



Five-year Strategic Plan Document
March 2017

STRATEGIC CONTEXT

Sertoma Centre continues to grow and expand services that empower individuals with disabilities to achieve personal success. The consumers inspire everything we do. The next phase of Sertoma Centre will build and expand on the close-knit community we have built with consumers.

Our Mission and Vision continue to guide us. In this five-year Strategic Plan we felt a new call to action to broaden the impact of what Sertoma Centre does by taking the lead in substantially evolving our services. We will more deeply embed our work in the communities where consumers live and work. Ongoing shifts in public policy affecting individuals with developmental disabilities and mental illness provide the framework and Sertoma Centre will provide the structure, programs, employment opportunities, and other services that will enable consumers to become even more productive members of their communities. Our Mission and Vision reflect the critical role Sertoma will play in driving this shift; a shift that will not only positively impact the lives of consumers, but of the broader community as well.

Mission Statement

The mission of Sertoma Centre, Inc. is to provide opportunities that empower individuals with disabilities to achieve personal success.

Vision Statement

Sertoma Centre, Inc. envisions communities where all people with disabilities live, work, and fully participate.

Sertoma Centre has a forty-five-year history of enriching consumers' lives through programs that give people meaning and teach them how to engage in their communities. We believe, now more than ever, that Sertoma has a responsibility to help the Chicagoland area and the broader world address the issues and opportunities impacting individuals with disabilities.

WHY BEING IN THE COMMUNITY MATTERS

Sertoma values all people and is committed to reducing the stigma associated with all disabilities and barriers to achieving a full community life. The organization believes that individuals with disabilities can fully participate in all societal roles and contribute to a better society. The trend in the industry is shifting to community integration rather than facility based services. Sertoma embraces this concept and is dedicated to this transformation. In order to achieve this goal Sertoma will need to impact the governmental policies and funding connected to services to allow for full community participation and the necessary supports. Through its affiliations with various associations, memberships, and local networking; Sertoma is well positioned to continue its influence in the public policy sector. As services become more community based, this will impact society at large to recognize the value of all citizens.





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STRATEGIC PLAN

This five-year strategic plan prioritizes investments that will enable Sertoma to transform its impact by delivering on its mission and vision in the context of community integration. We will deliver community-based services with an innovative and sustainable service model. We will become part of the communities and be front and center addressing the needs of consumers and the local communities in which they live. We will engage government to shape public policy affecting consumers. We will build an even stronger foundation to support Sertoma for years to come. Three focus areas guide the essence of the strategic plan:

- Leading the delivery of consumer-focused services in the community
- Connecting consumers, communities, and government to impact public policy that improves the lives of consumers and their communities at large
- Solidifying the future of Sertoma through a high performing organization and infrastructure with sustained funding and investment

Sertoma Centre Strategic Plan

COMMUNITY INTEGRATED SERVICES

delivered with innovative and sustainable service models

STRONG FOUNDATION

INFRASTRUCTURE

efficiently and effectively provide critical day to day support

RESOURCE DEVELOPMENT

an important priority for the Chicago area community

AWARENESS & DEMAND

community and government engagement with Sertoma services

HUMAN CAPITAL

inspiring our growth, strength and ability to innovate





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STRATEGIC PRIORITIES

PRIORITY 1

Build and manage a sustainable service model for the next generation of Sertoma services (mental health and developmental disability).

PRIORITY 2

Secure revenue to fund programs that achieve full integration of services for individuals in the community.

PRIORITY 3

Build Human Capital capacity to support the plan including Board, leadership, and staff.

PRIORITY 4

Build infrastructure to support the service models.

PRIORITY 5

Develop community and government awareness and demand for Sertoma services.



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PRIORITY 1

Build and manage a sustainable service model for the next generation Sertoma services. The model will be responsive to Community integrated services, consumer choice and preference, and position Sertoma Centre for future sustainability.

