

**BUTLER COUNTY BOARD OF MENTAL RETARDATION
AND DEVELOPMENTAL DISABILITIES**

STRATEGIC PLAN, 2005-2009

(Approved, February 12, 2004)

Introduction. Since about 1987, growth and change within the programs operated or arranged by the Butler County MRDD Program have been guided, at least in part, by a series of “Strategic Plans.” The currently effective Strategic Plan covers the years from 2000 through 2004. That plan was adopted by the Butler County Board of MRDD in January, 2000. In the spring of 2003, the Board of MRDD instructed the administrators of the MRDD Program to prepare a new Strategic Plan (covering 2005-2009) by the end of 2003.

Here is an image of strategic planning. During the age of steamboats on American rivers, steamboat pilots had to memorize the sections of river over which they would guide the boats. We learned about this from Mark Twain. Still, crewmen on each boat would test the depth of the river constantly, to try to make sure that the river had not changed or that new obstacles (e.g., snags) were not threatening the boat. For all their power, steamboats were either pushed ahead or hindered by the river’s force. A smooth and safe passage depended on the memory of the pilots and captains and on the regular flow of information from the crew about the river’s condition, right now.

Strategic planning is at least a bit like that. The MRDD Program, like any other formal organization, is pushed ahead or hindered by the flow of events around it, including its own history. The Program is guided by the results it hopes or expects to attain—the port it seeks. We are more likely to get where we want to go if we regularly assess our surroundings and our own sources of power and, then, if we plot our course—set our strategies—based on our best judgment about how to use our power and avoid obstacles well.

So, the “strategies” in the following plan are designed with those ends in mind. We want to use, as effectively as we can, the forces that we think are our strengths. We also want to dodge the snags and sand bars that we can see confronting us, so that we can progress toward our goal—people with disabilities living, working, and learning in the community!

Forces or changes surrounding the MRDD Program.

(These can work FOR or AGAINST
achievement of the results we want)

War and its effects. The fact of terrorism in our world has led our nation into war, and the outcome of this war is very uncertain. The cost of the war has increased the federal budget deficit, at least for the time being, and the growth of the deficit results in pressures on all government programs, like the Butler County MRDD Program. Federal deficits restrain the growth of federal programs like Medicaid (now a major source of money for the MRDD Program). The need for money to support the war on terrorism also may reduce the interest of citizens in supporting growth in social service programs and, as money gets tight in those programs, competition for money increases. As one administrator put it: “When the water hole dries up, the animals look at each other differently.”

Polarization in society. We will have to take account of the “loss of the middle ground” in current discussions about public life and public policy. At the present time, the media in our culture seem to promote polarization of ideas rather than ways to seek common ground.

Desirability of our communities (in Butler County) as places to live. The MRDD Program serves communities where both population and affluence have been growing for a long time. The diversity of the

local populace is also increasing, as larger numbers of people from Asia and (especially) Latin America move to Butler County. One effect of growing affluence, however, is what seems to be a loss of an older sense of interest in “community” identity and efforts, as people focus more on their jobs and their nuclear family, their homes, their church, and protecting their immediate surroundings or neighborhood.

Visibility of debate over the value of the lives of people with disabilities. Recent events (e.g., the situation of Terry Schiavo in Florida) have brought into the public arena this long-simmering debate. As competition for money for public projects increases, people’s opinions about the worth of other people begin to influence discussions about how resources are allocated (e.g., “rationing” of health care money).

Growing complexity of issues in the lives of people with disabilities. In recent years the MRDD Program has found itself responding to both children and adults whose disabilities are complicated by (for example):

- Living longer—needs for different services for elderly people with disabilities
- Early incidence of problems—lots more pre-school enrollees and young children with complex problems
- Coincidence of disability and “mental health” difficulties in both adults and children
- “Behavioral” challenges, seen in both adults and (increasingly) in children

Changed preferences of our “customers.” People with disabilities have been helped by the self-advocacy movement and other forces to be more clear and vocal about the kinds of assistance they want and need. The MRDD Program reacts now to much more expression about personal choice with individualized support design and individual budgets. High school graduates, accustomed to living in society’s mainstream, expect to be able to continue and expand their community associations. Preference for institutional services continues to decline, and such services continue to shrink and close.

