

FY 18-22

# Strategic Plan



Approved by the CMU Board of Directors on July 19, 2018

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## INTRODUCTION

CMU was incorporated in 1991 to provide case management and other functions related to mental health, intellectual and developmental disabilities, and early intervention services in Dauphin County, Pennsylvania on behalf of the Dauphin County MH/ID Program. Today the CMU provides supports and services annually to over 6000 children, adults and their families. CMU's three main service areas are:

### **MENTAL HEALTH**

Helping children (age 3 and up) or adults who have mental health needs to access supports and services. Any adult or family of a child who is interested in discussing supports and services may contact us for an intake and determination of eligibility.

### **INTELLECTUAL AND DEVELOPMENTAL DISABILITY**

Helping children or adults who have intellectual disabilities to access supports and services. Any adult or family of a child who is interested in discussing supports and services may contact us for an intake and determination of eligibility.

### **EARLY INTERVENTION**

Helping families to access services and support for children from birth up to their third birthday. Any family who may have a concern about their child may contact us for a developmental evaluation.

The CMU Strategic Plan for FY 18-22 was developed with involvement and guidance from the CMU Board of Directors and the CMU Strategic Planning Committee (CSPC) made up of senior management staff. The CMU Strategic Planning Committee met on over twenty occasions since December 2017 setting the stage for CMU Board input and guidance that helped define and refine the agency's strategic direction. The CPSC were instrumental in coordinating the planning process and provided important support and analysis to complete the strategic plan.

## What is Strategic Planning

Strategic planning is an organizational activity that is used to set priorities, focus energy and resources, strengthen operations, establish agreed upon agency goals, and assess and adjust the organization's direction in response to a changing environment. It is a disciplined effort that produces important decisions and actions that shape and guide what an organization is, what it does, why it does it, and maintains a focus on the future.

Effective strategic planning articulates not only where an organization is going and the actions needed for advancement, but also how it will know if it is successful. A strategic plan is a document used to

communicate the organization’s goals, actions needed to achieve those goals, and all of the other critical elements developed during the planning activity.

**STRATEGIC PLANNING PROCESS**

CMU’s Strategic Planning process began in December 2017. The Executive Director identified the members of the CMU Strategic Planning Committee (CSPC) and submitted a Strategic Planning Implementation Plan for CMU Board approval on December 21, 2017. The CMU Strategic Planning Implementation Plan established a timeline for submission of paperwork and materials for review by the CMU Board.

The Strategic Plan was developed using a multi-stage process that solicited input from CMU staff and stakeholders. The first stage identified the prerequisite activities for CMU Strategic Planning and timelines for completing the activities. The prerequisite activities included:

Identify CMU Strategic Planning Committee (CSPC)	Perform Agency Readiness Assessment	Identify Stakeholders	Conduct Stakeholder Analysis
Define Stakeholder Engagement Goals	Identify Data Collection Needs	Draft Timeline for Strategic Planning Activities	Adopt Strategic Planning Process

The second stage identified the necessary activities and timelines for the creation of a viable strategic plan including the exploration of CMU’s Mission, Vision and Values and identifying avenues for stakeholder input and comment. Necessary activities for the creation of a viable strategic plan included:

Identify agency mandates	Clarify type and level of stakeholder engagement	Explore CMU mission, values and vision with stakeholder input	Develop the strategic plan with stakeholder input
Complete environmental scan/SWOT with stakeholder input	Prioritize and select strategic initiatives	Develop process to monitor the plans implementation and evaluation	

**CMU PURPOSE STATEMENT**

CMU believes that any individual or family could experience challenges in life that require professional support. The family of an infant or toddler might have concerns about their child’s development, or perhaps a youngster requires professional help with behavioral issues. Quite often adults or families with children who have intellectual disabilities need support in their home and community. Many adults

experience mental health challenges at some point during their life. No two individuals or families are the same, but many share this common need for dependable support.

Our purpose at CMU is to partner with individuals and families to navigate challenging times by linking them with the proper resources. That is why our slogan reads “Charting Paths...Creating Opportunity”. At CMU, we strive to help individuals and families express their needs and priorities and provide information and support so they can make informed choices to address those concerns. As dedicated professionals, we share their challenges and celebrate their successes.

In working to fulfill our purpose, we...

- Listen carefully to determine each individual’s and family’s unique needs and priorities as well as their strengths and capabilities.
- Help with enrollment/registration through assessment and determination of eligibility according to applicable governmental or insurance mandated criteria.
- Empower individuals and families to make informed, life-affirming choices about the supports and services they choose to receive.
- Develop an individualized plan that weaves together information, resources and sources of funding.
- Advocate for each individual to ensure that his or her personal interests and rights are respected.
- Authorize funding for services when necessary.
- Smooth the way for individuals and families to access resources with the greatest regard for personal preferences and confidentiality.
- Assure quality and satisfaction through the monitoring of services and supports in the individual’s plan.

In the end, CMU becomes an individual’s gateway into, and support within, the publicly funded early intervention, mental health and intellectual disabilities systems.

