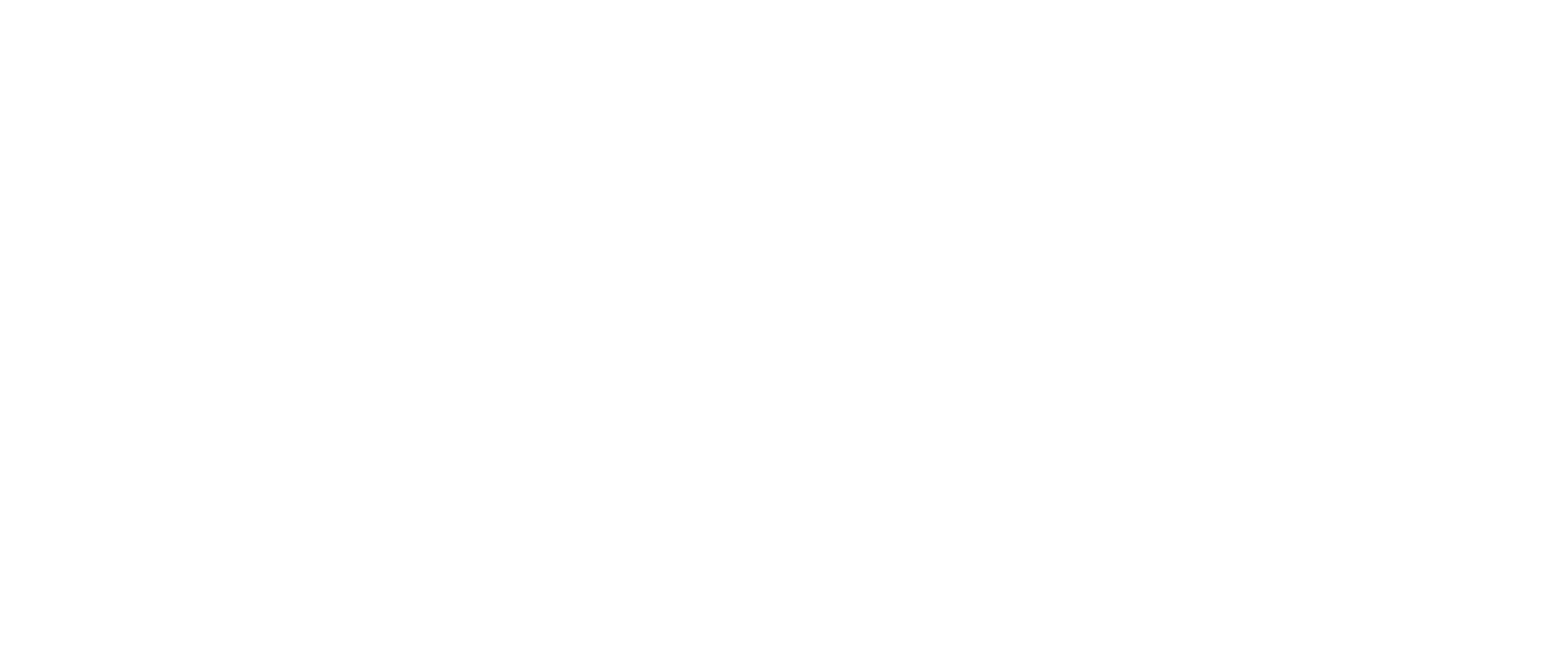
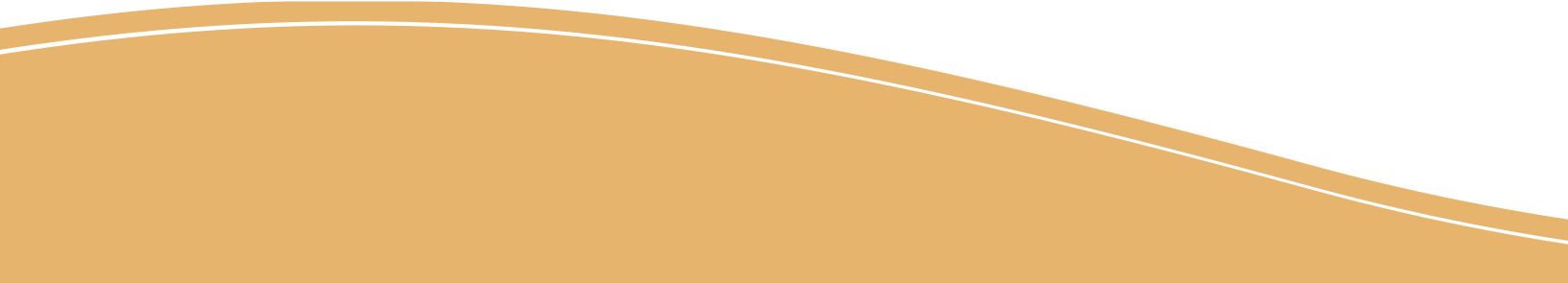
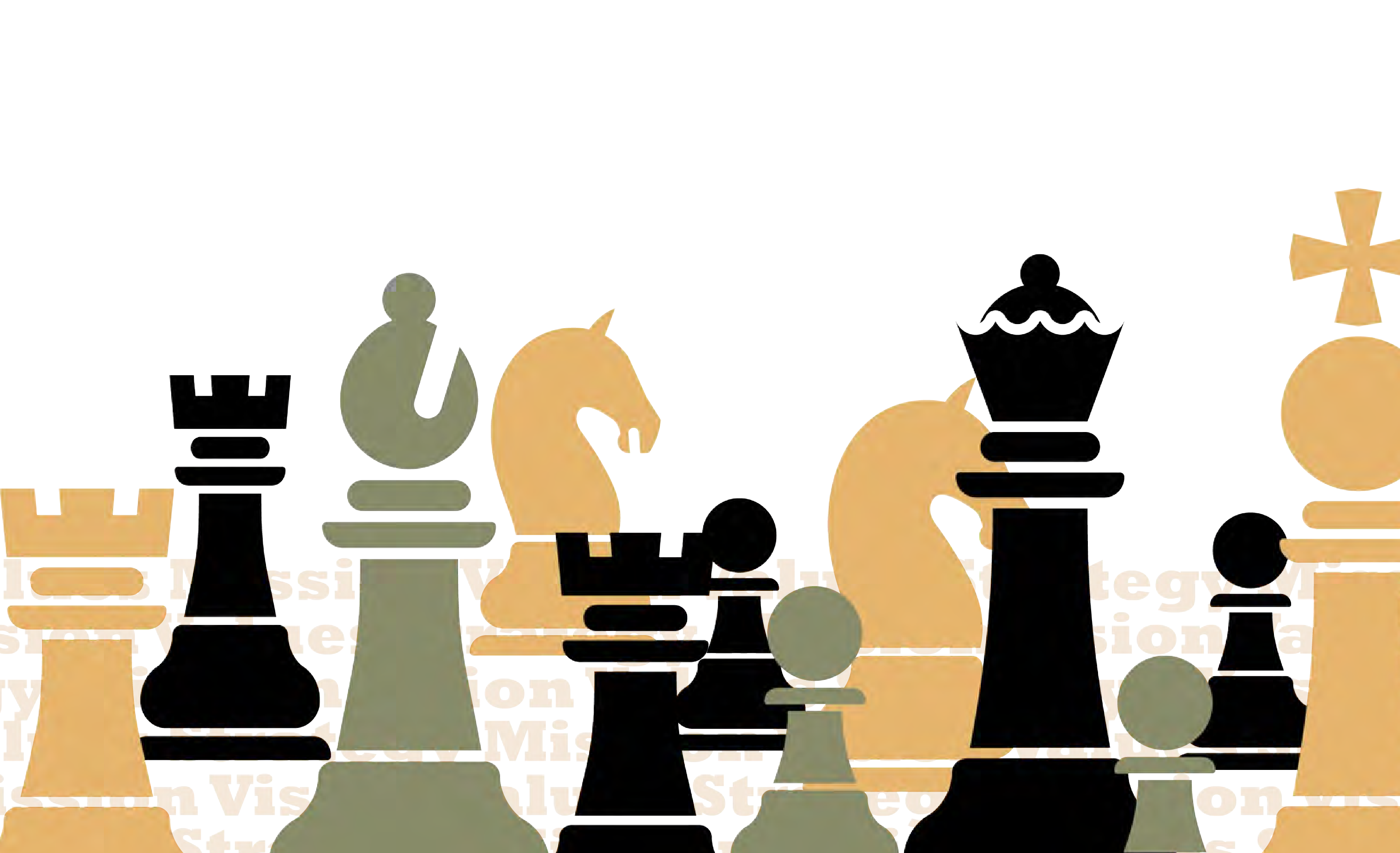


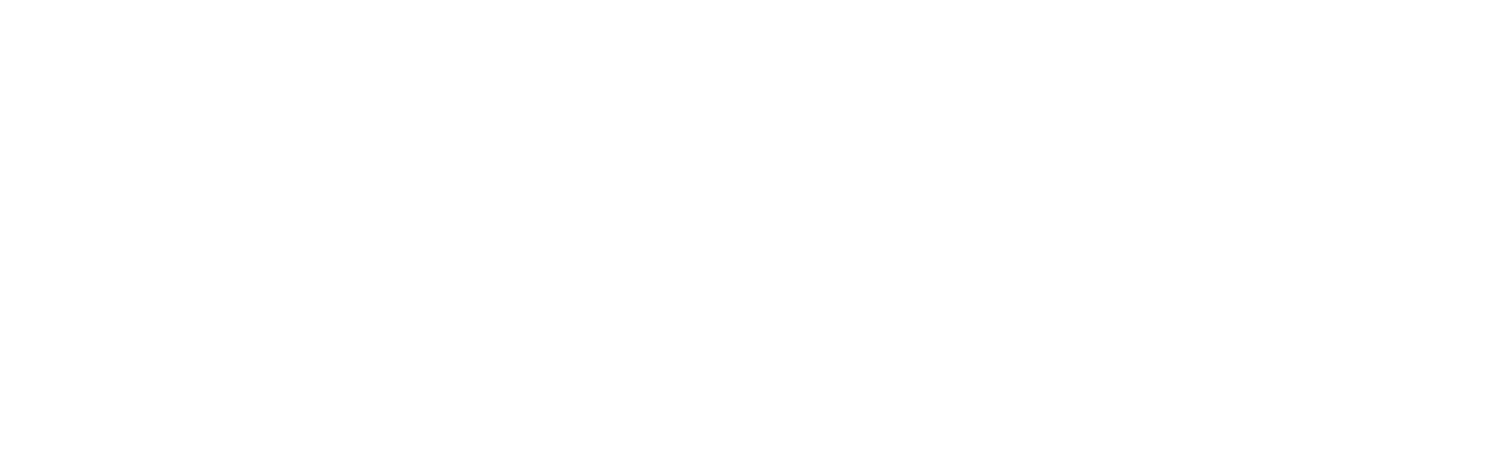
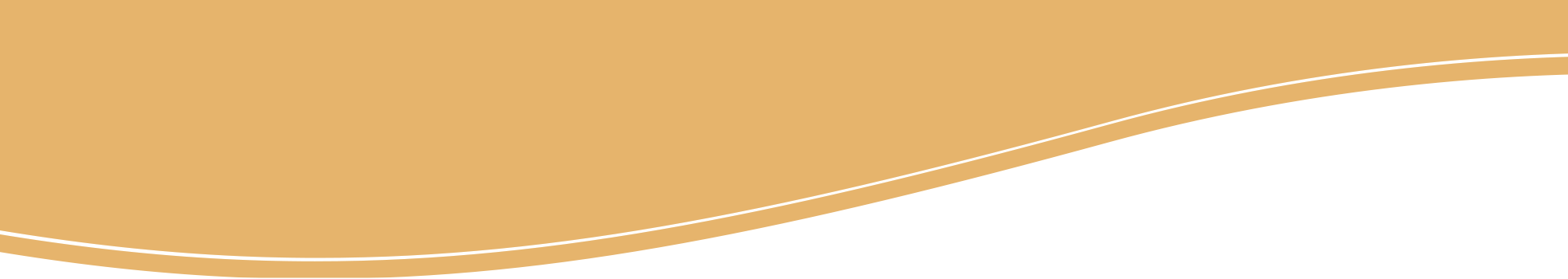
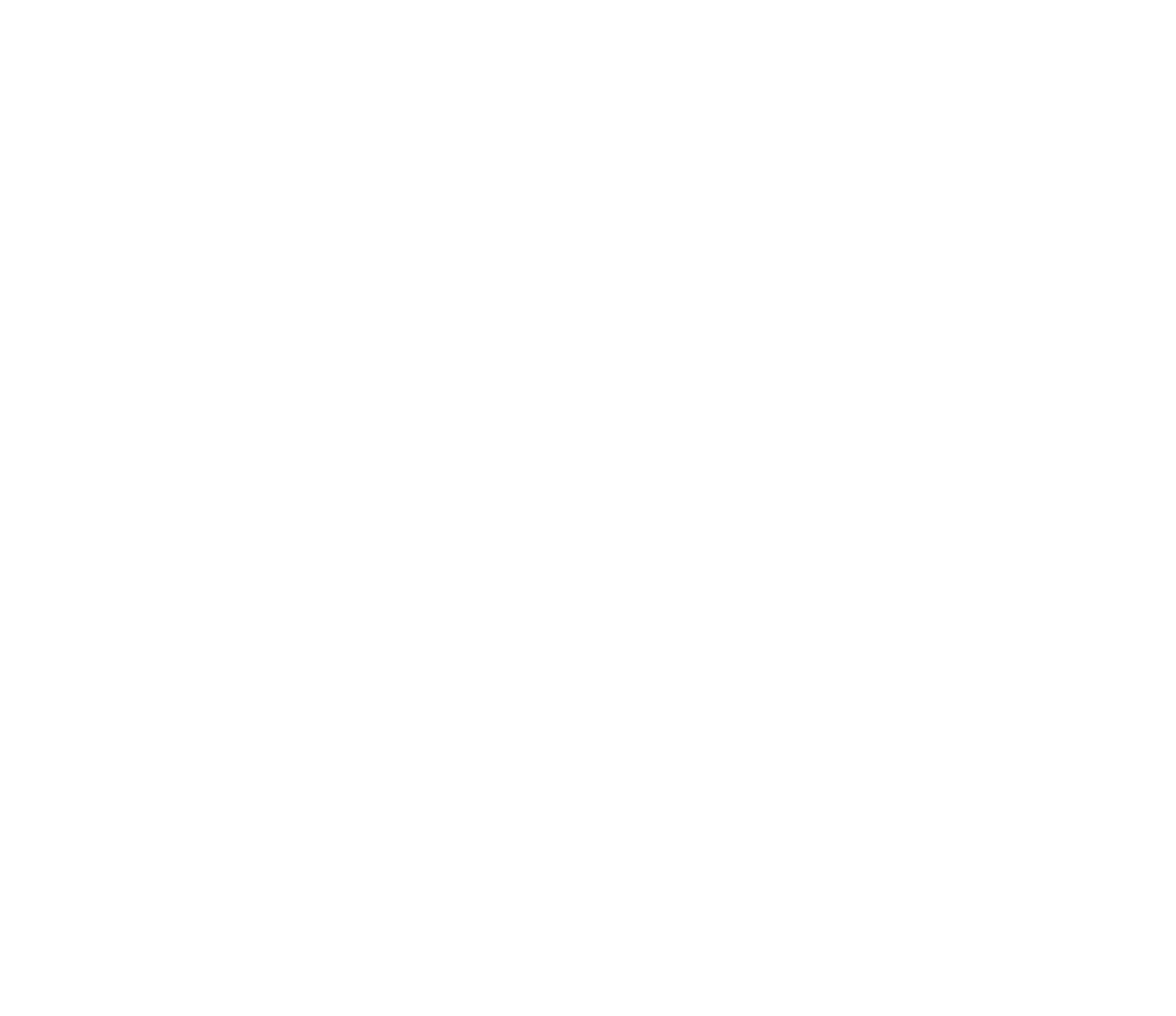
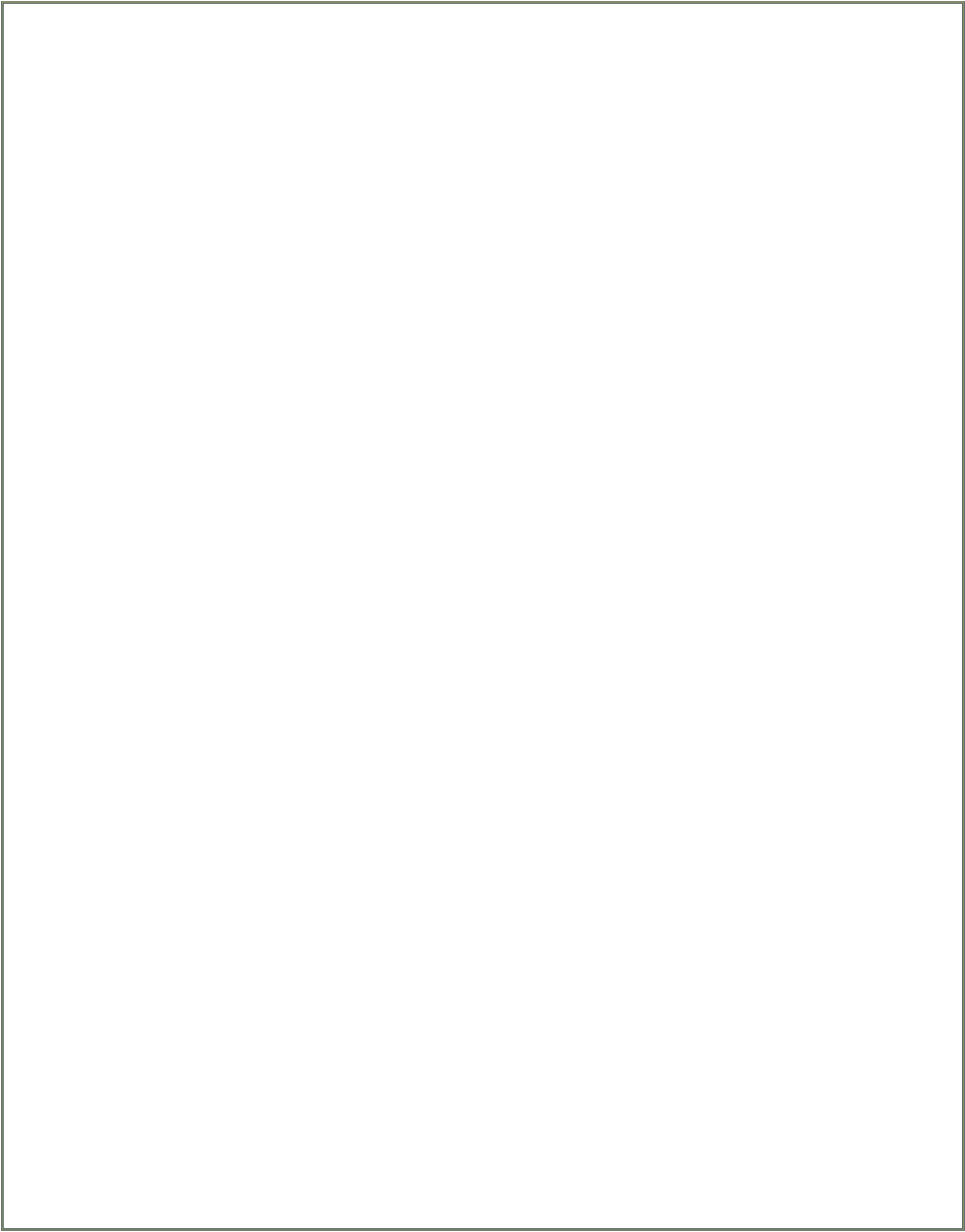
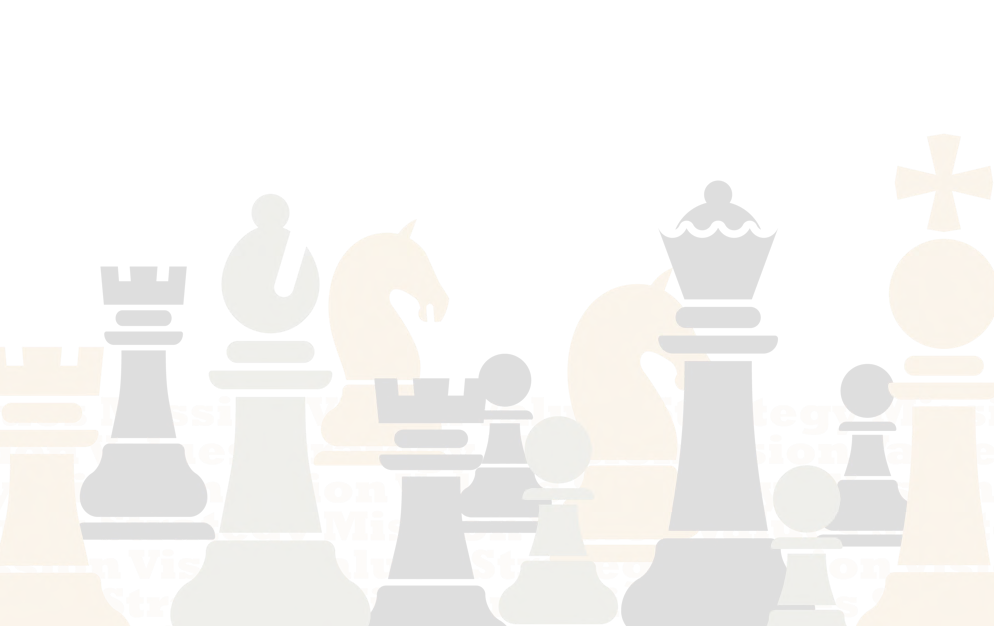
**2016**



