

LOGAN COUNTY BOARD OF DEVELOPMENTAL DISABILITIES

2016

Strategic Action Plan Progress Report

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We express appreciation to the individuals we serve and their families, our employees and the Logan County community for their continued support of people with disabilities and their families. Your support has been an essential part of this planning process. We are grateful to be members of such a caring agency and community.

The Administrative office is located at 1851 St. Rt. 47 West, Bellefontaine, Ohio and is open to the public Monday through Friday 8:00 am to 4:00 pm. For more information, visit <http://logancbdd.org>.

2016 STRATEGIC ACTION PLAN PROGRESS REPORT

Strategic Planning
“Every Person Adds Value to Our Community”

As a result of the survey and the emerging trends the Board is actively committed to the following strategic plan:

I. STRATEGIC ISSUES and PROGRESS REPORT

The process used for this strategic plan was based on the identification of key issues confronting the Logan County Board. The Strategic Direction Team identified the following as the most significant strategic issues confronting the Board:

THE BOARD’S MOST SIGNIFICANT STRATEGIC ISSUES AND ACTIONS TO ADDRESS THEM

Issue 1) Philosophy, Purpose, Values and Mission Statements: The Strategic Direction Team reviewed the Board’s current statements. They concluded that some changes were desirable to highlight and reinforce the Board’s commitment to promote community integration, support safe and supportive environments for families with children, and a safe and healthy lifestyle for adults. [See *Statements of Philosophy, Purpose, Values and Mission included in this document.*]

This Strategic Plan calls for strategic actions **for all issues** to be founded on the principles reaffirmed in the revised Statements. Key elements in the *Statements* include:

- a. **Every person adds value to our community.** *We will offer services and supports which help assure that persons with disabilities are received and treated as valued members of their community.*
- b. **Lifetime service** - *The services we provide should meet the needs of each person at each stage of life development, regardless of age or degree of disability.*
- c. *The Board will expand opportunities for **community integration**, inclusion and awareness.*
- d. *We set our sights to where people live a **good life**, as defined by them; and they are happy as a result of their accomplishments.*
- e. *Only when the **most integrated setting** is not meeting the needs of the individual will other specialized settings be explored with them.*
- f. *Our focus will be on the development of proven, **evidence-based practices that result in measurable performance outcomes at both the individual and system levels.***
- g. *To the extent permitted by financial realities, all strategies will **reflect the advocacy of the person** being served and an understanding of the current and future affordability of long-term systems of support.*

II. ACTION PLAN/PROGRESS REPORT

Specific actions recommended for Issue 1) Philosophy, Purpose, Values and Mission:

Action 1	Responsible Party(ies)	To Be Involved	Timing	Updated Action
Statement of Mission, Philosophy, Purpose and Values will be presented to the Logan County Board of Developmental Disabilities for formal review and affirmation. The Statements will be formally endorsed and circulated widely within the organization and to our community stakeholders.	Superintendent	Administrative Team Team/Board	Board consideration in August/September 2014.	The board adopted the Strategic Action Plan and the Annual Action Plan in 2014. The Plan was placed on our newly renovated Website (www.logancbdd.com). The plan has been defined through articles and interviews in the Bellefontaine Examiner, WPKO, social media and in our newsletter.
Action 2	Responsible Party(ies)	To Be Involved	Timing	Updated Action
Value statements will be used by the Board and the Administrative Team as an instrument to provide ongoing direction and motivation for the LCBDD and the community. Each value statement will be used by the Administrative Team as an instrument to assess and appraise current services and goals. Value statements will be used as a grassroots and Administrative Team instrument to encourage the development of ideas and initiatives to fulfill our mission.	Administrative Team	Marketing staff, persons with disabilities, board members, Superintendent	Winter 2014 and on-going	Value statements are placed on posters for presentations. Placed on the wall in cafeteria. Included in media release and radio announcement, included in our newsletter and The Insider. Management team reviews at meeting. These statements have been integral in our everyday decision making. We continue to make these values an accepted part of our daily activities.
Action 3	Responsible Party(ies)	To Be Involved	Timing	Updated Action
Statement of Mission, Philosophy, Purpose and Values will be provided to multiple constituencies: Staff, families, LEA, employees using: staff meetings, public forums, community presentations, and website.	Administrative Team	Marketing staff member, persons with disabilities, board members, Superintendent.	Fall 2014 and on-going	As stated above: Placed in Newsletter and on website. They continue to be a part of Management meetings, staff In-Services and daily conversations. Our survey was updated in 2016 to include specific aspects of these statements
Action 4	Responsible Party(ies)	To Be Involved	Timing	Updated Action
Applicable provisions of the Statement of Mission, Philosophy, Purpose and Values should be referenced to support any budget, policy and	Superintendent and Administrative Team	Board and Administrative Team	On-Going	We hired a Community First Facilitator in 2014. Our budget includes an increase in funding for community integration. SSAs are including integrated activities