## CMU DEFINING PRINCIPLES OR PILLARS

The strategic planning process included identifying the organizational principles or pillars that empower the agency to engage in a consistent and ethical approach to service provision. Defining organizational principles renew and rejuvenate staff and stakeholders by reminding them of shared principles, beliefs and importance of their work, regardless of their role.

CMU has five pillars or principles that provide the basis for our work and interactions. They are:

CMU’S FIVE PILLARS OR PRINCIPLES	
<b>RESPECT/AUTONOMY</b>	We believe that individuals have intrinsic and unconditional worth. We believe that individuals are free to decide how they live their lives. We also believe that people have the right to exercise freedom of thought or choice.

<b>DO NO HARM</b>	We never intentionally harm others through our actions or lack of action, nor engage in any activities that run the risk of harming others (avoidable harm). This includes, but is not limited to, using our positions for personal gain or to exercise power over others.
<b>DO GOOD</b>	We have an obligation to act in ways that prevent harm, remove harm and promote good. Our actions are defined by how well they help others. Actions and advocacy should always promote the health and well-being of the individuals we serve. We strive to put in place the supports and resources that reflect kindness, quality and maximize the benefit to others.
<b>JUSTICE</b>	We treat others equitably, fairly, and without prejudice. We treat others the way we wish to be treated.
<b>FIDELITY</b>	We are loyal to others in our words and actions and honor commitments. This includes keeping our promises, doing what is expected of us and being trustworthy. We are competent and capable when performing our duties and we adhere to applicable laws, policies and procedures.

**CMU MISSION**

CMU believes that relationships hold the key to overcoming barriers, accessing resources and fulfilling CMU’s mission:

*Charting paths and creating opportunity for adults, children and families to live full and inclusive lives in their communities.*

**CMU VALUES**

The strategic planning process engaged staff, management and the CMU Board to identify the top ten key agency values. Values support and strengthen our principles and articulate how CMU conducts itself. They guide our interactions with each other and our external stakeholders (consumers, funders, oversights, providers etc.). The CMU values are:

<b>VALUES</b>				
<b>CARING</b>	<b>COMPASSION</b>	<b>INTEGRITY</b>	<b>PATIENCE</b>	<b>RELIABILITY</b>
Feeling and showing concern for others	Being deeply aware of and wanting to lessen	Being honest and adhering to CMU principles and values	Waiting and tolerating without complaining or getting angry	Doing things consistently so that others can

	the distress of others			depend and trust you
<b>RESILIENCE</b>	<b>RESPECT</b>	<b>SUPPORTIVE</b>	<b>TRUSTWORTHINESS</b>	<b>UNDERSTANDING</b>
Ability to recover quickly from changing conditions or difficult circumstances	A demonstrated feeling, understanding or attitude that someone or something is important	Giving encouragement, support and help	Having people believe you, trust you, and have confidence in you	Having a tolerant and honest relationship with others

**CMU VISION**

All people living a life of abundance and connection in their community.

**CULTURAL DIVERSITY STATEMENT**

We, the CMU, celebrate diversity and are dedicated to the ongoing development of an environment which respects and values the uniqueness of all people.

Embodied in our vision are the following principles:

- Commitment to hold each other accountable through the ongoing process of education and the promotion of an environment that values others through words and deeds.
- It is recognized that the acceptance of diversity is an ongoing developmental process essential to the enhancement of personal and professional relationships. We will strive toward a better understanding, respect and appreciation for all individuals.

**CORE COMPETENCIES**

The CMU Strategic Plan establishes a framework that achieves our mission and propels us forward by leveraging the agency’s greatest attributes (i.e. core competencies). Core competencies are CMU’s areas of greatest strength and expertise. CMU’s core competencies are central to achieving our mission and provide CMU with unique advantages in our service environment. CMU’s core competencies differentiate CMU from other human service agencies, providing a competitive advantage and a difficult challenge for other agencies to imitate.



**STRATEGIC INITIATIVES**

CMU has identified four strategic initiatives that form the foundation of our strategic plan:

STRATEGIC INITIATIVES	
<b>SERVICE</b>	<b>STAKEHOLDER ENGAGEMENT AND AWARENESS</b>
Delivering programs and services, true to our mission, that meet the needs of our community and are in alignment with the changing human services landscape.	Effectively telling our story to increase awareness of our mission and programs, and demonstrate the value and impact of CMU to the stakeholder community.
<b>SUSTAINABILITY AND INFRASTRUCTURE</b>	<b>TECHNOLOGY</b>
Achieving long-term financial stability through innovative strategies that maximize efficiencies, maintain a robust and mission driven workforce, and expand our revenue base.	Creating information technology that allows us to monitor performance and understand service needs resulting in efficiencies that will drive service delivery decisions and the efficiency and effectiveness of services.

**PLAN DEFINITIONS**

<b>STRATEGIC INITIATIVE</b>
Overarching broad goals that represent critical projects key to advancing CMU’s delivery on its mission.
<b>GOAL</b>
Direction and avenues CMU seeks to pursue that evolve from the strategic initiatives.
<b>OBJECTIVE</b>

Steps needed to be achieved to realize strategic goals.