We will...	How we will do it...
<p>Ensure Sertoma is fully positioned for upcoming industry changes and trends by researching various options and designs with consideration to organizational capacity.</p>	<ul style="list-style-type: none"> ▪ Educate staff and board on relevant laws impacting service provision ▪ Shift to service delivery models and funding streams based on current knowledge and trends ▪ Identify opportunities for collaboration and networking for primary care and managed care ▪ Enhance existing services to support service programs (new and current) ▪ Design service model(s) and/or collaborative partnership for services ▪ Position CMHC in the local community as the key provider of behavioral health services to enhance services and diversify revenue streams
<p>Ensure Sertoma Centre is well positioned to be considered an ideal behavioral health partner and continues to be an industry leader in developmental disability services.</p>	<ul style="list-style-type: none"> ▪ Ensure that infrastructure and financial capacity can support new model ▪ Communicate changes to services delivery models to families, consumers, and other stakeholders ▪ Restructure/secure staffing resources to support identified model(s) ▪ Establish outcomes for levels of success and key indicators based on evidence based practices to further promote agency
<p>Establish an annual process for evaluation of new service models to include internal and external feedback.</p>	<ul style="list-style-type: none"> ▪ Evaluate progress on outcomes and goals ▪ Complete QA process with stakeholders ▪ Adapt current service models as needed and required with consideration to QA, funding, staffing and infrastructure needs, location, and organizational budget ▪ Evaluate sustainability of service programs ▪ Continue to expand models to full implementation



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PRIORITY 2

Secure revenue to fund programs that achieve full integration of services for individuals in the community. The funding model will diversify the funding base to increase money brought in for programs and services, expand resources and relationships so we do not count on one source, and replenish and create sustainability of donors and volunteers.

We will...	How we will do it...
Build a program for family involvement and investment in the organization.	<ul style="list-style-type: none"> ▪ Research how other organizations like Sertoma engage families in investment ▪ Engage in relationship building with consumer families to deepen personal relationships and support networks ▪ Advocate for governmental support/change, education, awareness ▪ Develop a Family Group to involve families in fundraising, programs, government initiatives and advocacy, and special events ▪ Highlight and communicate successes and personal stories
Build sustainable and diverse boards.	<ul style="list-style-type: none"> ▪ Develop and implement board recruitment and training program focusing on the corporate community, individual influencers, and fundraising ▪ Expand and diversify corporate representation on the board. ▪ Diverse board representation across backgrounds, all genders, ages, skill, and cultural diversity ▪ Ensure consumer representation on the Board as a voting member; women representation from Women’s clubs/groups
Increase revenue base for Major Gifts, Grants, and Special Events	<ul style="list-style-type: none"> ▪ Conduct moves management with major donors ▪ Market Planned Giving ▪ Create new Special Events for different audiences ▪ Uncover both private and public grant funding opportunities ▪ Establish a satellite location in Chicago proper ▪ Produce a Major Donor newsletter
Expand donor and volunteer pool	<ul style="list-style-type: none"> ▪ Work with corporations, colleges/universities, clubs to secure volunteers for events and/or one-time projects ▪ Sertoma leadership and domain experts engage in creating donor relationships ▪ Increase face-to-face opportunities with individual donors and volunteers; field days, contact HR departments, establish appointments ▪ Highlight and communicate successes and personal stories
Develop program to expose internal resources to develop new revenue.	<ul style="list-style-type: none"> ▪ Create and implement an internal communication and engagement plan to enable staff to support resource development efforts ▪ Understand staff connections and potential resource development opportunities from staff relationships ▪ Highlight and communicate successes and personal stories



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PRIORITY 3

Build Human Capital capacity to support the organization including Board, leadership, and staff. Sertoma is a high performing organization with a strong foundation for continual provision of quality services, attraction and retention of talent in our fields of service, better aligned personal and organization growth, and improved networking with the field, communities, governing bodies and funders.