<p>program recommendations taken to the Board in future meetings. This is the primary document guiding all our work on behalf of persons with disabilities, their families and our community. Our proposed actions should be tested against its standards</p>			<p>in each ISP. Willing providers have included integrated activities in daily activities. Transportation resources have been increased for integrated activities. Community Integration team meets quarterly to encourage, review and discuss additional ways to implement integration. The number and quality of integrated activities have increased significantly!</p>
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Issue 2) Board’s Continuum of Services: The services provided by the LCBDD have emerged over the years by the application of professional judgment about the balance between the needs of persons with disabilities, our fiscal and professional resources and the emerging trends affecting our field. As we listen to families and people served and other stakeholders, we also study the impact of emerging trends and issues in the developmental disabilities world. These will be front and center as we go about our work over the next three years and beyond. They will require us to redefine and redesign how we do many things, including day programs, community employment and community integration.

Action 1	Responsible Party(ies)	To Be Involved	Timing	Updated Action
<p>Administrative Team staff will review and inventory our lifespan services and identify gaps or overlaps.</p>	<p>Administrative Team</p>	<p>Administrative Team, Staff and persons receiving services</p>	<p>After Board adoption of the Strategic Plan</p>	<p>Lifespan services were placed on a timeline for review. Cross Systems Training is now available through FCFC to establish coordinated interagency services.</p>
Action 2	Responsible Party(ies)	To Be Involved	Timing	Updated Action
<p>Based on assessment of existing services, develop/refine our continuum of services.</p>	<p>Administrative Team</p>	<p>Administrative Team</p>	<p>Following Action 1.</p>	<p>Each school district signed an agreement in 2015 for ongoing transition services. RTC is actively coordinating transition services with each school. SSAs are involved in the planning of these services through PCP. Teens in Transition is offered in school districts and activities to promote transition are available to all eligible residents.</p>
Action 3	Responsible Party(ies)	To Be Involved	Timing	Updated Action
<p>Develop action steps to deliver our continuum of services based on our values; then prioritize them according to individual need, our available resources and evidence based practices</p>	<p>Administrative Team</p>	<p>Administrative Team, Staff and persons receiving services</p>	<p>Following Action 2.</p>	<p>A timeline of services provided in Logan County to eligible individuals was reviewed by the admin team. Services are deemed appropriate for all age groups.</p>

Action 4	Responsible Party(ies)	To Be Involved	Timing	Updated Action
Communicate to families and the community our desire to carry out the action steps and be open to their feedback. It is vital that we be viewed as partners with our families and the community.	Administrative Team and Marketing Committee	Staff, persons receiving our services, families, and the community.	On-going.	On-going articles and announcements are available via social media, Insider, newsletter, radio and newspaper. funding for public relations is part of our annual budget.
Action 5	Responsible Party(ies)	To Be Involved	Timing	Updated Action
Elicit community support in carrying out action steps as a way of keeping the community involved and up to date. We cannot act as a silo.	Administrative Team, Staff and Marketing Committee	Staff, persons receiving our services, families, and the community.	On-going.	A community First team meets regularly to review community activities and plan for a more integrated future for individuals with DD. The FANS network has grown to over 300 FANS. FANS include businesses, agencies and employees.

Issue 3) Community Education and Marketing: We believe that every person adds value to our community. When we welcome and include everyone our communities are made whole, we are stronger, we accomplish more and everyone benefits. In order to create a stronger community we need greater diversity and acceptance. The understanding of diversity and acceptance are fostered by knowledge and encounter. We will present a simple message and insert that message into as many conversations as we can. We will provide opportunities for community interaction as often as practical. Part of our marketing strategy will be directed internally to recognize that staff and community volunteers have some of the same needs for a better understanding of the agency as does the general community.

Action 1	Responsible Party(ies)	To Be Involved	Timing	Updated Action
Evaluate existing marketing strategies. Review communication needs based on staff and community understanding of our core values. Look at our literature, public statements, website content, etc. to ensure that our core values are at the center of focus. Assess the clarity with which we are projecting our image. Evaluate the marketing effectiveness of existing service materials. Look at our literature, brochures, assessments, etc. and ensure we identify available programs or services. Develop “top of mind” knowledge we would like internal and external stakeholders to have about the Board.	Administrative Team. Marketing Resource person.	Administrative Team, Staff and persons receiving services	After Board adoption of the Strategic Plan	Ongoing PR services through ESC. Jamie (ESC) has improved the look and readership of our newsletter and was key in establishing a new improved look to our website. All brochures have been reviewed and updated as of October 2015. Jamie provides approximately 8 hrs of PR services weekly
Action 2	Responsible Party(ies)	To Be Involved	Timing	Updated Action
Develop a marketing plan that includes sharing with other ‘gatekeeper’ agencies and providing opportunities for the community to encounter people with disabilities. Develop a budget for these events and experiences. Use the website to communicate our programs and contact	Administrative Team	Administrative Team, Staff and persons receiving services	After Board adoption of the Strategic Plan	Community integration budget was developed and approved by the board. Website is updated regularly to include current data and history.

