



Strategic Plan

Fiscal Years 2025 – 2027

Contents

- Introduction.....2
- Strategic Planning Process3
 - Data Collection and Analysis4
 - Strategic Sweet Spot.....4
 - Strategy Screens.....6
 - Stakeholder Insights7
 - Vision & Mission Review7
 - Plan Development.....7
- The Strategic Plan7
 - Vision7
 - Mission7
 - Strategic Questions.....7
 - Goals and Strategies8
- Appendix: Strategy Screens..... 10
 - Service Delivery 10
 - System-Building 11

Introduction

The Developmental Disabilities Board of St. Charles County (DDRB) is dedicated to being an ally to the Intellectual and Developmental Disabilities (I/DD) community. We know that including everyone, especially those with I/DD, makes our community stronger and better.

Our Strategic Plan reinforces our commitments to . . .

Being an Ally to the I/DD Community

Our goal is to be a strong partner and friend to people with I/DD. This means listening to their needs, amplifying their voices, and making real changes that help them live life on their terms. We want to ensure that people with I/DD have the same opportunities and respect as everyone else.

Promoting the Benefits of Inclusion for the Entire Community

Including people with I/DD in schools, workplaces, community activities, and at tables where decisions are being made benefits *everyone*. When barriers to inclusion exist, our community misses out on the talents and perspectives of people with I/DD. Removing these barriers brings new friendships, gifts, and energy to our community, making St. Charles County a more vibrant and welcoming place for all.

Changing Perceptions and Raising Awareness

Changing how people see and understand the I/DD community is essential for creating an inclusive society. Misunderstandings and stigmas often come from a lack of understanding and visibility. Our strategic plan focuses on partnerships that educate the wider community, showcasing the talents and achievements of individuals with I/DD. By doing this, we aim to foster empathy, respect, and mutual support throughout our community. We also want to ensure the I/DD community is aware of the many supports available to them through the support of the taxpayers via the DDRB.

Building Inclusive Systems

To make lasting changes, we need to create systems that support inclusion at every level. This means creating practices and infrastructures that are welcoming and barrier-free, allowing people with I/DD to join in and share their gifts. Accessible public and private spaces enable everyone to live, work, move about, and enjoy living in St. Charles County. Establishing these systems lays the groundwork for a healthy community for all.

Stewarding Tax Dollars and Responding to a Changing Economy

We recognize that the economy is always changing, and we face pressures on our budget and revenue. It is important to use taxpayers' money wisely and ensure our spending is effective and efficient. Being an ally to the I/DD community means we use our resources to respond to their expressed needs. As those needs change, so must our priorities. By being responsible with public funds, we can continue to support the I/DD community and meet the needs of all residents, even in challenging economic times.

In summary, our strategic plan is our commitment to partner with people with I/DD and make St. Charles County a more inclusive place. By being a strong ally, raising awareness, building supportive systems, and managing our finances responsibly, we aim to create a community where everyone can thrive.

Strategic Planning Process

In the Fall of 2023, DDRB issued a request for proposals from qualified consultants to facilitate its next strategic planning process. From the proposals received, the board selected The IllumiLab, LLC to facilitate a two-phase process. First, DDRB assembled a design team who collaborated with The IllumiLab to design the planning process.

Table 1: Design Team Members

Staff Members

Denise Cross, Executive Director
Vicki Amsinger, Human Resources Director
Kathy Robb, Agency and Community Relations Director
Nikki Rogers, Senior Administrative Assistant
Laura Taylor, Case Management Director

Board Members

Michael Mahoney
Sue Sharp

The design phase included three steps: 1) identifying and prioritizing strategic questions to focus the planning process, 2) identifying the data and information necessary to answer those questions in an informed way, and 3) articulating the team's requirements for the plan and planning process.

The team agreed to create a plan with two parts:

Strategic Plan – The Strategic Plan is a multi-year, high-level, plain-language, community-facing plan, which includes our Vision, Mission, Goals, and Strategies.

Annual Action Plans – The Annual Action Plan is a one-year, specific, actionable, measurable, and internally-facing plan, which includes Objectives and Tactics.

Then, we assembled a Strategic Planning Team inclusive of but larger than the design team, to include a variety of perspectives from the board of directors.