**DELIVERABLE**

The end product that is produced from the successful completion of strategic objectives.

**KEY LEADERS**

Individuals providing leadership and accountability for strategic objectives.

**FY**

FY (Fiscal Year) timeline that defines the fiscal year when each strategic objective begins and ends (i.e. the fiscal year in which each strategic objective is successfully completed).

CMU STRATEGIC PLAN FY 18-22

Strategic Initiative	Goal	Objective	Description	Key Leaders/Deliverable	FY 18/19	FY 19/20	FY 20/21	FY 21/22
1	<b>Strategic Initiative - Service</b>							
	<b>Delivering programs and services, true to our mission, that meet the needs of our community and are in alignment with the changing human services landscape.</b>							
1	1	<b>Develop staff expertise in engaging and serving complex individuals</b>						
1	1	1	Identify the traits and types of complex, challenging and high risk individuals and populations	Sausman/Simmons Ongoing efforts and progress noted in Executive Directors report	X	X		
1	1	2	Identify training needs for engaging and serving complex, challenging and high risk individuals and populations	Sausman/Simmons Identified training needs shared with staff and reported to CMU Board		X	X	
1	1	3	Implement and evaluate staff training on engaging and serving complex, challenging and high risk individuals and populations	Sausman/Simmons Training, implementation and evaluation results shared with staff and CMU Board			X	X
1	2	<b>Increase services for underserved populations</b>						
1	2	1	Identify underserved populations and barriers to engagement	Sausman/Simmons CMU Board updated on identified populations and barriers through Executive Directors reports.	X	X		

Strategic Initiative	Goal	Objective	Description	Key Leaders/Deliverable	FY 18/19	FY 19/20	FY 20/21	FY 21/22
1	2	2	Develop plan and strategies to engage underserved populations	Sausman/Simmons Plan and strategies shared with staff and CMU Board		X	X	
1	2	3	Implement and evaluate plans and strategies to increase services to underserved populations	Sausman/Simmons Implementation and evaluation results shared with staff and CMU Board			X	X
1	3	<b>Integrate the LifeCourse framework into non-waiver Supports Coordination services.</b>						
1	3	1	Assess need and evaluate strategies to integrate the LifeCourse framework into non-waiver Supports Coordination services	Dan Sausman/ Progress to be communicated to the Board through Executive Director reports	X	X		
1	3	2	Develop plan to integrate the LifeCourse framework into non-waiver Supports Coordination services	Dan Sausman/ Progress and plan shared with staff and reported to CMU Board		X	X	
1	3	3	Implement and evaluate LifeCourse framework integration framework into non-waiver Supports Coordination services	Dan Sausman/ LifeCourse framework integration and evaluation results shared with staff and CMU Board			X	X
1	4	<b>Implement efficiencies in accessing CMU Mental Health services.</b>						
1	4	1	Identify inefficiencies and barriers to accessing CMU Mental Health services	Simmons/ Identified inefficiencies and barriers shared with staff and CMU Board	X			
1	4	2	Explore and develop plans and strategies to address timely access to CMU Mental Health services.	Simmons/ CMU Board updated on Quality Improvement plan that addresses inefficiencies and barriers to services		X	X	
1	4	3	Implement and evaluate plans and strategies to address timely access to CMU services	Simmons/ Improved access to services based on Quality Improvement activities shared with Board			X	X

Strategic Initiative	Goal	Objective	Description	Key Leaders/Deliverable	FY 18/19	FY 19/20	FY 20/21	FY 21/22
2	<b>Strategic Initiative - Stakeholder Engagement and Awareness</b>							
	<b>Effectively telling our story to increase awareness of our mission and programs, and demonstrate the value and impact of CMU to the stakeholder community.</b>							
2	1	<b>Increase community understanding of CMU's purpose and roles</b>						
2	1	1	Increase community presence through outreach events	McCutcheon/Simmons/Sausman Scheduled monthly outreaches for each service line shared with CMU Board	X			
2	1	2	Develop presentation that focuses on CMU's mission, programs, value and impact	McCutcheon/Simmons/Sausman Progress shared with CMU Board through Executive Director reports	X	X		
2	1	3	Implement and evaluate presentation that focuses on CMU's mission, programs, value and impact	McCutcheon/Simmons/Sausman Presentation shared with CMU Board, staff and stakeholders		X	X	
2	2	<b>Collect, analyze and report outcome data to stakeholders.</b>						
2	2	1	Explore and identify outcome measures to be collected	Levy/Sausman/Simmons Committee convened and progress reported to CMU Board through Executive Directors report	X	X		
2	2	2	Develop strategies to collect and analyze outcome data	Levy/Sausman/Simmons Strategies communicated with board through Executive Director reports		X	X	
2	2	3	Collect and analyze outcome data	Levy/Sausman/Simmons Progress on collection and analysis shared with CMU Board through Executive Director Reports			X	X