information. Make sure the website is a useful tool for the community to use as a resource prior to actually contacting the Board if they so choose. Make sure all the literature points to our website as a resource. Utilize the website as a place the community can go for the initial information, and, if interested, can contact appropriate person as needed. (Track website usage).				Current events, Employee of the month and agency history have been added to website. A team will meet periodically to assess and make recommendations.
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Action 3	Responsible Party(ies)	To Be Involved	Timing	Updated Action
Identify strategies to reach out to our partners by attending their meetings in order to communicate our programs and services. Highly publicize the adoption of our new Strategic Plan and how to contact us for services we provide. Use the media, both radio and newspaper (Use associates on radio and in articles in newspapers). Create some work-out sessions at our In-service to create additional action steps and how they can “personally” contribute to educating the community about our programs and services.	Administrative Team. Marketing Resource person.	Superintendent , Board Members, Administrative Team, Staff and persons receiving services	After Board adoption of the Strategic Plan	Newspaper and radio have been essential in advertising our message. The Messenger and Insider update information regularly. In-Services have been used to educate and offer an avenue for input. Employees are visiting businesses, churches and organizations to educate and promote our mission/vision/values.

Issue 4) The Volume/Type of Work Available to Our Associates: Every adult should be afforded the dignity of work. Meaningful work is key to self-respect and dignity. The Logan County Board of DD wants to be a support to all eligible adults to assist them in pursuing a career path that is respectful of their individual interests and skills.

Action 1	Responsible Party(ies)	To Be Involved	Timing	Updated Action
Each individual should be surveyed for their desires for a career. Referrals to the appropriate agency (Bridges, BVR or Employment First) should be made to assist in connections for competitive jobs.	Habilitation Staff, SSAs	Associates , Staff, RTC Employment Services	ASAP	SSAs complete an assessment annually to determine needs and desires of individuals. Referrals are made for employment according to individual's choice.
Action 2	Responsible Party(ies)	To Be Involved	Timing	Updated Action
Each individual should be surveyed for their current connections to the community in which they live. They will be assisted in developing further connections to deepen their relationships with those around them.	Habilitation Staff, SSAs, VSSs, Community First staff	Associates & Staff	ASAP	SSAs complete an assessment annually. SSAs are closely connected to Community First Facilitator (a former SSA) and Employment Services providers. ISP uses Person Centered Planning and includes opportunities for work for each individual desiring work.
Action 3	Responsible Party(ies)	To Be Involved	Timing	Updated Action

Meaningful activities will be provided in addition to work.	Production Manager, Vocational Services Manager, VSSs	Associates & Staff	On-going	Providers have substantially increase the number of community activities for individuals. ISPs have been updated to include meaningful activities. Adult Day providers now offer integrated activities.
Action 4	Responsible Party(ies)	To Be Involved	Timing	Updated Action
Update Developmental Disabilities and RTC board members on emerging trends and issues related to sheltered work and community employment. Work together to maintain the best services possible for individuals and businesses and citizens of Logan County.	Superintendent, ES Director, VS Manager, RTC and DD Board Presidents	Administrative Team and Staff	On-going	Trends and issue have been included In board packets and in Newsletter. The DD board and the RTC board have been educated on the strategic plan. RTC transitioned to a private agency on 1/1/16 and NMT transitioned on July 2016. RTC provides integrated activities including employment as well as transition services for teens.
Action 5	Responsible Party(ies)	To Be Involved	Timing	Updated Action
In order to provide continuing employment in light of current political pressure to phase out sheltered workshops, a joint RTC/DD task force shall be established to study and promote integrates services.	Superintendent, Administrative Team and Board	Administrative Team, Associates, Board, Staff, Community	Begin in 2015	A task force was created in February 2015 to review trends and plan for further integrated services. Refer to Action 3 above. This task force planned for the privatization of RTC and creatively transitioned employees to the private agency in a seamless and efficient manner.

Issue 5) The Interdependence and Collaboration Between RTC and the Board. Although existing for distinct reasons and subject to fundamentally similar standards of accountability and stewardship of programs and policies, RTC and the Logan County Board come together in their commitment to meeting the needs of persons with disabilities in the community.