Table 2: Strategic Planning Team Members

Staff Members

Denise Cross, Executive Director
Vicki Amsinger, Human Resources Director
Kathy Robb, Agency and Community Relations Director
Nikki Rogers, Senior Administrative Assistant
Laura Taylor, Case Management Director

Board Members

Dan Dozier
Terry Elmendorf
Michael Mahoney
Sue Sharp

Data Collection and Analysis

The Strategic Planning process began with the collection, assembly, analysis, and visualization of the data identified and prioritized in the discovery and design phase of the project. Topics explored included:

- The size and composition of the eligible **population** of individuals with intellectual and developmental disabilities (I/DD) in St. Charles County;
- The current distribution of **funding** across service types, populations, and geographies and the prioritization of services funded;
- **Case management** data pertaining to client demographics, caseload sizes, case manager productivity, billable hours, and costs; and
- The composition, training, and practices of the **board of directors**.

Key insights from this analysis were shared with the staff and board of directors as an update on the process and the information forming the plan’s foundation.

Strategic Sweet Spot

Next, in March 2024, The IllumiLab facilitated two half-day retreats with the Strategic Planning Team and other available board members. The goal of the retreats was to identify and justify DDRB’s ideal role in the funding and service delivery landscapes – its identity and purpose. The IllumiLab referenced

the *Harvard Business Review*’s Strategic Sweet Spot as a framework for the discussions. The Strategic Sweet Spot of an organization is where it meets its customers’ needs in a way that its rivals cannot, given the context in which it operates.

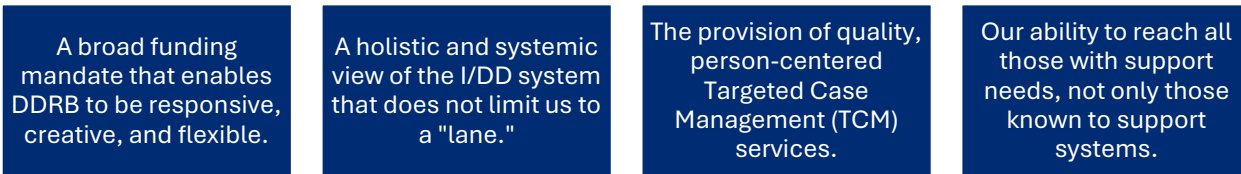
For the purposes of DDRB’s strategic planning, we adapted the framework to fit DDRB’s context. DDRB has counterparts and collaborators rather than competitors or rivals. We aimed to identify DDRB’s unique capabilities in contrast with those entities. We defined DDRB’s “customers” as the I/DD system itself, rather than individual consumers, families, or service providers. Finally,



we focused on DDRB’s core competencies as demonstrated by the staff and board teams.

Counterparts’ Offerings

When team members considered DDRB’s authorizing statute, mission, and place in the landscape and compared that to the roles and offerings of counterparts in the I/DD system, including Department of Mental Health, Medicaid, Medicaid waivers, and the Department of Elementary and Secondary Education’ Vocational Rehabilitation services, they identified several capabilities unique to DDRB. When asked which capabilities DDRB should leverage to create impact and drive its strategy, the retreat participants prioritized four capabilities:



1

"Customers’ Needs

As noted above, The IllumiLab slightly modified the Strategic Sweet Spot framework to fit DDRB’s structure and context. We acknowledged that DDRB has several groups of stakeholders to whom it is directly or indirectly accountable and on whom it has direct or indirect impact.

Customers are those who fund or purchase DDRB’s offerings. In the case of funded services, DDRB’s customers are the taxpayers of St. Charles County. DDRB’s Targeted Case Management (TCM) customer is Medicaid via the Department of Mental Health.

Clients are those to whom DDRB directly delivers its offerings. Funded agencies are the clients of DDRB’s service funding, and individuals are DDRB’s TCM clients.

Beneficiaries are those who benefit, directly or indirectly, from DDRB’s offerings. These include individuals with I/DD and their families, service providers, and the I/DD system as a whole.

For the purposes of this exercise, we focused on the I/DD system as the most inclusive stakeholder group to whom DDRB is directly accountable and with whom DDRB interacts directly in most cases.

¹ <https://www.lifecoursetools.com/lifecourse-library/lifecourse-framework/all-people/>

Themes in the retreat participants' survey responses identified four over-arching needs of the I/DD system, which DDRB is uniquely suited to address:



Core Competencies

The retreat participants and staff members brainstormed dozens of strengths and opportunities for improvement. When asked, as above, which strengths DDRB can and should leverage to create impact and drive its strategy, the team synthesized and combined several strengths and some unique capabilities to arrive at a concise list. See Figure 1.