**Strategic Plan**

2016 Strategic Plan

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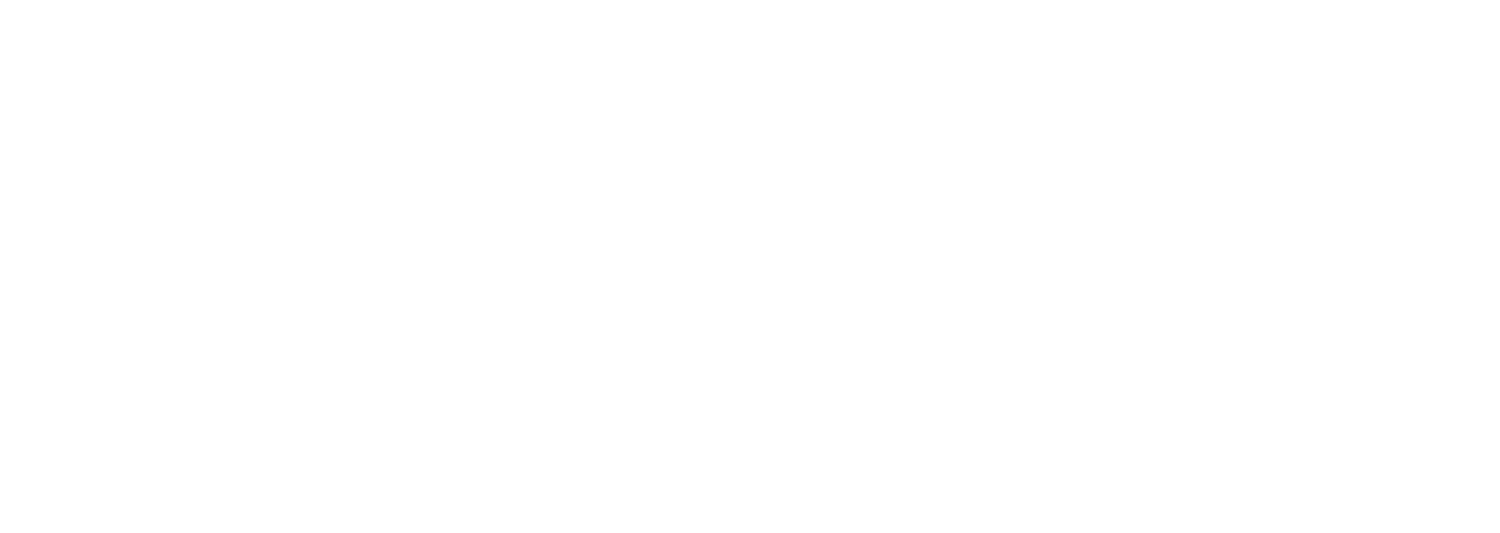
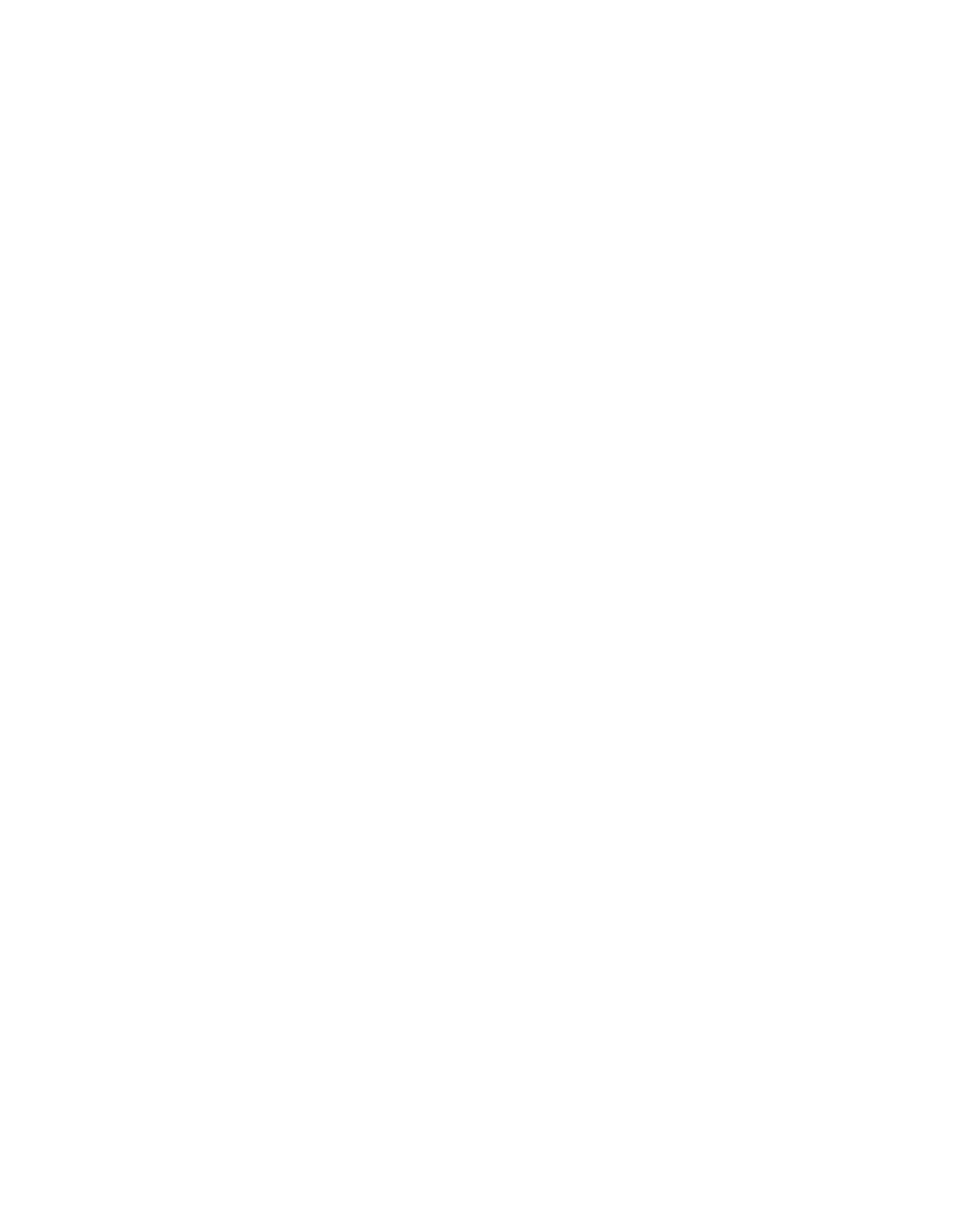
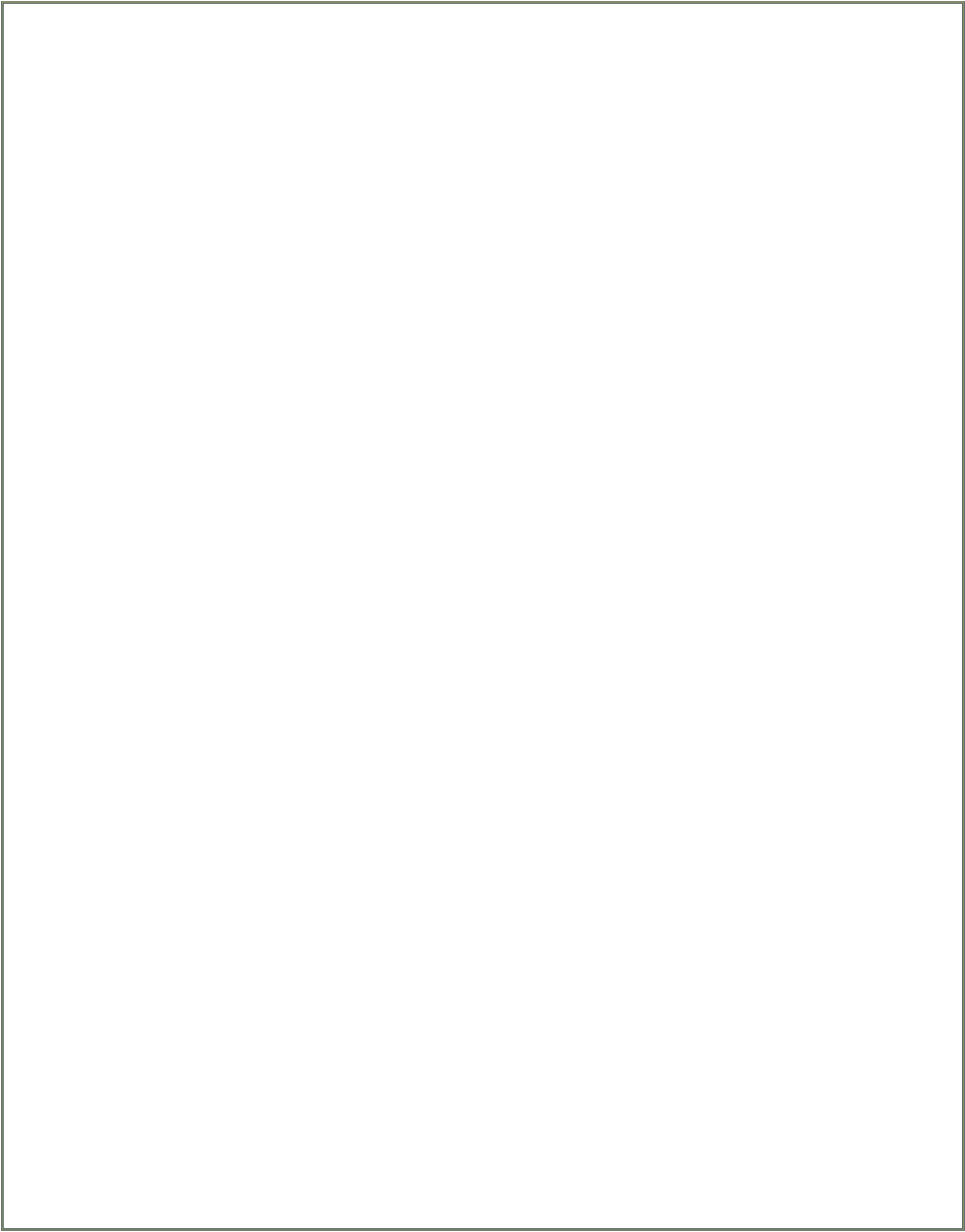
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## 2

**© Red Rock Center For Independence 2016**

2016 Strategic Plan

# Executive Summary



We are the Red Rock Center For Independence (RRCI), and this is our Strategic Plan. The objective of this plan is to guide members of staff and the Board of Directors as we navigate our strategic and tactical decision-making processes, live our Mission, and move closer to our Vision.

This plan is a dynamic model – adapting to changes in the external environment and the needs of our expanding community. It is a *litmus test*, adopted to ensure strategies are crafted in a manner consistent with the RRCI’s Mission, Vision, and Values.

The format of this plan is designed to illustrate clarity in RRCI’s Vision and strategies, identify resources and processes necessary for success, and promote teamwork in achieving strategic goals as we strive to improve the experience and lives of our consumers.

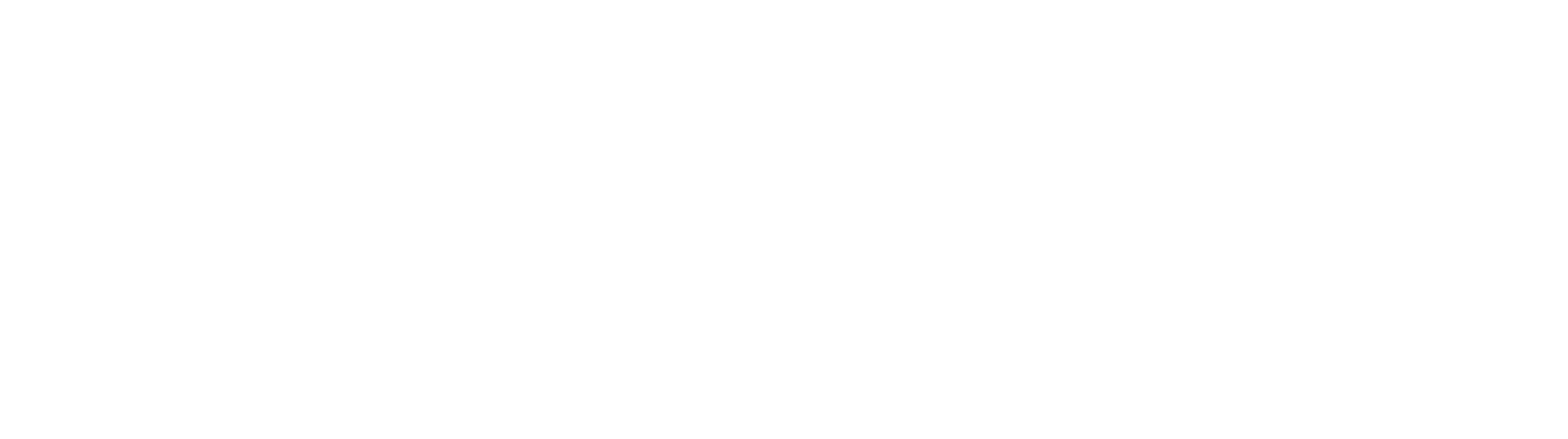
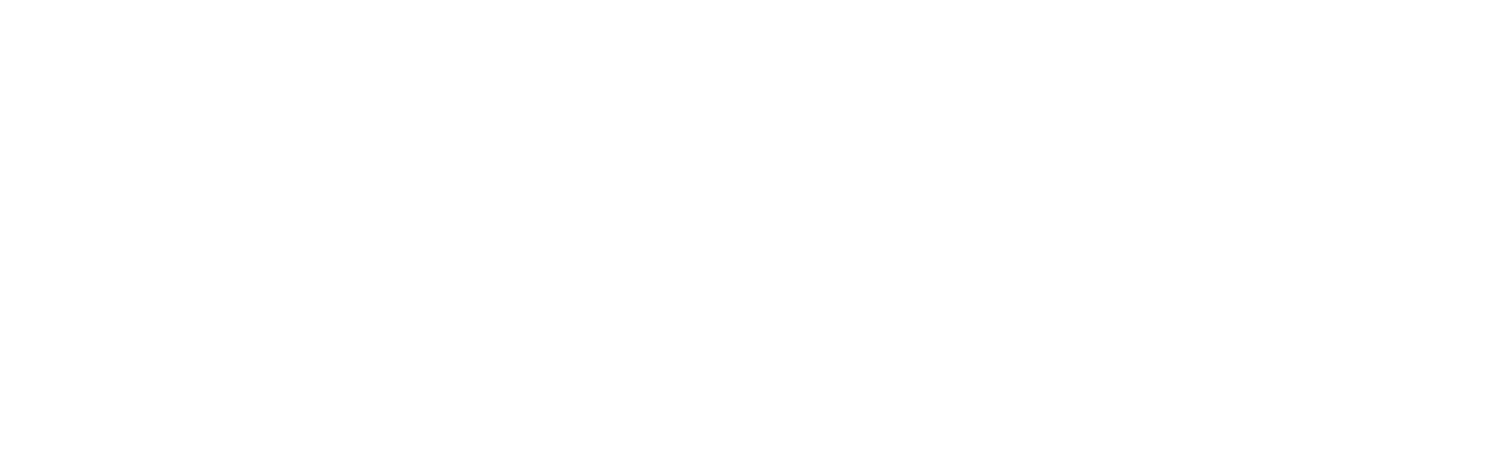
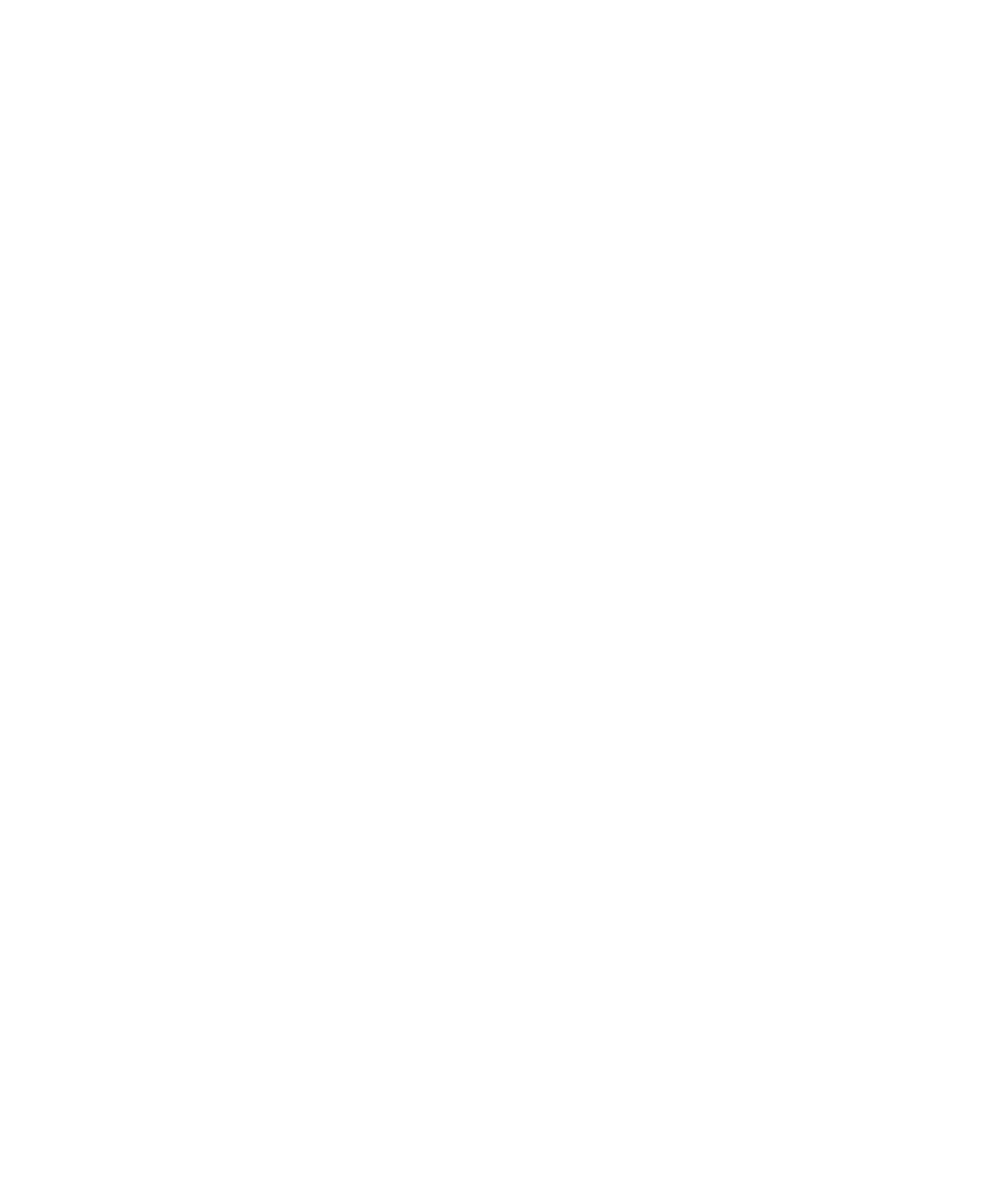
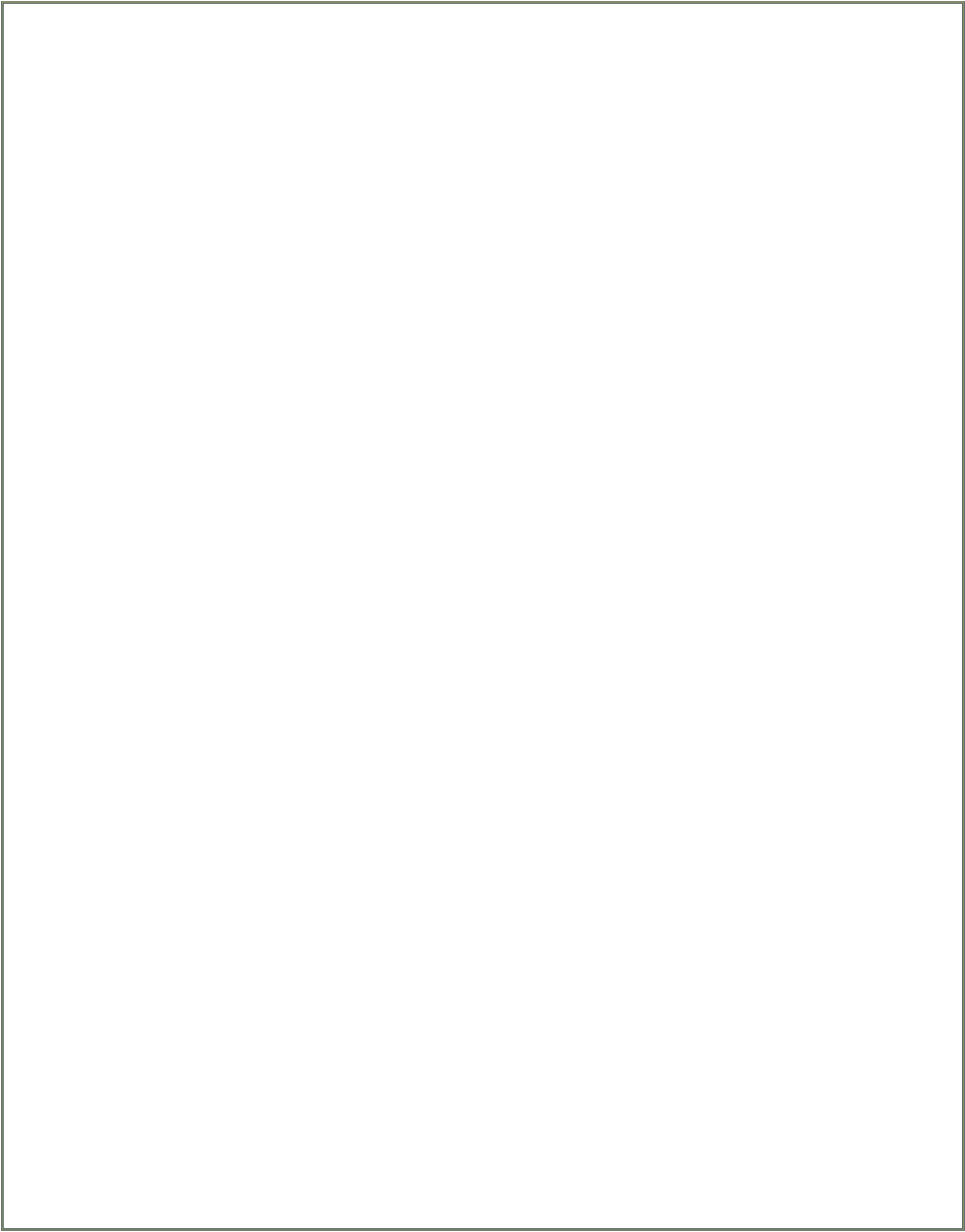
This plan is a tool for current and incoming board members, staff, and strategic partners. It is designed to be a reference tool, and *should be present* during all decision-making meetings.

