



STRATEGIC PLAN

18 months – 1-1-21 to 6-30-22

Planning for the future amidst COVID-19 – Focusing on the next 18 months.

Developed by: The Enrichment Center Board and Leadership Team

Date: 1-1-21

Board Approval Date: January 2021

Introduction

Developing a strategic plan is a process to map out the future that is reflective of the needs and vision of The Enrichment Center. The Plan is not developed alone but by the Board, staff, individuals served and stakeholders. The focus is on the mission, vision and strategic priorities identified during the strategic planning process.

This strategic plan acts like a road map to identify the route to take to get to where we want to go in the coming 18 months. It is the vision for a bright future for The Enrichment Center. It also serves to help coordinate the work of The Enrichment Center, make efforts more effective and is a reminder to stay focused on The Enrichment Center's values. It also allows the organization to be more accountable and transparent to all involved. The items mentioned directly impact the lives of those we support and the ultimate outcome of helping each person in our services live their best life.

MISSION / VISION / VALUES

Mission

Our mission is to **empower and enrich** adults with intellectual and developmental disabilities, enabling them to grow as individuals, live with dignity and have choices in how they fulfill their lives.

Vision Statement

Our vision is to see every person with an Intellectual/Developmental disability in our community **live the best life** for them.

Values

People First

We believe that people with intellectual and developmental disabilities are defined by their own strengths, abilities, and inherent value – not by their disability.

Equity

We believe that people with intellectual and developmental disabilities are entitled to the respect, dignity, equality, safety, and securities accorded to other members of society and are equal before the law.

Community

We believe that people with intellectual and developmental disabilities belong in the community and have fundamental moral, civil and constitutional rights to be fully included and actively participate in all aspects of society.

Self-determination

We believe in self-determination and self-advocacy. People with intellectual and developmental disabilities, with appropriate resources and supports, can make decisions about their own lives and must be heard on issues that affect their well-being.

Diversity

We believe that society benefits from the contributions of people with diverse personal characteristics (including but not limited to race, ethnicity, religion, age, geographic location, sexual orientation, gender and type of disability).

The commitment is to communicate the plan to the Board, staff, those supported, families and stakeholders over the coming months. This is to ensure that those associated with The Enrichment Center are aware of the goals and our commitment to success.

Strategic Planning Process

The Enrichment Center worked with a strategic planner to assist with the process of gathering information and identify strategic priorities. This effort was funded by a grant from The Winston-Salem Foundation. The Enrichment Center is grateful to The Winston-Salem Foundation for continually supporting growth and leadership efforts.

This strategic plan lays out an 18-month planning cycle for The Enrichment Center. The key elements of the strategic planning process are outlined in this document. Additional information on the assessment, data collected, and input obtained is available for review in form of reports, minutes, and power-points. The planning process took just over three months. The work has not ended since the Strategic Plan has been developed, it is only the beginning.

To process that must occur to ensure success for this plan for The Enrichment Center are:

- Understanding the Plan by staff, families and the Board;
- Ownership of the strategic priorities by leadership;
- Development of clear and measurable plans to meet the outcomes identified;
- Accountability of leadership staff to ensure that the tasks are completed; and
- Reporting process for each strategic priority.

Steps Taken to Prepare for the Strategic Plan:

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| August 2020: |
| <ul style="list-style-type: none">• The Board selected a Strategic Planning Committee.• Strategic Planning Committee helped to select a strategic planning consultant. |
| September-October 2020: |
| <ul style="list-style-type: none">• Stakeholders and families were interviewed to obtain input on the direction The Enrichment Center’s future.• Strategic Planning Committee prepared for Board Retreat and determined information to be shared. |
| October 2020: |
| <ul style="list-style-type: none">• Consultant spent a week on-site meeting with staff, those served and the Leadership Team to obtain input for the strategic plan.• Board Retreat held to share the information collected and to obtain Board input.• Strategic Planning Committee reviewed all the input and direction provided. |
| December 2020: |
| <ul style="list-style-type: none">• The Leadership Team Retreat was held and all the input that was obtained from September-October was shared. Goals and objectives were developed for the organization during the retreat. |
| January 2021: |
| <ul style="list-style-type: none">• The Strategic Planning Committee reviewed the goals of the Plan and prepared to present to the Board.• The Board was presented with the Plan for review. |