The Sweet Spot

Having considered these aspects of DDRB's context, purpose, and performance, the team identified a few answers to complete this sentence:

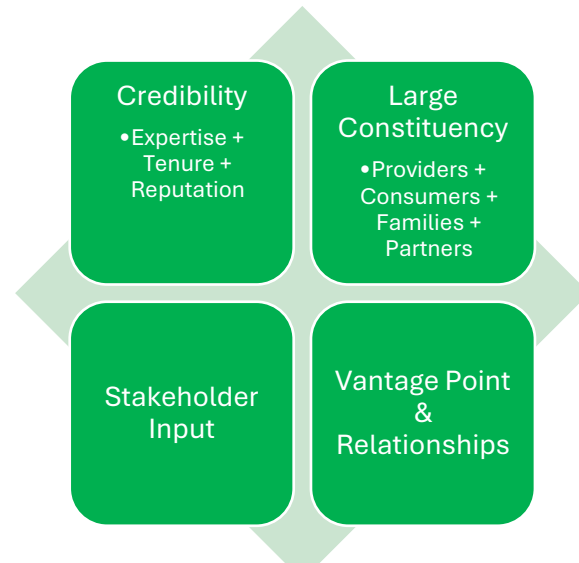


FIGURE 1: DDRB CORE COMPETENCIES

"Based on these facts and perspectives, DDRB should prioritize strategies and opportunities that . . .

- *Lean into/embrace the flexibility of our funding mandate,*
- *Respond to emerging needs, and*
- *See and strengthen the system, beyond service funding and provision."*

Strategy Screens

A strategy screen is a decision-making matrix that contains a set of criteria that reflects an organization's values and priorities, which should inform strategic decision-making.

The Strategic Planning Team designed two strategy screens to support DDRB board and staff leaders in evaluating opportunities and invitations to 1) develop and/or deliver services and 2) to leverage its credibility, relationships, and expertise to build the strength, capacity, and infrastructure of the I/DD system. See Appendix.

Stakeholder Insights

Guided by the data and information needs the design team identified, The IllumiLab planned, facilitated, documented, and analyzed notes from focus groups with individuals with I/DD and/or their guardians, interviews with leaders of other organizations providing case management services, and interviews with DDRB board and staff members. Discussions with stakeholders explored each of the Strategic Questions, and the insights generated informed the remainder of the process. Details of this work can be found in The IllumiLab's *Summary of Stakeholder Insights*.

Vision & Mission Review

Building upon the ideas developed thus far in the process, the team reviewed and revised the organization's Vision and Mission statements against best practices to ensure the statements each achieved their unique purpose and provided sufficient direction to the organization. Ultimately, the team recommended revisions to both, which are included below.

Plan Development

Finally, the team turned its attention to the development of multi-year Goals and Strategies to guide the DDRB for the coming three years, which are listed below. Goals describe the results the DDRB seeks, its definitions of success. Strategies describe high-level approaches to pursuing those goals. Annually, the appointed staff members and board committees will collaborate to develop Action Plans with specific Objectives and Tactics it will pursue that year to contribute to Goal achievement. In two half-day retreats, the Strategic Planning Team reached consensus on Goals and Strategies and assigned individual team members to draft Action Plans per Goal. Those workgroups met individually to develop their Action Plans, and the Strategic Planning Team met a final time to review Action Plans and sequence Tactics.

The Strategic Plan

Vision

We envision a community that is enriched by the contributions and inclusion of all people.

Mission

Through partnership and direct action, the Developmental Disabilities Resource Board of St. Charles County builds a community that strengthens and includes people with intellectual and developmental disabilities.

Strategic Questions

This strategic planning process was guided by five strategic questions. Through this planning process, we aimed to answer the following three questions:

- How can DDRB use tax money to make the biggest and most significant difference in people's lives and support the services they need? How can we keep doing that, even if our tax dollars cannot go as far?

- How can we position our case management services to best support DDRB’s strategic goals and positively impact the I/DD system?
- How can we set up our board and get its members ready to make the most important decisions?

Finally, this strategic plan outlines processes for gathering the information necessary to answer the final two strategic questions over the three-year life of the plan:

- How can DDRB use our resources and/or relationships to address the things people need most right now, including transportation and housing?
- How can we make people in St. Charles more aware of the strengths and needs of people with I/DD and the programs that serve them?

Goals and Strategies

Goal 1: The DDRB commits tax dollars and uses its resources where it can make unique and valuable contributions that meet prioritized needs of the I/DD system.

Strategies

- Pro-actively and systematically identify needs within the I/DD system and prioritize them according to their alignment with DDRB’s unique capabilities and strengths.
- Set funding priorities that align with our intended impact and financial realities.
- Inform funding decisions with assessments of services’ performance and impacts on the I/DD system.
- Utilize strategy screens to identify aligned and impactful opportunities for DDRB to deliver services and/or engage in system-building as alternatives or supplements to service funding.

Goal 2: DDRB’s case management program delivers quality services with measurable impact to a range of clients.

