

Strategic Plan Fiscal Year 2021					
Quality and Safety Areas					
	Goal	Objective	Measurement Method	Lead and Report	Financial Commitment
	<i>What are you focused on?</i>	<i>What is the measureable definition of what we want to achieve?</i>	<i>How will this be tracked, how often, and through what means?</i>	<i>Who will guide this goal?</i>	<i>What is the financial cost to this goal and when?</i>
Compliance Standards	To ensure that Pioneer Resources meets 90% of all CARF standards at next CARF survey in August of 2022	Out of all required standards that Pioneer Resources will be assessed on the organization will meet no less than 90% of these at the August 2022 survey	This will be tracked through the survey preparation process as well as through the survey final report	Executive Director and Performance Improvement committee	commitment to apply cost of CARF accreditation survey to 2022 budget
	Pioneer Resources staff working in contracted areas will meet all training requirements	13 out of 15 staff files will have required training and documentation in HR files	Through a monthly audit of HR files and training supervisor assistance with scheduling	new training staff role	approved through board already
Technology	Assure to train and assess on technology use	Pioneer Resources will assure to train 100% of program participants and staff on use of technology and increase awareness of safety and cyber security.	<p>Pioneer Resources will partner with Next IT to provide a quarterly training to all staff via online tool and tracked attendance of this training</p> <p>All staff will be trained on the new telehealth policy</p> <p>All program participants will be offered a training and documented yearly</p>	Next-IT and Program Supervisors	None
Communication	To increase knowledge and awareness regarding services, persons served, contractual compliance, financial and other best practices to PR staff, persons served, families/guardians, donors and community at large	PR will record show that at least 90% of all staff feel they receive adequate information to be informed about agency updates	measured through Employee survey	Marketing manager/ED/ HR for survey	\$0 defined at this time

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Safety	To ensure safety for all persons served by Pioneer Resources	Pioneer Resources will decrease the number of critical incidents by 15% over last year.	through tracking of IR/ Critical incident reports	safety committee and leadership	None
	To ensure safety of all employees and participants of services from infectious diseases	To ensure that proper procedures, policies and training are in place along side the appropriate level of PPE necessary to support need.	creation of an infectious disease policy and procedure measured through PPE outcomes	Anna all supervisors	
	Ensure that employees of Pioneer Resources can provide for their basic needs outside of work	Pioneer Resources will provide support, guidance and referrals to all employees to ensure their basic needs are being met share more about employee assistance program continue to offer PTO buyout option provide 211 information on employee portal	employee survey measures such as : food, health, challenges in life right now, financial	HR, safety committee, referral program support	\$1000 fund to balance emergent needs
Marketing	PR will increase community knowledge of its reputation as a premier provider of services for individuals with disabilities	Share "Monthly Mission Moment" via social media, newsletter, and other platforms.	March 2021 - Load reporting tool on Employee Portal and Review with supervisors at Lunch and Learn	Community Relations Manager	No Additional Funding Needed
			April 2021 - Begin reporting monthly on Social Media and at Lunch and Learns and Board Meetings		
			September 2021 - Annual Review at Managers Meeting		
		Utilize buses as a "moving billboard" and list all program/services	June 2021 - receive quotes for stickers	Community Relations Manager	No Additional Funding Needed
			September 2021 - Apply stickers to buses	Maintenance/ Transportation	TBD
		Connect and market utilizing local media channels (ex: Positively Muskegon, etc.)	Complete 1 external media interview per quarter.	Community Relations Manager	No Additional Funding Needed
		Increase transparency and communication via Social Media	Increase likes and followers by 10% by September 30, 2021	Community Relations Manager	No Additional Funding Needed