Strategic Initiative	Goal	Objective	Description	Key Leaders/Deliverable	FY 18/19	FY 19/20	FY 20/21	FY 21/22
2	2	4	Develop and implement plan to share outcome data with stakeholders.	Progress and plan shared with staff and communicated to CMU Board through Executive Director Reports				X
2	3	<b>Develop marketing and branding strategies to convey CMU impact and value.</b>						
2	3	1	Establish committee and explore marketing and branding strategies.	McCutcheon/Simmons/Sausman Committee established and progress communicated to CMU Board through Executive Director Reports	X	X		
2	3	2	Develop implementation plan to execute marketing and branding strategies.	McCutcheon/Simmons/Sausman Progress to be communicated to the Board through Strategic Plan Updates to E.D. on a quarterly basis, at minimum.		X	X	
2	3	3	Implement and assess marketing and branding strategies to convey CMU impact and value.	McCutcheon/Simmons/Sausman Implementation plan shared with CMU Board			X	X
3	<b><u>Strategic Initiative - Sustainability and Infrastructure</u></b> <i>Achieving long-term financial stability through innovative strategies that maximize efficiencies, maintain a robust and mission driven workforce, and expand our revenue base.</i>							
3	1	<b>Create strategies for staff retention and engagement.</b>						
3	1	1	Identify organizational and supervisory approaches that enhance staff retention	Simmons/Sausman/McCutcheon/Carroll Identified approaches shared with supervisors and CMU Board	X	X		

Strategic Initiative	Goal	Objective	Description	Key Leaders/Deliverable	FY 18/19	FY 19/20	FY 20/21	FY 21/22
3	1	2	Implement and assess organizational and supervisory approaches to enhance retention including revamping exit interview	Simmons/Sausman/McCutcheon/Carroll Monitor staff retention and vacancy rates and share with CMU Board		X	X	
3	1	3	Revise onboarding process to engage staff by creating buy-in to CMU Mission, Principles and Values	McCutcheon/Carroll/Levy Revamped onboarding process shared with supervisors and CMU Board	X	X	X	
3	1	4	Realign and redesign HR department duties and responsibilities to meet changing agency and workforce needs	Carroll/Verano/McCutcheon Progress on realignment and redesign shared with Staff and CMU Board	X	X	X	
3	2	<b>Develop organizational infrastructure plan for growth and expansion.</b>						
3	2	1	Assess current infrastructure for sufficiency	Verano/McCutcheon Gap analysis and findings reported to CMU Board	X	X		
3	2	2	Implement results of infrastructure assessment	Verano/McCutcheon/Reorganization and/or enhancement of CMU organizational structure shared with CMU Board		X	X	
3	2	3	Develop staffing benchmarks to indicate need for infrastructure reassessment	Verano/McCutcheon/ Progress and benchmarks shared in Executive Director reports			X	X
3	3	<b>Explore and develop opportunities for new revenue streams.</b>						
3	3	1	Research and explore opportunities for expanding existing revenue and developing new revenue streams.	McCutcheon/Verano Board updated on potential opportunities for expansion and new revenue streams	X	X	X	
3	3	2	Identify and develop opportunities for expanding existing revenue and developing new revenue streams.	McCutcheon/Verano Identified and developed opportunities shared with CMU Board			X	X

Strategic Initiative	Goal	Objective	Description	Key Leaders/Deliverable	FY 18/19	FY 19/20	FY 20/21	FY 21/22
3	3	3	Explore, develop and implement fundraising infrastructure and strategy	McCutcheon/Verano Progress and three yearly fundraising events shared with the CMU Board.	X	X	X	X
<b>Strategic Initiative - Technology</b>								
4			<b><i>Creating information technology that allows us to monitor performance and understand service needs resulting in efficiencies that will drive service delivery decisions and the efficiency and effectiveness of services.</i></b>					
4	1	<b>Develop data solutions to monitor and improve staff and program performance.</b>						
4	1	1	Identify data integrity needs and establish plan to ensure that necessary data is collected and accurate.	Simmons/Verano/ McCutcheon/Sausman/ Create workgroup and report progress to CMU Board through Strategic Plan Updates	X	X		
4	1	2	Identify, develop and create user friendly reports that enhance staff and program performance	Simmons/Verano/ McCutcheon/Sausman/  Progress and demonstration presented to staff, supervisors and CMU Board		X	X	
4	1	3	Develop culture that encourages user feedback and cultivates creativity within our data systems	Simmons/Verano/ McCutcheon/Sausman/ Create workgroup to train staff within the framework of CMU's Mission and report progress to the Board through Strategic Plan Updates			X	X
4	2	<b>Identify and employ technology that results in better care, better outcomes and lower costs.</b>						

Strategic Initiative	Goal	Objective	Description	Key Leaders/Deliverable	FY 18/19	FY 19/20	FY 20/21	FY 21/22
4	2	1	Implement technology that allows for mobile initial access to CMU services	Simmons/Verano/McCutcheon/Sausman/ Create workgroup and report progress to CMU Board through Strategic Plan Updates	X	X		
4	2	2	Refine MH intake process to auto-populate provisional diagnosis.	Simmons/Verano/McCutcheon/Sausman/ Progress will be communicated to the board through Strategic Plan Updates.		X	X	
4	2	3	Functioning consumer portal that enhances consumer access, outcomes and service impact	Simmons /Verano/McCutcheon/Sausman/ Begin utilizing the consumer portal in Credible and communicate progress to board.			X	X

## CMU IMPLEMENTATION PLAN

### Focus I - Obtain Approval for CMU Strategic Plan

Goal I – Submit timely paperwork and materials for review by CMU Board.

