determine what has been accomplished and what still needs to be done. The status of each goal helps set the direction. The code used to identify the status of each goal is:

- [C] = Completed
- [O] = Ongoing
- [C/O] = Completed and Ongoing
- [I] = Incomplete

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STAKEHOLDERS

Community and Family Involvement

Satisfaction Surveys

- Each year all consumers and other stakeholders complete Satisfaction Surveys. (Quality Assurance Director, Managers - 11/10 - [C/O])
- Results from the Satisfaction Surveys are compiled, analyzed and utilized for the benefit of consumers; the results provide the foundation for determining quality services which provide a quality of life and “support success” for the consumers. (QA Director, Managers, Strategic Planning Committee - 12/10 - [C/O])

Increase Family Support

- A family event is planned and held annually. (Program Directors, Managers - 12/10 - [C/O])

Publicity & Awareness

Continue the P.A.C.E. newsletter

- Distribute the P.A.C.E. six times a year (P.A.C.E. Committee - 12/10 - [C/O])
- Continue to expand accessibility of P.A.C.E. - increase the numbers of people to whom it is sent and also post it on CSI website. (P.A.C.E. Committee, Technology Committee - 12/10 - [C/O])
- Evaluate and update P.A.C.E. continually. (Technology Committee, P.A.C.E. Committee - 12/10 [O])

Improve Marketing Strategies

- Schedule presentations with community organizations, schools, and colleges. - (Marketing Committee - 12/10 - [O])
- Develop a CSI presentation and other marketing materials. (Marketing Committee - 12/10 - [C/O])
- Plan and develop an annual rotating schedule for public open houses. (Program Directors, Marketing Committee - 12/10 - [O])

EMPLOYEES

Development

Expand training and development opportunities

- Orientation checklists have been updated. (Policy Committee - 12/10 - [C])
- Evaluate/update orientation training for new employees. (Training Committee, Program Director, Safety Director - 12/10 - [C/O])
- Webinars have been used for training whenever possible. (Training Committee - 12/10 [O])

- E Doc has expanded through the year. All areas are using E Doc for attendance and for submitting attendance for billing. (E Doc Committee, Training Committee - 12/10 [C/O])
- E Doc is being used in all RCF/MR, HCBS, and Voc areas for documentation. (E Doc Committee -12/10 - [C/O])
- The ICF/MR Program is utilizing E Doc for incident reports, nurse's notes, and contact messaging system. (E Doc Committee - 12/10 - [I])
- Continue to help develop and utilize new aspects of E Doc such as forms, policies, training, etc. (E Doc Committee - 12/11 - [C/O])
- Some areas are using the scheduling program on E Doc. (E Doc Committee - [C/O])
- Quality Improvement reviews of narrative logs are completed by the QI Team using the E Doc assessment tool. (QI Team, E Doc Team - [C/O])
- Implementation of the Event Tracker has begun and will be fully implemented in 2011. (E Doc Team - [I])
- Program Plans are being discussed with E Doc developer and future development is expected in 2011. (E Doc Team - [I/O])
- Planning to incorporate Policy/Forms on E Doc is under development, expected to transpire in 2011. (E Doc Team - [I])

Recruitment and Retention

Negotiate union contract

- Assess conditions and negotiate an appropriate union contract. (Administrative Officer - 6/1/10 - [C])

Assess financial conditions and impact on employees

- Assess possibility of wage increase for qualified Administrative Employees. (Executive Director, Administrative Officer, Managers - 6/1/10 - [C/O])
- Establish monthly attendance records. (Executive Director, Associate Director, Team Building Committee - 7/1/10 - [C/O])
- Evaluate Recruitment/Sign-On Bonus. (Executive Director, Associate Director, Team Building Committee - 7/1/10 - [C/O])
- Evaluate/Revise Incentive Program. (Executive Director, Associate Director, Team Building Committee - 6/1/10 - [O])

OPERATIONS/FINANCIAL

Board of Directors - Leadership

Provide foundation for leadership

- Review Table of Organization, annually. (Board of Directors, Executive Team. - 1/10 - [O])
- Continue to develop/implement governance policies as outlined in CARF Governance Standards. (Board of Directors, Executive Team - 12/10 - [O])
- The board continues to ensure CSI is managed effectively, efficiently, and

ethically through defined accountability mechanisms. (Board of Directors, Executive Team - 12/10 - [O])