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Fund Development	<i>PR will improve charitable giving through increased donations and enhanced donor relations.</i>	Increase relationship/partnership with local businesses. Increase community knowledge. Increase donations. Through monthly partnership with local business to "round up" purchase at their location.	February 2021 - Create list of suggested partnerships and review at Fund Development Committee.	Community Relations Manager	<i>No Additional Funding Needed</i>
			April 2021 - Begin conversations with local businesses and set up/assign month for program		
			June 2021 - begin program with first business partnership		
		Increase business and personal sponsorship of events/programs by offering an "a la carte" menu for sponsorship to increase sponsorships by 10% from FY 2020.	February 2021 - review a la carte menu with Fund Development Committee.		
			February 2021 - Determine businesses to target for an ask with Fund Development Committee and Management Team		
			February 2021 - Begin asks for year sponsorship		
		Connect with current donors that utilize paper checks as a form of donation via quarterly newsletter mailers with a soft ask for donations.	June 2021 - Review sponsorships quarterly with Fund Development Committee and Management Team	Community Relations Manager	<i>No Additional Funding Needed</i>
			March 2021 - Identify current donors who utilize mail vs online donation options		
			May 2021 - Send out email and postcard to "opt in" for newsletter mailer		
		June 2021 - send first quarterly newsletter via mail	<i>\$110 in Mailing Costs</i>		
		Track and increase in-kind donations from businesses	March 2021 - develop tracking form for in-kind donations	Community Relations Manager	<i>No Additional Funding Needed</i>
			June 2021 - review quarterly with management team and Fund Development Committee		
		Increase donor giving by 10% and increase event participation by 20%	As measured compared to fy 2020 donations and event attendance		
		Complete an average of 2 grants per month per fiscal year.	January 2021 - Complete 2 grants per month and continue researching new grant opportunities		
Increase Planned Legacy Giving by securing one Planned Giving per year.	June 2021 - Discuss potential marketing strategies with Fund Development Committee				
	July 2021 - Meet with prospective Legacy Giving donors and make the ask				

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Benefits	Increase employee knowledge about benefit offerings	We want employees to be informed about the total compensation we offer, not just wages	1 page flashy document highlighting total compensation - poll in 3 months - provide staff a one pager at annual review with total compensation	HR Manager	Time/Gift Card <u>\$100</u>
		We want employees to be informed about the voluntary and fringe benefits we offer	Send out Benefit Spot App information - communicate with HUB on app downloads		Time
	Assuring Staff feel recognized and valued and compensated fairly to lead to the highest level of a quality and caring workforce	Be a leader in compensating staff in the area	Informing staff of PR activities to keep state increase continuing - newsletter/video blog/portal and review other provider wages annually	HR Department, Personnel Committee, Executive Director, Program Managers	Time
		Hire PT staff focused on Training/Hiring	Better compliance in training requirements - LRE and Licensing Review		already approved (20,000)
		Implement Employee of the Month Program	Selecting EOM using criteria/form created - highlight them in a group setting		Gift card \$25? Coffee with Jill? (\$300 = \$25x12 months) - clothing item?
	Staffing	Reduce staffing shortages in group homes	Focus on benefit conversations. Send out video from Workforce Committee	Number of views on commercial YouTube link	HR Department
Highlighting employee referral program - goal of 1 referral a month			Increased number of applications/referral payouts	None	
Ensure our longer term employees feel valued in their compensation			Adjust discrepancies in pay	already approved (\$22,000)	
Reduce employee turnover		utilize acquired trends, surveys and feedback to provide influences to retaining staff and deduce employee turnover rate by 4% over last year	measureable each quarter and as a year	Hr Manager	None

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Quality	Increase Communication and Transparency	Ensure staff are invited to PCP Meetings. Program managers/supervisors will track PCP dates and keep a record of what meetings they were invited to - or not invited to. Program manager/supervisor will ensure that a program staff is available for accuracy and content.	Annually or as PCP meetings are scheduled.	Managers/Supervisors	\$0. We can bill to attend a PCP meeting.
	Have higher standards and consistent documentation	Program manager/supervisor to review monthly service logs for accuracy prior to them being released to billing	Monthly	Manager/supervisor	\$0
Person Focused	Offer variety and choice of activities	Pilot Meaningful day curriculum for skill building, Marcoux, and Community Connections. Provide choice in the activities that persons served can participate with. Provide opportunity for in person programming as well as virtual programming for those who would like it.	Weekly	Manager/Supervisor	\$0
	Support participants PCP goals	Staff will ensure to provide activities that meet the goals defined in the IPOS. At annual PCP meetings staff can provide input on meaningful goals.	Daily/annually	Supervisors	\$0
Communication	To provide communication and information for families/guardians	Offer educational series to include - MIABLE Saving Account. Collaborate with agencies such as Gracious Grounds providing participants served and families with information on Pioneer resources services. CC will hold quarterly parent advisory meeting and phone surveys will be conducted to access interest in virtual services due to COVID-19.	Month/Quarterly	Manager and supervisors	\$100 annual/Flyers and other means to get the information out.