As RRCI finalized its planning for 2016 and beyond, the agency reconfirmed its Mission and Values, and identified a Vision, which reads: *Red Rock Center for Independence envisions individuals with disabilities in southwestern Utah will achieve their maximum level of independence with full inclusion across all environments.*

## 3

2016 Strategic Plan

# Strategic Environment



###### CHALLENGES

* **Funding –** Creating a safety net to ensure uninterrupted services for our consumers.
* **Volunteers –** Building a strong volunteer network to provide RRCI with resources to achieve a variety of strategic objectives.
* **Geography –** RRCI faces a variety of challenges resulting from the large geographic service area.
* **Regulatory Compliance –** Continuing changes in regulatory demands have become strategically significant to RRCI.

###### OPPORTUNITIES

* Increase community awareness.
* Overcome geographic challenges.
* Create systematic processes to address strategic challenges in funding and compliance.

Our Vision can be achieved if we leverage our strengths, advantages, and expertise to address these challenges and opportunities. An overarching challenge all nonprofit agencies face is limitations to resources. Our Business Alignment model discussed throughout this plan will aid in managing priorities and resources as we tackle our strategic goals, live our Mission, and pursue our Vision.

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2016 Strategic Plan

# Our Team

Red Rock Center For Independence is made up of a variety of individuals and groups – each playing a unique and critical role in the delivery of services to our consumers. Listening to, and acting upon, feedback from *everyone* is paramount to improving the services and programs we implement to help maximize the independence of our consumers.

Everyone has a role in our success. Understanding our roles, and the roles of others, helps to keep us focused on living our Mission.

**Board of Directors**

Our Board of Directors has a variety of roles, including fiduciary oversight, planning, and ensuring the Executive Director has the necessary resources

to lead RRCI.

**Staff**

Our staff is the lifeblood of our operation. They deliver our services with compassion and dedication.

**Our Consumers**

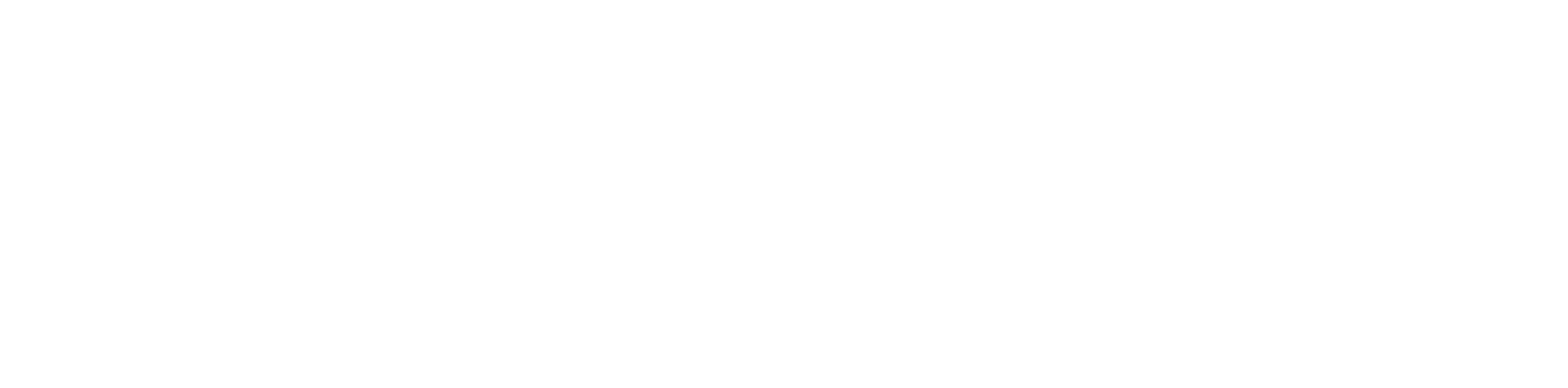
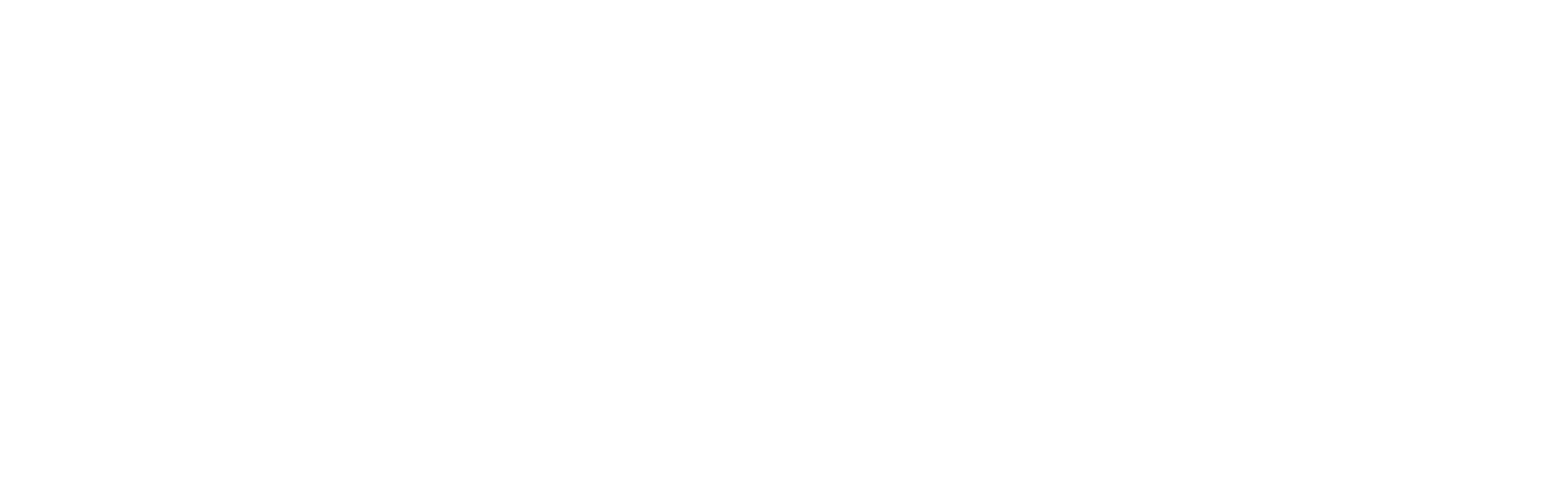
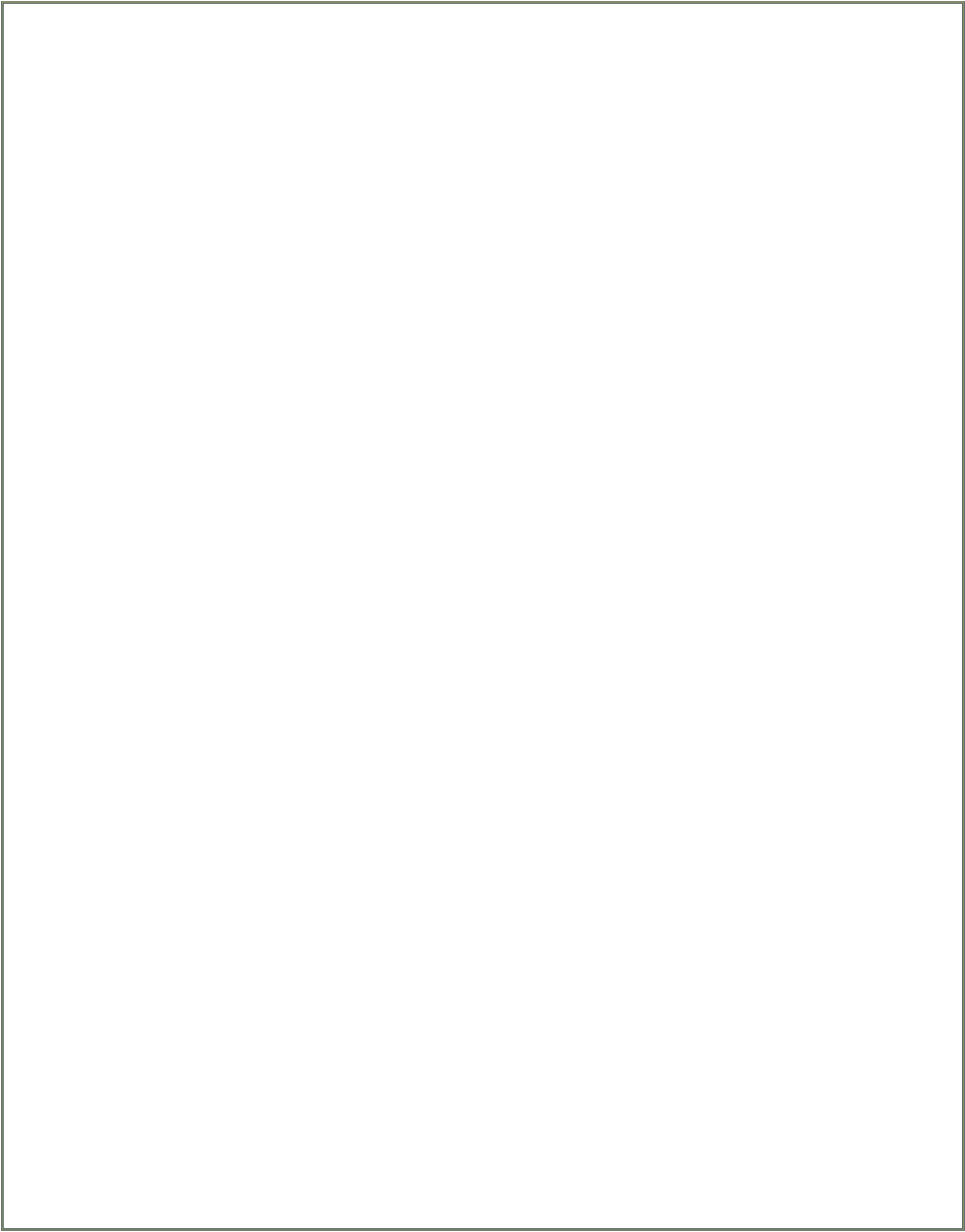
**Volunteers**

Individuals with disabilities throughout southwest Utah. We strive daily to maximize their independence.

**Partners**

Our volunteers play a vital role in educating our community about our services, and helping the agency reach those in need.

RRCI has a network of strategic partners and contacts to help facilitate access to resources to assist in the delivery of our services.



## 5

2016 Strategic Plan

# Planning Process

Strategy Development

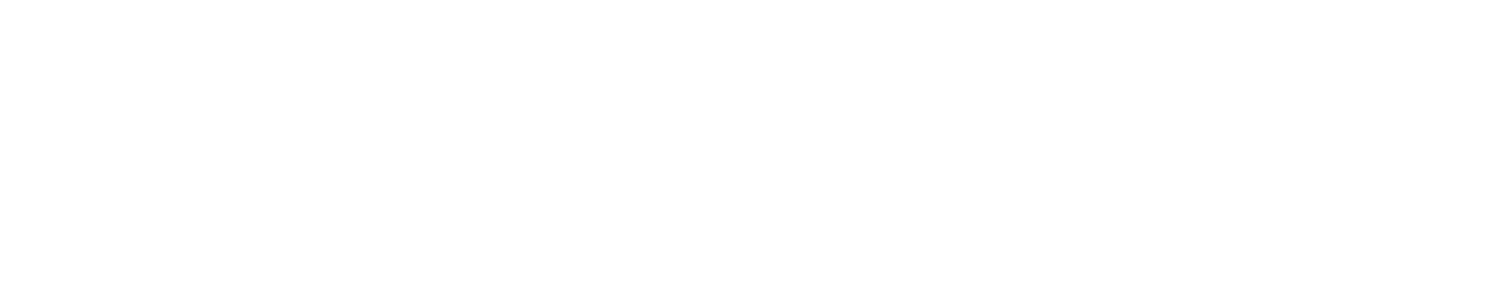
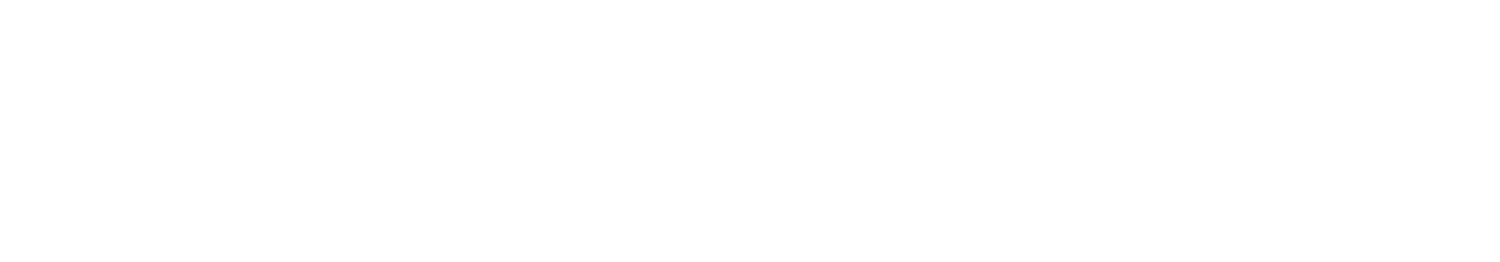
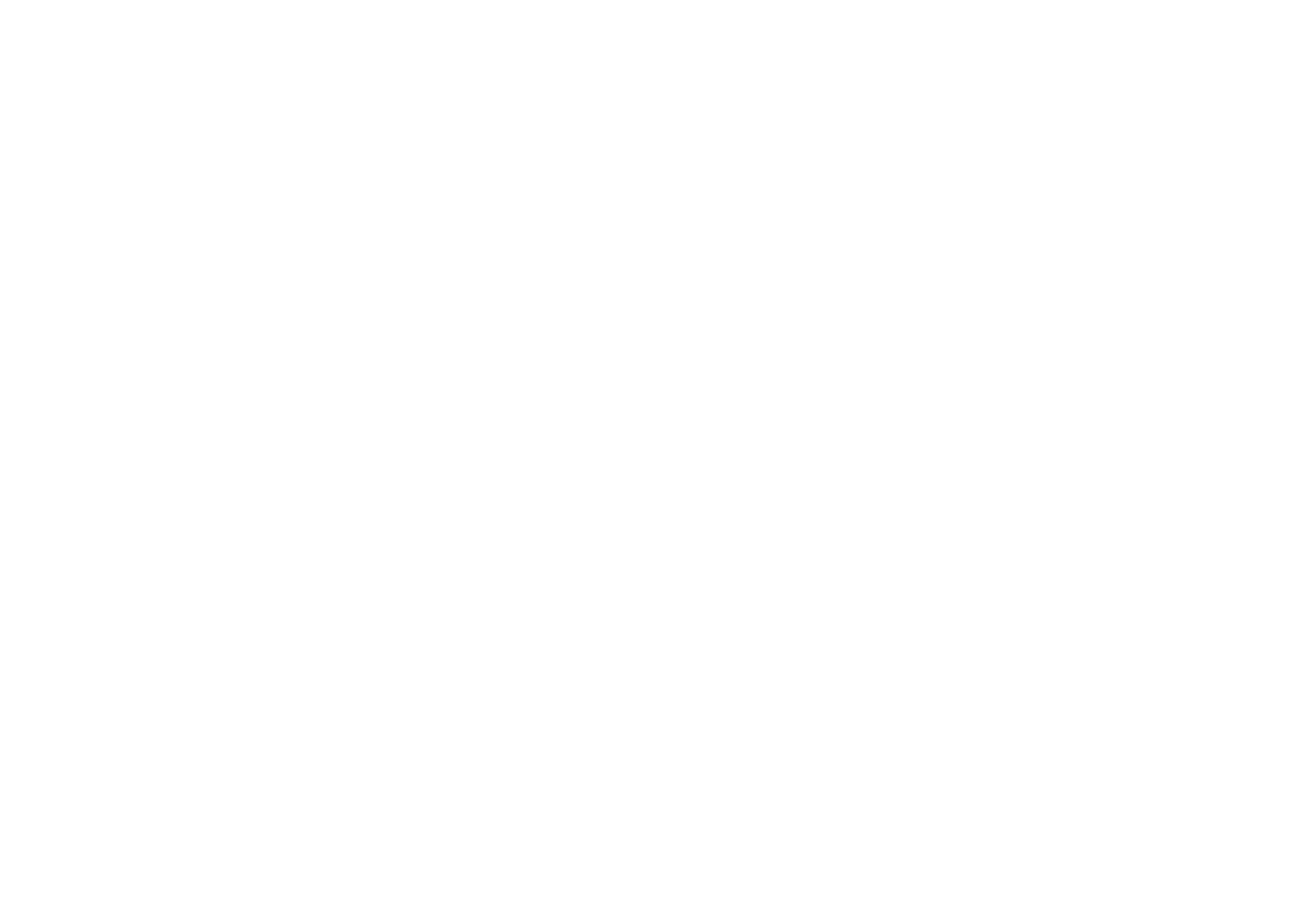
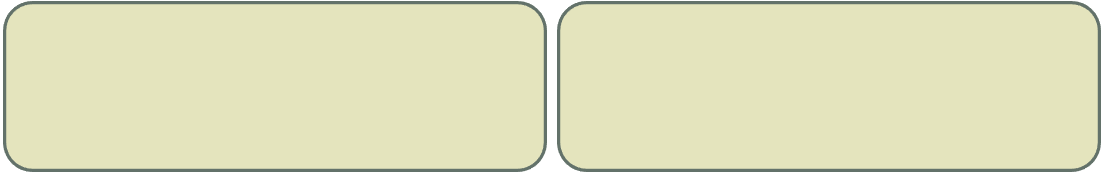
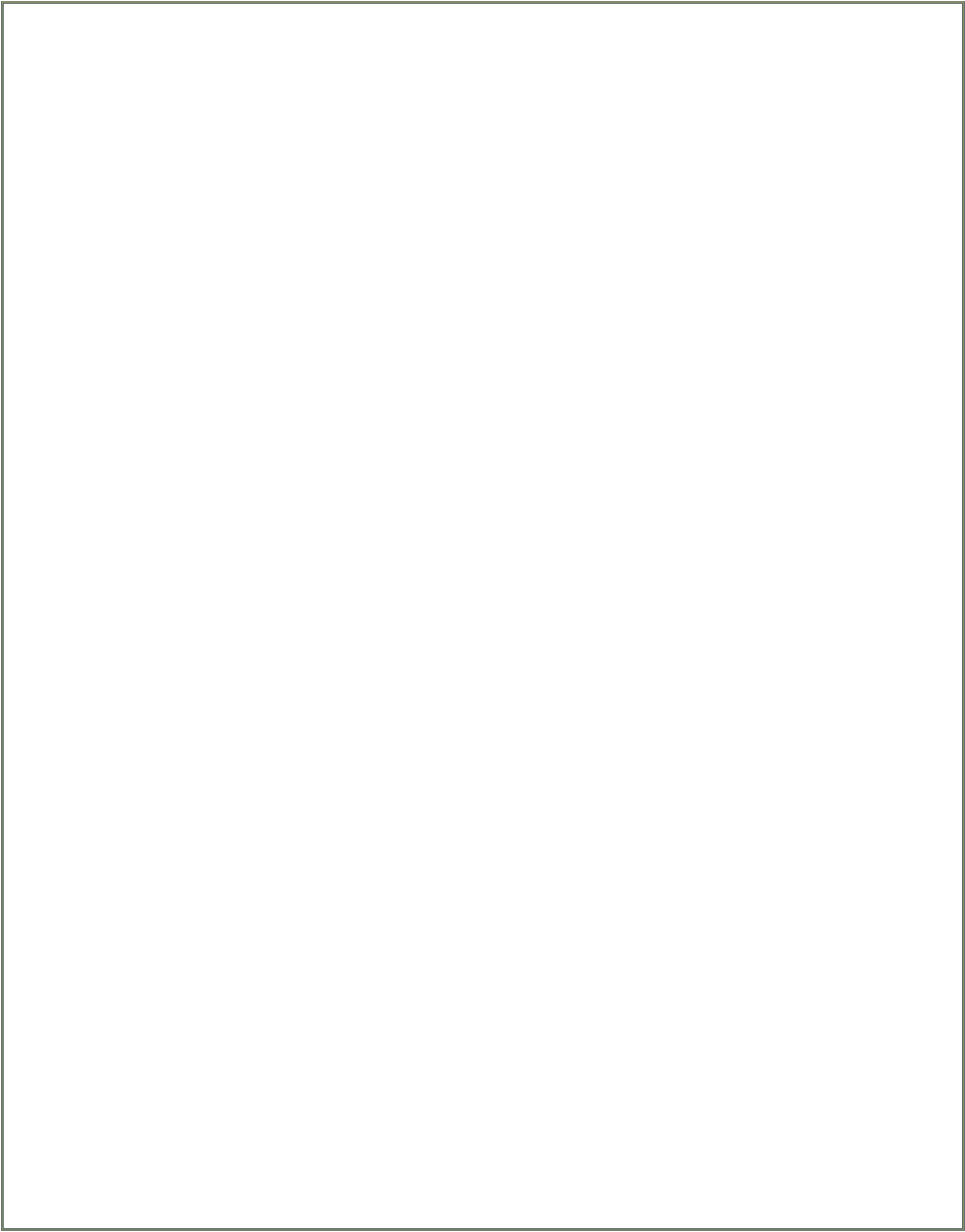
Business