<u>Objectives</u>	<u>Target Date</u>	<u>Status</u>	<u>Responsibility</u>
1. Submit implementation plan for CMU Board approval	December 21, 2017	Completed December 21, 2017	Executive Director
2. Submit revisions/additions as needed for CMU Board approval	Within 30 days of request	Completed January 19, 2018	Executive Director
3. Submit Final Document for CMU Board Approval	June 21, 2018	Completed June 21, 2018	Executive Director

### Focus II – Preparing for Strategic Planning

Goal II – Complete necessary prerequisite activities for CMU Strategic Planning and report back to CMU Board on the status and completion of activities within established time frames.

<u>Objectives</u>	<u>Target Date</u>	<u>Status</u>	<u>Responsibility</u>
1. Identify CMU Strategic Planning Committee (CSPC)	December 21 2017	Completed December 14, 2017	Executive Director
2. Perform Readiness Assessment, Identify Stakeholders and Conduct Stakeholder Analysis	January 26, 2018	Completed January 24, 2018	CMU Strategic Planning Committee (CSPC)
3. Define and clarify stakeholder engagement goals and data collection needs, draft timeline and adopt strategic planning process	February 2, 2018	Completed January 29, 2018	CSPC
4. Develop project plan based on timeline and process	February 15, 2018	Completed January 30, 2018	CSPC

### Focus III – Development/Implementation/Evaluation of CMU Strategic Planning

Goal III – Complete activities necessary for viable CMU Strategic Plan and report back to CMU Board on the status and completion of Development/Implementation/Evaluation activities within established time frames.

<u>Objectives</u>	<u>Target Date</u>	<u>Status</u>	<u>Responsibility</u>
1. Identify and review agency mandates	March 1, 2018	Completed February 26, 2018	CSPC
2. Redefine CMU principles, mission and values	March 15, 2018	Completed March 1, 2018	CSPC Identified Stakeholders
3. Initiate environmental scan/SWOT with stakeholder input	April 10, 2018	Completed April 10, 2018	CSPC Identified Stakeholders
4. Select strategic issues and develop the strategic plan with stakeholder input	May 27, 2018	Completed May 22, 2018	CSPC Identified Stakeholders
5. Develop process to monitor the plans implementation and evaluation	June 10, 2018	Completed June 6, 2018	CSPC

### CMU SWOT ANALYSIS

Strengths	Weaknesses
Caring And Helpful Staff Staff Knowledge And Resources Provides Quality Services To Consumers Strong Presence In Service Community	Staff Safety Concerns Stakeholder Misperceptions About Services Staff Turnover Not enough/inconsistent support for consumers

Strong Leadership And Administration Resilience And Recovery Focus Payee Services Consumers/Families/Providers Collaboration Responsiveness And Advocacy Walk-In Intakes Good Work/Life Balance and Schedule Flexibility Supportive Supervisors 24/7 Availability	Inconsistent Staff Quality/Professionalism Returning Phone Calls (Some Staff) Union Influence Communication between Departments Lack of Growth Opportunities Low Compensation Quantity vs. Quality Services Supervisor Accessibility and Training Staff Support Concerns
<b>Opportunities</b>	<b>Threats</b>
Staff Engagement and Retention Improve Access to CMU Services Increase Services for Underserved Populations Create new services marketing strategies to convey impact and value Consumer Engagement Improve Transition Planning Consumer Engagement Community intakes Expanding Services Geographically Specialized Case Management Services Engaging and Serving Complex Individuals Service improvement through technology	Poor reimbursement Competition with other providers Failure to identify stakeholder needs Reduction of funds Funding Complacency Staff turnover Fiscal pressures Poor communication with Partners Lack of community Resources Increased Regulations Changing Payment Models Lack of Infrastructure for growth and expansion

## STAKEHOLDER INPUT AND PUBLIC COMMENT

In addition to receiving ongoing stakeholder feedback through meetings and surveys, an overview of the CMU Strategic Plan was made available to our stakeholders through a series of meeting presentations. CMU received many comments and suggestions throughout the process and would like to thank everyone who took the time to provide feedback on the draft strategic plan. Significant insights and recommendations were helpful in refining elements of the plan based on the comments received and the concerns expressed.

## CMU CONSUMER SATISFACTION SURVEY

CMU is committed to providing quality services to all individuals. In an effort to serve you better, we are asking you to complete the following survey.

Please CIRCLE the ONE that best describes your experience with services at the CMU.

