



Strategic Plan June 2019 – June 2022

Procedure: Plans align with YVEDDI Fiscal Year and goals are presented to Board for input prior to the triennial anniversary. Final approvals of plan at the June meeting. Add timelines to annual work plans and report progress at Planning and Evaluation Committee Meetings.

Purpose: To unify goals and guide organization into action with focused energy toward desired outcomes

VISION STATEMENT

To empower people to lead more successful lives in the communities we serve.

MISSION STATEMENT

Dedicated to improving the lives of individuals and families in Davie, Stokes, Surry, and Yadkin Counties through a variety of programs and partnerships to build stronger communities.

VALUES

Honesty/Integrity; Respect; Teamwork; Fairness; Service to Others

I. What's most important going forward?

Goals

1. Build Reserves.
2. Increase Sustainability (ongoing administration policy and systems development to minimize risks and improve efficiencies).
3. Expand and strengthen partnerships to aid the transformation to Medicaid Managed Care to build healthier communities.
4. Seek professional assistance with the Community Assessment and Strategic Plan.

Note: This Strategic Plan is considered a draft working document to be updated as the details of Medicaid Managed Care program becomes more visible.

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Strategic Issue #1: Build Reserves

Build Reserves: Develop strategies that will lead to agency financial health and sustainability, i.e. three months of expenses or \$3,000,000. Reserves are necessary to avoid service interruption at fiscal year beginning.

Action Steps: What is to be done?	Who will do it?	When will it be done?
Budget less (programs with unrestricted funds)	Program Directors	At fiscal year beginning
Expense tracking and monitoring	Accounting Staff and Directors	Monthly
Identify sources of replenishment: - Endowments - Donate button on website	Executive Director Finance Director	July
Closely monitor and carry out agency fundraising plan: Annual Agency Plan presented to Finance Committee for approval	Board and Staff	August

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Strategic Issue #2: Increase Sustainability		
Sustainability: Develop systems and strategies of continuous improvements that minimize risks and will lead to financial health and viability.		
Action Steps: What is to be done?	Who will do it?	When will it be done?
Regularly review and update of major policies to include new laws and reflect agency needs. Major policies include: Board By-Laws, Personnel, and Financial Policies and Procedures	Relevant committee with final Board approval in consultation with Executive Director	Every 3 years minimum
Conduct Agency Assessments: • Agency Risk-Assessment • Agency Self-Assessment • Board Self-Assessment • Review Community Assessment Results Use results to develop annual improvement plans and to inform Strategic Planning.	Executive Director Finance Director Management Staff Board input and approval	Assessments - Annually May – June Strategic Plan – every 3 years – 2019-2022
Ongoing Monitoring: share all program monitoring results with Planning and Evaluation Committee. Review improvement plans and any responses to grantors.	Executive Director, Program Directors	Ongoing
Share Strategic Plan progress updates with Planning and Evaluation Committee	Executive Director	Planning & Evaluation meetings.
Develop and publish Annual Report to examine mission impact and create public awareness.	Executive Director, Program Directors, with Board input and approval	Annually in February / March

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Strategic Issue #3: Strengthen Partnerships

Partnerships: Expand and strengthen partnerships to aid the transformation to Medicaid Managed Care to build healthier communities.

Action Steps: What is to be done?	Who will do it?	When will it be done?
Seek to partner with noncompeting businesses that serve the same customer base to help create a network of care.	All programs	Ongoing
Create educational resources and host on the YVEDDI Website - Post Health Opportunities Video - Update service brochures and flyers	Executive Director Program Directors and Communications Specialist	Completed. Update as needed.
Participate on Electronic Networks “NC360” to advertise our services	Executive Director Program Directors	Completed. Update as needed.
Complete Health Plan Surveys and Letters of Intent	Executive Director	Completed. Update as needed.
Participate in regional meetings and on listservs to stay abreast of any new developments with Medicaid Managed Care.	Management staff	Ongoing

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Strategic Issue #4: Comprehensive Community Assessment and Strategic Plan		
Community Assessment and Strategic Plan: Seek professional assistance with the Community Assessment and Strategic Plan.		
Action Steps: What is to be done?	Who will do it?	When will it be done?
Seek Board approval and input of process, and with identifying professional and financial resources.	Executive Director	April 2019
Survey staff for community assessment data types needed along with any funding source requirements and timelines.	Executive Director	May 2019
Develop Request for Bids with detailed scope of work	Executive Director	June 2019
Assist with Community Assessment and Strategic Plan development ○ Interviews ○ Data compilation ○ Arranging meeting space, meals, etc.	Board and staff	July – December 2019