Strategy Implementation

Strategic Environment

Strategic Foundation

Alignment Metrics Goals



RRCI’s 2015 Strategic Planning Workshop was built on a set of activities influenced by the Malcolm Baldrige National Quality Award criteria. Two overarching processes manage these activities: Strategy Development and Strategy Implementation, which encompass the following:

**Strategic Environment:** During this step, we identify our key strategic opportunities and challenges. They are the drivers for our strategic goals. Understanding that we operate in a dynamic environment, we should constantly monitor internal and external measurements to proactively address changes that impact our Vision.

**Strategic Foundation:** This is the core of our strategic plan. Our Vision guides our future. Our Mission articulates our action. Our Values provide guardrails to ensure every decision we make does not compromise our image and reputation.

**Business Alignment:** We use a Business Alignment model to illustrate the connection between our Vision and the activities and processes we use to operate RRCI on a daily basis. It is designed to ensure we are utilizing all of our resources and expertise to achieve our goals.

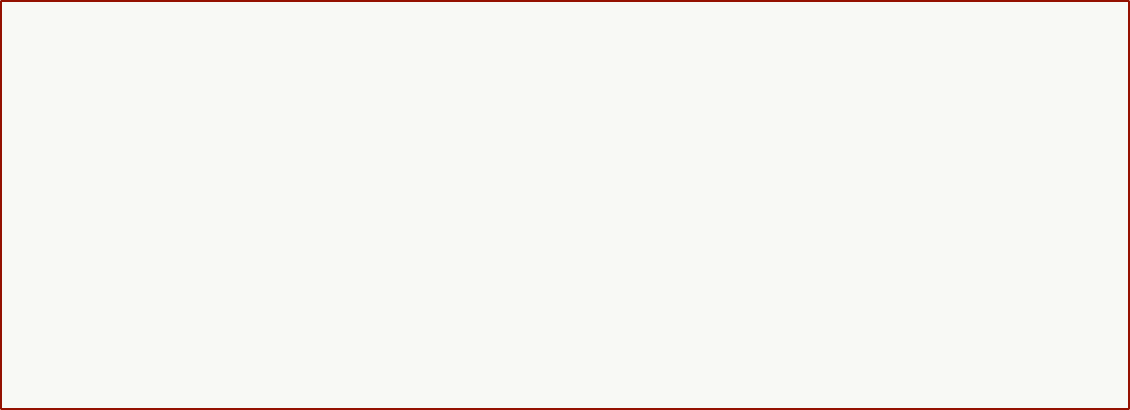
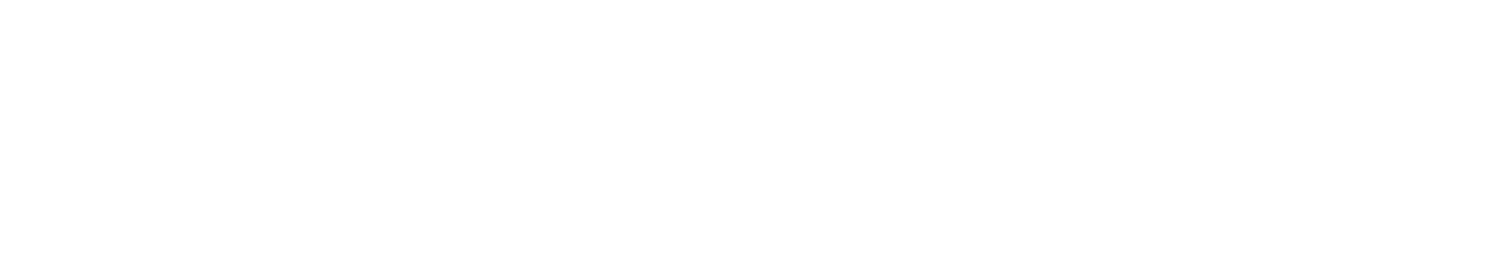
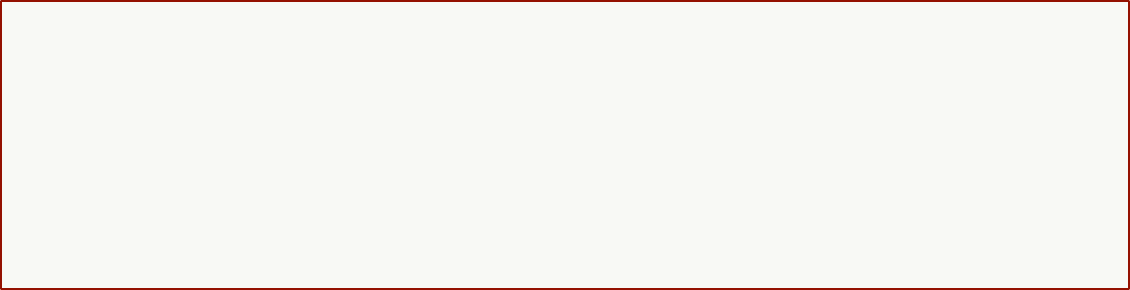
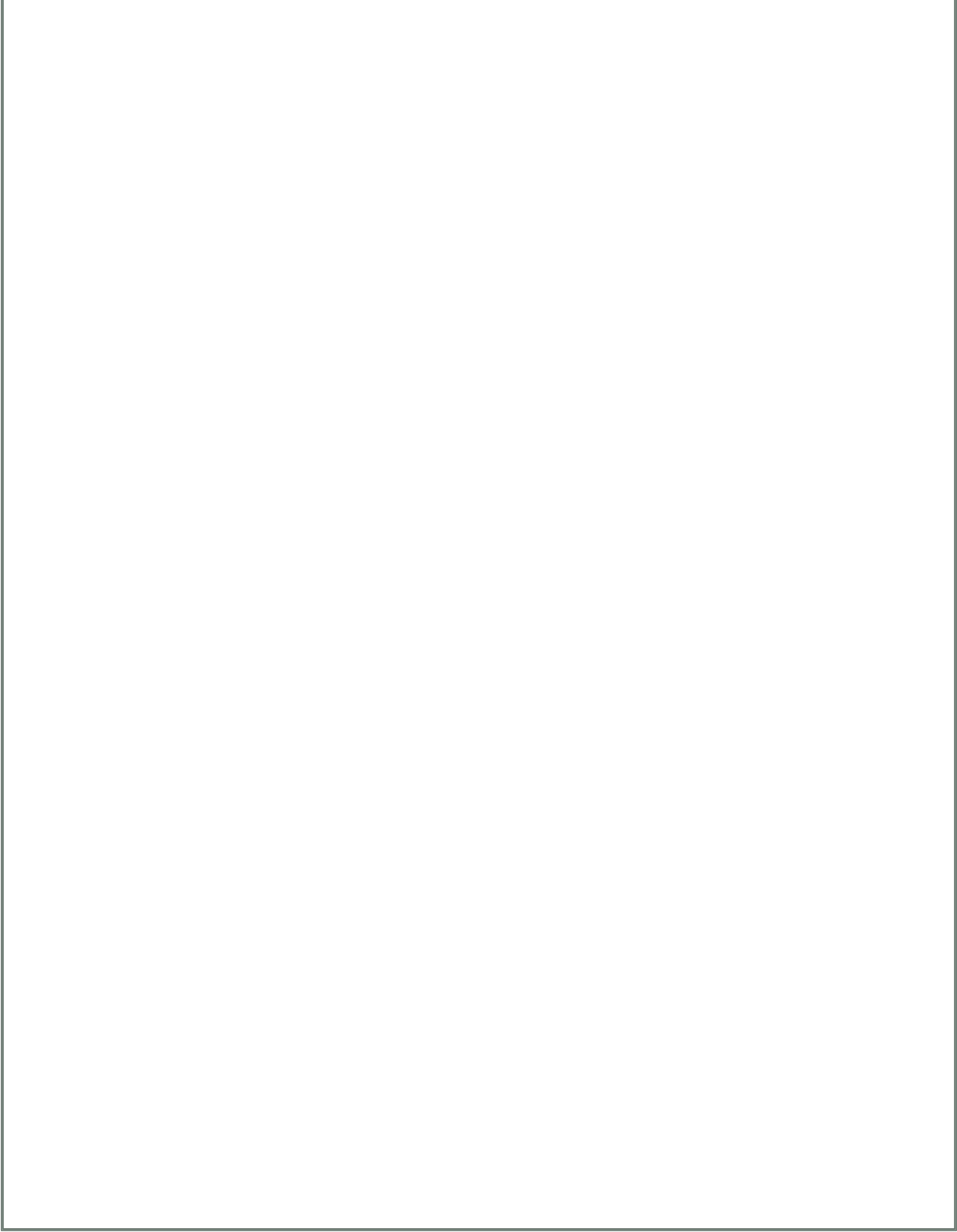
**Metrics:** A set of overarching critical success metrics provides clarity in planning, and ensures sub-goals and action plans are aligned with our strategic plan.

**Strategic Goals:** These are the drivers of our strategic plan. They are the key activities we have identified to move us closer to our Vision.

## 6

2016 Strategic Plan

# Vision



***Red Rock Center for Independence envisions individuals with disabilities in southwestern Utah will achieve their maximum level of independence with full inclusion across all environments.***

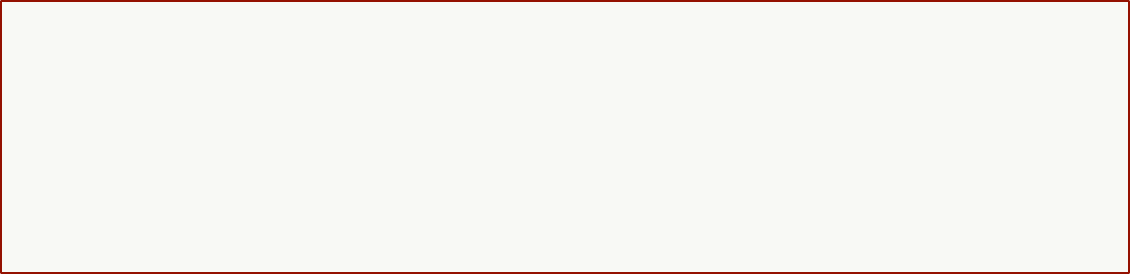
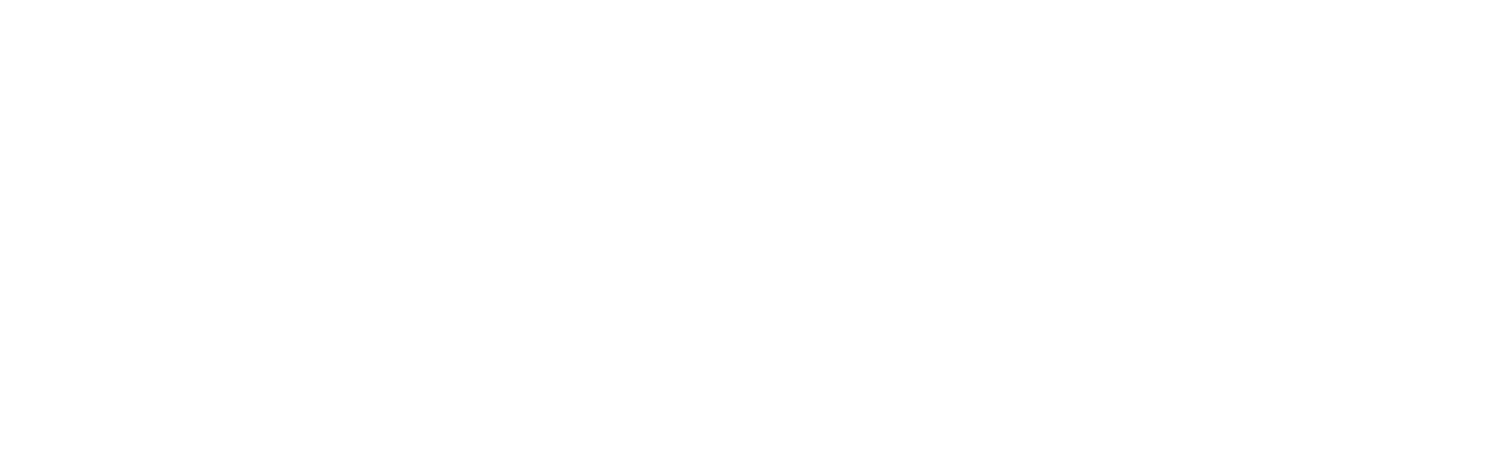
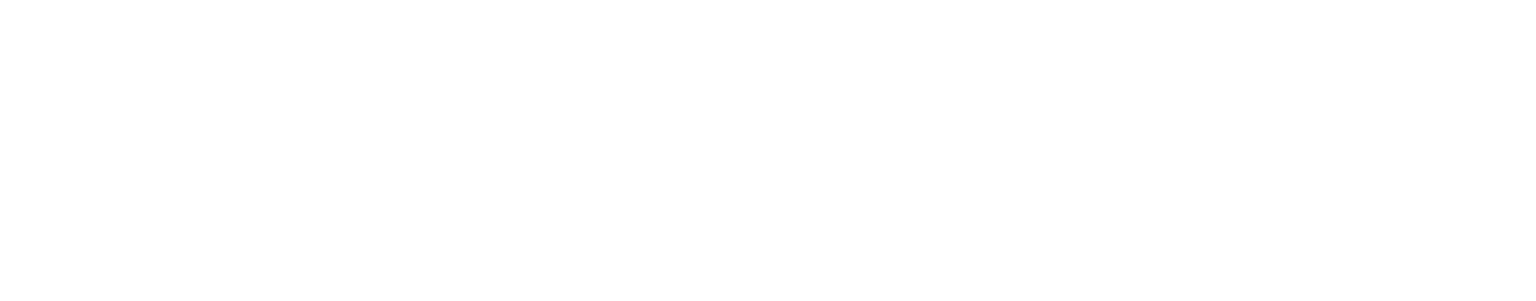
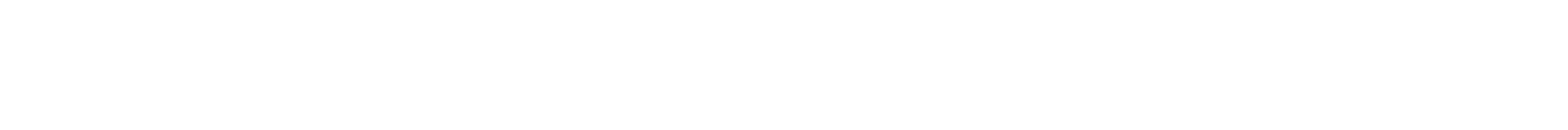
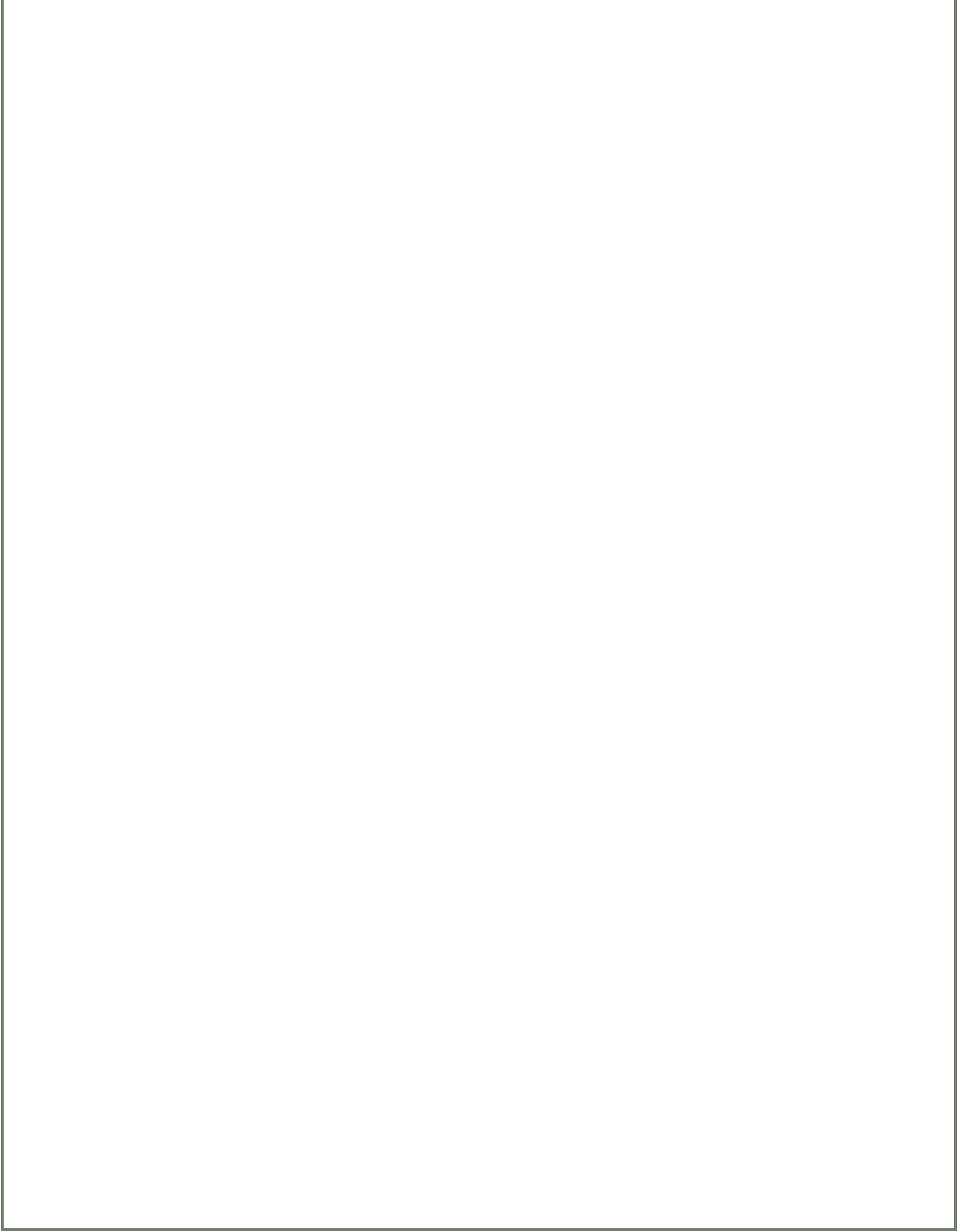
Our Vision Statement is a clear and powerful message that articulates our desired future. It was written and adopted by RRCI’s Board of Directors and staff in 2015.