Action 1	Responsible Party	To Be Involved	Timing	Updated Action
Define the existing relationship between RTC and the Logan County Board as it relates to the programs each provide and acknowledge the differences and similarities and the distinct ways in which we work together. To begin pursuit of this action strategy, the Strategic Direction Team considered a diagram setting out in graphic form the various services provided to persons with disabilities by the two entities. The Table helps show the utility of having some services primarily overseen by one partner but also highlights the value added where overlapping services or programs are addressed collaboratively. Use the table to educate members of both	Administrative Team	Administrative Team, Staff and persons receiving services	After Board adoption of the Strategic Plan	A VENN diagram was developed in m2015 and updated in 2016 to illustrate the diversity of services and the organizational complexities of these two businesses. A contract was developed to define services. Both boards signed a resolution to transition RTC to an independent agency effective 1/1/16. RTC will progress in its independence from the DD Board over a three-year transition process.

boards and their staffs regarding the interdependent relationship especially as programs are added or changes made. (See Table 1, <i>Interdependence and Collaboration</i>)				
Action 2	Responsible Party(ies)	To Be Involved	Timing	Updated Action
Define funding sources for existing and future programs offered by RTC and/or the Board. New funding resources will be defined as opportunities present themselves as a result of the initiative of either partner or from external developments which may be utilized to the advantage of our associates.	Superintendent, ES Director, VS Manager, DD Business Manager, DD and RTC Board President	Administrative Team, Board	After Board adoption of the Strategic Plan	Venn Diagram reveals funding sources. Contract updated and annually reviewed for accuracy. RTC is now a certified waiver provider and privatized corporation.
Action 3	Responsible Party(ies)	To Be Involved	Timing	Updated Action
Update the contract between the Logan County Board of Developmental Disabilities and RTC to reflect the dynamics of their relationship as those dynamics may be impacted by any needed changes.	Superintendent, ES Director, VS Manager, DD Business Manager, DD and RTC Board Presidents	Administrative Team, Board	After Board adoption of the Strategic Plan	Contract was updated in 2015 and in 2016. RTC is an independent company. Through education and training the DD and RTC Boards resolved that RTC would transition to a private corporation on 1/1/16. Regular Meetings continue to assure a seamless transition. The Board approved a transition resolution in June 2015 and a plan in September 2015. Timelines were developed and RTC privatized on 1/1/16. NMT privatized on July 2016.



2016 Annual Plan, Goals and Progress Report

Goals Approved:
May 19, 2016

Logan County Board
Developmental Disabilities

“Empowering people with developmental disabilities to contribute as
valued members of our community”

Logan County Board of Developmental Disabilities

2016 Agency Goals and Progress Report

1. Mission/Vision/Values
 - a. Adopted September 18, 2014 and amended May 19, 2016 the LCBDD Strategic Plan will provide direction for several years to come.
 - i. Our mission statement, moto and logo are located on emails, letterhead, website, business cards and social media.
 - ii. Value statements are instrumental in providing direction for the LCBDD. The statements are framed and present on the wall in our cafeteria, in the board room and in the Discovery Center.
 - iii. Each value statement has been used by the Administrative Team as an instrument to assess and appraise current services and goals.
 - iv. Value statements have been used as a grassroots and Administrative Team instrument to encourage the development of ideas and initiatives to fulfill our vision and mission. Our mission and values have led to the following implementations:
 1. Community First position
 2. Increase in budget for integrated activities
 3. Integration Workgroup meets regularly to support community integration
 - v. The Board will expand opportunities for community integration, inclusion and awareness. View number iii
 - b. Continue to expand opportunities for Self-Advocacy and increase training through Project STIR
 - i. Eight individuals have attended Project STIR
 - ii. Individuals have promoted more self-advocacy events and activities including advocacy network and Best Buddies
 - iii. Continue the realization of our Community First policy. A myriad of events and activities are happening to support self-advocacy and integration. Our website, www.logancbdd.org is loaded with activities.
 - c. Provide ongoing opportunities for staff training in The Good Life. Good Life is now a part of our orientation and the Good Life team meets periodically to organize thoughts and promote the Good Life ideals.
2. Vocationally – Create a diversity of options in day services that support Community First and Employment First. Logan County has three Day Service providers: RTC Industries (RTC is also a provider of Artistic services at Union Station), IHS (provides dog training and pet care, ‘Friends of Leroy Brown’), Excursions Unlimited (provides opportunities to attend entertainment events).
3. Network with willing providers for the implementation of our Strategic Plan
 - a. Expansion of community employment opportunities. Community Employment numbers have remained steady for several years. SSAs complete an annual assessment of needs which offers job development to every individual. We have collaborated with all Logan County school districts to provide transition services for teens.
 - b. Increase the number of people employed in the community. Answered above
4. Staff Training- Invest in staff development, trainings, in-services – continue to creatively provide effective board sponsored in-services and trainings. Numerous avenues have been utilized to train and educate employees. The board sponsors three In-Services per year for training purposes. The newsletter and “Insider” are used for ongoing education. DD Awareness month is filled with educational events. We provide ongoing training through BODD Works.
5. Budgeting - assure fiscal stability
 - a. Continue projections for a 3-5 year budget. Presented to the board and approved at our January board meeting
 - b. Continue to ensure fiscal efficiencies. The 2017 budget is 30% less than the 2011 actual expenditures
 - c. Continue to update levy information. The next levy is over three years into the future, over 17 yrs between levys!
6. Residential - Long term planning for residential services to assure adequate residential settings. The board sends about \$100,000 annually to WestCON for long term supported living needs
7. Medicaid Billing – increase the effectiveness and efficiency of Medicaid Billing and the outsourcing of this billing where appropriate:
 - a. Create efficient means to maximize and bill all revenue streams. Billing was brought in-house to increase efficiency.
 - b. Outsource adult day services and transportation to willing providers. RTC is certified to provide and bill ADS
8. Create effective, efficient, operative and useful services in IT - Outsourcing this service where appropriate. We are developing a contract for services through NetGain to assure long term service provision in IT.
9. Encourage and promote transition services with LEAs (school districts) for students with developmental disabilities. An agreement was signed by all LEAs to have CB through RTC provide transition services in Logan Co.
10. Policies – Update employee policies and procedures ensuring they are current and accurate and are available electronically to staff. Updated policy manual was approved by the board in February 2016. Procedures are being updated in 2017

