



**BLUE WATER DEVELOPMENTAL
HOUSING, INC.**

JANUARY 2016 – DECEMBER 2018

**FOCUS ON OUR FUTURE:
ORGANIZATIONAL
STRATEGIC PLAN**



Blue Water Developmental Housing, Inc.
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**BLUE WATER DEVELOPMENTAL HOUSING, INC.
ORGANIZATIONAL STRATEGIC PLAN
JANUARY, 2016 – DECEMBER, 2018**

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I.

**COMMUNICATION FROM THE
EXECUTIVE DIRECTOR**

COMMUNICATION FROM THE EXECUTIVE DIRECTOR

May 2015

Dear Board Members and Friends,

Attached is our Strategic Plan covering the three year period from May 2015 through April 2018. I would invite you to read it over and accept it as a blueprint for our organizational focus and energies for this period of time.

I would also emphasize that this is a planning document and, as such, may be modified by the Board as we go forward. Despite our best efforts to plan for our future, there is no way to anticipate every challenge or opportunity that will head our way. Therefore, it continues to be important that BWDH remain nimble and able to make midcourse adjustments if and when it is necessary to do so.

I hope you share my pride and excitement concerning our organization. We have the huge responsibility and privilege of touching many lives. What we do and how we do it makes a difference. That is why we continue to regularly promote our mission, vision, and organizational values throughout the workplace.

If you have any comments, observations, or suggestions regarding this plan, please feel free to contact me. As always, thank you for providing the support, oversight, and encouragement so important to the success of BWDH.

Sincerely,

Kathleen M. Swantek
Executive Director
Blue Water Developmental Housing, Inc.

II.

PREFACE TO THE PLAN

PREFACE TO THE PLAN

Historically, strategic plans call for such things as environmental scans, key informant interviews, focus groups, literature searches, and exhaustive data analysis. Such a process does not fit the culture of this organization.

Referrals to BWDH are strictly controlled by the funding sources and services are provided under specific contractual requirements.

Based upon the experience of BWDH over the last several years and when considering the writings of Henry Mintzberg, Andrew Campbell, and Laura Nash, more meaningful and active information gathering techniques were used. The speed by which opportunities and threats emerge, the lack of data on emerging opportunities and threats, and the length of the traditional planning process makes traditional strategic planning no longer as valuable as in the days when trends could be seen and measured well in advance.

The most accurate and action-focused planning is the result of an organization that:

- Knows its strengths and abilities
- Applies experience-informed intuition
- Cultivates an entrepreneurial spirit
- Considers the views of those in the environment
- Continues periodic reviews and revisions

These are among the very things that, for many years, have guided the actions of Blue Water Developmental Housing, Inc. To that end, the next section of this document overviews the planning process the agency used to identify priorities.

III.

PROCESS USED FOR A “FOCUS ON OUR FUTURE”

PROCESS USED FOR A “FOCUS ON OUR FUTURE”

A. DOCUMENT REVIEW

There were several meaningful activities undertaken to develop a sense of where BWDH has been and where it could be headed in the future.

There was a review of corporate documents including such things as program descriptions, Board Meeting Minutes, compliance reports, program audits, accrediting body findings, and strategic plan outcomes. These materials provided a foundational understanding of how BWDH has been responding to the environment over the last several years.

In addition to a review of internal documents, planning data from such organizations as the Southeast Michigan Council of Governments, U.S. Census Bureau, St. Clair County Planning Office, and St. Clair County Community Mental Health were reviewed. Although planning trends from these sources were minimally relevant to the mission of BWDH, their potential contribution could not be overlooked in the process of developing this plan.

B. STAKE HOLDER INVOLVEMENT

Meaningful information, reflections, and recommendations came from those closest to the organization:

Board Members	Staff
Administration	Consumers
Program Managers	Parents/Guardians

1. Program Managers participated in a planning exercise and were asked to:
 - a. Complete a questionnaire and select/rate those factors most important to the organization (See Attachment 1).
 - b. Identify the top two factors that have the greatest impact upon the organization.
 - c. Identify the top two factors which, if left unattended, are likely to negatively impact the organization.
2. Administrators met multiple times to contribute to the planning process. They shared barriers and opportunities with regard to their particular areas of responsibilities as well as agency-wide considerations.

3. Parents and guardians completed an annual survey seeking input on their degree of satisfaction with BWDH services. Several also completed a questionnaire with regard to Consumer Protection and Safety.
4. Staff completed a questionnaire with regard to Consumer Protection and Safety. They also made comments and recommendations as to how services could be improved.
5. Consumer survey results were also reviewed as part of the foundation for developing this planning document. Consumers are encouraged to participate in the satisfaction survey process annually.

