

STRATEGIC PLAN

APRIL 2022 - SEPTEMBER 2023



Strategic Planning Summary

Pioneer Resources | TBD Solutions | March 2022

Between December 2021 through March 2022, Pioneer Resources engaged in a strategic planning process to guide its strategic direction until October 2023. Through the strategic planning process and in collaboration with TBD Solutions, the Strategic Planning Leadership Team discussed organizational dreams, operational assets and vulnerabilities, feedback from an environmental scan, and insights from key stakeholder interviews. This report is the product of those strategic planning activities and includes:

- Draft Focus Areas, Goals, and Objectives as outlined by the leadership team
- Findings from the environmental scan and stakeholder interviews
- Priorities for Action as outlined by the leadership team

The Comprehensive Strategic Plan Example, provided as a companion document to this report, lists several considerations for refining and implementing a strategic plan.

Strategic Planning Process

To get a baseline understanding of the organization's operations, TBD Solutions conducted an environmental scan and stakeholder interviews. The goal of both was to understand more about the organization's assets and vulnerabilities. The organization was assessed on the 14 key domains of operation.

Then, the Pioneer Resources' Strategic Planning Leadership conducted three Strategic Dialogs to discuss environmental scan and stakeholder interview results; reflect on themes in discussions; and brainstorm, document, and prioritize organizational goals. During the Strategic Planning process, the Strategic Planning Leadership team considered the current and ideal state of the organization's operations.

Expectations and Needs of Persons Served
Expectations and Feedback from Staff
Community Needs
Regulatory & Legislative
Clinical/Service Initiatives
Competitive Environment
Finance
Capital Resources
Human Resources
Technology
Training and Evidence-Based Practices
Relationships with External Stakeholders
Community Awareness and Perception
Other Areas as Identified by Pioneer

Environmental Scan Findings

The environmental scan was informed by stakeholder interviews and a review of key documentation including:



- Financial reports
- Outcomes reports
- Meeting minutes
- Web pages
- Brochures
- Previous strategic planning materials
- Exit interview summaries
- Community relations reports

For a full summary on stakeholder interview process, see [Appendix A](#). Each domain was examined through a Strength, Weaknesses, Opportunities, and Threats Analysis (SWOT Analysis). Through this process, two assets and three vulnerabilities emerged and were discussed with the Strategic Planning Leadership team. The findings from the environmental scan were used to engage additional dialog, understand more about the organization's operations, and discuss ideas and suggestions for the future. Pioneer Resources is aware of its strengths and weaknesses and, in many areas, has an existing plan to address each.

Assets

Financial and Capital Resources and Relationships with External Stakeholders were identified as the organization's assets and protective factors to internal and external threats.

Financial and Capital Resources. The state of Pioneer Resources' finances and capital resources as well as its evident fiduciary responsibility puts the organization at an advantage as a provider. The organization seemed to have enough cash on hand to cover 90+ days of expenditures, it owns the homes it utilizes for services, and it has investments in place. The organization does have vulnerabilities in the amount of depreciation it has in its properties and homes.

Key stakeholders reported that Pioneer Resources has established a financial position of strength. With its financial stability, some key stakeholders hope to see the organization invest in- and take the lead on new programming options.

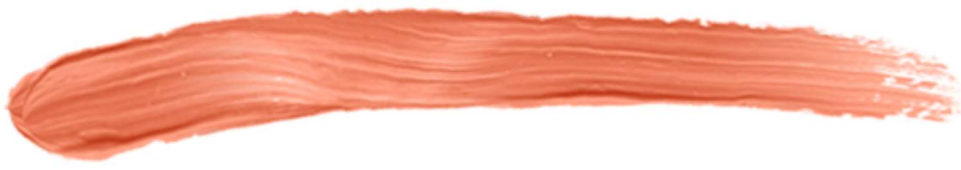
"They are good partners, they always come to the table... we would like to see new innovative proposals for Pioneer."

Relationships with External Stakeholders. It was evident in the environmental scan and in stakeholder interviews that Pioneer Resources has excellent relationships with community stakeholders. They have both long-term engagements and are building new relationships in the community. The organizations relationships with its stakeholders are a result of its rich history and collaborative approach.

Key stakeholders reported that Pioneer Resources is a strong collaborator. They felt the organization has a good reputation and would be trusted in any leadership role it wished to take.

Vulnerabilities

Human Resources, Community Awareness, and Programs and Clinical Initiatives were identified as the three potential vulnerabilities to the organization. Much of the concerns or gaps found in these areas was due to external threats and changes in environment that could put the organization at risk.