1. How would you rate the quality of service you have received from CMU?

Excellent  
Good

Fair  
Poor

2. Have the services you received from CMU helped you?

Yes, I strongly agree  
Yes, I agree  
No, I disagree  
No, I strongly disagree

3. Has CMU staff treated you with respect and dignity?

Yes, I strongly agree  
Yes, I agree  
No, I disagree  
No, I strongly disagree

4. Has CMU helped you with your recovery?

Yes, I strongly agree  
Yes, I agree  
No I disagree  
No, I strongly disagree

5. I would recommend CMU to a friend.

Yes, I strongly agree  
Yes, I agree  
No, I disagree  
No, I strongly disagree

Thank you for completing our survey!

## CMU STAFF SWO SURVEY

Each CMU employee is a valuable member of our strategic planning team and your input is important! As part of our Strategic Planning initiative, you are invited to participate in our SWO Analysis. A SWO analysis involves identifying CMU's strengths, weakness, and opportunities to expand CMU's influence.

1. What are CMU's Strengths? Things to consider are what we do better than others, our unique capabilities and resources, and what others perceive as or strengths.

2. What are CMU's weaknesses? Things to consider include things CMU could improve, what other agencies do better than CMU and what others perceive as CMU weaknesses.

3. What opportunities do you see to expand CMU's influence?

4. What threatens the agencies mission?

Thanks for completing the survey!

## CMU Board Survey

CMU Welcomes CMU Board input, guidance and feedback in the strategic planning process. The CMU Strategic Planning team has been meeting on a regular basis and has identified four strategic initiatives: Service, Stakeholder Engagement and Awareness, Sustainability and Infrastructure and Technology.

1. The first initiative is Service: Delivering programs and services, true to our mission, that meet the needs of our community and are in alignment with the changing human services landscape.

Some suggested broad goal ideas include:

1. Implement efficiencies in accessing CMU services
2. Develop case management protocol for serving complex MH/IDD individuals
3. Redesign IDD TSM services to include focus on the LifeCourse framework
4. Increase consumer engagement in services
5. Improve physical health coordination and health outcomes
6. Minimize fear and confusion of seeking services through customer service
7. Identify service gaps and plans for service development
8. Train staff on the impact of trauma on consumer
9. Identify training needs for engaging and serving complex individuals
10. Increase staff attendance at consumer requested meetings/appointments

What are your top three choices? Do you have any other suggestions for the Service initiative?

2. The second initiative is Stakeholder Engagement and Awareness: Effectively telling our story to increase awareness of our mission and programs, and demonstrate the value and impact of CMU to the community.

Some suggested broad goal ideas include:

1. Demonstrate and communicate value of CMU services to consumers
2. Increase community presence through outreach events
3. Use visual media to tell our story, provide education and deliver our message

4. Develop communication strategy that includes “call to action”
5. Increase community understanding of CMU’s purpose and roles
6. Develop communication strategy to increase understanding of how services impacts consumers
7. Develop marketing and branding strategies to convey CMU impact and value
8. Provide semi-annual training for families and caregivers
9. Collect, analyze and report outcome data to stakeholders
10. Educate public about CMU services and access to treatment

What are your top three choices? Do you have any other suggestions for the Stakeholder Engagement and Awareness initiative?

3. The third initiative is Sustainability and Infrastructure: Achieving long-term financial stability through innovative strategies that maximize efficiencies, maintain a robust and mission driven workforce, and expand our revenue base.

Some suggested broad goal ideas include:

1. Develop organizational infrastructure plan for growth and expansion
2. Identify and pursue service diversification consistent with our mission and expertise
3. Reduce duplication and inefficiencies
4. Develop infrastructure for the promotion and solicitation of funds
5. Review and monitor all contracts to ensure compliance
6. Establish MOU’s with all relevant stakeholders.
7. Enhance employment outreach and internship programs
8. Create strategies for staff retention and engagement
9. Elevate workplace safety and preparedness to optimize consumer and employee well being
10. Provide opportunities for team building/fellowship outside business hours

What are your top three choices? Do you have any other suggestions for the Sustainability and Infrastructure initiative?

4. The fourth initiative is Technology: Creating information technology that allows us to monitor performance and understand service needs resulting in efficiencies that will drive service delivery decisions and the efficiency and effectiveness of services.

Some suggested broad goal ideas include:

1. Establish data collection and reporting mechanisms for outcome measures
2. Establish processes to use technology to measure performance

3. Identify key outcome measures
4. Identify and employ technology that results in better care, better outcomes and lower costs.
5. Establish data driven continuous quality improvement
6. Develop data solutions to monitor and improve program performance
7. Collect, analyze and report outcome data
8. Conduct IT needs assessment
9. Identify technology solutions to improve communication
10. Increase all staff's access to data for managing outcomes and performance

What are your top three choices? Do you have any other suggestions for the Technology initiative?

SWOT stands for Strengths/Weaknesses/Opportunities/Threats.

5. What do you see as CMU's strengths?
6. What do you see as CMU's weaknesses?
7. What opportunities do you see to expand the CMU's influence?
8. What threatens the agency's mission?

Thanks for completing the survey!

## STAKEHOLDERS

CMU would like to thank the following organizations whose participation and input was instrumental in the development of the CMU Strategic Plan.