EARLY CHILDHOOD GOALS PROGRESS REPORT

Joy Badenhop

1. Work cooperatively with Logan County First Response officials to Develop Emergency Operating Plan Procedures for submittal to the Department of Education as required by Ohio Revised Code section 3313.536.
 - a. Development of procedural Management Plans
 - b. Develop Electronic floor plans
 - c. Update School Emergency Contact Information
 - d. Secure community law enforcement and safety official's signatures
 - e. Conduct annual procedural training drill with at least one county safety entity for submittal
Completed. Emergency Plan will need updated annually.
2. Update agency policy for Preschool to reflect current practice and agreements with our LEAs.
In Progress. Draft Policy is completed for review and adoption.
3. Continue to update agency policy for Early Intervention services reflecting rule changes in 2016, as the Ohio Department of Developmental Disabilities transitions to the lead agency from Ohio Department of Health.
Ongoing
4. Monitor Integration of preschool services and rule changes to assure preschool students receive educational services in the most integrated settings possible.
Goal will need continued as interpretation of rule is provided by ODE and implementation requirements are given. We are anticipating a significant change in staff ratio before the 2017-18 school year.
5. Provide quality Staff Development Opportunities.
 - a. Expand knowledge regarding the prevalence of drug/alcohol abuse in Logan County and the impact on our community. Assist staff in becoming aware of local Statistics, initiatives, supports within Logan County, and current research/strategies for working with children exposed to drug abuse. **Ongoing- We have held 2 In-Service trainings.**
 - b. Provide training for administration of new child assessment requirements, timelines, and electronic submission set forth by the Department of Education. **Continue. Due to late roll out by Ohio Department of Education training will be available in August 2017.**
 - c. Continued technology support for Early Intervention as they incorporate their EI technology grant focusing Skyping/remote printing/electronic signatures/electronic. **Completed**
6. Meet all assessment and reporting timelines as required by the Ohio Department of Health, Ohio Department of Developmental Disabilities, and Ohio Department of Education. **Ongoing**

SSA / SUPPORT SERVICES GOALS PROGRESS REPORT

Karen Hesson Brady

- I. SSA Department will provide quality services
 - a. SSAs will be provided with necessary & valuable training. **All new staff have received required training and all continue to attend Dept. trainings and recommended webinars**
 - b. New SSAs will be mentored by current SSAs. **Done**
 - c. SSAs will maintain person centered thinking. **Done & continue**
 - d. SSAs will work with Community integration specialist to encourage community integrated activities to those we support. **Kelli updates SSAs at our team meetings as to activities available**
 - e. SSAs will work to be as efficient as possible with TCM documentation. **Continue**
 - f. Team meetings will be held regularly to review information & encourage open communication. **Done & will continue**
 - g. Human Rights Committee member training will be monitored & provided. **There were 4 trainings provided during 2016 for total of 125 minutes**
- II. Develop an Individual Plan that captures the individual's desires and the supports they need while focusing on community integration.
 - a. We will continue to revise and update our Discovery Assessment as needed to capture strengths & needs. **I think we are at a point we haven't needed to make any more revisions. But with the continual rule changes, we can also make changes**
 - b. ISP meetings will be person centered & promote self-advocacy & community integration. **Done -These items are addressed in all ISPs**
 - c. The ISP will focus on what is important For the individual and what is important To them. **Done – in all ISPs**