Decentralization of service/support locations. As supports get more personal and more dispersed, they are increasingly less-visible to the general (tax-paying) public. This makes “selling” tax-levies for special services more difficult.

Work-force difficulties. Both the MRDD Program and, to an even greater extent, local providers have faced increasing problems in attracting and keeping a qualified work force. The Program and other agencies deal with frequent changes within their staffs, especially in those positions that involve direct work with people who have disabilities.

An unforeseen and changed relationship between state and local governments. Ohio’s state government historically bore the cost of residential supports for people with developmental disabilities. Recent changes in law (e.g., HB 94, 2001) enabled greater use of Medicaid money for residential supports but did so by shifting downward, to local governments (i.e., County MRDD Boards), the responsibility for matching federal dollars. This has resulted in:

- Growing uncertainty and pressure on local (MRDD) budgets
- MORE REGULATION from the state, connected to greater use of Medicaid
- Higher levels of administrative work to be done at the local level
- A push toward judicial solutions to disagreements that develop out of the changed financial and regulatory arrangements.

Forces that arise from the Butler County MRDD Program’s HISTORY

(These can work FOR or AGAINST achievement of the results we want)

Rooted in families. The MRDD Program was started by families who were trying to: a) get an education for their children, when schools excluded those children prior to federal right-to-education laws and b) keep

their children at home, in the face of much social indifference and at least some outright opposition (e.g., from medical authorities).

Rooted in Butler County communities. The Program has a long history (50 years) in both Hamilton and Middletown, which has resulted in its recognition as a solid community service that citizens and other local social service agencies alike have been able to count on.

Leadership stability. There have been only four chief administrators in the 36 year history of the County Board of MRDD in Butler County. Among other things, this continuity has meant that there has been little need to re-establish relationships with community or government agencies after a leadership change. The continuity has also promoted to the maintenance of a vision about what the Program intends for people whom it supports.

Constant mission but changed methods. The aims of the MRDD Program have not changed much, over time. The means by which those aims (assistance in living, working, and learning in community) are approached have, however, changed considerably. Now, demands for consumer/family-driven supports, fueled by advocacy and fresh appreciation for the differences in individuals' wants and needs, call for an organization that is much more flexible or agile than was necessary at earlier times. The MRDD Program has experience, however, in adapting to this kind of demand. It accommodated the shift from segregated to more-inclusive schooling in the '80's and '90's and a shift from group-living to supported living during the 90's. We have a history that includes agility.

Pride in being on the cutting edge. Butler County's MRDD Program has a reputation, locally and state-wide, for being an early adopter of innovations in the developmental disabilities service arena. Such early adoption has included early pursuit of new funding streams, such as Medicaid reimbursement for habilitation center services. In the past, as new sources of money have been needed, new "treasure boxes" of funds have become available, but the situation now is that no such treasure box any longer seems likely to appear.

Vigilance about what is important to people with disabilities and their families. The history of the Butler County MRDD Program is full of start-ups of new kinds of services, to respond to people's needs. Support for leisure activity through coaching and the beginning of attention to people's need for dental services are but two examples of this. This growing array of services that are needed but not strictly required by law or regulation bumps up, more recently, against the reduced availability of local funds (much committed to matching Medicaid) and the increased administrative cost connected with state regulations. This makes the Program uncertain whether it can maintain innovation into the future.

Experience of dealing adaptively with LOTS of changes thrown at us. On the other hand, the MRDD Program has a track record of finding ways to respond well to sudden changes and to keep moving toward its aims. For example, Butler County reacted to the challenge of deinstitutionalization in the 1980's by arranging homes and living supports for many people whose lives had been severely restricted by long periods of institutional living (either in state centers or in nursing homes or both).

A Future We Want

The MRDD Program's conversations with local supporters (families, people who use services or supports, interested citizens) have revealed a common view of a future that we think is worth our joint effort. This view contains: a) richer lives for people with developmental disabilities and b) greater achievement of common purpose by the communities of Butler County. We think that this new richness and achievement can be accomplished if local communities maintain and grow their openness to all their citizens and respond to the particular aspirations and needs of members who require more support. The MRDD Program sees itself as a major conduit through which the community can deliver such support.

