



**Strategic Plan
2020 – 2022**

Charting Our Future – Continuous Improvement Process: 2/28/21

I – Programs & Services: Continually develop and offer employment and programs that empower the individuals we serve

Goal	KPI	Who	Steps	Status
1.1 New Programs & Services: Research and Assess new programs and opportunities that advance mission and financial sustainability.	<ul style="list-style-type: none"> • Create one new program by 2022 • Become a “preferred provider and fundable by other entities by 2022 			
1.2 Work/Jobs: Provide relevant, different, and exciting opportunities for meaningful work & jobs, maximizing engagement for every associate	<ul style="list-style-type: none"> • 25% increase in AHR (from 2020 level) by 2022 • ATM teams: 2 -4 in place by Q1 2021 • Associate Satisfaction: 4 or higher on 5-pt scale • Stakeholder/Customer Satisfaction: 3.5 or higher on 5-pt scale 		'21 Q1: Identified staffing as issue. Consider eitas roundtable of agency heads to introduce program to wider net. LH to post position openings for ATM Project Leads.	'20 Q4: AHR = \$3.35; 31% increase 2020 AHR = \$2.95; 16.6% increase '21 Q1: OXG Janitorial and Trimming ATMs, Cart-Kings coming online

<p>1.3 Skills: increase self-esteem by helping people advance their ability to perform successful work and navigate independently</p>	<ul style="list-style-type: none"> • Associates collectively meet (exceed) 80% of skills goals • Attain 3.5 of higher on 5-pt scale on annual survey • Maintain or increase AHR annually • Conduct needs assessment annually 			<p>Year over year since 2018 (40%, 31% respectively at end of 2020)</p>
<p>1.4 Community Engagement: Provide mutually beneficial interactions for the community and associates that advance familiarity with both sides and reduce barriers with public engagement</p>	<ul style="list-style-type: none"> • Host annual Open House through Chambers • Increase number of Associates who attend events by 2 per year • Increase attendance at quarterly SE Town Halls by 20% per quarter • Two public officials to attend SE events per year 		<p>'21 Q1: Give budget to XXX = \$750 DM to provide list to LH of building improvements (e.g paint, signage, floors)</p>	<p>2020 – Due to coronavirus pandemic all face-to-face meetings cancelled. 2021 Q1 – similar</p> <p>March 24, 2021 N and D attended the SKCCC planning event at Faulkner Farms Lee’s Summit, MO.</p> <p>May 21, 2021 Attended LSMO Chamber Luncheon had a lengthy conversation with Mo. House Representative Keri Ingle, District 35 and invited her to come and tour Southeast.</p> <p>May 22 & 23, 2021 Held first annual Mattress sale event, great success.</p>

II – People & Operational Excellence: Create and maintain a culture of excellence by supporting and inspiring highly qualified and diverse staff, directors, and volunteers

Goal	KPI	Who	Steps	Status
<p>2.1 Associates: Develop and grow eligible client/associates we serve</p>	<ul style="list-style-type: none"> • Increase associates served by 10% each year 		<p>'21 Q1 & Q2: S. to set-up tours and skill assessment appointments with all ind on SE waitlist. In addition, post notices that SE is hiring with eitas, VR, and DMH</p> <p>'21 early July: Revise annual survey</p>	

	<ul style="list-style-type: none"> • Assoc. overall job & program satisfaction during annual survey is 3.5 on a 5-pt scale • Bi-yearly interviews assessing level of satisfaction in attaining their goals. (e.g. ATM interest and forward movement) 		<p>'21 end of July: prepare to mail, text, blog out to constituents</p> <p>'21: On-going interviews with ATM team members (S). On-going interviews with SE P&A assoc (D & S)</p> <p>'21 Q2: Consider money coach – financial autonomy?</p>	
<p>2.2 Staff: Recruit, develop, and retain a highly skilled, diverse staff with the ability to think and act in a manner necessary to achieve key organizational results.</p>	<ul style="list-style-type: none"> • Hire and retain two new personnel by year-end 2021 for programs & operations • Become known as Top Places to Work in KC end of 2022 • Develop and cultivate missional and goal-driven culture • Staff overall job satisfaction during annual survey is 3.5 on 5-pt scale 		<p>'20 Q4: Hire new P&A Supervisor</p> <p>'21 Q1 & Q2: Hire Program Director, P&A Supervisor, P/T Community Outreach (ATM support). Office Assistant</p> <p>'20: Develop new staff manual – centered on new culture, values</p> <p>'21: Revise and implement 403b Retirement Plan with Insurance comm.</p>	<p>'20 Q4; Hired Supervisor (JP)</p> <p>21 Q1: Hired Program Dir. (D)</p> <p>'20 Q2: Developed and published new Staff Manual</p> <p>'21 Q2: Implemented new 403b Plan</p>
<p>2.3 Board: Recruit, develop, and retain mission-driven and engaged Board members that broadly represent</p>	<ul style="list-style-type: none"> • Assess Board matrix for diversity and skill on annual basis. 			