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Inclusion	Provide diversity, Inclusion and Equity	Restrooms will be designated as a non binary restroom for each building on the Wesley Campus and program referral forms will be updated to reflect ethnicity, sexual orientation which will also reflect in our annual outcomes report.	Annually	Manager/supervisors	\$100
Quality	To assure staff competencies	Staff will complete required trainings annually. Staff training documentation will be gathered in one excel document Staff will be trained to provide safety drills for fire/tornado and bomb threats with the participants. Annual safety training will be required and documented for staff.	Annually	Manager/supervisors	0.00
Safety	Managers will create a "phone tree" for staff	A phone tree will be created for the purpose of contacting a manager or supervisor in the case they cannot reach their direct supervisor/manager	Annually or updated as needed.	Managers	\$0

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Financial Management	The goal is to ensure assets are used in accordance with donors' intent and in support of the mission.	Through the use of updated financial and fund development software, Pioneer Resources will track 100% of donations in accordance with donor intent and/or in general support of the mission.	We will have accomplished this goal by successfully mailing donor thank you letters by 1/31/2022 for the 2021 calendar year.	Finance Manager/Fund Development Manager	Cost is staff time and minimal postage expense which can be minimized by donors who wish to receive information via email.
	The goal is to ensure that there is a high standard of integrity and honesty in all financial activities.	Updated, comprehensive, financial policy manual completed by 9/30/2021.	Progress updates on financial policy to be reviewed at: 3/31/2021, 6/30/2021, 8/30/2021 with finalized policy to be confirmed no later than the October 2021 Finance Committee/Full Board meeting.	Finance Manager to report to Executive Director and Finance Committee	Cost is staff time.
			We will have accomplished this goal with a "no material audit findings" on our 2021 YE financial audit.		
	The goal is to ensure accountability, trust and confidence in the organization's finances.	Development financial department segment of management meeting by 4/30/21.	Check in at management meetings regarding accessibility/confidence in financial information.	Executive Director	Cost is staff time.
				HR Manager	
		Develop financial department segment for lunch and learns by 6/30/21.	Check in at lunch and learn meetings regarding accessibility/confidence in financial information.	Finance Manager	
Executive Director, Finance Manager, Finance Committee					
Create Financial Dashboard: Determine Key Metrics - create high, acceptable, low range and corresponding action/activity by 9/30/21.	Integrate Financial Dashboard into Financial Policy Manual.	Executive Director, Finance Manager, Finance Committee			
		Board/Management Team Survey			
Financial Stability	The goal is to establish financial milestones and guidelines that greater ensure the financial stability of the Agency.	In collaboration with the finance committee, establish stability milestones regarding operational reserves, debt elimination goals, and any other financial milestones to be determined, by 9/30/2021.	Integrate stability guidelines into the completed Financial Policy Manual.	Executive Director, Finance Manager, Finance Committee	Primary expense is time not cash outlay.
		By April 2021 management to begin reporting budget to actual to whole team at management meetings (March's financial reports).	Budget to actual reports are discussed at management meetings.		Opportunity cost of keeping funds in savings vs. growth. Paying down debt vs investment.

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Fiscal Minded Agency	The goal is increased financial literacy of management team.	Managers will establish access and be trained in utilizing Financial Edge NXT for monthly financial reporting by March 2021.	Finance Manager will provide group training for all managers on a specific date and schedule one on one trainings. Finance Manager will report to Executive Director on status/completion.	Executive Director, Finance Manager, Managers	Cost is staff time.
		Managers will establish access and be trained in utilizing Zobrio for annual budgeting and forecasting by June 2021	Finance Manager will schedule trainings with Zobrio team and provide training opportunities for managers. Finance Manager will report to Executive Director on status/completion.		
	The goal is to greater ensure the organization is receiving the best value for the cost of products and services purchased.	As part of the annual budgeting process, managers will review their department's active expense contracts. Every three years and/or as they near their expiration any contracts over \$25,000 will have an in-depth review - examples include insurance brokerage and technology contracts.	All contracts over \$25,000 will either have been reviewed or be reviewed as part of the next budget cycle; any not yet nearing expiration will have a review date assigned in FE NXT.	Executive Director, Finance Manager, Managers	Cost is staff time.



QUALITY / BUSINESS GOALS
MARKETING/FUND DEV GOALS
HUMAN RESOURCES GOALS
PROGRAM GOALS
FINANCIAL GOALS