The future we want for people with developmental disabilities as members of Butler County communities includes these images:

1. People with developmental disabilities will have useful work to do—work that brings dignity, a reasonable financial return, and—whenever possible—employment benefits.
2. People with developmental disabilities will be able to use a personally affordable and convenient transportation system that not only enables them to get to work but also enables them to participate more fully in community life.
3. People with developmental disabilities will have a choice of decent, affordable housing and will be able to get the support they need to make good homes for themselves.
4. Young children with developmental delays—and their families—will find the assistance they want so that family life can be strong and can lead each child toward a satisfying and productive life. Supports for children will come through local organizations (e.g., schools) that regard each child as “one of our own.”
5. People with developmental disabilities will find the attention and care that will help them maintain good health.
6. People with developmental disabilities whose needs or ways-of-living have challenged or puzzled agencies and communities in the past will benefit from more appropriate and more focused support.
7. The periods of transition in life that people with developmental disabilities experience will be filled with plans and activity that adequately prepares those people for life’s next challenges.
8. People with developmental disabilities will get assistance they want or need from workers who have superior training and motivation for the work and who are rewarded for their commitments to the people they assist and to their work.
9. So that people with developmental disabilities have real choices about the supports they use, service-provision will be readily available from lots of different organizations and people. People with developmental disabilities will direct the use of funds to pay for desired supports.
10. People with developmental disabilities will find the MRDD Program to be a smaller, agile organization that: a) collaborates readily with other local groups, both public and private; b) plans, develops, and evaluates supports for quality and efficiency; and c) easily enables self or family-directed supports.

We think that the strategies outlined in this Strategic Plan for 2005-2009 will move the MRDD Program and the communities of Butler County five years closer to the above visions.

Strategies to Carry our Mission Forward

Strengthened capacity for leadership

I. Build up the capacity of the MRDD Program to lead toward continued and expanded patterns of supports for people with developmental disabilities and their families as funding and administrative environments change radically.

The MRDD Program will adopt several ways of acting that recognize current or emerging realities in the world around us (including Ohio’s developmental disabilities system). As in earlier times, the Program will try to get ahead of these changes, so that we can safeguard our effective ways of supporting people and develop new ways as those seem necessary or appropriate. Specific strategic directions will include:

Amended mission

- Noticing that our mission statement may need amendment. It now says: “Our mission is to assist individuals with mental retardation and other developmental disabilities to successfully live, work and learn in the community.” We suggest that amendment along the following lines be considered: “Our mission is to **assist our communities to support** individuals with mental retardation and other developmental disabilities to successfully live, work and learn in the community.”

Contracts for services

- Recognizing and taking advantage of recent Medicaid funding shifts that disadvantage county MRDD programs as direct providers of services. It is now clear that the state prefers non-profit agencies as service providers under the Medicaid (CAFS) program. Butler County will be ahead of this change if it pursues ways to offer services to people through **contracts or partnerships** (see below) with other local or regional agencies.

Tax-exempt foundation

- Developing additional sources of funds, especially for innovative services. The MRDD Program currently lacks capacity to receive or administer grants from private funding sources (foundations). We need to develop or participate in a tax-exempt foundation that has the capacity to seek grants, award grants, and administer privately donated funds to support new ways to support people with developmental disabilities or their families.

Broader view of “work force”

- A new way of regarding “work force.” It will be important for the MRDD Program to recognize that all workers in supports specifically for people with developmental disabilities in Butler County are appropriate recipients for staff development. We must broaden our efforts at recruitment, retention, and training of workers to include the whole work force in the county

Being sure of our “niche”

II. Clarify and tell others about a new understanding of the most effective ways that the MRDD Program can assist people with developmental disabilities and their families (“MRDD’s NICHE”). We should develop our understanding of the MRDD Program’s expanded role as the designer, funder, and organizer/contractor for services or supports, and we need to aim our passion for innovation at several areas of support that deserve extra attention. More specifically, our strategies will include:

Requests for proposals

- Developing and using an effective method for requesting proposals for new or altered services, as the primary method for exchanging MRDD funds for high-quality supports obtained from other local or regional providers. Preparing and evaluating the responses to “Requests for Proposals” must become a habit within the MRDD Program.