- d. Provide individuals with a variety of service options in the most integrated setting; such as vocational, residential, and recreational. Also recognize the supports that can be provided naturally and by volunteers. **Done and continue**
 - e. The ISP will include conversations about the path to community employment. **Done – under the about me section and addressed in outcome section**
 - f. Behavior support strategies will be included in the individual plan. **Done**
 - g. Plans will have a plan for fade out aversive interventions and rights restrictions. **Done and reviewed by HRC**
 - h. All rights restrictions and aversive intervention will be reviewed by the Human Rights Committee. **Done**
- III. Provide individuals and families with choices & options
- a. Agency brochures on services, waivers, due process & rights will be provided to all new enrollees. **Done & ongoing**
 - b. Develop a flyer with information about vocational & day habilitation options in our county and in surrounding counties with the focus being on community employment. The flyer will be available at the individual’s service plan meeting. **Not done**
 - c. SSAs will inform individuals of recreation and service opportunities being supported by our Recreation Coordinator and Integration specialist. **When SSAs here of an activity they feel someone on their caseload would enjoy, the contact them**
- IV. Fund services & supports with State funded Medicaid waivers
- a. Review current waiver waiting list. **Done**
 - b. Inform individuals of state funded waivers. **Done**
 - c. Identify those with current needs leaving those on the list who desire supports in the future. **Done**
 - d. Revise waiting list to identify potential date for future needs. **Done**
 - e. Proceed through the waiting list & put individuals on IO, SELF & Level 1 waivers as identified by their needs. **Done & waiting for possibly more state funded waivers**
- V. Assist in retaining direct care providers
- a. SSAs will make sure that direct care providers have a copy of the ISP & understand duties on going
 - b. SSAs will provide support with the ISP & individuals served on going
 - c. SSAs will provide ISP training to independent providers on going, meetings are scheduled so providers can be present
 - d. SSAs will maintain open communication with direct care providers so they are comfortable with contacting the SSA on going
- VI. SSAs will promote self advocacy
- a. SSAs will encourage individuals to express their opinions, wants & needs. **Ongoing**
 - b. SSAs will encourage individuals to participate in self advocacy training. **Individuals are referred when training is scheduled**
 - c. SSAs will encourage individuals to direct their ISPs and express what is important to them. **Ongoing**
- VII. Be fiscally minded
- a. Targeting 85% productivity & 59% efficiency, which will increase our TCM billing. **2 staff met - staff average 79.85% & 56.6%**
 - b. Reduce paper by scanning more documents/files current files scanned. **This is ongoing**
 - c. Look at informal and natural supports as well as other funding methods such as State plan services, Adult Family Living, Adult Foster Care and remote monitoring as possible ways to support people. **Ongoing**
- VIII. Maintain current staff and promote positive morale
- a. maintain an open-door policy. **Ongoing**
 - b. Remain visible, approachable, and available. Look for opportunities to give accolades where appropriate. **Ongoing**
 - c. Facilitate and promote the “Good Life” culture by leading by example. **Hopefully done & ongoing**
 - d. Keep open communication about policy & procedure changes. **Done & ongoing**

HUMAN RESOURCES GOALS PROGRESS REPORT

Deb Morrison

1. **Policy Manual** –Develop, publish & maintain on public drive an updated handbook for staff of LCBDD to include: Review & update policies to remain compliant at all times. Contract this year to review entire policy manual for compliance and updates with new regulations. **On Going – New Policy Manual completed. Now working on Procedures and Policy Manual Review for any needed updates.**
2. **Certifications & Registrations** –assure all employees & vendors are compliant with rules and code of the ODODD, Department of Education, Nursing, Workers Comp, Liability Insurance, etc. Move forms to LCBDD Public drive. **On Going – I monitor certification & registration and send applications prior to expiration, review and process all returned applications and documentation.**

3. **Safety** - Keep all Records Current & Compliant. Include safety tips in Insider. **On Going – Review all accident & incident reports. Log on PERRP if required. Track and monitor history and root cause. Put tips in Insider for all employees to review.**
4. **Technology** – review HR technology options. Infall1 Light – pilot project for HR – we will be working with Primary Solutions beginning with certification/registration & performance evaluations. **Currently using manual options and tracking that I created. We are not going to be a pilot project for Infall 1 Light. I determined it is cost efficient to continue tracking HR manually.**
5. **Compliance** –Monitor LCBDD compliance with all federal, state & local rules and regulations including: Scan any images/data we can. Meet to review current legal advice on scanning. Finalize a plan and continue to move towards a paperless office. **On Going – scanned history files last year and combined old files from others before me. Organized files and will begin scanning those items to NAZ. Began to scan personnel files, started with terminated employees first.**
6. **Contracts** – make sure we keep all contracts active without expiring. Work with Fiscal to scan contracts for easy viewing when needed. **On Going – Scanned all contracts into HR for easy view and Fiscal moved them on the NAZ drive in 2016.**
7. **Insurance & Wellness** –review rates and options available. Wellness Committee – develop a wellness plan for wellness committee. **On Going – Got insurance cost quote from another vendor. Completed 2016 wellness/fitness challenge.**
8. **Staff/Employee** - Develop Strategy to provide essential services utilizing the existing staff. Review & update job descriptions annually. **On Going – all employees completed. Management team was added in with the staff review in 2016.**
9. **Communication & Morale** – maintain an open door policy. Promote good life training to improve morale. Lead by example. **On Going – door is always open for employees. Do fun activities throughout the year with staff (e.g.: What do you love about working at DD).**