RRCI’s Vision has a long-term goal of helping those consumers in our region to achieve their maximum level of independence, and become self-sufficient in their daily activities.

## 7

2016 Strategic Plan

# Mission



***The Red Rock Center For Independence Mission is to empower people with disabilities in southwestern Utah to live independently through education, personalized services, and technology.***

Our Mission illustrates our commitment to action. Our Mission articulates, “*What We Do Today”, and answers the question* “What are we attempting to accomplish?”

## 8

2016 Strategic Plan

# Values

Consumer-Focused Services

Resources, services and programs are focused on successfully responding to and meeting the needs of consumers

Community Relations

Consumers, community and staff recognize, understand and respect the professional services and mission of the RRCI

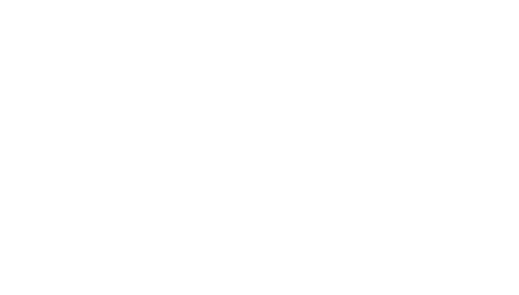
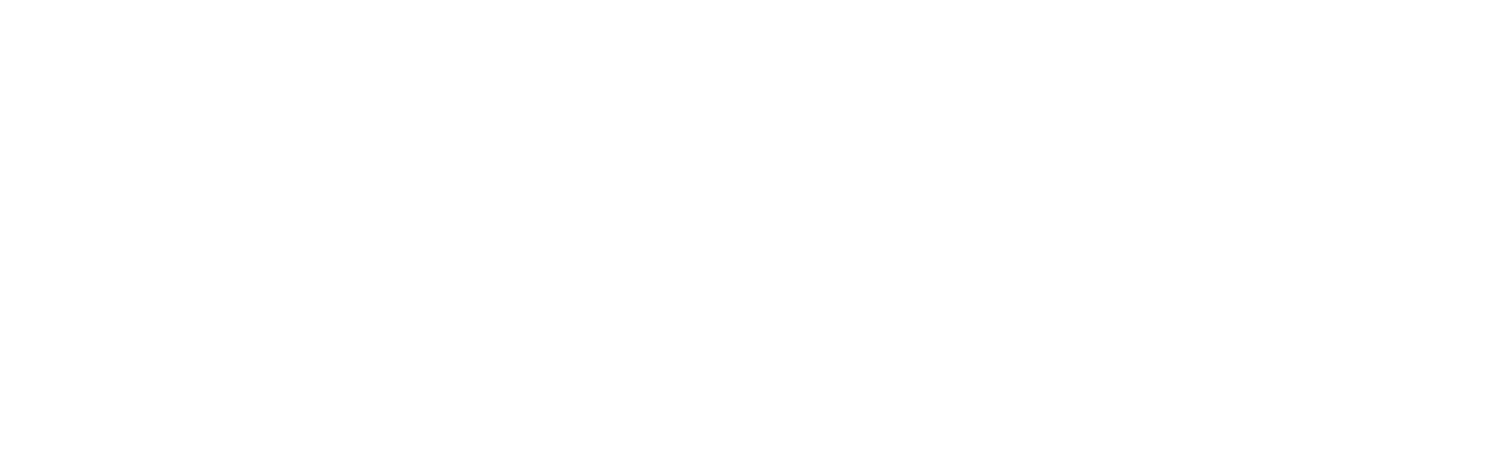
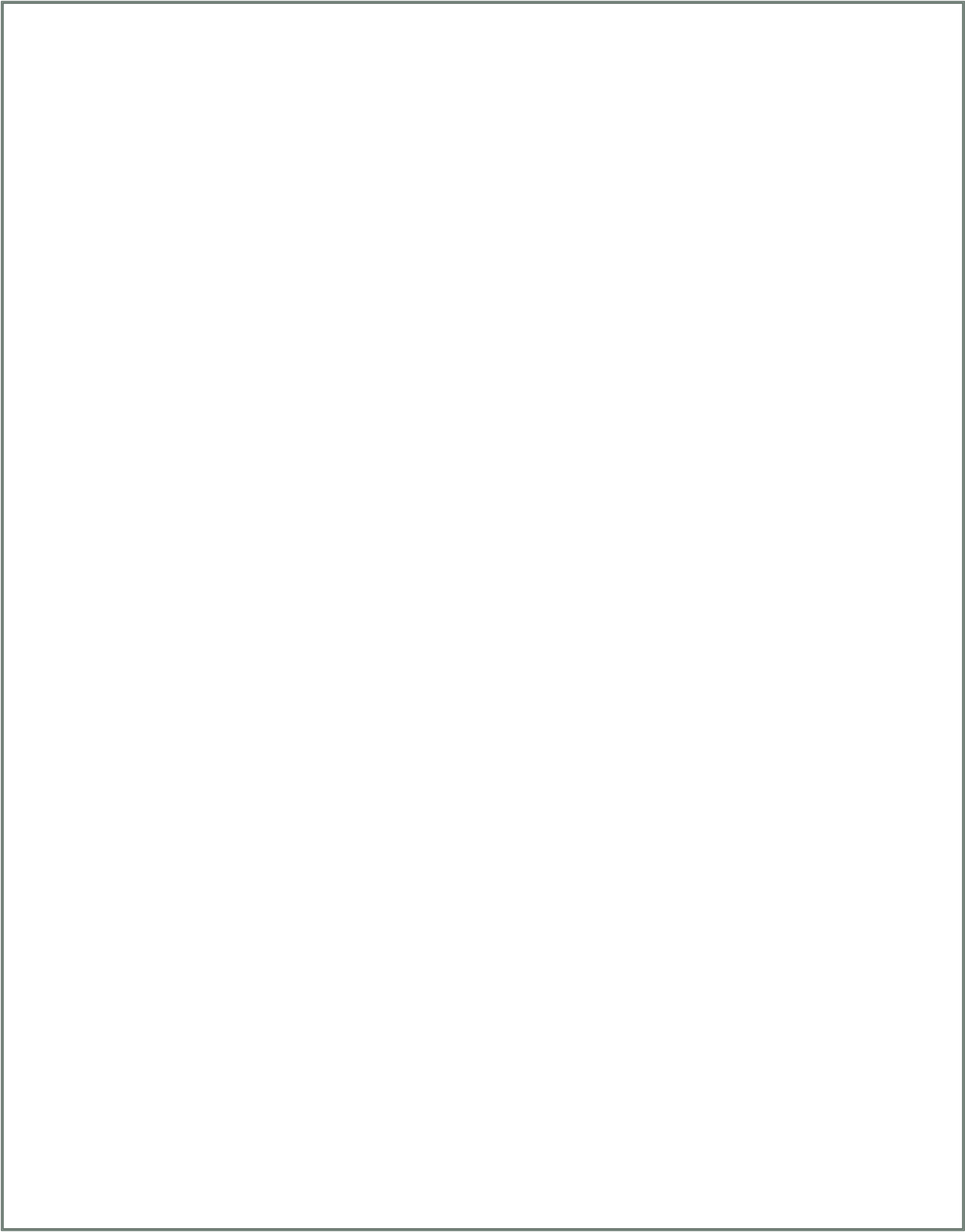
**Our Values**

Dedication

Staff and consumers actively participate in training and education and demonstrate values of integrity, empathy, compassion and engagement

Individual Rights

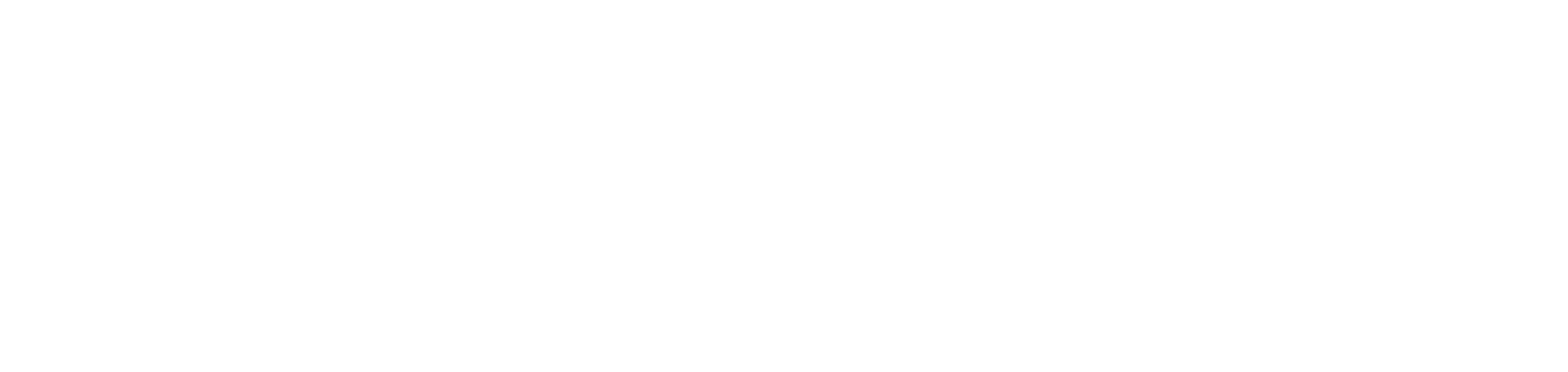
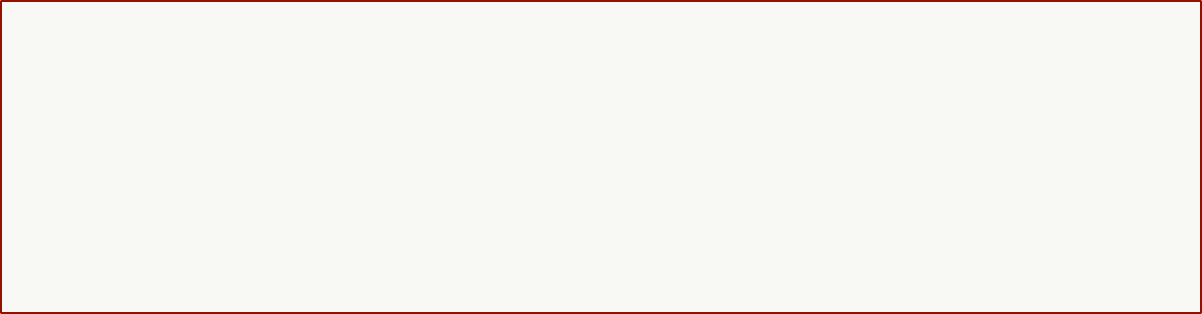
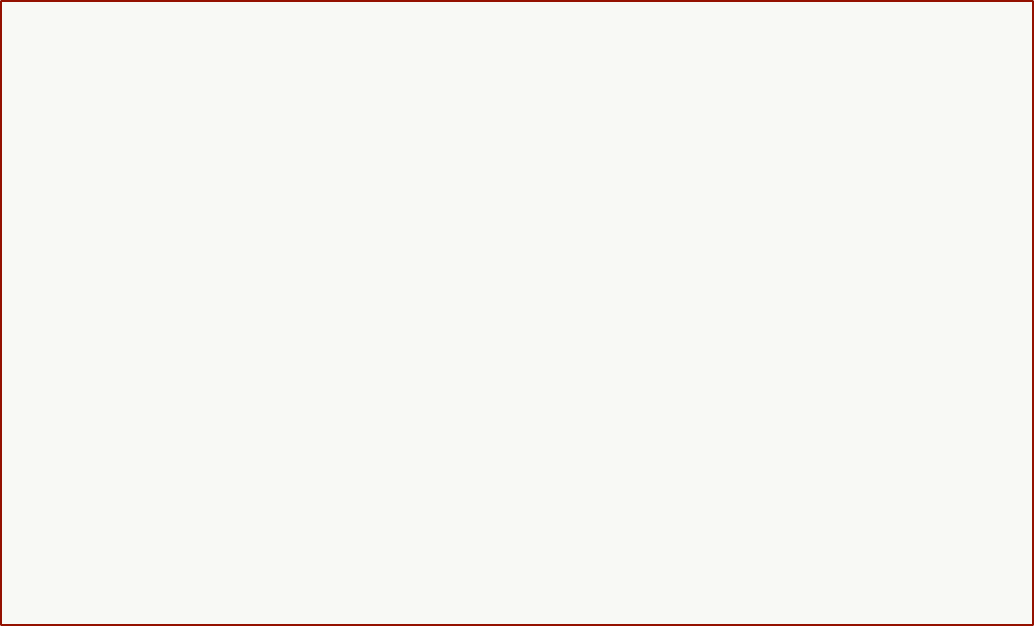
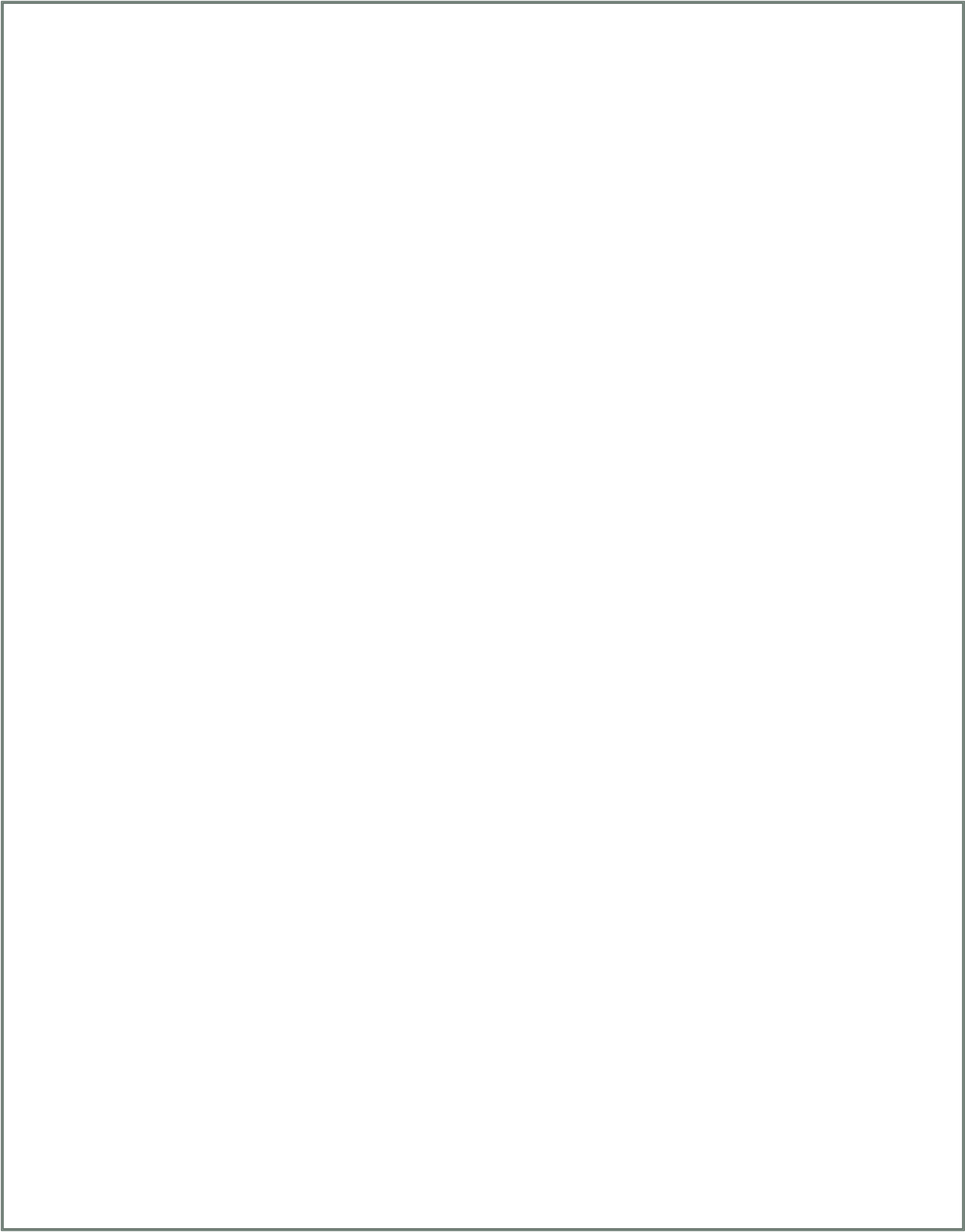
People with disabilities will have and exercise the same rights as everyone else



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2016 Strategic Plan

# Core Competencies



RRCI has worked hard over the years to build processes, relationships, and systems that have become the driver of our ability to successfully serve our consumers. Protecting our core competencies isn’t enough. It is important that we ask “why” our core competencies are effective, and look for ways to not only improve these systems, but also find ways to implement the successes into other aspects of our operation and our strategies.

Core Competencies are the systems and processes that make RRCI unique in the community. Core Competencies are our differentiators. They are difficult to copy or replicate, therefore they must be nurtured to protect our strategic advantage.