Human Resources. At the time of the environmental scan, nearly every industry was experiencing a staffing shortage that impacted organizations' ability to recruit and maintain staff. Pioneer Resources faces steep competition for staff that are most likely shared between provider organizations and even among other industries. The organization may need to assess how its competitors are hiring, paying, and retaining their staff and nimbly adjust its practices, as necessary.

Pioneer Resources, per key stakeholders, has staff that are committed to person-centered care and the mission of the organization.

"I am not sure there is anything they can do about it, but they need to pay staff better and give them more training."

Community Awareness. Pioneer Resources has an incredible story to tell and may need to consider how it markets and brands itself in the community. Not all provider organizations have such a rich history and deep roots in a community. Pioneer Resources can use its story and history

"Pioneer is a strong collaborator, they need to get the story of Pioneer out there... More about the mission, making sure the whole mission is known."

as a tool to market itself without losing focus on the mission. Stakeholders reported Pioneer Resources is known for its buses, although the organization has a large service array in addition to transportation.

Programs and Clinical Initiatives. Pioneer Resources offers value to the community in its commitment to offer a place to live, a place to grow and play, a place to learn, and a way to get there. With a shift in competitive environments for nearly all service and support providers, there is a push for providers to demonstrate the effectiveness and cost-efficiency of their services. It is imperative Pioneer Resources is equipped with the financial tools and negotiation abilities to leverage its value to the benefit of people served, contracting agencies, and collaborative relationships. This may require the organization to evaluate the cost and community benefit of each of its services and how it should shift to meet the everchanging needs of the people they serve.

Key stakeholders reported Pioneer Resources is a ready and willing partner. They have rapport with the community and can step into leadership and visionary roles, as it sees fit.

"We need Pioneer to come to the table as a leader and offer more innovative solutions and programming... They need to consider implications of a value-based-purchasing model, it is coming in the future."

Draft Focus Areas, Goals, and Objectives

Focus Areas

Focus Areas should be short statements about where the organization would like to concentrate its efforts for the duration of the strategic plan. They should be broad enough to encompass the organization's Goals, yet centered on what is truly important to the organization and its vision. The Goals under each Focus Area should aptly describe how Pioneer Resources will fulfill its Focus Area. Focus Areas should be "We Are..." statements. Over the course of three Strategic Dialog



sessions and as informed by the environmental scan, Pioneer Resources Strategic Planning Leadership team drafted four Focus Areas: Known in the Community, An Employer of Choice, A Quality Provider, and Responsible Financial Stewards.

Goals and Objectives

Each Focus Area has Goals that support it. Goals should be “We Will...” statements. They should be activities that the organization wants to complete with or without the support of smaller Objectives. Goals and their Objectives should be accompanied by additional details that outline how the Goal will be tracked, documented, implemented, and completed. Each organization outlines these details differently. However, at minimum Goals and Objectives should have deadlines, assigned staff, and a process for reporting progress to the board of directors.

Pioneer Resources’ Strategic Planning Leadership team drafted its goals and several of the subsequent Objectives. Goals are documented below next to their Focus Areas. A full list of Objectives identified by the Strategic Planning Leadership team can be found in [Appendix B](#) and includes objectives identified as ongoing priorities from previous planning efforts.

We Are...

We Will...

<p>KNOWN IN THE COMMUNITY</p>	<p>Engage new community partners</p>	<p>Refresh/review organizational brand</p>		
<p>AN EMPLOYER OF CHOICE</p>	<p>Retain staff</p>	<p>Diversity recruiting</p>	<p>Improve hiring portal on website</p>	<p>Enhance hiring practices</p>
<p>A QUALITY PROVIDER</p>	<p>Enhance training</p>	<p>Evaluate wage scale</p>	<p>Research staff support</p>	
<p>RESPONSIBLE FINANCIAL STEWARDS</p>	<p>Use data to demonstrate quality of life outcomes</p>	<p>Improve staff training</p>	<p>Expand service array</p>	<p>Create efficiencies</p>
	<p>Diversify funding</p>	<p>Improve fund development</p>		



Priority and Direction

After identifying Focus Areas, Goals, and Objectives, the Strategic Planning Leadership Team was invited to prioritize. Each Goal and Objective was reviewed and tagged by if it should be pursued “Now” or “Later” or if it should be “Let Go.”

“Now” Goals

Five Goals were tagged as ones to pursue right away and all five were a part of two Focus Areas, Known in the Community and Employer of Choice. The “Now” Goals include Engage New Community Partners, Refresh/Review Organizational Brand, Retain Staff, Evaluate Wage Scale, and Research Staff Support. All other Goals were untagged.