C. SUMMARY

When combined, these activities represented a comparatively rapid method of collecting valuable opinions, recommendations, and insights concerning what various stakeholder groups saw as the priorities for the organization. Further, all of this information helped form the foundation for the various work plans within this document.

IV.

MISSION & VISION STATEMENTS

MISSION STATEMENT

We will provide the highest quality housing services and supports to people with special needs and those involved in their lives.

VISION STATEMENT

In an effort to fulfill its Mission, Blue Water Developmental Housing, Inc. will:

- Be recognized as the provider of choice for housing, respite, and community-based support services for people with special needs.
- Employ and develop staff members who support the vision of the organization, are dedicated to achieving excellence, and who reflect and represent the values of Blue Water Developmental Housing, Inc.
- Establish and maintain relationships with other service providers, community service groups, funding sources, advocacy groups, and other organizations as necessary to advance and enhance the Vision and Mission of Blue Water Developmental Housing, Inc.
- Continuously improve the quality of services based upon input from the stakeholders and the individuals served by the organization.

V.

**ORGANIZATIONAL VALUES AND
GUIDING PRINCIPLES**

ORGANIZATIONAL VALUES AND GUIDING PRINCIPLES

Blue Water Developmental Housing, Inc. has organized the development and delivery of its services around some core values. These values are designed to help establish and maintain the highest degree of professionalism and services to consumers.

RESPECT FOR INDIVIDUALS

Blue Water Development Housing, Inc. cannot succeed without people. It is people who give this organization its meaning and its people who will make it work. Blue Water Developmental Housing, Inc. believes in the idea that treating people well – with dignity, respect and with expectations of growth and development – is fundamental to the achievement of a satisfying work experience and essential to assuring consumers are treated with respect.

THE IMPORTANCE OF INNOVATION

Blue Water Developmental Housing, Inc. believes that it can demonstrate new, creative, and innovative ways of supporting, serving, and assisting people. Innovation, creativity, and inherent risks involved in doing things differently, but responsibly, are the hallmark values of Blue Water Developmental Housing, Inc.

THE IMPORTANCE OF TEAMWORK

Despite the requirements of running an organization with various levels and lines of authority, those connected to Blue Water Developmental Housing, Inc. believe that everyone affiliated with the organization can offer perspective, insight, and input into improving what we do, how we serve and support people, and the quality of our efforts. To that end, important and creative ideas may originate at any level within the organization.

CONTINUOUS IMPROVEMENT

The aspiration of excellence is also an important value. Excellence is grounded in the quality of our efforts to serve, support, encourage, and recognize one another as important contributors to the overall success of Blue Water Developmental Housing, Inc. Improvement requires continual work in monitoring and, as necessary, modifying our policies, procedures and practices.

COMMUNITY COMMITMENT

Blue Water Developmental Housing, Inc. sees itself as a valued and integral part of the communities it serves. Blue Water Developmental Housing, Inc. seeks meaningful ways to provide human services in response to under-met or unmet community needs. Blue Water Developmental Housing, Inc. believes that accountability to and responsibility for the local community is essential.

SUMMARY

These values will define the character of Blue Water Developmental Housing, Inc. only if we put them into practice. Putting them into practice offers a challenge to all of us. Putting values into practice helps position Blue Water Developmental Housing, Inc. for durability and competitiveness in a rapidly changing human services environment.

- These values must fuel the work of Blue Water Developmental Housing, Inc., its activities, services, and programs.
- They will guide our interactions with one another.
- They will guide our staff development and training programs.
- They offer a way to evaluate the services, supports, and opportunities which are offered to our consumers.
- They serve as a means of holding ourselves accountable.

VI A.

**STRATEGIC INITIATIVES
ORGANIZATION WIDE**

BLUE WATER DEVELOPMENTAL HOUSING, INC.
STRATEGIC PLAN
MAY 1, 2015 – APRIL 30, 2018

DIVISION: **ORGANIZATION WIDE**
GOAL AREA: **ACCREDITATION MANAGEMENT**

BRIEF DESCRIPTION: BWDH is currently accredited by C.A.R.F. There are standards which must be met in order to ensure good standing with the accrediting organization. Further, there are citations and/or recommendations BWDH wishes to respond to prior to the next site visit. BWDH is committed to maintaining accreditation, continual improvement of services, and addressing all findings of C.A.R.F.