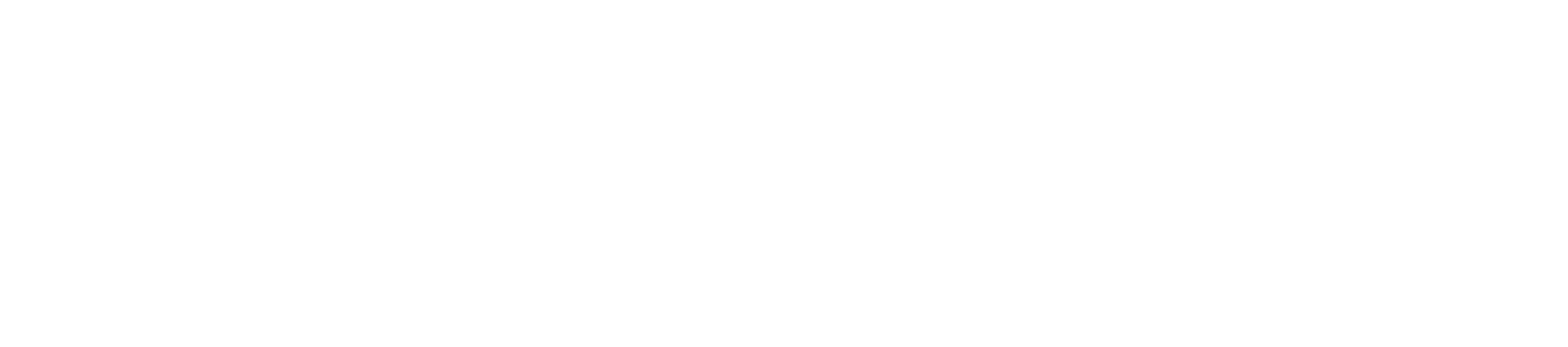
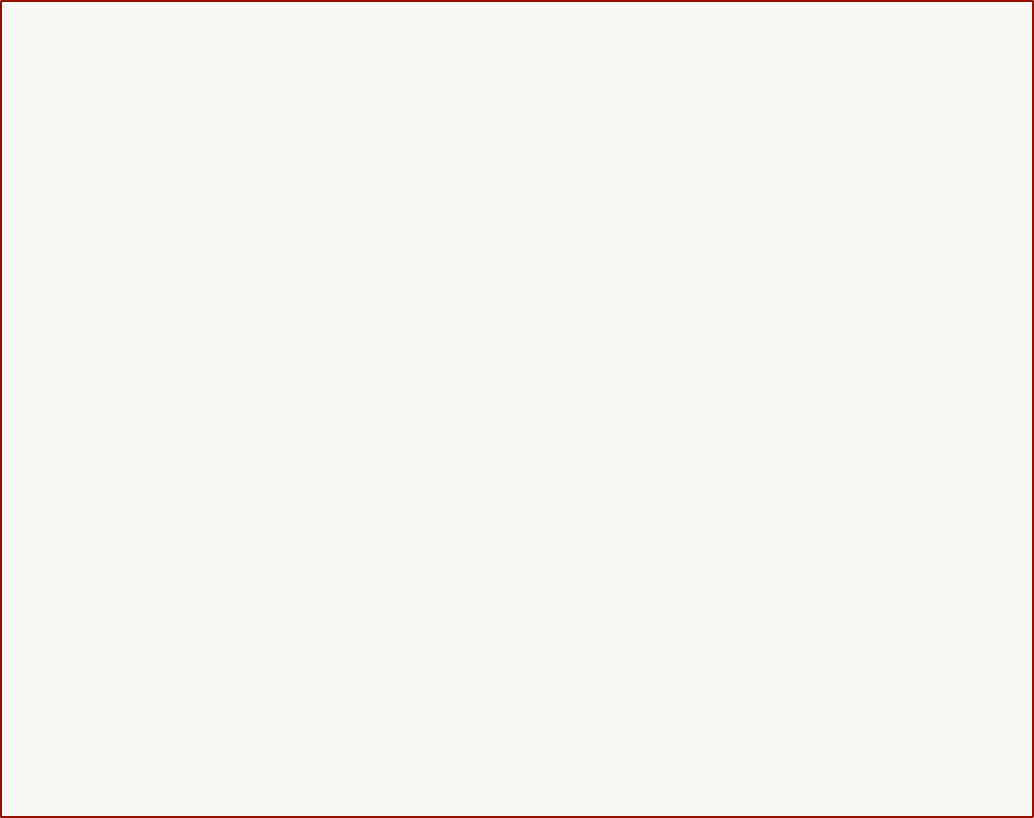
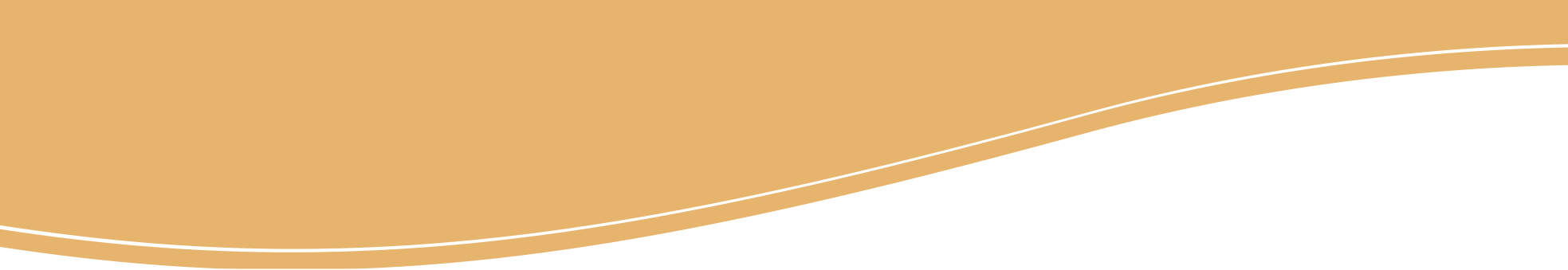
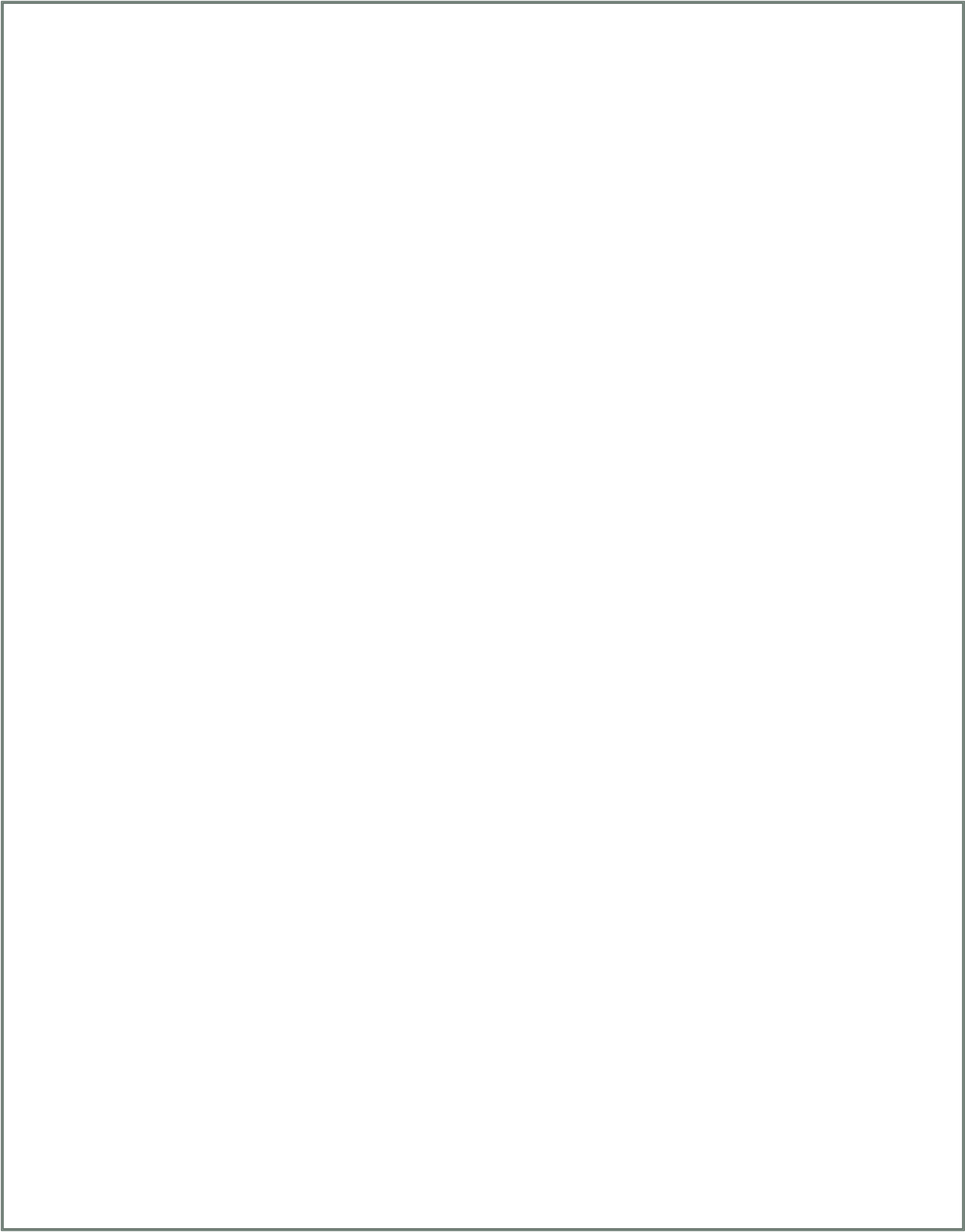
###### Loan Bank

* + **Connections**
  + **Our People**
  + **Commitment**

10

2016 Strategic Plan

# Metrics



Critical Success Metrics are a set of overarching measurements and indicators that provide clarity in planning, and ensure sub- goals and action plans are aligned with our Strategic Plan.

RRCI has identified the following Critical Success Metrics:

* Organizational Performance
  + Annual Audit
  + Service
  + Employee Engagement
  + Compliance
  + Financial
  + Budget
* **Loan Bank Utilization**
* **704 Reporting Metrics**

When each Strategic Goal and supporting action item is developed, all of the corresponding metrics should roll up to one or more of these metrics and metric categories. High-level metrics for each category can be summarized into a manageable dashboard for board and staff meetings.

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2016 Strategic Plan

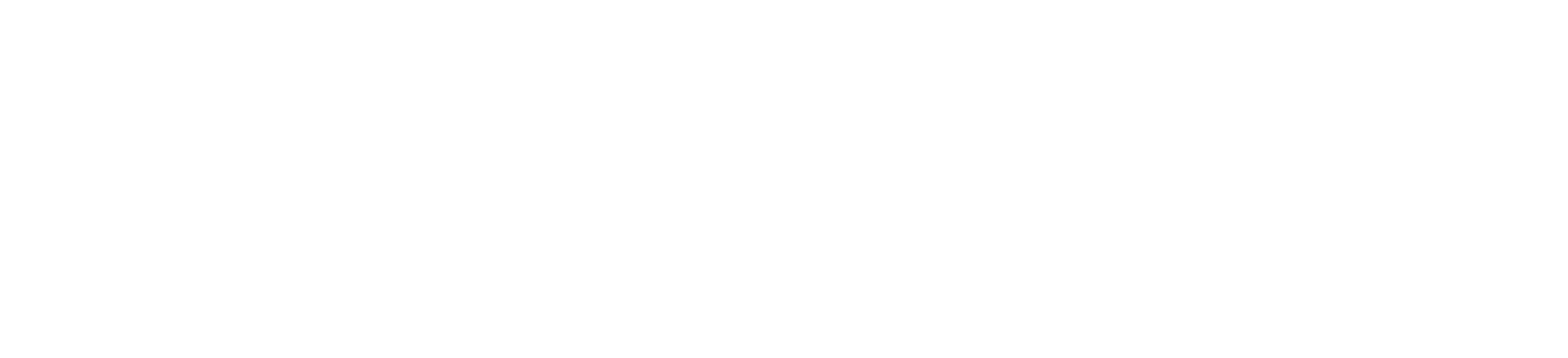
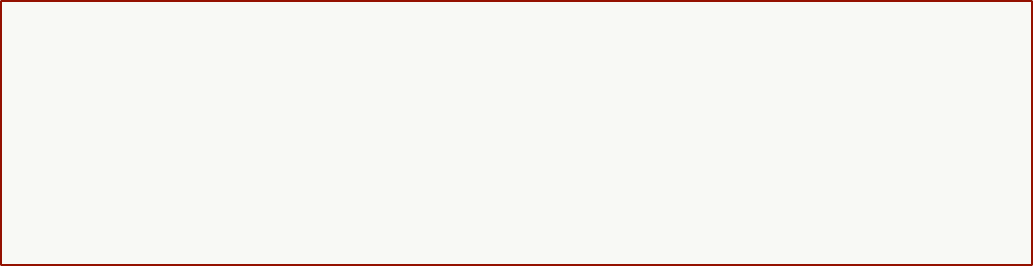
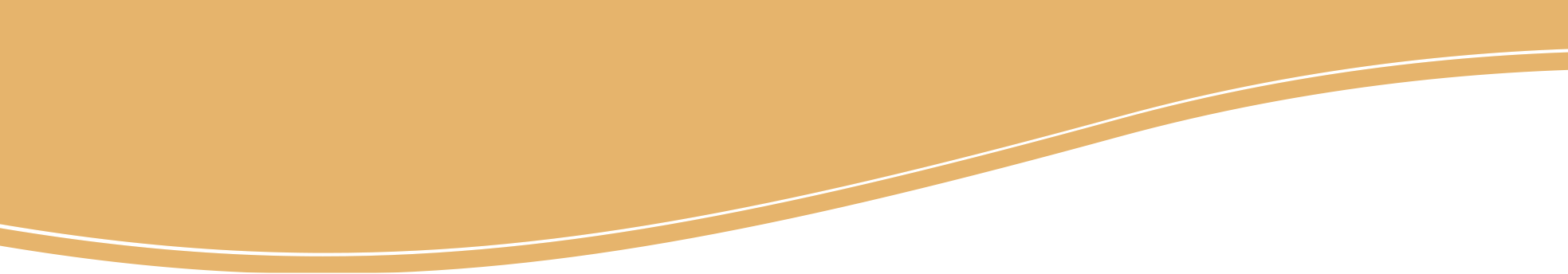
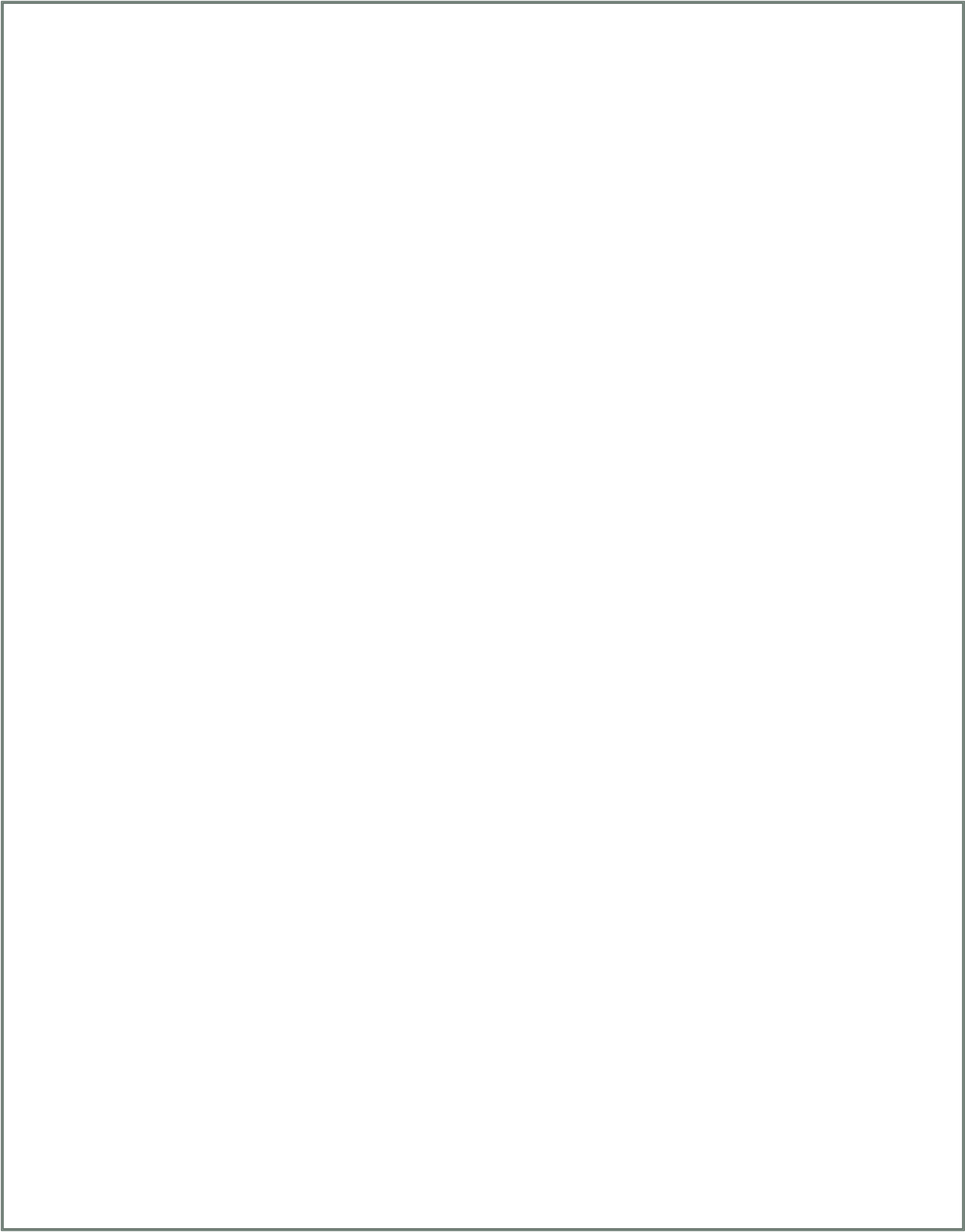
# Strategic Goals