The following information will provide an oversight of 2020 and background information to better understanding The Enrichment Center’s positioning at the time this plan was developed. A new Executive Director was hired in November 2019 and one of the main task assigned by the Board was to complete a Strategic Plan. A grant was applied for early 2020 and was awarded by The Winston-Salem Foundation in the Spring of 2020. There was brief delay in planning due to COVID-19 but the strategic planning activities resumed in August 2020.

Summary of 2020

Since March 2020 and due to COVID-19, The Enrichment Center has made major adjustments to most every area of the operation. Changes were made to the organizational chart within two weeks of Phase 1 Quarantine. A total of 54 staff were laid off from work and the management team was restructured by May. The organization went from a 3.4 Million operation to under 1 Million over night.

A portion of the day services and Supported Employment continued in the community but more than 75% did not receive services from late March through mid-June 2020. The Day Program closed for twelve (12) weeks. The Administrative staff continued to report to work and the remaining staff were considered “essential workers”. By December, services had returned to 50% capacity and we were staffed at forty-nine (49). The revenue continued to be just over 1 Million but the expenses were reduced to meet revenue. This placed The Enrichment Center in a better financial position than in previous years.

Below is a summary of the activities that have transpired leading up to the Strategic Plan and will help to provide the backdrop for understanding the strategic priorities identified:

Capacity/Funding

| Persons Supported 2019 | | Persons Supported 2020 | |
|-------------------------------|------------|-------------------------------|-----------|
| Day Services | 106 | Day Services | 31 |
| Community | 3 | Community | 23 |
| Supported Employment | 39 | Supported Employment | 21 |
| Vocational Rehabilitation | 98 | Vocational Rehabilitation | 45 |

The Enrichment Center’s budget was cut by over 50% due to COVID in March 2020. There were 89 staff prior to COVID and the agency shrank to less than 40 staff. We are rebuilding and back up to just over 50 staff.

Building and System Enhancements

(Safeguards put in place for COVID)

Building:

- Security System for entrances
- Expanded entrances from 1 to 4
- PPE – Masks, cleaning materials, thermometers, sanitizer, etc..
- Fogging System for extra sanitization

Systems:

- Mobile Check in System – Temp and Health Checks at car
- Day Program restructuring for social distancing
- Zones to limit exposure
- Online presence and move to virtual gallery

Management Change

(From March through December, there was a renewed emphasis on the TEC Mission and outcomes on those in service.)

- Restructure the TEC Leadership Team
- Developed staff training
- Clinical Training
- Staff Development
- Fundraising / Donor Development
- Strategic Planning for 2021-2022

Gallery

The impact of COVID on the gallery was traumatic. It resulted in Gallery Openings cancelled, no foot traffic in Gallery, lower sales, and decreased opportunities for artist to earn income.

2020 Progress Made – Despite COVID!

- Improved staff satisfaction
- Balanced the budget
- Increased donations
- Improved clinical and administrative systems
- Increased outcomes focus
- Measuring participant satisfaction

Current Strengths, weaknesses, opportunities, and threats identified:

Over the past year, there have been two assessments completed by outside consultants to help identify the organization’s strengths, weaknesses, opportunities, and threats (SWOT). The information captured was not

relevant for where we are now as an organization mid-COVID and much of the information was related to how The Enrichment Center previously managed. In most cases, changes had already occurred or plans were in place to make changes. The assessments were used to create the SWOT below along with additional input gathered.