RELATED ACTIVITIES	WHO WILL DO	BY WHEN	RESOURCES	COMMENTS
1. Review the C.A.R.F. Accreditation Report to determine all areas which, per their recommendation, require additional action and attention on behalf of BWDH.	Michelle Dineen Gramer			
2. Identify personnel to be “leads” in developing the organization’s responses to C.A.R.F. findings, recommendations, and/or citations.	Michelle Dineen Gramer			
3. Develop a “master schedule” which identifies issues being worked on, who is responsible to accomplish them, and date (by when) each specific C.A.R.F recommendation or citation will be addressed.	Michelle Dineen Gramer			
4. Report regularly on progress towards addressing the recommendations.	Michelle Dineen Gramer			

BLUE WATER DEVELOPMENTAL HOUSING, INC.
STRATEGIC PLAN
MAY 1, 2015 – APRIL 30, 2018

DIVISION: **ORGANIZATION WIDE**
GOAL AREA: **POLICY REVIEW**

BRIEF DESCRIPTION: BWDH has developed many administrative, operational, and personnel policies over the last 37 years. The policies have been authored by many people and are often in different formats. Further, the policies need to be categorized with regard to their continuing applicability within the current structure and environment of the organization.

RELATED ACTIVITIES	WHO WILL DO	BY WHEN	RESOURCES	COMMENTS
1. Develop work groups who will be assigned the responsibility of reviewing and updating organizational policies.	Jennifer Stringer	January 1 2016		The CARF Executive Team is the work group assigned to this task.
2. Develop the instructions and guidelines to aid the various work groups in their policy review activities.	Jennifer Stringer	January 1 2016		
3. Design a process whereby policies are reviewed and revised, if applicable, on a regular basis and obtain administrative review and approval.	Jennifer Stringer	January 1 2016		
4. As necessary, reorganize the policy manual table of contents to ensure policies are properly grouped and coded by subject.	Jennifer Stringer	January 1 2016	Executive Secretary will assist.	

POLICY REVIEW (CONTINUED)

RELATED ACTIVITIES	WHO WILL DO	BY WHEN	RESOURCES	COMMENTS
5. Updated policies are available electronically and in hard copy.	Jennifer Stringer	January 1 2016	Executive Secretary will assist.	
6.				
7.				

STAFF DEVELOPMENT AND TRAINING (CONTINUED)

RELATED ACTIVITIES	WHO WILL DO	BY WHEN	RESOURCES	COMMENTS
4. Implement RELIAS training system	Jennifer Stringer	March 15 2016	RELIAS training consultants	
5. Develop a succession plan which identifies potential candidates for advancement within the organization.	Kathleen Swantek	May 1 2016	Executive Team	
6. Design and implement a strategy whereby potential leaders are provided opportunities to experience the management environment.	Kathleen Swantek	May 1 2016	Executive Team	

BLUE WATER DEVELOPMENTAL HOUSING, INC.
STRATEGIC PLAN
MAY 1, 2015 – APRIL 30, 2018

DIVISION: **ORGANIZATION WIDE**
GOAL AREA: **FUND DEVELOPMENT**

BRIEF DESCRIPTION: Funding for provider organizations in the State of Michigan is undergoing change and it is apparent that such funding sources may be unable to provide the level of financial support necessary to deliver the desired level of services. The organization seeks to develop a broader, more deliberate fund development strategy via which potential donors would be asked to consider gifts from their assets as opposed to their income.

RELATED ACTIVITIES	WHO WILL DO	BY WHEN	RESOURCES	COMMENTS
1. Develop a concise “Case Statement” which provides the rationale and need for additional funding and illustrates the benefits that the organization provides to the community.	Kathleen Swantek	August 1 2016	Board of Directors	
2. Present the “Case Statement” and fund development strategy to the Board emphasizing the importance of legacy giving to meet unmet or under-met organizational needs.	Kathleen Swantek	September 1 2016	Board of Directors	
3. Recruit key corporate representatives and individuals willing to assist the Board via active participation on a Fund Development Committee.	Kathleen Swantek	October 1 2016	Board of Directors	

FUND DEVELOPMENT (CONTINUED)

RELATED ACTIVITIES	WHO WILL DO	BY WHEN	RESOURCES	COMMENTS
4. Identify support personnel to help organize, design, equip, convene, and encourage the Fund Development Committee in their work.	Kathleen Swantek	October 1 2016		
5. Design the Fund Development Activity Work Plan including identification of targeted donors (corporate and individual).	Kathleen Swantek	October 1 2016		
6. Market, publicize, and then launch the Fund Development Campaign.	Kathleen Swantek	November 1 2016		
7.				
8.				