Vision Mission Values

Core Competencies

Work Processes

Action Plan Management



Reporting

Staff Champion

Resources

Goal Board Champion

Knowledge

Executive Director

Leadership

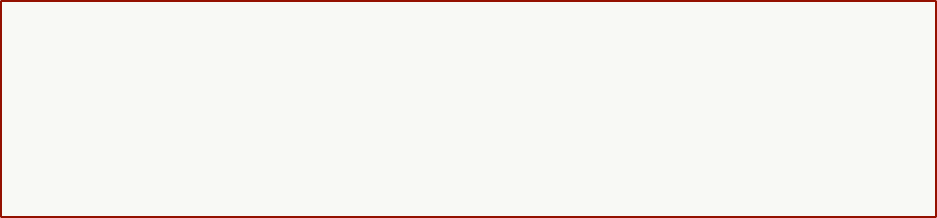
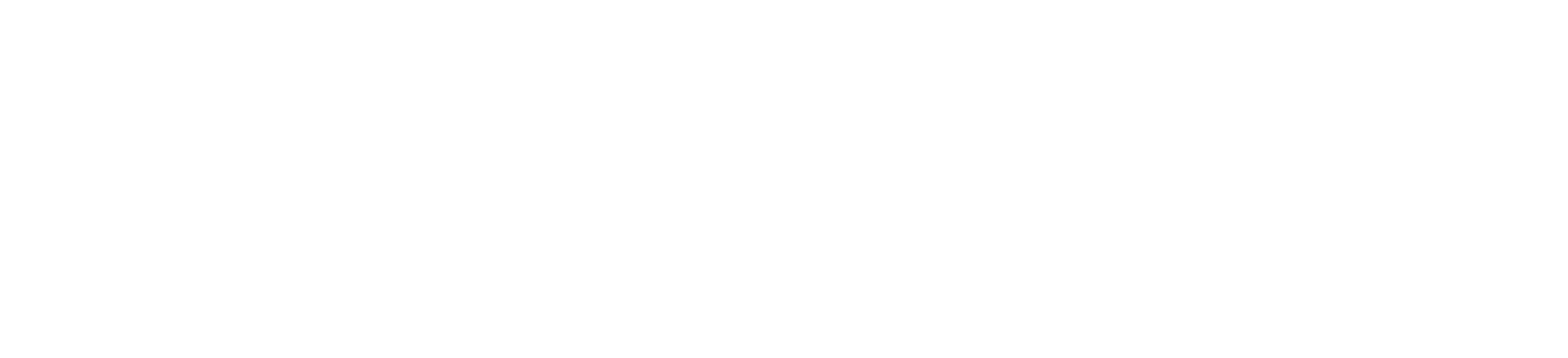
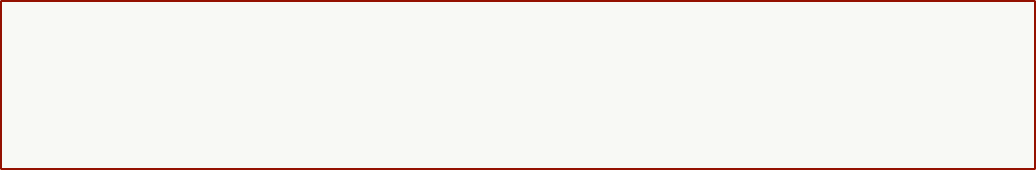
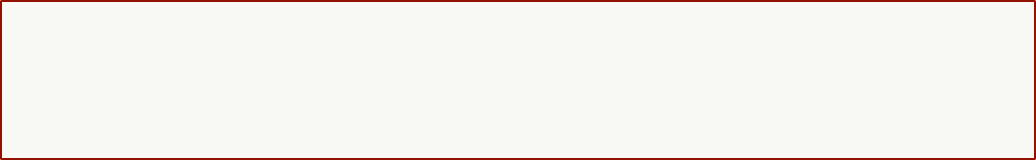
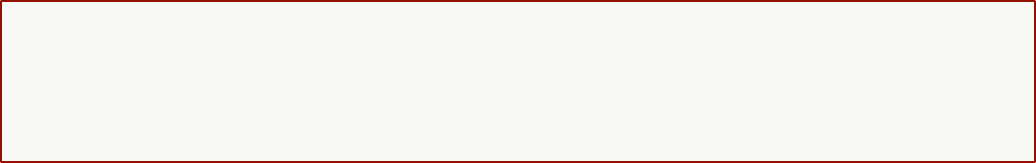
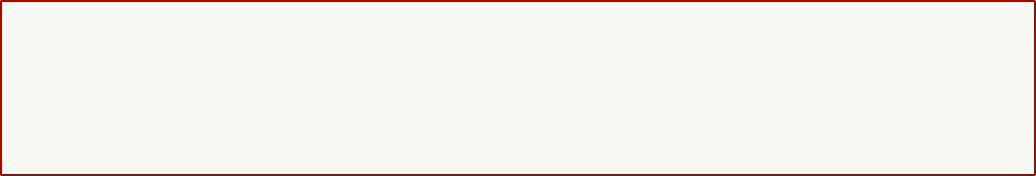
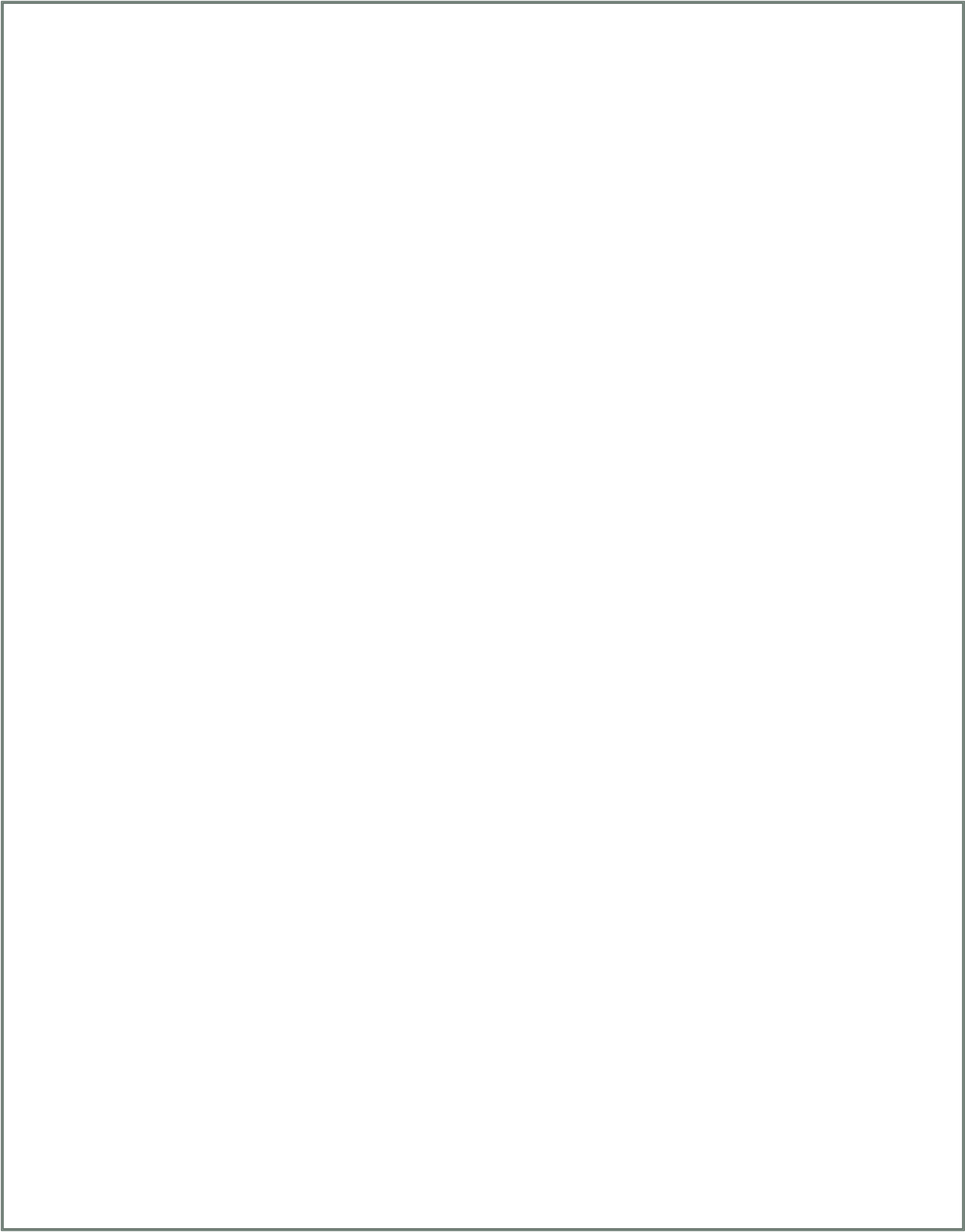
Plan Alignment

Components of successful goal management and execution include relevant goal ownership, alignment with our core competencies to leverage our expertise, and an understanding of our individual roles and how each of us contributes to the success of the goal.

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2016 Strategic Plan

# Strategic Goals



#### Funding Development

**Regulatory Compliance Strategy**

**Volunteer Program**

**Connections**

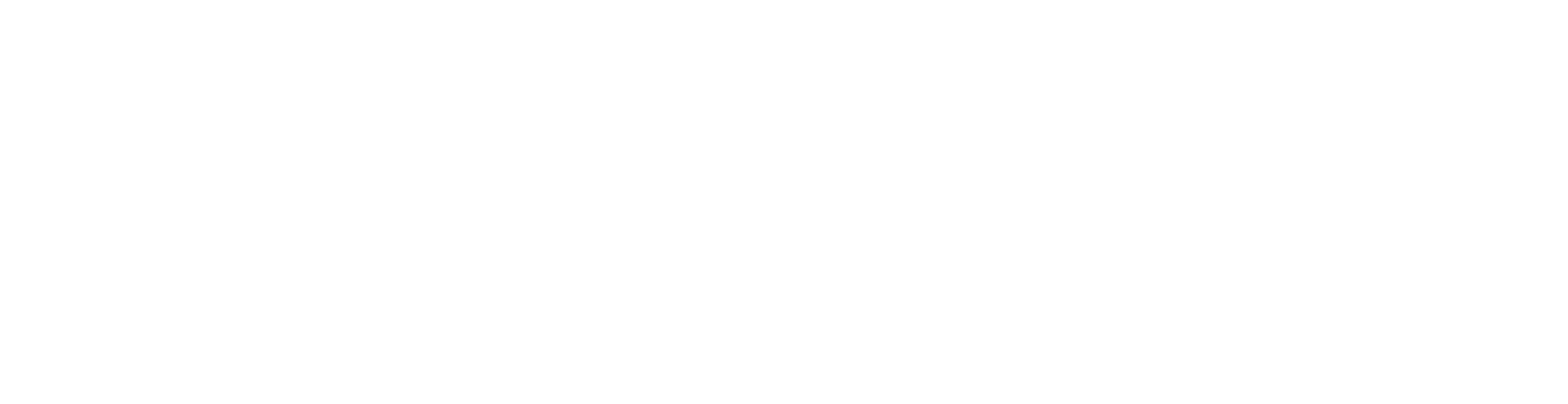
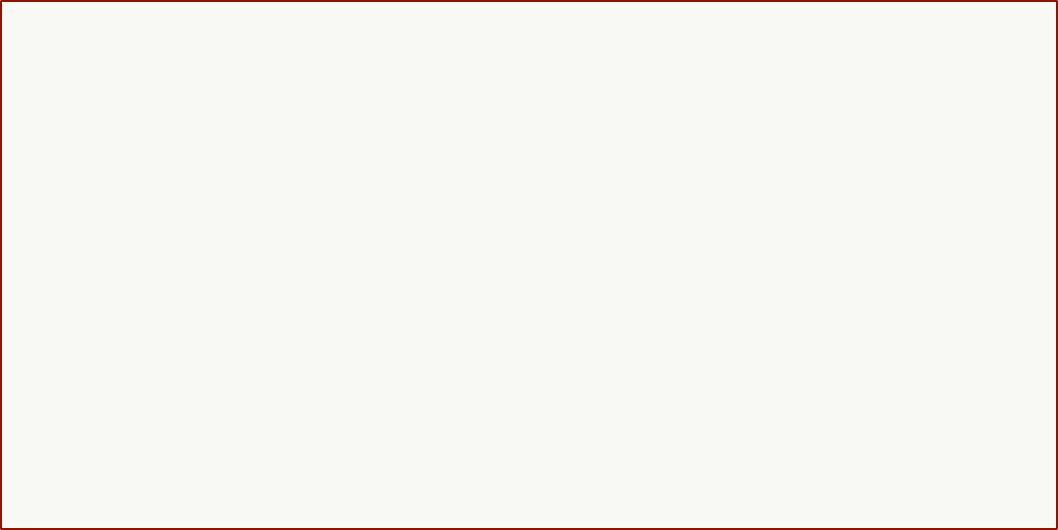
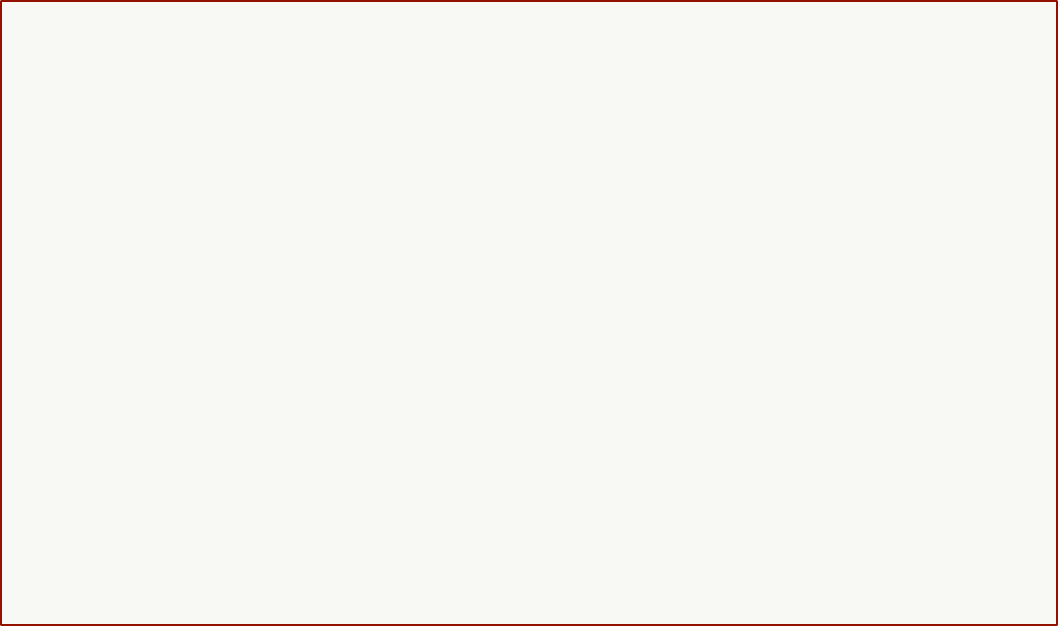
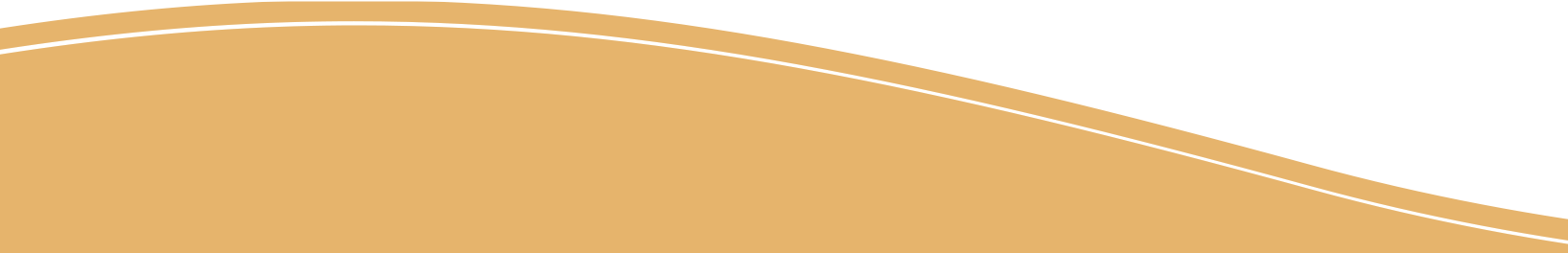
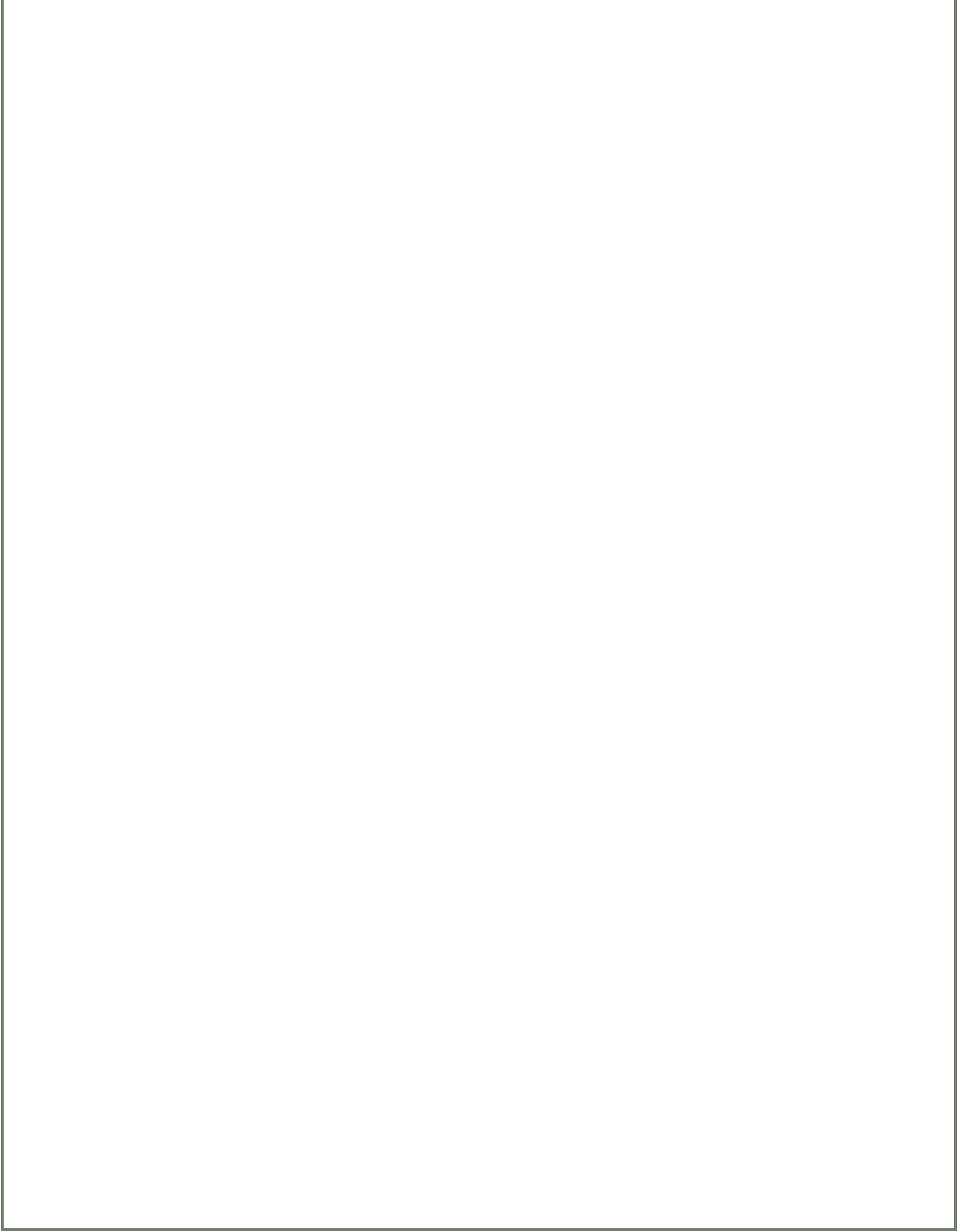
**Broaden Communication and Outreach in Rural Communities**

Detailed action plans are found in the Appendix titled “Strategic Goal Management”, which include goal objectives, ownership, metrics, justification, and timelines.

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2016 Strategic Plan

# Key Work Processes



Key Work Processes are the most important operational systems and processes. They are the processes that involve the majority of RRCI’s workforce. It is important to include these processes in the Strategic Plan to help us understand the primary tools we will use each day to accomplish our Strategic Goals and move closer to our Vision. RRCI has identified the following Key Work Systems:

##### Funding

* **Service**
* **Training**

Our processes must be optimized if we are to achieve our strategic goals on time and on budget. In the same manner we allocate funding and resources to Strategic Goals, our Key Work Processes require the same attention. Our operation is driven by people and processes.