Engage New Community Partners

Refresh/Review Organizational Brand

Retain Staff

Evaluate Wage Scale

Research Staff Support

Several Objectives were tagged as “Later” and include Facilitate Autism Family Training, Identify Funding Sources for CDL Training, and Merge/Acquisition with Other Non-Profits.

Please see the five main goal categories below. Appendix B will represent the objectives and timelines.

KNOWN IN THE COMMUNITY

AN EMPLOYER OF CHOICE

A QUALITY PROVIDER

RESPONSIBLE FINANCIAL STEWARDS

RESPONSIBLE ORGANIZATION TO THE ENVIRONMENT



Next Steps

As Pioneer Resources finalizes its Strategic Plan, it should consider how it will amalgamate the information collected during the strategic planning process to make the plan focused, measurable, achievable, and true to Pioneer Resources' mission. Each organization's plan is unique to their desired goals and systems for reporting on progress. The Strategic Planning Leadership team may want to:

- **Make the plan achievable** by focusing on goals that can reasonably be achieved in 18 months.
- **Define the plan** and its project timelines, due dates, and assignments.
- **Format the plan** in a way that is easy to review, track, and report on updates and barriers.
- **Set measures of success** by defining Key Performance Indicators.
- **Make the reporting process straight forward** by setting expectations and timelines for reporting to leadership team and the board.
- **Ensure equity in responsibility** by reviewing the balance of goal assignment and ensuring goals are fairly distributed among team members.
- **Balance the plan** with new and ongoing initiatives.
- **Make the plan living** by incorporating parts of it into agendas, organizational communications, and staff progress reports/evaluations.



Appendix A: Stakeholder Interview Details

Methods

Key stakeholders were identified by the Strategic Planning Leadership team and were engaged by TBD Solutions via email and/or phone contacts. Interviews took place over the phone or through a teleconference platform (Microsoft Teams). Interviews were conducted individually or in small groups of three or less. Each interview took between 30-45 minutes. The 13 of interviewees represented five¹ collaborating organizations, board members, and people served.

Each interview was informed by the interview guide, but the primary goal was to conversationally engage stakeholders and their perspectives on Pioneer Resources. The interview guide included the following questions:

1. **CONTEXT:** Tell me about yourself and your experience with Pioneer Resources.
 - a. What Pioneer Resources programs have you worked with or heard about?
 - b. Are you aware of all of the services Pioneer Resources Provides?
2. **SATISFACTION:** What are the best parts about Pioneer Resources? How do their services benefit the people served and families?
3. **GAPS/PAIN POINTS:** What are the top three things you would change about Pioneer Resources?
4. **REPUTATION:** What is Pioneer Resources most well-known for? How does Pioneer Resources stand out from other providers or what do you think makes them unique?
5. **FUTURE:** Imagine Pioneer Resources in five years. Imagine they are doing so well and are operating better than they ever have.
 - a. Describe what Pioneer Resources looks like.
 - b. What are they offering to the community?
 - c. Who are they collaborating with?
 - d. What is different?
 - e. **What will be the biggest barrier to that vision?**
6. **MISC:** Is there anything we did not discuss today about Pioneer Resources that you think would be helpful for me or the team to know?

¹ Several interviewees represented both the Board of Directors and a collaborating organization.