Strengths:

- The organization is small but strong in the management team structure and oversight of the departments. Resources are available and each department has capacity to grow without adding additional resources.
- The reserves available can help to sustain The Enrichment Center through several months without revenue, if necessary. Reserves are stable and relatively untapped through COVID-19 though 1-1-21.
- Donors have been generous and have given more than in the past to help the organization get through COVID related challenges.
- New orientation training and a new culture identified –
- Focus on hiring those that fit what is needed in the future and those that support the Mission of the organization.
- Families are loyal and committed to TEC
- Supportive Board
- Staff are knowledgeable about services, accreditation and outcomes
- We have quality system staff in place to help with auditing and tracking progress
- We are able to increase base wages this year to help recruit higher quality staff
- System in place to manage social distancing moving forward in the Day Program
- Finance Director hired 11-20 and is engaged and involved with Leadership Team
- Art gallery and unique art focus in the Day Program
- New Day Program security and multiple entrances
- Ability to monitor and audit Waiver and State services
- Resources to manage Vocational Rehabilitation (VR) and Supported Employment (SE) services in place and capacity for growth
- Mass text/voice mail communication system
- Able to balance budget in 2020 for the new budget year 2020-2021

Weaknesses:

- Newly formed leadership team and new leaders
- Newer staff that are young and have less experienced
- Not having extra staff available to fill in when needed
- No backup system for coverage of services
- Willingness of staff to work afterhours
- Under funded through Medicaid and State
- No opportunity to provide transportation support in the community
- Old culture still exists
- Staff are not cross trained
- Staff turnover has been high
- Few staff that have art/music background
- Lacking staff with a technology background
- Limited IT resources and those in place are expensive
- Ability to easily tap into new referrals with funding
- Pay increases are not based on performance
- Limited customers in the gallery
- Lack of art being created for the gallery
- Willingness to change the gallery practices and how it has been managed
- Internal skills related to technology, internet sales and shipping
- Limited accountability for not meeting outcomes
- Long term problem solving and planning by leaders
- No system to monitor and audit Vocational Rehabilitation (VR) services
- Operations decisions made without data or justification
- Quality of the work that is done is subjective
- New accreditation guidelines that leaders are not aware
- Grant writing skill set
- No consistent communication process

Opportunities:

- New services to deliver – CLS, Vocational Rehabilitation and Supported Employment
- After hours and wrap around services
- Unlimited employment potential for Vocational Rehabilitation /Supported Employment services
- Fundraising and relationship development with donors has untapped potential
- Resources that are willing to help – CAP DEV / Network 4 Good / Strategic Planner
- Need for more community providers
- Connecting with local advocacy groups – NC Waiver Team, IDD Group, Autism Society, Downs Syndrome, etc.
- Partnership with The Arc of High Point and ways to serve High Point
- Yadkin County needs services – Vocational Rehabilitation requesting
- Value Based Payments to begin through Cardinal
- Personal Outcome Measures (POM) Training in Feb
- Network for Good provides new ways to communicate as an organization
- Request to combine art and technology for a POD
- System in place to track outcomes for those in services
- Online art sales/virtual gallery
- Connection with the Arts Council and members
- Future grants

Threats:

- United Way funding changing/ending
- COVID extended / not ending quickly
- Transportation expense
- Forsyth County petitioning to move away from Cardinal Innovations
- Electronic Visit Verification payments – new system/new requirements
- Unfunded mandates – accreditation, Electronic Visit Verification, Value Based payments,
- Guardians contracting COVID and those in our services impacted
- Families not comfortable in sending individuals back to services
- Individuals not returning to TEC due to not having services for 10+ months
- Space limitation with new social distancing standards
- Limited Medicaid funding w/no plan for increase
- NC Budget not approved since 2018
- Uncertainty of COVID long term and the changes it brings
- Need for more of a medical approach to our services – increased nursing services
- Instability of NCDDDMHSAS and a plan for the future of Waiver services
- Retainer payments are being discontinued
- Staff expecting pay increases annually
- Families not wanting to let go of the way things were done in the past as a “school”
- Not being able to hire quality staff

Overview of the Strategic Priorities:

Throughout the Strategic Planning process, the strategic areas have presented themselves in six (6) strategic priority areas. **Art** being the first area to be focused on and the founding basis for our programming. It is the area that differentiates us from other day programs. Our **growth** is a natural progression since we have adjusted from the way we have done in the past and services were relocated in the community. **Staff development** came about due to COVID and the opportunity to have a new leadership team and staff. The desire and need for a culture change, wanting to retain our new staff and finding career paths for those we hire were areas of focus for the new leadership team. **Marketing and development** have always been on the radar. We have been fortunate there has been an increase in our donations and amazed at the generosity of those who support The Enrichment Center. We have also changed how we provide services and need to market our services accordingly. It is necessary to reach out and communicate more with our stakeholders and keep them in the loop with where we are as an organization. **Advocacy** is not only our obligation as a chapter of The Arc, but is a priority for our leadership team. We want to do our part in helping those in Forsyth and surrounding counties receive the services they need to live their best life. This brought us to the last area of focus, **quality management**. To bring all of the areas together in a way that can be tracked and monitored, it was agreed upon that mediocrity would not be accepted and there was a renewed commitment to improve our services over time.

Strategic Areas Identified:

- Art
- Growth
- Staff Development
- Marketing/Development
- Advocacy
- Quality Management

Goals, Strategies and Actions Identified:

Art:

Outcomes/Tactics:

- Provide opportunities to learn and create various types of art: photography, music, dance, culinary, pottery, graphic art and other art forms
- Provide opportunities to those in services to increase their income
- Promote the unique talents of those we support and share the benefits of art for those with disabilities
- Get involved in Winston-Salem outside the organization in the arts community
- Build up our staff and volunteers that have professional talent in: art, music, pottery, dance, photography, and other art forms
- Increase gallery sales and attendance
- More marketable and interesting art to a more diverse group

Actions:

- Develop a voluntary Art Advisory Group to assist in giving direction to the art gallery and types of events that are to be held for the year.
 - **Goal Date: 8-1-21**
 - **Responsible Party: Amy Stevens**
 - Measurements: Identified artist, scheduled meeting, minutes from meeting, scheduled events and success of events
- Research opportunities for a virtual gallery. Initially identify a site to begin listing items (ebay, ETSY, FB Marketplace or other) but long-term, develop a website and have a plan to create art, list art, sale art and ship the product anywhere in the US.
 - **Goal Date: 7-1-21**
 - **Responsible Party: Amy Stevens**
 - Team Involved: Day Program Director, Administrative Assistant, and QA Director
 - Measurements: Posting of product online for sale, sales on-line, views, and feedback/surveys
- Diversify art opportunities on-site at the Day Program. Initially, focus will be on returning to the level of art prior to Covid and then move to additional art methods and mediums (to include performance art, metal work, and technology).
 - **Goal Date: 1-1-22**
 - **Responsible Party: DeeAnna Kerns**

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- Measurement: Artist skills available, track interested participants in art offered, tracking of sales and types of products sold
- Gallery events are staffed by participants in supported employment services, once trained.
 - **Goal Date: Started by 6-1-21; Successful oversight by 6-1-22**
 - **Responsible Party: Tory Walker**
 - Team Involved: Day Program Director and Administrative Assistant
 - Measurement: Participants/Staff identified, trained, hours worked, and events held, reporting of outcome

Growth:

Outcomes/Tactics:

- Increase the number of people we support in the community 10% in each area: VOCATIONAL REHABILITATION, SE and Day Program
- Increase the area in which we provide VOCATIONAL REHABILITATION and Supported Employment services by one (1) city/county
- Growth of the B-3 program to be self-sufficient
- Stabilize the Vocational Rehabilitation program to ensure long term viability
- Increase the services that are provided afterhours and weekends

Actions:

- For the Vocational Rehabilitation program into Hight Point (HP) and provide services.
 - **Goal Date: Started by 6-1-21; Self-Sustaining by 7-1-22**
 - **Responsible Party: Rhonda Dioum**
 - Measurement: Approval from VOCATIONAL REHABILITATION to move into HP, contract change to include HP, staff hired for HP and Number of those served in HP.
- Day Program regain those supported prior to Covid and offer interest based PODs.
 - **Goal Date: 1-1-22**
 - **Responsible Party: DeeAnna Kerns**
 - Measurement: Increasing the program to 106, a technology POD is added, and a Group Lead is hired that has background in technology
- The Supported Employment Program (B-3 and Innovations) will be self-sufficient and stable to work toward growth in the future.
 - **Goal Date: 7-1-21**
 - **Responsible Party: Tory Walker**
 - Measurement: Monthly financials, productivity, and new referrals

Staff Development:

Outcomes/Goals:

- Decrease Turnover (baseline from COVID)
- Best Provider to Work For by 2023

- Increased Staff Satisfaction
- Positive work culture
- Create a pipeline for future staff, management and leadership
- To move toward a learning organization at all levels
- Formalize a communication system for internal staff to offer 360 communication
- Hire staff that align with the Mission: (qualities identified below)
 - Flexible
 - Willingly offers help
 - Asks for help
 - Seek feedback
 - Takes ownership
 - Mature
 - Holds themselves accountable
 - Wants to stay with EC long-term
 - Works as a team player
 - Self-motivated
 - Self-starter
 - Positive attitude
 - Direct and clear communicator
 - Skills to do the job

Actions:

- In order to shift the culture to be more positive, work will be done with the Board and staff to identify the core values and value statements of the organization in order to align with the Mission. Use the core values to align the organization’s policy and practice using Board Committees and the Culture Group.
 - **Goal Date: Developed by 6-1-21; Fully Implemented 7-1-22**
 - **Responsible Party: Amy Stevens**
 - Team Involved: Leadership Team
 - Measurement: Values identified, communication of values, minutes, and updates to policy and procedures
- Create a Recruitment and Retention Plan that addresses the outcomes, tasks and measurable goals to accomplish recruitment of staff with identified qualities, retaining staff, staff development activities, move to a learning organization, and align with our core values.
 - **Goal Date: Developed by 4-1-21; Fully Implemented 7-1-22**
 - **Responsible Party: Deanne Hooker, HR**
 - Team Involved: Leadership Team
 - Measurement: Plan completed by 2-15-21. See Plan for Details on measurement
- Develop a Cultural Group that represents staff across all levels and managed by an outside consultant. This will be a quarterly group that will meet and discuss the strategic plan, communication across the organization, and give feedback from staff on ways the organization can grow and improve as an employer and provider.
 - **Goal Date: Started 4-1-21; Implemented 7-1-22**
 - **Responsible Party: Amy Stevens / Deanne Hooker**
 - Team Involved: Human Resources Specialist, Finance Director, QA Director
 - Measurements: Committee members, meeting scheduled, minutes, surveys, and changes made based on the feedback
- Career Ladder and opportunities for growth for each level of staff within available funding.
 - **Goal Date: Identified by 9-1-21; Implemented by 1-1-22**

- **Responsible Party: Amy Stevens/Paul Marceau**
- Team Involved: Directors
- Measurement: Budget for opportunities developed, identify opportunities, process for application for staff, tracking of progress
- Research, develop and implement a communication system for staff that provides information at any time to all levels of the organization.
 - **Goal Date: 6-1-21**
 - **Responsible Party: Amy Stevens / Deanna Hooker**
 - Team Involved: Leadership Team
 - Measurements: software purchased, system tested, employee usage, messages posted, views, and surveys
- Review of all benefits for staff at all levels and develop a benefits programs that promotes staff longevity and growing with the organization.
 - **Goal Date: 5-1-21**
 - **Responsible Party: Amy Stevens**
 - Team Involved: Finance Director, QA Director, HR Specialist
 - Measurements: plan changes, surveys, length of employment, number of staff promoted

Marketing/Development:

Outcomes/Goals:

- Programs grow and referrals increased
- Formalize messaging and branding
- More social media presence and engagement
- Increase donors and donation amounts
- The Enrichment Center beyond Winston-Salem via on-line presence
- Sharing services that are more than art – Day Program, Supported Employment and Vocational Rehabilitation
- Increasing overall awareness of The Enrichment Center in the community and on-line