<p>individuals served and the community to assure highest level of advocacy with effective and efficient governance.</p>	<ul style="list-style-type: none"> • Conduct annual Board assessment • Board members meet 100% of functional Responsibilities • At least one director has disability that is relatable by Associate community 			
<p>2.4 Operations: Create and implement operational systems to maximize the capacity, efficiency, and impact of our work</p>	<ul style="list-style-type: none"> • Increase production capacity by 30% by year end 2021, with 10% increase year over year • Internal Quality and Process system • Registrations & Certifications 		<p>'21 Q2: L consulting with Mo Enterprise re: LEAN mfg</p> <p>Secured MASBDA grant for feasibility study et al for agribusiness needs and services</p> <p>'21: Keep all certifications up to date. FDA registered – food handling New FDA registration for safety device repackaging, handling</p>	<p>Q1 2021: WIP (L&D) – meeting mentors, MO Enterprise consultants</p> <p>ACTIVE for 2021 WIP for 2021</p>
<p>2.5 Internal Communications: Ensure transparent, timely and effective communications with staff, families, and associates.</p>	<ul style="list-style-type: none"> • Minimal Rework and 98% QA performance records • Families/Associates rate their overall satisfaction at 3.5 or higher on 5-pt scale • 20% increase in engagement of parents, friends, families, Board 		<p>'20 Q2: Invested in “Call Multiplier” for robotexts and robocalls; create a closed FB page for SE personnel and parents/staff only to be connected during COVID. Training activities link sent out regularly. Timely shop announcements.</p> <p>'21 Q2: Launch blog</p>	<p>COMPLETE (NA)</p>

2.6 Parents & Volunteers: Explore the feasibility of advancing our mission through greater involvement of parents and/or volunteers	<ul style="list-style-type: none"> Parent participation in fundraising events increases by 25% over 2019 baseline Identify volunteer opportunities and quantify participation in them 			5-22-2021 Mattress Event Fundraiser had 5 volunteers from the Lee's Summit branch of the Knights of Columbus.
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III – Financial Stability: Enhance our funding opportunities, including donations, grants, and trade revenue, and have appropriate financial systems in place to ensure that our financial position is solid and able to meet the needs of our mission

Goal	KPI	Who	Steps	Status
3.1 Trade Revenue: Continue to nurture existing customer relationships while identifying new business and market opportunities that will advance earned revenues and discontinuing those that don't.	<ul style="list-style-type: none"> Secure at least four contracts per year Restart one dark account on average per quarter Evaluate pricing/profitability annually and restructure for those that fall below minimum standard 		'21 Q1: DM/LD conduct PVW survey and rates calc. '21: MO m.w @ \$10.30 '21 Q1: LH/LD to adjust SE pricing	'20 Q1: Coronavirus hits. Country shuts down March. Assoc sheltering at home till phased back starting in May (Q2). LH writes for PPP Loan , CARES Act funding. <u>Rec. \$365,000</u> '21 Q1: CSM account landed. Potential vol. \$1mm+
3.2 Alternate or Contributed Income: Continue to nurture existing	<ul style="list-style-type: none"> Gain at least \$200,000 annually in additional 		'21 Q2: create Development Plan with External Affairs comm. Will include SM plan for website attraction and engagement	

<p>funding sources and relationships, as well as research and build new opportunities to ensure we have diverse sources of funding to advance our mission and goals</p>	<p>philanthropic contributions</p> <ul style="list-style-type: none"> • Increase number of new individual donors by 20% annually • Increase number of new corporate donors/sponsors by one annually • Retain higher than industry average of 45.5% of current non-government donors 				
<p>3.3 Fiscal Accountability: Effective stewardship over the resources entrusted to us</p>	<ul style="list-style-type: none"> • No material errors cited in annual independent audit • Annual variance to budget bottom line is less than 5% +/- • At least 80% revenues to programs 				

IV – Visibility: Continue to differentiate SE’s value and mission

Goal	KPI		Who	Steps	Status
<p>4.1 Marketing: Advance our name and purpose recognition through developing a strong marketing effort that includes sharing our story</p>	<ul style="list-style-type: none"> • Complete marketing plan creation by year-end 2020 • Meet all goals within the marketing plan (once plan is 				<p>2020: New brand & website launched. Due to Covid, no plan implemented.</p> <p>April 2021 D M. has reached</p>

	<p>completed, drop key goals into KPIs)</p> <ul style="list-style-type: none"> • Develop new Mission Statement and Brand 		<p>Q2 2020: L and D worked with A, J, and staff to create new mission statement and tagline. New logo launched (see story and guidelines) New corporate LH and website carries new brand and tagline. Other swag and PR rolled out</p>	<p>out to Mr. Gordon Gregory with Adsplosure to learn about Transit branding.</p> <p>Reached out to Patrick Jones, with The Kansas City Star to begin a conversation about digital advertising.</p> <p>COMPLETE 2020 Q3</p>
<p>4.2 External Communications: Seek opportunities to be in the public sphere, to advance our visibility, tell our story, and build our network</p>	<ul style="list-style-type: none"> • Make 4 public appearances to community groups /associations with Associates • CEO to be active member of two Leadership Associations • Actively participate in monthly Chamber and special events 			
<p>4.3 Advocacy: Actively engage in the I/DD community & organizations to be part of the</p>	<ul style="list-style-type: none"> • The SE A-Team actively participates in A-Team state events that have 			<p>2020: On Hold (Covid) '21 Q1 & Q2: On hold (Covid)</p>

<p>conversation to inform and be informed</p>	<p>measurable impact</p> <ul style="list-style-type: none"> • Raise the Wage legislation does not negatively impact our sustainability • Board stays highly engaged with advocacy activities through letters/calls to government representatives 		<p>'21 Q1: DM & JB facilitate advocacy for letter writing campaign to separate RtW campaign from 14c policy discussions</p>	<p>BOD and parents write to federal reps</p>
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