We will...	How we will do it...
Define and fund the employee value proposition. Offer a living wage to all Sertoma employees.	<ul style="list-style-type: none"> ▪ Develop and implement a communication plan publicizing the reasons Sertoma is a great place to work ▪ Increase wage levels ▪ Refine benefit packages to be more competitive ▪ Develop strategies to assure funding adequate to compensation needs ▪ Develop a communications plan which organizes advocacy for wage funding
Acquire the talent needed to effectively support the internal needs of the organization.	<ul style="list-style-type: none"> ▪ Assess and identify talent requirements and gaps to address for new service delivery model ▪ Refine recruitment activities for effectiveness and efficiency and to address talent requirements and gaps ▪ Evaluate HR structure and ensure internal resources in place to address talent acquisition needs of the organization
Facilitate growth in the scope of experience, knowledge and skills of existing talent.	<ul style="list-style-type: none"> ▪ Develop and implement plans for greater talent development including onboarding, mentoring program and succession planning
Maximize retention of talent within the organization.	<ul style="list-style-type: none"> ▪ Explore potential work condition options which support life balance while meeting operational needs ▪ Identify and promote pathways for advancement as a part of periodic supervision and/or performance review process ▪ Identify and implement experience opportunities ▪ Develop and implement merit raise system
Leverage external resources to promote growth and assure innovative and best practices across the organization.	<ul style="list-style-type: none"> ▪ Develop and implement plans for formal Board development ▪ Develop and implement plans for greater use of internship program to feed into hiring needs and supplement services



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PRIORITY 4

Build infrastructure to support the service model. Flexible and adaptive infrastructure will support new ways of operating and growth, facilitate better integration between departments and provide proactive support to the organization.

We will...	How we will do it...
Build an adaptive support departments' organization structure, process, roles, and talent.	<ul style="list-style-type: none"> ▪ Develop a system to measure and evaluate each department's effectiveness at meeting the current and future needs. Support services include all finance activities, transportation services, human resources, maintenance, and Advancement
Develop effective systems for interdepartmental communication between support organization and Programming.	<ul style="list-style-type: none"> ▪ Gather feedback from program leadership and support departments on relevant information needed to work together effectively ▪ Establish and implement an ongoing communication system between program leadership and all support departments ▪ Re-access processes or protocols as indicated between program services and support departments ▪ Develop a Program Proposal and Capital Project Template
Establish a strong IT infrastructure with the ability to expand.	<ul style="list-style-type: none"> ▪ Define current IT infrastructure needs and develop and implement plan for enhancing IT infrastructure ▪ Seek grant funding for purchase and implementation of new IT systems ▪ Maintain an IT infrastructure that supports evolving program service delivery models
Effective process to ensure equipment, facilities, IT, transportation, etc. are in place to support program implementation.	<ul style="list-style-type: none"> ▪ Conduct needs analysis and ongoing annual assessment of equipment and space ▪ Implement Capital Inventory & Control System ▪ Develop an ongoing user training plan as part of new hire onboarding



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PRIORITY 5

Develop community and government awareness and demand for Sertoma services. Engagement efforts will increase our role in public policy, integrate Sertoma in communities, and build brand awareness and buy-in for what Sertoma does.

We will...	How we will do it...
Build a program for family and support network involvement and investment in the organization.	<ul style="list-style-type: none"> ▪ Research and collaborate with other agencies to learn about successful programs and methods to achieve the strategic initiatives ▪ Choose strategies to engage families and gain their investment and support ▪ Develop methods and processes and identify staff/resources for implementation ▪ Identify baseline for current family involvement and establish goals and timelines for increased support ▪ Implementation of program
Ensure adequate funding and supportive/effective public policies by engaging and influencing state and local leaders.	<ul style="list-style-type: none"> ▪ Form work group of staff, board, consumers, and family members to engage state and local leaders ▪ Establish regular meetings with local legislators ▪ Develop a speaker's bureau ▪ Participate in local and state advocacy rallies ▪ Establish partnerships with other organizations that share common advocacy goals
Achieve broad support and awareness of Sertoma's value by engaging the community.	<ul style="list-style-type: none"> ▪ Penetrate media outlets to raise awareness about Sertoma's services and issues ▪ Expand relationships with referral sources ▪ Active and visible participation in community events by staff and consumers ▪ Increase staff membership in community organizations, boards, educational institutions ▪ Continuous evaluation and feedback loop on our efforts