*CMU Board of Directors  
 Dauphin County MH/ID/EI Office  
 CMU Staff and Supervisors  
 CMU MH/ID/EI Consumers and Families  
 Dauphin County Adult Providers Meeting  
 Dauphin County ID Provider Meeting  
 Dauphin County MH Committee  
 Dauphin County ID Committee  
 CMU Family/Consumer Advisory Board  
 Speaking For Ourselves  
 Dauphin County CSP*

*Elwynn  
 PerformCare  
 Paxton Ministries  
 Community Services Group  
 Christian Services United  
 Merakey  
 Penn State Health  
 T.W. Ponessa & Associates  
 Riverside Associates  
 Dauphin County Crisis Intervention  
 UPMC Pinnacle*

Volunteers of America  
 Keystone Human Services  
 Pennsylvania Psychiatric Institute  
 PA Counseling Services

Dauphin County Drug and Alcohol Services  
 Slovia Therapy, LLC  
 NAMI  
 Jewish Family Services

STRATEGIC PLAN FY 14-18 Final Update

CMU recently completed the strategic plan for FY 14-18 and a final update is available below for your review. CMU Board of Directors and CMU Staff were provided regular updates on progress and goal completion. It should be noted that completion of strategic objectives does not signal an end to the processes and protocols put in place, but signifies a new work process or protocol that is now standard operating procedure at CMU.

Strategic Initiative	Goal	Objective	Description	Final Update	FY 14/15	FY 15/16	FY 16/17	FY 17/18
1	<b>Strategic Initiative - Service</b> <i>Enhancing creating and delivering mission-driven programs and services that meet the current and growing needs of our community.</i>							
1	1	<b>Explore and develop avenues to promote consumer-driven input into current and planned services.</b>						
1	1	1	Outreach to and provide representation on self-advocacy groups.	<b>COMPLETED IN FY 15/16</b> CMU established ongoing agency liaisons to the following self-advocacy groups: Double-Trouble, CSP, Speaking for Ourselves (SFO), Self-Advocates Unit As 1 (SAU1), Arc of Dauphin County and NAMI.	X	X		
1	1	2	Explore and implement consumer advisory boards for MH, ID and EI services.	<b>COMPLETED IN FY 16/17</b> Consumer/family advisory group members were identified to represent the ID and MH programs areas and have met individually and jointly since on November 2016 in their advisory role to CMU.		X	X	

Strategic Initiative	Goal	Objective	Description	Key Leaders/Deliverable	FY 14/15	FY 15/16	FY 16/17	FY 17/18
1	1	3	Plan, coordinate and implement stakeholder focus groups.	<b>COMPLETED IN FY 16/17</b> CMU held its first focus group for parents of children who have been discharged from Residential Treatment Facilities. Other focused groups were held including an ID focus group centered on Supporting Individuals across the Lifespan.		X	X	
1	1	4	Plan, coordinate and implement "teach backs".	<b>COMPLETED IN FY 17/18</b> The first teach back was held at the CSP Recovery conference in May of 2017 and teach backs have become a go to feedback tool utilized in a variety of venues.			X	X
1	2	<b>Improve services through the use of outcomes and collaborations with providers.</b>						
1	2	1	Explore, identify, and develop outcomes that measure the impact of our services.	<b>COMPLETED IN FY 16/17</b> The QM/QI committee is underwent a qualitative redesign to be more in alignment with strategic goals and initiatives that lead to outcome measures.		X	X	
1	2	2	Use outcome measures to improve services.	<b>COMPLETED IN FY 17/18</b> The Executive Director attended several workshops and conferences focused on using data and outcome measures to improve services, implemented a new EHR program and is using technology to improve services.			X	X
1	2	3	Identify and pursue opportunities for collaboration with providers that enhance and improve services.	<b>COMPLETED IN FY 16/17</b> A MOU tracking record was established and reviewed monthly in order to ensure MOU's are current and reflect interagency collaboration. CMU has dozens of active MOU's with a wide range of providers as documented on the MOU tracking record. CMU has engaged with numerous agencies to pursue opportunities to enhance and improve services.		X	X	

Strategic Initiative	Goal	Objective	Description	Key Leaders/Deliverable				
					FY 14/15	FY 15/16	FY 16/17	FY 17/18
2	<b>Strategic Initiative - Public Education/Awareness</b> <i>Effectively telling our story to the community that increases awareness of our mission and programs, reduces stigma, and demonstrates the value and impact of CMU to the community.</i>							
2	1	<b>Develop a plan for public outreach and service that includes educational programs targeted for consumers and their families.</b>						
2	1	1	Explore, develop and implement public outreach strategy and plan	<b>COMPLETED IN FY 16/17</b> Community outreach is pervasive and ongoing as CMU averages participation in over 20 outreach and community events a year to inform the public regarding the mission and supports available through our agency.		X	X	
2	1	2	Develop and implement educational programs targeted for individuals and families receiving CMU services.	<b>COMPLETED IN FY 16/17</b> CMU hosted a Resource Fair designed to engage families and provide them a venue to access multiple services and providers in one location. CMU also routinely provides leadership, logistics and fundraising for the annual CSP conference and hosted a smoking cessation event at the Elizabethtown office. CMU continues to develop and implement educational opportunities for individuals and families receiving our services.			X	X
2	2	<b>Develop a media strategy that includes updating our website and uses print media to tell our story, highlights our work and deliver our message.</b>						