COMMUNITY RELATIONS PROGRESS REPORT

Executive Secretary - Deb Morrison

1. **Promote Public Education – Work with Jamie Ross from ESC to improve areas below (Q. Outreach & Communication – Strategic Plan)**
 - a. Website Maintenance – upgrade **On-Going – Many new items added to Web Site.**
 - b. Facebook **On-Going – share new posts often, update Self-Advocate of the month. Share current events.**
 - c. Brochures **On-Going – updated in 2015 & 2016 – added new board members for 2016.**
2. **Network in Community**
Continue current & expand if possible. Community & Employment First activities & support. **On-Going – Participated in BuDDie Walk, Wellness Day at Camp Myerah, Chamber of Commerce Safety Committee, HR Committee & Community Wellness Work Group, Logan County Leadership, United Way Community Care Day, Creating a Healthy Me, & Creating a Healthy U.**
3. **Employee & Associate Relations**
Continue current & expand if possible. Support & share Good life, Community & Employment First information and details. **On-Going – Surveys, BuDDie Walk, Good Life Activities, Wellness & Safety Tips.**
4. **Keep Records Current & Compliant**
Post information and forms on web site. **On-Going – keeping most forms on public drive. Have some forms on web site ex: applications, surveys, etc.**

FISCAL GOALS [PROGRESS REPORT

Lana Switzer, Business Director

Vision/Mission

1. Ensure the new agency mission and vision is always at the forefront of decision making-**completed-reviewed in management meetings**
2. Assist with the development, implementation and updates of the strategic plan-**completed-reviewed and updated in management meetings**

Community Integration/Employment

1. Assist agency with implementing and supporting “Community First” initiatives-**completed-community integration budget established**
2. Stay informed of the “Funding Redesign” committee work and OAC changes to update the 5-year financial forecast-**completed-attended various OACB meetings with updates**

Financial Accountability

1. Agency Budget/Finance
 - a. Agency Budget-**completed-approved by Board November, 2016**
 - b. Financial Reporting

- i. Monthly Board Report-completed-attended monthly Executive Council meetings and present financial Board report with detail
 - ii. Messenger-completed-provide detailed financial data on our annual Messenger
 - iii. Cost Report-completed 2015 cost report in 2016
 - c. Department Budgets/Purchasing-completed-met with department heads and Superintendent in October to establish department budgets. Routinely monitor department budget reports
 - d. Accounts Receivable/Cash Management-completed-updated cash management and accounts receivable procedures with fiscal clerk. Reviewed revenue and aging accounts receivable reports monthly
 - e. Payroll-completed-payroll is processed by fiscal clerk, reviewed by Business Director and final approved by Superintendent each bi-week
 - i. Paperless Timekeeping-Due to effectiveness, this has been tabled
- 2. Policies and Procedures
 - a. Monitor Policies and make recommendations where needed-completed, met with Superintendent and HR Manager routinely to review and update policies where needed
 - b. Develop and monitor procedure manual and make recommendations when needed-completed-procedures were developed for fiscal processes
- 3. Contract Administration
 - a. Establish contracted services procedures and implementation-completed-a new personal service contract procedure was developed
 - b. Ensure all contracts comply with legal requirements, renewed before expiration and proper documentation is on file-completed-all personal service contracts were reviewed and updated based on legal requirements, and a tracking sheet was created to ensure they are renewed prior to expiration
 - c. Develop the indexing and scanning of agency contracts-completed-all contracts have been indexed and scanned per the record retention requirements
- 4. Waiver/Non-Waiver Committee
 - a. TCM Software Development-completed-began development, data merge, staff training and billing of TCM Medicaid services in the new software system with new vendor Brittco, LLC.
 - b. TCM Billing/Productivity/Error Follow-Up-completed-TCM billing was monitored, errors were researched, and productivity reports were prepared and monitored by management
 - c. Complete Waiver billing for transportation services through July, 2016-completed-all transportation billing was completed and received
 - d. Review and monitor all non-waiver adult service billing-completed-each invoice was reviewed monthly for accuracy by the Business Director
 - e. Develop, implement and monitor budgets for non-waiver services-completed-non-waiver consumers were provided a budget per the ISP, and the utilization was monitored monthly by the Business Director
 - f. Monthly Reports for Committee-completed-this is a work in process for the committee to determine the reports that are needed
- 5. Building Security
 - a. Work with retiring Operations Manager to learn the door security system and all building keys-completed-Operations Manager retired in April, 2016
 - b. Conduct a key inventory and update key logs-completed-logs have been updated
- 6. Record Retention
 - a. Ensure compliance with the record retention policies and procedures when it comes to scanning, maintaining and destroying agency records-completed
 - b. Work with department heads to develop scanning index, train staff and begin scanning documents in Human Resources and Discovery Center-completed-scanning begun in both areas
- 7. IT Services & Security
 - a. Work with retiring Operations Manager and NetGain on current computer inventory to develop a master inventory list that will also track future movements-completed-master list was established and maintained, and movement of equipment is tracked
 - b. Develop a replacement schedule for new computers-completed-deployed remaining desktop towers. Nothing older than 2012 in on the network. Replaced some laptops and desktops to a ThinkPad notebook as a primary workstation
 - c. Establish HIPAA procedures in network passwords and screen locking-this has been carried over to 2017-will be updated during procedures development in 2017
 - d. Monitor the Help Desk tickets to ensure compliance with agency policies-completed
 - e. Monitor the IT, HIPAA, and Records Manager list serves to remain current with other CB's-completed
- 8. Inventory
 - a. Work with maintenance other department heads to determine unneeded inventory that can be salvaged or sold at an auction-this has been carried over to 2017