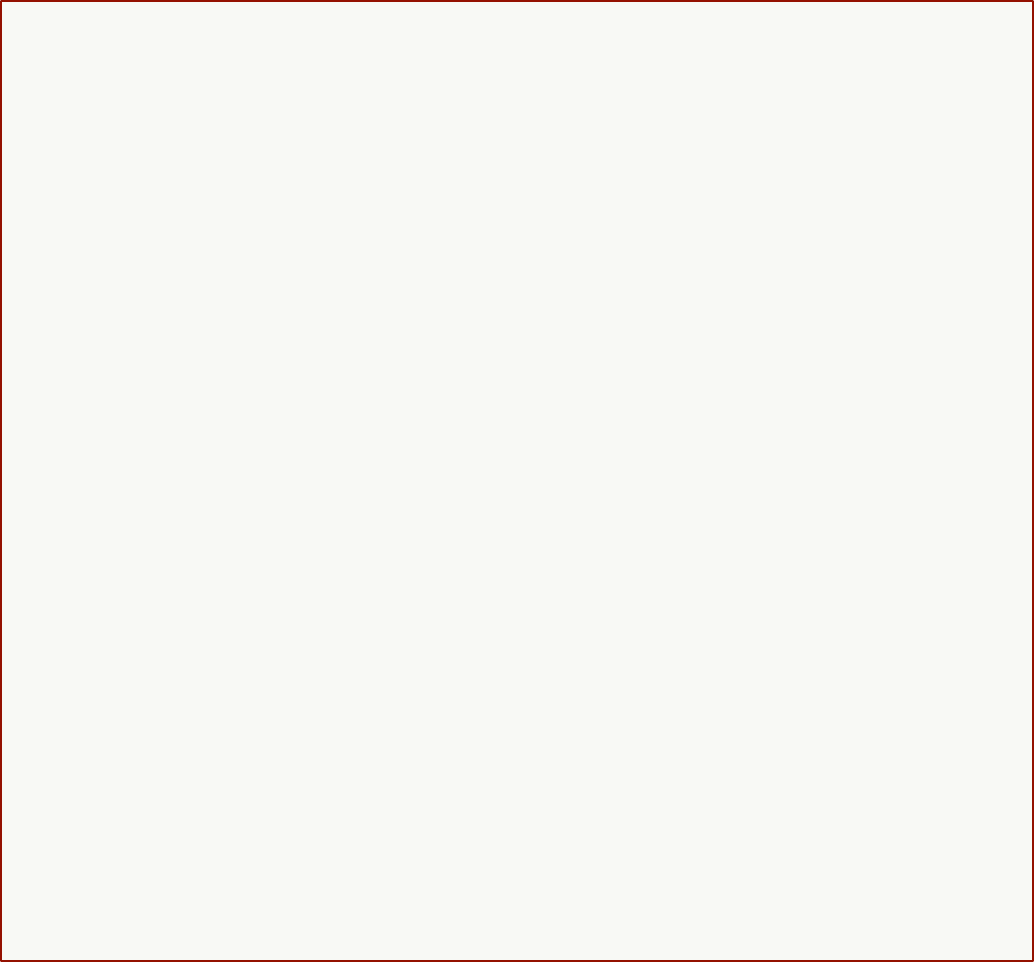
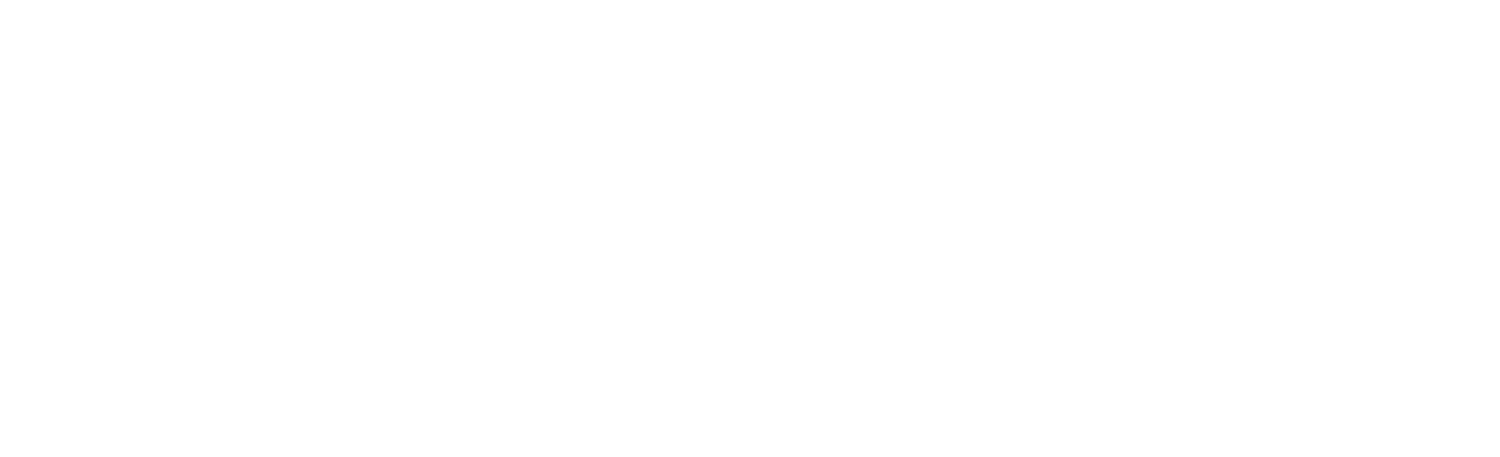
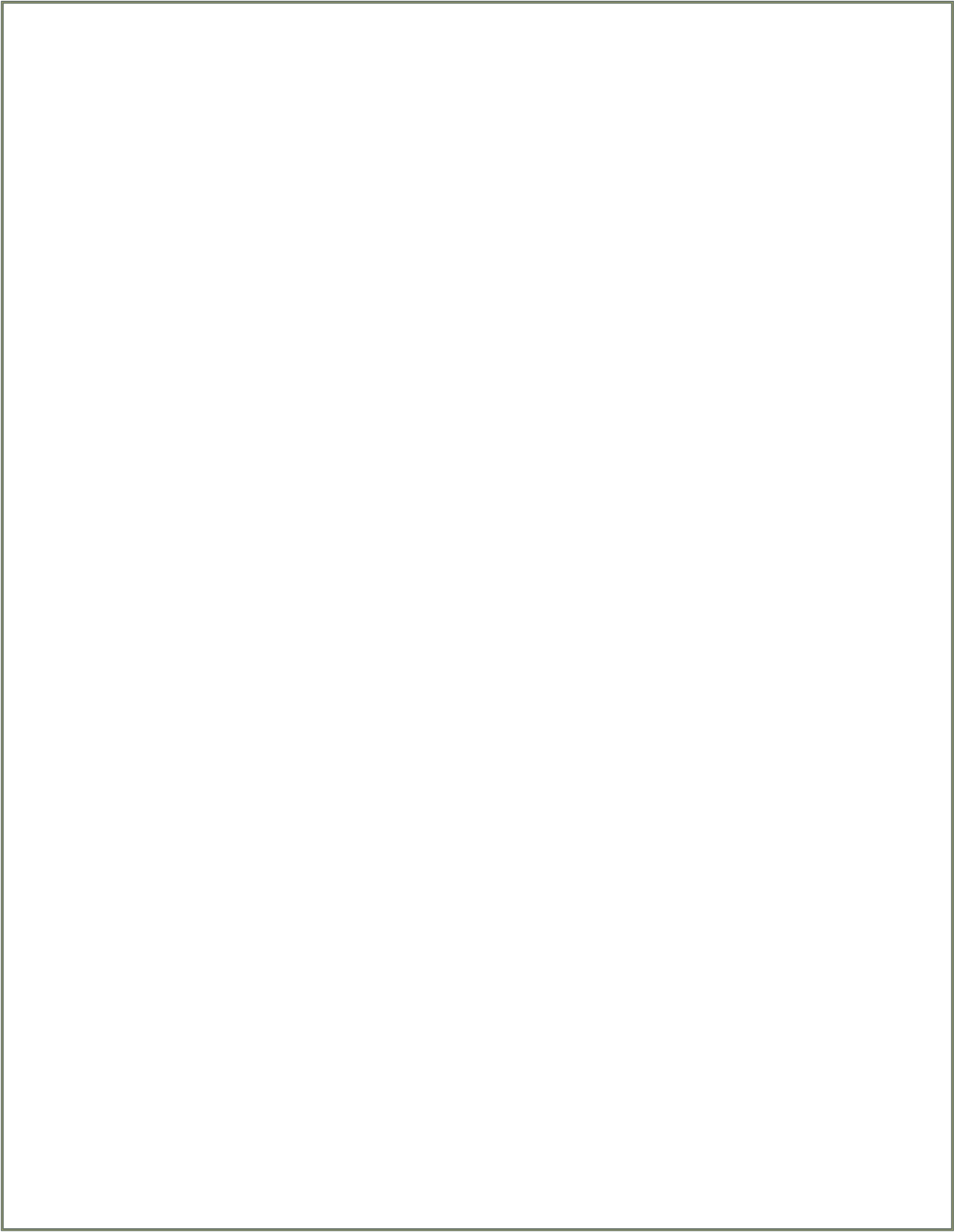
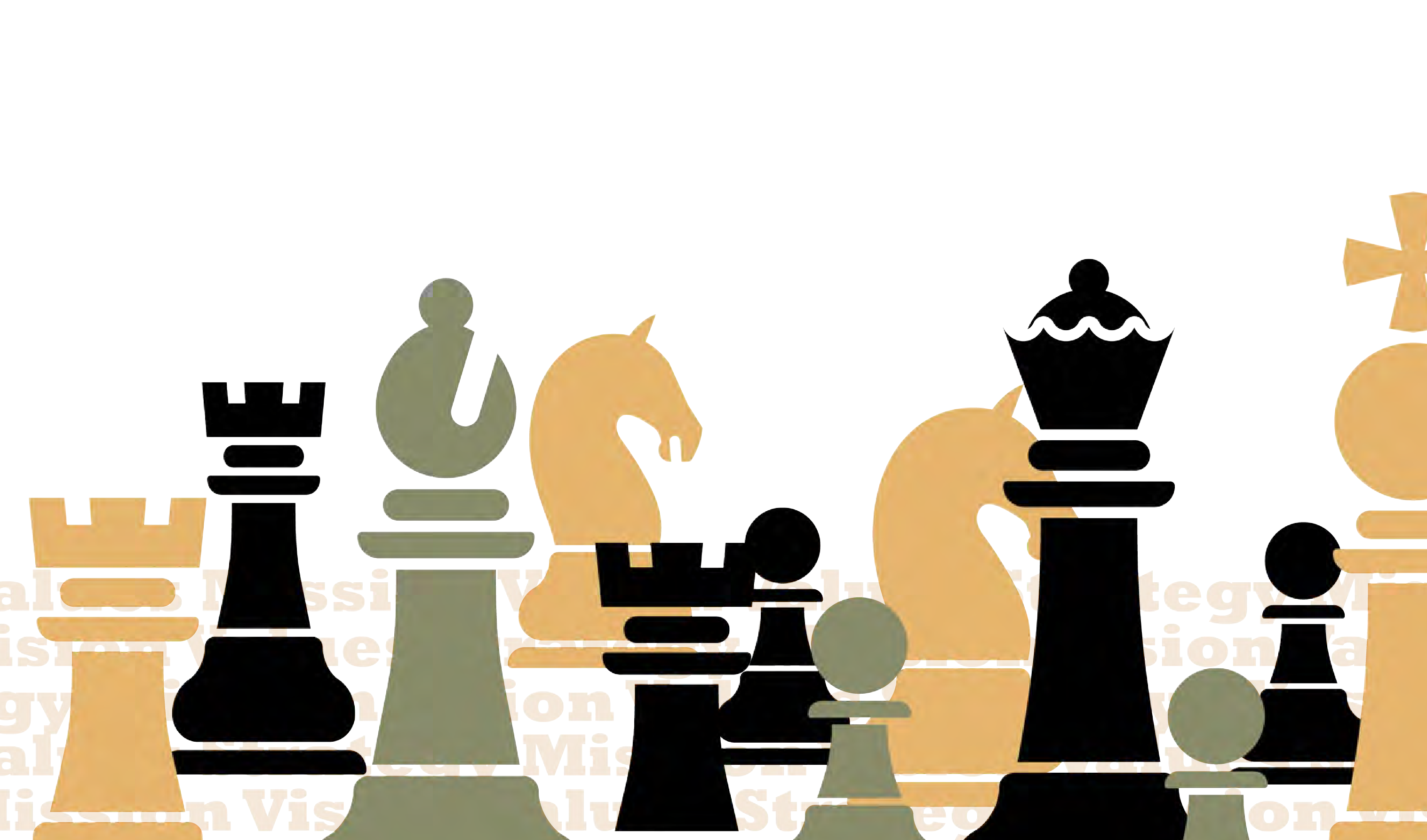
The owners of each of our processes are the experts we rely upon to ensure we are properly maintaining the systems in our operation with continuous process improvement methodologies.

To effectively manage continuous process improvement methodologies, each process should be assigned an owner, with the responsibility of monitoring and improving the process.

14

2016 Strategic Plan

# Summary



The vision of our desired future is clear. *Red Rock Center for Independence envisions individuals with disabilities in southwestern Utah will achieve their maximum level of independence with full inclusion across all environments.*

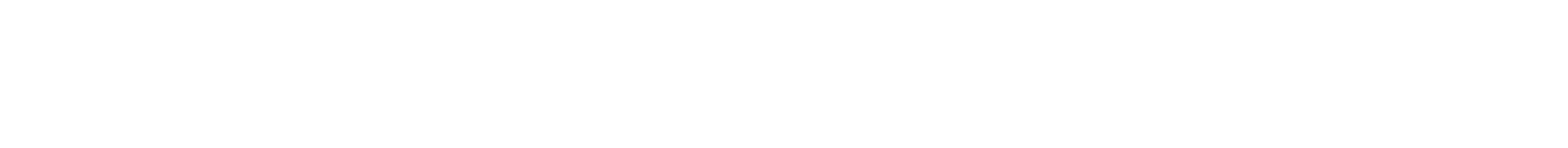
We have identified a set of Strategic Goals to move us closer to our Vision. Our Strategic Goals are:

* Funding our Future
* Regulatory Compliance Strategies
* Volunteer Program
* Connections
* Strengthen Outreach in Rural Communities

As we pursue our Vision and Strategic Goals, we are guided by our Mission *to empower people with disabilities in southwestern Utah to live independently through education, personalized services, and technology,* and by our Values of Dedication, Consumer-Focused Services, Community Relations, and Individual Rights.

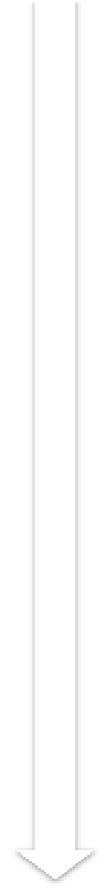
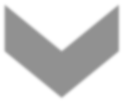
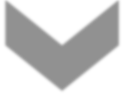
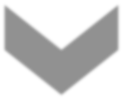
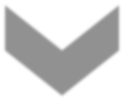
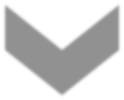
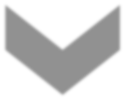
Our Strategic Plan is a roadmap to RRCI’s success.

### 15



**Business Alignment Model**

Vision Mission Values



Strategic Foundation

Regulatory Geographic Funding Volunteers

Strategic Environment

Loan Bank Connections People Commitment

Core

Competencies

Organizational Performance Loan Bank Utilization 704 Metrics

Critical Success Factors

Strategic Goals

Funding Compliance Volunteers Connections Outreach

Funding Service Training

Key Work Processes

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **Strategic Goal Management** | | | | | | | |
| **Title:** | **Goal #1: Funding Development** | | | | | | |
| **Objective:** | The objective of this goal is to research fee for service models and develop a business plan to implement a program with the most potential for return on investment. The board is responsible to develop fundraising strategies to fund our reserve account to support operations for at least two months for contingency planning. | | | | | | |
| **Start Date:** | January 1, 2016 | | **Target Date:** | December 31, 2018 | | | |
| **Champions:** | Barb | | Board Member (TBD) | | Brenda | | |
| **Metrics, Measurements, and Tracking:** | Metric 1: Present fee for service opportunities to the board April 2016 and strategize timeline for business plan | | | | | | |
| Metric 2: Develop a fundraising strategy and timeline | | | | | | |
| Metric 3: Develop a one month reserve, approximately $60,000 by December 2017 | | | | | | |
| Metric 4: Develop an additional one month reserve of approximately $60,000 by December 2018 | | | | | | |
| **How will this goal help us achieve our Vision?** | | | | | | | |
| If we are driven to maximize our consumers' independence, then it is fitting that we seek to establish our own financial independence. | | | | | | | |
| **Are there any specific resources required for this goal?** | | | | | | | |
| A considerable amount of Executive Director's and Board of Director's time is expected to successfully accomplish this goal. | | | | | | | |
| **Notes** | | | | | | | |
| A systematic process to filter and manage potential fundraising opportunities could increase RRCI's fundraising efficiency. | | | | | | | |
| **Action Plans** | | | | | | | |
| **Start Date** | **Due Date** | **Description** | | | | **Owner** | **x** |
| Jan-16 | Apr-16 | Report on fee for service model and potential business plan timeline | | | | Barb |  |
| Feb-16 | Mar-16 | Development committee to make fundraising recommendations to board | | | | DC |  |
| Apr-16 | Ongoing | Execute timeline for fund development strategies | | | | DC |  |
| Mar-16 | Sep-16 | Develop a budget and strategy to fund commination's in Goal 5 - Rural | | | | DC/Rhonda |  |
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| **Strategic Goal Management** | | | | | | | |
| **Title:** | **Goal 2: Regulatory Compliance Strategy** | | | | | | |
| **Objective:** | The objective of this goal is to ensure compliance issues, identified to be of strategic importance to RRCI, are addressed in a timely and sufficient manner. | | | | | | |
| **Start Date:** | January 1, 2016 | | **Target Date:** | December 31, 2018 | | | |
| **Champions:** | Barb | | Lester | | Tim | | |
| **Metrics, Measurements, and Tracking:** | Metric 1: Establish criteria to determine which compliance issues will become part of this strategy. | | | | | | |
| Metric 2: Create systematic process to manage strategic compliance issues. | | | | | | |
| Metric 3: Set target dates for completion of first action items: Board Development, Outcome Reporting, 704 Reporting. | | | | | | |
| **How will this goal help us achieve our Vision?** | | | | | | | |
| Minimizing regulatory burdens and restrictions will free valuable resources to allocate to services and programs. | | | | | | | |
| **Are there any specific resources required for this goal?** | | | | | | | |
|  | | | | | | | |
| **Notes** | | | | | | | |
| This goal has been established to manage a current and expected review of ongoing regulatory compliance matters more effectively. | | | | | | | |
| **Action Plans** | | | | | | | |
| **Start Date** | **Due Date** | **Description** | | | | **Owner** | **x** |
| Jan-16 | May-16 | Establish triage criteria to assess strategic level of compliance issues. | | | | Barb |  |
| Jun-16 | July | Create processes to manage compliance matters in a systematic manner. | | | | Lester |  |
| Jul-16 | Ongoing | Establish project plan (using new process) to address Board Development. | | | | Lester |  |
| Aug-16 | Ongoing | Establish project plan (using new process) to address Outcome Reporting. | | | | Tim |  |
| Sep-16 | Ongoing | Establish project plan (using new process) to address 704 Reporting. | | | | Barb |  |
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| **Strategic Goal Management** | | | | | | | |
| **Title:** | **Goal 3: Volunteer Program** | | | | | | |
| **Objective:** | The object of this goal is to develop a volunteer program for consumer support. | | | | | | |
| **Start Date:** | January 1, 2016 | | **Target Date:** | December 1, 2018 | | | |
| **Champions:** | Barb | | Ian and Lester | | Brenda | | |
| **Metrics, Measurements, and Tracking:** | Metric 1: Research and develop volunteer support program | | | | | | |
| Metric 2: Identify funding sources and program manager | | | | | | |
| Metric 3: Identify volunteers and implement program | | | | | | |
| **How will this goal help us achieve our Vision?** | | | | | | | |
| An effective volunteer program positively impacts funding, education, resource availability, and participation in programs and services. | | | | | | | |
| **Are there any specific resources required for this goal?** | | | | | | | |
| The management of resources and establishment of realistic assignments is critical to the accomplishment of this goal. | | | | | | | |
| **Notes** | | | | | | | |
|  | | | | | | | |
| **Action Plans** | | | | | | | |
| **Start Date** | **Due Date** | **Description** | | | | **Owner** | **x** |
| Jan-16 | Mar-16 | Report to board regarding volunteer support model | | | | Ian |  |
| Apr-16 | Jul-16 | Have funding sources and program manager identified | | | | Barb |  |
| Jul-16 | Ongoing | Implement volunteer support program | | | | Barb/Brenda |  |
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| **Strategic Goal Management** | | | | | | | |
| **Title:** | **Goal 4: Connections** | | | | | | |
| **Objective:** | The objective of this goal is to increase community awareness and engagement among community leaders, business leaders, and media. | | | | | | |
| **Start Date:** | January 1, 2016 | | **Target Date:** | December 1, 2018 | | | |
| **Champions:** | Barb | | Board Member | | Jamie | | |
| **Metrics, Measurements, and Tracking:** | Metric 1: Develop criteria for desired awareness and engagement. | | | | | | |
| Metric 2: Develop process to build relationships. | | | | | | |
| Metric 3: Establish and track success metrics for goal. | | | | | | |
| **How will this goal help us achieve our Vision?** | | | | | | | |
| Improved strategic partnerships and brand awareness. | | | | | | | |
| **Are there any specific resources required for this goal?** | | | | | | | |
|  | | | | | | | |
| **Notes** | | | | | | | |
| Resources should be spent on natural and meaningful connections. Stakeholder roles (i.e. Board, Staff) need to be determined and understood. | | | | | | | |
| **Action Plans** | | | | | | | |
| **Start Date** | **Due Date** | **Description** | | | | **Owner** | **x** |
| Feb-16 | Aug-16 | Develop criteria for community awareness. | | | |  |  |
| Feb-16 | Aug-16 | Establish connection success metrics. | | | |  |  |
| Feb-16 | Aug-16 | Develop processes to prioritize and establish new and retain existing connections | | | |  |  |
| Sep-16 | Ongoing | Implement and monitor metrics for community engagement | | | |  |  |
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| **Strategic Goal Management** | | | | | | | |
| **Title:** | **Goal 5: Broaden Communication and Outreach in Rural Communities** | | | | | | |
| **Objective:** | The objective of this goal is to minimize the impact of geographical barriers in the area we serve. | | | | | | |
| **Start Date:** | January 1, 2016 | | **Target Date:** | December 31, 2017 | | | |
| **Champions:** | Barb | | Board Member (TBD) | | Rhonda | | |
| **Metrics, Measurements, and Tracking:** | Metric 1: Identify viable communication systems | | | | | | |
| Metric 2: Fund, purchase , and implement selected communication system | | | | | | |
| Metric 3: Recruit board members from rural service areas | | | | | | |
| **How will this goal help us achieve our Vision?** | | | | | | | |
| Improved ability to serve all of our consumers, regardless of their geographic location. | | | | | | | |
| **Are there any specific resources required for this goal?** | | | | | | | |
| Integrate with funding strategies in Goal 1-Funding Development | | | | | | | |
| **Notes** | | | | | | | |
| There may be individualized strategies for each rural community. | | | | | | | |
| **Action Plans** | | | | | | | |
| **Start Date** | **Due Date** | **Description** | | | | **Owner** | **x** |
| Feb-16 | Mar-16 | Research available technologies for remote meetings. | | | | Rhonda |  |
| Mar-16 | Sep-16 | Establish a funding goal to be supported by Goal 1 - Funding Development | | | | DC |  |
| Oct-16 | Mar-17 | Communication system funded and purchased | | | | DC/Barb |  |
| Apr-17 | Ongoing | Recruit board members from rural serve areas | | | | Nominate Comm |  |
|  |  |  | | | |  |  |
|  |  |  | | | |  |  |