Strategic Initiative	Goal	Objective	Description	Key Leaders/Deliverable	FY 14/15	FY 15/16	FY 16/17	FY 17/18
2	2	1	Update the CMU website.	<b>COMPLETED IN FY 15/16</b> The new look website was unveiled for the CMU Board of Directors on November 19, 2015.	X	X		
2	2	2	Plan and implement the use of press releases to highlight our work and deliver our message.	<b>COMPLETED IN FY 16/17</b> In 2016, CMU posted its first press release on its website's press page highlighting CMU's expansion of Intellectual Disability services in Lebanon County. Also in 2016, CMU posted its a press release entitled "CMU Steps in to Deliver Over 7 Tons of Holiday food to Less Fortunate". CMU continues to use press releases to highlight our work and deliver our message.		X	X	
2	3	<b>Enhance reputation, presence, brand, and marketing through a yearly conference.</b>						
2	3	1	Explore and identify service area training needs and interest.	<b>COMPLETED IN FY 16/17</b> CMU held ongoing planning meetings to assess training needs and interest. CMU routinely publishes a monthly calendar of training events that are directly related to service area needs. Additionally, CMU distributes notices of external trainings of interest to staff and staff are encouraged to submit notices of training that interest them.		X	X	
2	3	2	Develop, plan and implement yearly conference.	<b>COMPLETED IN FY 17/18</b> CMU held a successful inaugural conference on June 19, 2018.			X	X
3	<b>Strategic Initiative - Stability</b> <i>Achieving long-term financial stability through innovative strategies that maximize efficiencies and expand our revenue base.</i>							

Strategic Initiative	Goal	Objective	Description	Key Leaders/Deliverable	FY 14/15	FY 15/16	FY 16/17	FY 17/18
3	1	<b>Maximize efficiencies in hiring practices and retention through hiring for attitude and culture and providing on-going management and leadership development.</b>						
3	1	1	Identify attitudes and traits that are a good fit for CMU culture.	<b>COMPLETED IN FY 14/15</b> A series of workgroup meetings identified the attitudes and traits consistent with CMU culture and mission were completed in May 2015.	X			
3	1	2	Develop interview protocol aligned with CMU culture and attitudes.	<b>COMPLETED IN FY 15/16</b> A new hiring and interview protocol aligned with CMU culture and attitudes was completed in August of 2015 and an overview of protocol was presented to CMU board.	X	X		
3	1	3	Provide training and implement new interview protocol.	<b>COMPLETED IN FY 15/16</b> Supervisor training on the new interview protocol took place on October 19, 2015. The new hiring and interview protocol was initiated immediately following the supervisor training and is being used for all new applicants.		X	X	
3	1	4	Identify desired leadership competencies.	<b>COMPLETED IN FY 15/16</b> Supervisory and leadership competencies were identified including employee engagement, team building, motivating employees, interviewing and selection, performance management, evaluation and appraisal, performance improvement, leadership, delegation and progressive discipline.	X	X		
3	1	5	Explore and identify leadership training to meet competencies.	<b>COMPLETED IN FY 16/17</b> CMU assessed available options for supervisory/leadership training and concluded that the lack of financially feasible management training options should lead to a management training regimen more focused on individual needs rather than a one size fits all pre-packaged program.		X	X	

Strategic Initiative	Goal	Objective	Description	Key Leaders/Deliverable	FY 14/15	FY 15/16	FY 16/17	FY 17/18
3	1	6	Implement leadership training.	<b>COMPLETED IN FY 17/18</b> The CMU Leadership and Professional Development Self-Assessment that focuses on individual management needs was completed in April 2018 and is currently being phased in.			X	X
3	2	<b>Explore expansion opportunities, opportunities to sell expertise to other agencies.</b>						
3	2	1	Research and explore opportunities for expansion.	<b>COMPLETED IN FY 16/17</b> Exploration and research of potential opportunities for expansion is on-going and includes expanding current services into other counties and looking for opportunities to provide new services.	X	X	X	
3	2	2	Identify and develop opportunities for expansion.	<b>COMPLETED IN FY 16/17</b> CMU accepted proposal from Lebanon County MH/ID/EI to offer Supports Coordination services.			X	X
3	2	3	Identify and develop areas of internal expertise.	<b>COMPLETED IN FY 16/17</b> Areas of internal expertise identified included strategic planning, program development, staff training and development, productivity analysis, interviewing and hiring, fiscal oversight, corporate compliance, COOP development, policy development and representative payee services.	X	X	X	
3	2	4	Research and explore opportunities to sell expertise to other agencies.	<b>COMPLETED IN FY 16/17</b> CMU's completed initial research and exploration into opportunities to sell expertise to other agencies led to the decision to make consultation a secondary focus to program expansion.			X	X