BLUE WATER DEVELOPMENTAL HOUSING, INC.
STRATEGIC PLAN
MAY 1, 2015 – APRIL 30, 2018

DIVISION: **ORGANIZATION WIDE**
GOAL AREA: **TECHNOLOGY**

BRIEF DESCRIPTION: The successful application of technology at every level of the organization enhances our ability to make decisions and contributes to a more efficient work flow allowing us to focus on providing service.

RELATED ACTIVITIES	WHO WILL DO	BY WHEN	RESOURCES	COMMENTS
1. Conduct an inventory of existing equipment noting age, condition, and functionality of existing technological resources.	Jonathan McCulloch	January 1 2016	Advanced Digital	
2. Complete an assessment of existing technological capacity and make recommendations regarding improved applications and/or hardware.	Jonathan McCulloch	March 1 2016	Advanced Digital	
RELATED ACTIVITIES	WHO WILL DO	BY WHEN	RESOURCES	COMMENTS
3. Assess current social media applications and develop a strategy and budget for expanded use of social media.	Kathleen Swantek/Jennifer Stringer	January 1 2016	Write Company/Patti Samar	Contract with Write Company to post at least weekly.

TECHNOLOGY (CONTINUED)

4.				
5.				

BLUE WATER DEVELOPMENTAL HOUSING, INC.
STRATEGIC PLAN
MAY 1, 2015 – APRIL 30, 2018

DIVISION: **ORGANIZATION WIDE**
GOAL AREA: **COMMUNITY COLLABORATION**

BRIEF DESCRIPTION: As a part of the community, the organization recognizes that cooperating and collaborating with others is an important way to advance and preserve the mission.

RELATED ACTIVITIES	WHO WILL DO	BY WHEN	RESOURCES	COMMENTS
1. Participate in a multi-organizational group interested in sharing “best practices.”	Kathleen Swantek	January 1 2016	Executive Team	
1. Participate in a multi-organizational group interested in addressing unmet or under met needs within the community.	Kathleen Swantek	January 1 2016	Executive Team	
2. Design and implement a strategy to create greater awareness of the organization within the community.	Kathleen Swantek	March 1 2016		

COMMUNITY COLLABORATION (CONTINUED)

RELATED ACTIVITIES	WHO WILL DO	BY WHEN	RESOURCES	COMMENTS
3. Identify what strengths, capacities, and/or resources the organization has to assist in community improvement initiatives.	Kathleen Swantek	April 1 2016		Review opportunities supported by the new home and community based services rules.
4. Develop (or access) staff training materials concerning the importance of community collaboration.	Kathleen Swantek	January 1 2016	RELIAS system	
5. Conduct training and/or informational sessions for employees concerning community collaboration.	Kathleen Swantek	February 1 2016	RELIAS system	
6.				

VI B.

**STRATEGIC INITIATIVES
RESIDENTIAL SERVICES DIVISION**

BLUE WATER DEVELOPMENTAL HOUSING, INC.
STRATEGIC PLAN
MAY 1, 2015 – APRIL 30, 2018

DIVISION: RESIDENTIAL SERVICES

GOAL AREA: PROGRAM DEVELOPMENT/REFINEMENT

BRIEF DESCRIPTION: The residential system represents a significant amount of the organization. Although the residential system state-wide is not experiencing much growth, there is always room for refinement and process improvements within the current configuration of services.

RELATED ACTIVITIES	WHO WILL DO	BY WHEN	RESOURCES	COMMENTS
1. Identify potential residential programming opportunities in surrounding counties <ul style="list-style-type: none"> • Macomb • Sanilac • Genesee • Lapeer 	Jonathan McCulloch	January 1 2017	Consultant	
2. Identify and meet with Director of Residential services in each county to educate them on the services of the organization and inquire as to opportunities in their area.		January 1 2017		
3. Where opportunities exist or are identified establish a plan to address those unmet or under met needs where feasible.		April 1 2017		

TECHNOLOGY (CONTINUED)

<p>4. Provide plan of growth to Board for review and approval.</p> <p>5. Move forward with plan to expand residential services.</p>	<p>Jonathan Mc Culloch</p> <p>Jonathan Mc Culloch</p>	<p>May 1 2017</p> <p>June 1 2017</p>		
<p>2. Insure that the organization has the personnel available and trained to meet licensing and funder requirements necessary to make the new service successful.</p>	<p>Jonathan McCulloch</p>	<p>May 1 2017</p>	<p>Jennifer Stringer</p>	<p>This activity is tied into implementation of staff development and succession planning goal.</p>
<p>3. Design a training approach which addresses the needs of program supervisors and also responds to more episodic, variable, and situational training needs within specific service sites.</p>	<p>TBD</p>	<p>TBD</p>		<p>Include in the organization wide development and succession goal</p> <p>Come back to this at a later date</p>

VI C.