- b. Conduct a physical inventory all assets before the transition of the building and equipment to RTC in 2017-
this has been carried over to 2017

Staff Morale/Training

2. Develop Trust-**on-going**
 - a. Continue to look for ways to apply the principles of “Speed of Trust” to foster increased trust within the organization
 - b. Remain visible, approachable, available and look for those things that are done “right” and give praise
 - c. Facilitate and promote the “Good Life” culture by leading by example
3. Training-**on-going**
 - a. Provide needed training to assist staff in the performance of their specific job duties
 - b. Monitor and update policies and procedures and ensure we are implementing the policy as written and they are clear, concise and fair
 - c. Provide hands-on training and support to staff as needed in new software initiatives
 - d. Seek training to remain informed of required updates and changes to rules and regulations and provide in-sight and feedback to internal staff when necessary

FACILITIES GOALS PROGRESS REPORT

Gary Morris

- I. Control Department budgets by working with staff in monitoring expenses
 - a. Work with custodial staff in efficiently use of cleaning supplies
 - b. Monitor utilities costs and control through reminding ALL staff of efficiencies in savings with comfortable HVAC settings. **Developed a positive relationship with staff at DC and encourage energy savings.**
- II. Utilize safety committees to control Workers Comp cost and increase everyone’s daily awareness/ **Continue to work with maintenance and Safety groups. There has been a decrease in workers injuries over the past two years**
 - a. Have safe facilities **Will work with Business Director to develop a maintenance and cleaning schedule.**
 - b. Assure adequate training of staff through BODD works. **This is completed by HR**
 - c. Attend building monthly meetings and make staff aware of issues and remedies **Done**
- III. Vehicle maintenance/ replacement of truck. **Truck was replaced. Maintenance of vehicles is scheduled**
 - a. Assist to provide a specialized, safe, efficient, cost effective and coordinated transportation program for the individuals of the Logan Co Board of DD. **Transportation was transferred to private providers in 2016**
- VI. Continue cleanliness of facilities while monitoring the total needs of custodial staff/ **Facilities have been maintained and are clean. A cleaning schedule will be developed in 2017**
- VII. Repair and pave DC parking lot. **Half of the lot was completed in 2016. Remaining will be paved in 2017. Striping and coating will be done in 2017 of DC and Admin lots.**
- VIII. Complete evaluations on all custodial staff. **Done**

FACILITIES

- I. Train staff to encourage smooth transition of job duties and work with staff to help them grow as effective and efficient employees. **I have a positive relationship with custodial staff and the transition is going well.**
- II. Learn daily functions of Board buildings to support their needs and prep for transition of duties. **I continue to learn tasks associated with the position. The HVAC system is complicated, but I am learning how to manage it. Worked with Joy and others to complete the playground project.**

KITCHEN - James Shouse

1. Hire two or more quality subs and cross-train staff for versatility in kitchens and custodial duties. **Two subs have been hired and are cross trained in kitchen and custodial.**
2. Utilize associates (individuals) as often as practical. **Associates help when needed**
3. Communicate effectively with the school nurse to assure proper diets and meals are provided. **Done**
4. Increase options for healthier choices on menus. **Ongoing**
5. Complete evaluations on all kitchen staff. **Done**