Opportunities

- Completion of Tax Exempt Bond projects. (Financial Officer, Executive Director, Maintenance Director - 10/31/10 - [C])
- Develop more funding sources. (Marketing Director, Grant-Writing Team - 12/10 - [O])
- Evaluate existing and future service needs. (Executive Team - 11/10 - [O])
- Increase networking activities with other providers. (E Doc Team - 12/10 - [O])
- Promote more intra-company technology. (Technology Committee - 9/10 - [O])
- Continue to work with E Doc developer. (E Doc Team - 12/10 - [C/O])
- Planning and preparation for the Program Plan Model continues. (E Doc Team - 12/11 - [I])
- E Doc developer is planning to meet with all E Doc users. (E Doc Team - 3/11 - [I/O])

Cost Effectiveness

- Continue proactive plan for budget reductions. (Executive Team - 8/10 - [O])
- Develop cost analysis plan for vendors. (Financial Officer - 8/10 - [O])
- Maintain/evaluate employee benefits. (Financial Officer - 6/10 - [O])

Economic/Political Environment

- Communicate with legislators. (Executive Director, Associate Director - 8/10 - [O])
- Advocate for funding. (Executive Director, Associate Director - 8/10 - [O])
- Participate in state and national organizations. (Executive Director, Associate Director - 7/10 - [O])

QUALITY

Quality Services

- Increase efficiency of management. (Personnel Director, Program Directors - 12/10 - [C/O])
- Study need for expansion of Day Hab Program to meet changing demographics. (Program Director, Vocational Managers - 12/10 - [O])

Quality Improvement

- Implemented Quality Framework (Medicaid Program). (QA Director, Program Managers, Policy Committee - 9/10 - [C/O])
- Continued to review results from Quality Framework implementation with leadership. (Quality Improvement Committee - 9/10 - [C/O])
- Trending and tracking continues in preparation for the 2010 Quality

- Improvement Framework. (Quality Improvement Committee - 9/10 - [C/O])
- Refine Quality Assurance Process. (QA Director, Program Directors - 9/11 - [I])

PHYSICAL PLANT

Structures and Environment

- Charles City Tax Exempt Bond I was completed. (Board of Directors, Executive Director, Associate Director, Financial Officer, Maintenance Director, QA Director - 10/10 - [C])
- Maintenance Area/Warehouse completed. (As above - 6/10 - [C])
- Labor Center was refurbished. (As above - 7/10 - [C])
- A new roof was installed on Crestview. (As above - 7/10 - [C])
- Treasure Chest was refurbished. (As above - 8/10 - [C])
- 9th Street Storage Garage was completed. (As above - 9/10 - [C])
- Burling House Storage Garage was completed. (As above - 9/10 - [C])
- Carpenter Shop was completed. (As above - 10/10 - [C])
- The 2010 Accessibility Plan was developed and reviewed for ways to improve accessibility. (Accessibility Committee, Capital Improvement Committee - 12/10- [O])

Vehicles

- Update/upgrade vehicles. (Board of Directors, Maintenance Director, Financial Officer - 12/10 - [O])
- Maintain vehicles with company-wide vehicle maintenance schedule. (Maintenance Director, Program Director, Financial Officer, Vocational Manager - 12/10 - [O])
- Research building and operating a vehicle-care center. (Maintenance Director, Financial Officer, Program Director, Vocational Managers - 12/10 - [O])

**Comprehensive Systems, Inc.
2010 - 2011 Committees**

Strategic Planning

Jody Baxter
Ryan Becker
Melissa Bollman
Diane Brandt
Jack Brown
Mary Pat Cole*
Mike Franke
Julie Funk
Chris Gohr
Sandy Harrington
Sheryl Heyenga
Butch Johnson
Carolyn Repp
Laura Wallace

Team Building

Joan Dunn
Kelly Hinders
Val Kolbet
Marianne Kuethe
Mary Langreck
Sara Mahncke
Marge Quigley
Sondra Schmitt*

P.A.C.E.

Jody Baxter
Melissa Bollman
Mary Pat Cole
Chris Gohr
Jennifer Thompson
Laura Wallace*
Lisa Ward*

E Doc Team

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Keith Brunsvold+
Kevin Brunsvold+
Julie Funk*
Sandy Harrington
Amy Hillegas
Marge Quigley

Accessibility

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Julie Funk*
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Becky Orcutt
Jaime Ozzella
Carolyn Repp

Marketing

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Quality Improvement

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Vicky Johnson
Val Kolbet
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Judy Rust
Jill Schmitz
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Technology

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Linda Shirley
Laura Wallace
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Policy

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Kim Blazek
Melissa Bollman
Chris Gohr
Sheryl Heyenga
Marianne Kuethe
Carolyn Repp
Laura Wallace*

Wellness

Trisha Baxter
Tammy Kerrigan+
Nancy Lawler+
Jenna Nichols
Pam Schackleton
Jill Schmitz
Jean Shannon

** Indicates committee chair
or co-chairs*

+ Indicates consultant