More jobs

- Undertaking a special effort to seek community employment for many adults who have never had jobs, and finding more ways to help these people maintain their jobs over time.

Provide therapies more efficiently

- Finding ways to more efficiently offer “therapies” (physical, occupational, speech/language, etc.) to young children while maintaining the MRDD Program’s emphasis on offering these services in ways that are most convenient to families. It is important that we maximize our ability to recoup as much of our financial cost of these services as possible without compromising the helpfulness of the services for families.

Help multi-need children stay close to home

- Developing agreements with local partners (e.g., Children Services Board) to offer “close-to-home” support for children, with developmental disabilities, whose families have fallen apart. The Program needs to cease supporting far-away “placements” and work to establish supports in Butler County, so that children’s lives are minimally disrupted and family reconstruction (when possible) is easier.

Agreements with public schools

- Arranging more up-to-date partnerships with public schools that enable schools, with MRDD Program assistance, to educate all of the children in their districts, ages 3-22. The MRDD Program will work with each school district in the county to agree on how the Program can best support the education of that district’s children who also happen to be eligible for MRDD supports. The Program will continue to monitor those agreements and work with districts to revise them accordingly over time.

Complex health needs

- Figuring out how to offer services to people who have complex health and/or medical support needs. An increasing number of people whose health-maintenance is complicated have come to the attention of the MRDD Program, and this is likely to be a continuing issue. The Program needs to find a variety of ways to respond to people in that situation, so that those people will have options from which to choose.

Assistive technology

- Expanding local capacity to help people get and learn to use more “assistive technology.” The world of technological help for people with disabilities gets larger and more complicated every day. The MRDD Program recognizes a need to know more about this world and to find ways to match available technology with the local citizens with

disabilities who could be helped by it to lead lives of greater self-direction.

“Research and development”

- Being alert and responsive to new opportunities for funding innovative efforts. This strategy matches with the above-listed need for a tax-exempt foundation to seek grants. The MRDD Program, if it is to stay the leader in local services for people with developmental disabilities, must have a “research and development” capability that matches new needs or desires of individuals or families with potentially-available funding.

Partnerships: the main avenue for services

III. Work through partnerships with other local and regional organizations—partnerships that ensure that services maintain high levels of quality. “Partnership” must become the by-word and the main method of service-development for the MRDD Program in the next five years. This is, as mentioned above, implied by new funding rules from the state, and it is required as well by limits in the ability of MRDD Programs to any longer attempt to be “all things for all people with disabilities” in their communities. More specific strategies aligned with partnership development and maintenance are:

Task-based action teams

- Organize “task-based action teams” to look for opportunities for partnerships with other area organizations. After identifying such opportunities, these teams will work to develop partnership agreements and to establish methods to “monitor” the performance of partners to assure that high-quality supports result from the agreements.

Advantages of partnering

- The MRDD Program, through its Plans, should communicate widely about the advantages of partnerships as a model for its work. These advantages include:
 - Potential higher quality services, obtained through specialization of the partner agency and resulting focus on the kind of service or support that an individual wants or needs.
 - Increased cost-efficiency, as a result of the sharing of resources
 - Reduced duplication of effort.
 - Spreading the “ownership” of services to a broader community, with the result that this broader community shares more fully in support of its citizens with disabilities.
 - A broader base to use as a communicator of the MRDD Program’s vision of better lives for people with developmental disabilities.

Variety of partners

- Enter into partnerships with organizations that have an identity and mission that is only on the edge of social services—such as Neighborhood Housing, the Health Alliance, the Regional Transit Authority. Also consider partnerships with private organizations with whom mutual benefit may be obtained (e.g., Cincinnati Financial Corporation as an employer or advisor).

**Ways to
strengthen the
work force**

IV. Developing a stronger, more capable work-force made up of people who truly enjoy the work that they do with people who have developmental disabilities.