**STRATEGIC INITIATIVES
COMMUNITY SERVICES DIVISION**

BLUE WATER DEVELOPMENTAL HOUSING, INC.
STRATEGIC PLAN
MAY 1, 2015 – APRIL 30, 2018

DIVISION: COMMUNITY SERVICES

GOAL AREA: FACILITIES OVERSIGHT & MAINTENANCE

BRIEF DESCRIPTION: BWDH and its affiliate non-profit housing organizations oversee and manage an extensive system of rental properties within St. Clair County. Monitoring maintenance and preventative maintenance needs is an important part of the budgeting process. Additionally, such monitoring may allow the organization to avoid major expenses via regular and early detection of potential problems with the facilities and/or equipment in those facilities.

RELATED ACTIVITIES	WHO WILL DO	BY WHEN	RESOURCES	COMMENTS
1. Develop and implement a form and process to create a baseline for each facility which indicates such things as age of facility, roof, water heater, appliances, etc.	Kathryn Baker	January 1 2016		
2. Develop a document for use in periodic facility inspections which specifies the condition of facility as well as any need for maintenance repair or replacement of equipment or furnishings.	Kathryn Baker	January 1 2016		
3. Develop and implement a process and document to initiate and monitor the manner in which facility repairs or equipment replacement/repairs are scheduled and completed.	Kathryn Baker	January 1 2016		

FACILITIES OVERSIGHT AND MAINTENANCE (CONTINUED)

RELATED ACTIVITIES	WHO WILL DO	BY WHEN	RESOURCES	COMMENTS
4. Design and populate spreadsheets to monitor housing data.	Kathryn Baker	January 1 2016		
5. Provide periodic reports to the Executive Director concerning future capital improvements, maintenance and equipment expenditures.	Kathryn Baker	January 1 2016		
6.				
7.				

BLUE WATER DEVELOPMENTAL HOUSING, INC.
STRATEGIC PLAN
MAY 1, 2015 – APRIL 30, 2018

DIVISION: COMMUNITY SERVICES

GOAL AREA: PROGRAM EXPANSION–MACOMB COUNTY

BRIEF DESCRIPTION: The organization currently has a service contract and office space in the Macomb area market place. The opportunity to provide additional services exists. The organization is currently developing the activity time table necessary to develop and initiate services in that region.

RELATED ACTIVITIES	WHO WILL DO	BY WHEN	RESOURCES	COMMENTS
1. Reexamine existing job descriptions and redeploy personnel as may be necessary to benefit both the program and the employee(s).	Kathryn Baker	January 1 2016		
2. Develop a three (3) month start-up budget necessary to initiate Community Services in Macomb County.	Kathryn Baker	June 1 2016		
3. Obtain start-up funding from the organization and based upon current referral analysis; develop a repayment schedule for start-up funds.	Kathryn Baker	June 1 2016		

PROGRAM EXPANSION – MACOMB COUNTY (CONTINUED)

RELATED ACTIVITIES	WHO WILL DO	BY WHEN	RESOURCES	COMMENTS
4. Identify the method of staffing the Macomb office with personnel familiar with the requirements, needs, and requirements of the program.	Kathryn Baker	June 1 2016	Jennifer Stringer	
5. Develop a preliminary program expansion activity work plan identifying such things as staff assigned to the start-up initiative, marketing and referral development, staff recruitment and orientation and administrative and program oversight.	Kathryn Baker	September 1 2016	Rebecca McFarlane and Jennifer Stringer	
6. Implement Community Services in Macomb County.	Kathryn Baker	October 1 2016	Rebecca McFarlane	
7. Transition the community based services hiring function out of the program and centralize to the organization wide hiring process.	Jennifer Stringer	January 1 2016	Community based management staff	
8. Meet with St. Clair County Community Mental Health program director to examine the possibility of providing community based autism services	Kathryn Baker	January 1 2016	Rebecca McFarlane	

VII.

ATTACHMENTS