Strategies

- Define and evaluate case management services to non-Medicaid-eligible individuals as we do any other funded service.
- Evaluate the goodness-of-fit between the current case management service delivery model and unique needs of different client groups.
- Explore differential service delivery models tailored to the unique needs of different client groups, as necessary.
- Maximize reimbursement revenues by rewarding productivity, efficiency, and regulatory compliance.
- Maximize efficiency by reducing fixed costs and/or better using technology.

Goal 3: *The DDRB board focuses primarily on the big picture and proactively sets the organization's direction and pursues its priorities.*

Strategies

- Make sure that board and staff members know, fulfill, and hold each other accountable to their unique roles.
- Make sure that the board's time and attention is balanced between pro-active, big picture thinking and day-to-day operations.
- Regularly review the quality of board and staff member relations and the balance of roles and responsibilities.
- Support the selection of board members with the skills and experience that our board needs to be effective.

Goal 4: *The DDRB will identify realistic opportunities to use its influence, relationships, and expertise in partnership with others to develop systemic solutions to persistent needs.*

Strategies

- Maintain a consistent presence and voice at tables where regional actors are or should be addressing complex, unmet needs.
- Foster the development of creative and collaborative solutions.
- Invest our funds to support the collaborative development of long-lasting, wide-reaching solutions.
- Evaluate how well our current investments in transportation and housing services align with our strategic goals for positive system impact and scalable solutions.

Goal 5: *The DDRB will identify ways to raise awareness of the DDRB's mission and value, available services, and the strengths and needs of people with I/DD among taxpayers, the I/DD community, and the general community, respectively.*

Strategies

- Explore the feasibility and potential scope of a dedicated marketing and outreach position.
- Explore the feasibility of a multi-media awareness campaign.
- Pursue community outreach and education opportunities in partnership with other community-serving entities.

Goal 6: *DDRB has the staff and structure to achieve its strategic goals.*

Strategies

- Ensure DDRB's organizational structure and staff roles meet the organization's needs and align with its goals.
- Equip DDRB's future leaders with the values, knowledge, and skills necessary to lead effectively.
- Seek opportunities to include members of the I/DD community in our workforce and efforts.
- Publicize the benefits of working at DDRB.

Appendix: Strategy Screens

A strategy screen is a set of criteria that reflects an organization’s values and priorities, which should inform strategic decision-making.

Service Delivery

This tool is designed to support DDRB board and staff leaders in evaluating opportunities and invitations to develop and/or deliver services. DDRB is committed to growing and strengthening the I/DD system, and we believe that is best achieved through our funding and system-building efforts. The DDRB believes that being a provider of services is not the best use of DDRB’s strengths and resources, unless the following criteria are met.

If an opportunity meets these criteria and DDRB enters into service delivery, leadership will reassess the service’s alignment with these criteria at least annually to ensure continued necessity and goodness-of-fit.

Opportunity:	
Criteria	Score 4 = Completely 3 = Mostly 2 = Somewhat 1 = Barely 0 = Not at all
The service is consistent with our mission.	
The service builds upon or reinforces our current strategic sweet spot.	
The service is critical to the functioning of the I/DD system.	
DDRB is the provider of last resort ² .	
System actors agree that there is a need that is greater than supply.	
We can develop and deliver stable and quality services.	
We have evaluated and planned to mitigate risk, including financial and reputational risks.	
Total	

² To ensure that DDRB is or would be the provider of last resort, DDRB will try to recruit, incentivize, prepare, and support all potential providers of the service in question. To meet these criteria, all these efforts must first fail.

System-Building

This tool is designed to support DDRB board and staff leaders in evaluating opportunities and invitations to leverage its credibility, relationships, and expertise to build the strength, capacity, and infrastructure of the I/DD system. Such efforts are beyond and independent of DDRB’s funding and service delivery work.

If an opportunity meets these criteria, and DDRB enters into system-building, leadership will reassess the service’s alignment with these criteria at least annually to ensure continued necessity and goodness-of- fit.

Opportunity:	
Criteria	Score 4 = Completely 3 = Mostly 2 = Somewhat 1 = Barely 0 = Not at all
The effort is consistent with our mission.	
The effort builds upon or reinforces our current strategic sweet spot.	
The issue or need is impacting numerous DDRB-funded providers and/or partners and/or a substantial portion of the I/DD community, and the solution would, too.	
Other entities in the system, in addition to DDRB, have a stated responsibility for or interest in the need or potential solution.	
The need is greater in scope, cost, or complexity than DDRB can adequately address through its own funding or service provision.	
System-building would ensure a more sustainable and/or impactful solution.	
We have the capacity to meaningfully contribute our relationships, expertise, and perspective and add substantial value to the effort.	
Total	