Appendix B

March 2022 through September 2023 Strategic Plan

Vision	Focus Areas	Goals	define steps	Projects	KPI
	We Are...	We Will...		We use... to get it done	We will know we are successful when...
	Known in the Community	Engage new community partners	Work with County of Muskegon on Mats	meetings with consultants	the needs of the community have been addressed
			Work with Shoreline Regional Development Commission	Meeting held with Erin Kuhn on 3-18-22 and further communication will be facilitated	When Pioneer Resources is able to facilitate better relationship with Shoreline Regional development commission and work with them to determine further collaboration on transportation opportunities.
			1. Add Mercy Health Partnership 2. United Way support	1. spoke with Cory and he is working on Trinity Health Muskegon (new name) Rachel to schedule meeting with representative from Trinity Health 2. Coordinating a time to present to United Way staff about the Services Pioneer Resources provide, Be engaged in the grant request funding rounds 3. Hold open house through Muskegon Chamber at Wesley after all renovations	1. When we have received sponsorship from Trinity Health Muskegon 2. When completed presentation & grant application 3. When community is invited to learn about our services through an open house.
			Add Other community partners	meetings with Ottawa County CMH discussions with Senior Resources	when we are able to provide services to utilize JARC grant
		Refresh organizational brand	update website	We will submit needs to Finline on updating the website and commit financial support in which to do so.	focus on one of the four areas on website each month starting in April 2022 to begin the process of updating pictures / content
			update marketing materials	Karen and Leslie are updating these internally.	update each area and only print limited numbers but have available on the website for print on demand. Create each in line with the website updates for the once a month for specific areas.
			update social media	karen	continue to keep programs highlighted and information to represent the areas of service
	Utilize buses as a "moving billboard" and list all program/services	when we have new logos on the buses	continue to add to new buses as they are purchased and commit financial support to get on some of the older vehicles		
	An Employer of Choice	Be an employer that is appreciated by its employees	Retain staff	we will utilize our staff retention, exit interviews and employee surveys for input on this (last fy retention rate was 47.3%)	1. Continually assess wages to assure market comparability 2. Educate staff on benefit information (value of this, how they can assist in providing reduced costs, price shopping (hospitals and services) and telehealth 3. Budget for, and plan staff recognition and gathering events.
			Enhance hiring practices	Improve hiring portal on website	1. When we have a pop up on the website that states "open positions" as soon as they go to website 2. On careers page list some of our most common job postings and they can submit resume to an email to allow them to quickly "apply". 3. Add a video about programs and services so they can see what the job is.
			Evaluate wage scale	We utilize the Mich Non profit annual salary and benefit survey due out spring 2022 to assure competitive wages	We will present a wage scale to the Personnel committee Ongoing analysis of applicable wages as market opportunities occur.
			Inquire on other means of financial support (debt payoff or student loan payoff)	inquire as to other organizations/ businesses that offer this and review their policies/ procedures	Determine how much funding the agency can put towards this support, the criteria in which employees are eligible and how to facilitate this program
			Assess staff's perceptions on the organization's atmosphere	Holly attend meetings with each dept and provide a survey	Information from survey to develop focus areas for the engagement committee to create goals
			honor diversity	Follow goals in DEI plan	measure results from original survey comparative to a secondary one. (budget for this item)

To help people with disabilities and seniors attain independence and dignity by creating opportunities for participation in the community. People in pursuit of a place to live, a place to learn, a place to grow and play, and a way to get there.		Be an employer that supports employees in all areas of their life	Provide support, guidance and referrals to all employees to ensure their basic needs are being met (social worker, child care, transportation, PTO gifting)	1. Include survey questions when Holly meets with staff to find out needs of staff. 2. Ask staff monthly to determine if there is a more challenging timeframe and focus positive engagement during these challenging times.	1. Assess a position, cost of position and or supports to meet needs recognized in the survey. 2. complete survey 12 times year (very simple) build in incentives during challenging times.	
				Assess viability of PTO gifting policy with Director team	When we have assess rules, create policy and implemented	
	A Quality Provider	Create efficiencies		Create efficient office process and use of space	Development of office plans	Work with architects and in planning of new spaces
				Out of all required standards of CARF, the organization will meet no develop consistent finance practices and procedures	We created an assignment list and each program / service area will place build efficiencies in both the FE system and the utilization of the new	When we receive the CARF report and can measure that we have met 90% or more of standards this is an ongoing process
				New electronic Health Record implementation	financial commitment in budget and implement a new electronic health record by Oct 1, 2022	we have a new system starting on Oct 1, 2022 and can utilize it to gather participant data
		Use data to demonstrate quality of life outcomes		Advocate for agency/ program specific supports coordinators	develop meetings with HW to define why this is key to our service success	by July 2023 we will have 50% of supports coordinator for agency specific/ home specific.
				Assure PCP goals include meaningful, measureable goals that show key data towards quality of life	1. making Pioneer Resources staff are engaged in each PCP. 2. advocating for the measureables in the goal	when we have PCP goals and documentoin that are able demonstrate quality of life outcomes
		Improve staff training		Pioneer Resources will provide a professional data driven 6 month review to supports coordinators for each individual receiving services	1. Having each program have supervisor, or staff present at each PCP meeting. 2. work with supports coordinators to assure the goals are measureable and can be ducmented to provide meaningful data on life outcomes	This can be measured by each program director reviewing at least 5 goals per month to assure they meet the project criteria
				create an additional contracted service for group CLS for those with higher ratio participant to staff needs.	contact Healthwest to add to current contract.	when this new contractual rate is added and services defined
				1. provide a training on customer service to all employees that engage with public, clinical teams and families of persons served. 2. Provide a training on documentation for all employees who will be required to document in the new electronic health record	Internal or external sources will be utilized to provide this training	1. to have all training for customer service done April 2023. 2. training on electronic health system and importance of documentation
Expand service array			assess opportunity for day services for seniors inside CC	1. Contact Pace to determine if there is a need 2. inquire with insurance on this	when we are able to add seniors to our services and bill for them.	
			Assess other transportation opportunities from community needs	continue to attend community and regional meetings and review community needs assessment to coordinate new services	when we have met a community outstanding need for transportation	
Diversify funding		Increase grants	Apply for 4 new grant applications that have not been applied for	In our monthly goal reviews monitoring grant applications.		
		increase planned legacy giving awareness	Host a learning opportunity in community on planned legacy giving	Upon successful collaboration of a planned legacy gift.		
		funding source for CDL training if we offer this as a vocational service	Determine if MRS would support CDL learning certification from Pioneer Resources trainer	If we were able to support individuals in receiving this certification and gain revenue from this supportive training		
		establish a cost of care for current services	create per unit cost matrix by program in order to utilize this information for contract negotiations and establish funding needs.	1. Establish per unit measure by program - most are already defined by how we bill 2. Document expense an allocation standards - current procedures put to (virtual) paper 3. Presentation - define how these costs are presented, reported, stored (can FE do what we want with this? Do we		
		Apply for additional services (Senior Resources, MATS, Public Health, municipalities)	1. letter of intent submitted to Senior Resources for Transportation 2. engage with County and Regional Development Commission to see if MATS can be supported through PR 3. engage with Public health for continued needs. 4. engage PACE of providing additional day program services for seniors.	We will know we are successful when we have engaged in these additional services.		