As mentioned above, the MRDD Program needs to have a leadership position in recruiting, training, and retaining workers, in various organizations, who will work in ways that support the MRDD Program's mission. Specific strategies that will help with this effort are:

- Organizing ways for both new and continuing members of the work force to gain/maintain their vision about the value of people with developmental disabilities, their importance to community life, and the meaning of everyday work as their assistants or on their behalf.
- Figuring out ways to link the vision that workers have or maintain with their performance goals and performance evaluation.
- Developing more accurate descriptions of the work to be done and seeing to it that these descriptions are kept up-to-date.
- Conducting regular assessments of the needs or wishes of workers for training in new areas. These assessments must also take account of requirements for refresher education or re-training about seldom used methods or procedures.
- Preparing a full array of written materials to support understanding by workers of the nature and value of the work to be done. The MRDD Program will develop guidance manuals, flow charts about the processes involved in the work, and brochures or similar documents to be used by staff members within or outside the MRDD Program itself.
- Arranging for mentors to demonstrate the work and to encourage growth in the field of developmental disabilities. The Program will design or commission the design of an effort to match new or inexperienced workers with those who have significant experience and from whom valuable learning can be gained.
- Expanding the scope of worker orientation beyond just an initial learning experience. The MRDD Program will develop, with the help of its employees and the employees of its partners, a pattern of worker-orientation that refreshes and updates the training experience of all employees at regular intervals. Such orientation could include both introductions to new technical skills and review of the philosophy underlying services in Butler County and ways to carry out that philosophy effectively.
- Organizing "cross-training" for workers, especially across agency or program division lines. Such cross-training, including "job-shadowing," will enable all workers supporting people in Butler County to have a broader understanding of the whole effort of service or support in which each of them is engaged.

**System of
communi-
Cation**

V. Developing a creative, understandable system of communication that effectively conveys and receives information—to and from the community (external communication) and to and from the staff of the Program and partner agencies (internal communication). Such a communication system will make use of advances in technology (audio, video, web, etc.) available at present and over the next few years. It will address and respond to culture and language differences and to differences in individuals' learning styles. This system will rely, for its success, not just on a "communications staff," but on the effort of all who are involved in the MRDD Program. Specific strategies to be pursued include:

**Expanding on
current ways to
communicate**

- Continue to utilize the communication efforts the MRDD Program currently has, but find ways to improve them. For example:
 - Adapt current information produced by the Program—reports to the community, newsletters, action plans, etc.—to multiple communication modalities.
 - Develop and cultivate ongoing relationships with the media so that they are aware of the MRDD Program and, therefore, more likely to report about programs and events.
 - Make the MRDD Program's web site "Bobby-certified" so that people with disabilities can more easily use it.
 - Identify "Ambassadors of Information" about MRDD services in Butler County. These Ambassadors can help develop new programs, such as parent-to-parent mentoring, and get the word out about them. Ambassadors can be parents, people who use MRDD services or other interested citizens.
 - Develop and activate a Speakers' Bureau about developmental disabilities and the supports that people with disabilities want or need.
 - Develop and regularly update a directory of staff members who assist people with developmental disabilities in Butler County. This directory would include photos of workers and job descriptions written in ordinary language.

**Other ideas
about how to
communicate**

- Communicate not just by conveying information but with an overtone of shaping how people think about MRDD services—favorably positioning and branding the MRDD Program and its partners through the communications effort.
- Conduct market research so that the Program learns what kinds of communications stakeholders and the community want. Allow that research to guide changes in communications processes.
- Create a comprehensive marketing plan about MRDD services and supports, and update that plan once each year.
- Use technology to share information with MRDD Program and partner

staff members quickly and efficiently. One option would be an intranet.

- Create a telephone line through which individuals may choose from a menu to hear reports and other information about MRDD services or supports read to them.
- Compile and share comments from people who use MRDD services, family members and other citizens who testify to the quality of services available through the MRDD Program.
- Conduct monthly forums about practical topics that interest people (e.g., creating a checklist of steps to prepare a child for more-independent living). Advertise these forums in local media.
- Compile advice (tips) from parents to be shared with parents who are new to the MRDD Program or its partners.
- Develop Staff Action Groups (SAG's) working through the union representing MRDD workers.
- Create a communications committee composed of people within the Butler County communities who have expertise in various areas of communications. Gather advice and suggestions from this committee.