Actions:

- Create a Marketing Plan that is focused on branding that includes our purpose message and cascading our message via social media presence, gallery events, website, focused mailings, emails and community activities /festivals.
 - **Goal Date: Developed by 7-1-21; Implemented 7-1-22**
 - **Responsible Party: Amy Stevens**
 - Team Involved: Finance Director, QA Director
 - Measurements: Marking Plan, consistent messaging, survey to check understanding, track correspondence

- Locate a new donor/communication database that provides consistency in messaging across website, social media, emails, mailings and general communications. The database is also to provide ease of access to reports on donors, contacts, labels, on-line payments and general donor statistics 6-1-21.
 - **Goal Date: Switched by 6-1-21; Implemented 9-1-21; Fully utilized by 3-1-22**
 - **Responsible Party: Amy Stevens**
 - Team Involved: Finance Director, QA Director, Consultant
 - Measurements: Database purchased, contract in place, data transferred, donor reporting, messaging consistent, newsletters and online payments processed
- Create a Development Plan with the goal of raising \$200K each year and re-establish the Board Development Sub-Committee to help with involvement and engagement in fundraising.
 - **Goal Date: Developed by 9-1-21; Implemented 7-1-22**
 - **Responsible Party: Amy Stevens**
 - Team Involved: Finance Director, QA Director
 - Measurements: Plan, Minutes, donations, communications made
- Apply and awarded three (3) additional grants. This is to be done by using a consultant / contractor to help with locating and final review for new grants opportunities.
 - **Goal Date: 1-1-22**
 - **Responsible Party: Amy Stevens**
 - Team Involved: Finance Director, QA Director
 - Measurement: grants applied for, grants awarded, contract with consultant

Advocacy

Outcomes:

- Help those with intellectual or developmental disabilities receive benefits
- Meet our obligation as a chapter of the Arc

Actions:

- Create steps to offer support to families that contact The Enrichment Center to help in navigating the process to receive services.
 - **Goal Date: Developed 11-1-21**
 - **Responsible Party: DeeAnna Kerns**
 - Team Involved: Director of State Services
 - Measurements: Number of those calling, Number new to services,
- Develop the website to include resources to help those seeking services and key contacts to assist them in navigating the service delivery process.
 - **Goal Date: 1-1-22**
 - **Responsible Party: Paul Marceau**
 - Team Involved: Director of Waiver Services, Director of State Services
 - Measurements: Website w/ link, Number of those visiting site, Number calling for support

Quality Management

Outcomes/Goals:

- Improve the quality of services provided
- Have data to support the work
- Show progress for those receiving services
- Put measurement to those items that can be measured
- To share data with stakeholders and funders
- To be considered the best provider in Forsyth County

Actions

- The organization will have a Quality Assurance Plan in place, functioning, reporting and tracking on a quarterly basis to the QAI Team and to the Board. The Plan is to include 3 projects (Communication, Service Record Review and CQL Accreditation).
 - **Goal Date: Plan Developed 5-1-21; Implemented 7-1-22 (see plan for specific goals/dates)**
 - **Responsible Party: Paul Marceau**
 - Team Involved: Leadership Team
 - Measurements: Plan, Minutes, Projects and data
- Implement Personal Outcomes Measures for Leadership and implement for those in Waiver and B-3 services. This will promote staff's understand of the person supported, the areas of their life that mean the most to them and to identify areas of focus for services and supports.
 - **Goal Date: 6-1-22**
 - **Responsible Party: Paul Marceau**
 - Team Involved: Leadership Team
 - Measurement: Training scheduled, training held, interviews held, data from interviews tracked in Therap
- Develop an annual report to share the data tracked and progress made across the organization. The report is to be shared with stakeholders, donors, funders and posted on the website.
 - **Goal Date: 11-2-21**
 - **Responsible Party: Paul Marceau**
 - Team Involved: Executive Director
 - Measurements: Annual Plan, mailing list