Responsible Financial Stewards	Improve fund development	Advocate for adequate funding and increase community awareness of this need	1.Continue to be a member of MALA, Incompass MI and multiple coalitions to support appropriate funding, appropriate wage and professionalism of DSP. 2. Provide community opportunities to learn about the funding gap 3. engage with legislators at least 2 times a year to educate on our services and discuss the funding gap.	when we have achieved the adequate funding, wages and professional certifications.
		collaborate with Autism Alliance on advocacy for ABA funding	Sharon will meet quarterly with the AA	ensure our agency is engaged in this process.
		Engage corporate partners in community	To increase annual sponsorships over 2022 by \$25,000	2023 sponsorships will be increased by \$25,000
	Strengthen our agency financial stability	Assess mergers/ acquisitions of other non profit organizations.	Meetings with local providers to assess strategies and benefits of collaborations.	When it is determined that best practice and positive outcomes would define it beneficial to merge with other providers
		Create Financial dashboards	create visual dashboards to aid program directors, managers, and others see the financial measures that are most important to them "at a glance"	1. Determine who needs financial dashboard viewing. 2. Meet with those identified above to define their financial dashboard needs. 3. Make policy/procedure and FE updates so dashboard functions as desired 4. Roll out dashboards.
		Establish Medical billing and define process for this internally	Sharon to share monthly with Finance the billing sent to blue cross and blue shield	when we have billing to BCBS that is submitted 30 days or less from service.
		Develop an endowment fund based on needs of services	create an endowment fund in order to diversify income streams, provide, and build support for the agencies programs outside of service contracts.	1. Finalize Wesley Project(s) and review strategic reserve funding levels. 2. Decide on funding rules (when do we add, when do we allow withdrawals, do we only draw on interest or do we allow principal withdrawals, more than one endowment?) 3. Review and decide on endowment partner (UBS/Community Foundation/Other) 4. Fund it! 5. Incorporate endowment into marketing/ fundraising initiatives
	Be a Responsible organization to the environment	Be a safe, healthy and sustainable business in our community	Create policy on use of paper vs electronic	we want to assure to be a environmentally friendly organization
Develop a property management sustainability plan			look at key areas in other examples of sustainability plans, inquire with other providers/ businesses if they have a property sustainability plan for resources	completed plan in place and ready to implement
have Fleet manager attend learning opportunities on feasibility of electric vehicles for fleet			Jack will attend trainings, seminars to learn more about use of electric vhecles in our MDOT fleet	when we have electric vehicles utilized at our residential group homes
Add electric charger for vehicles to all sites			Connecting with Rich at Consumers to gather information on this goal	To have a plan to fund and install electric charger stations at each site
assess solar energy for organizational sites (have the residential homes assessed by consumers or DTE)			1. Dave will coordinate an assessment by a representative of Consumers or DTE at each Pioneer Resources site to assess more more efficeint and efficitive uses. 2. Dave will have solar power companies provide quotes for the residential sites and work with Rachel on any available grants for this.	When we can be a better and more sustainable business