

# Melmark

## Strategic Plan 2022



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# Introduction

Melmark's 2017 Strategic Planning process resulted in new organizational guiding principles in the form of Core Commitments that emphasized our overriding goal for the entire Melmark community creating a consistent cross-divisional culture that we are – Mission First. *Every Individual, Every Day*. The Strategic Plan was successful in unifying all divisions working in a forward motion utilizing consistent performance-based outcomes to inform our decision-making processes. As we worked on our strategic objectives in the areas of clinical, human resource, professional development, operating, financial, technology and advancement we strengthened our high-quality services.

Some accomplishments from the 2017 overall Organization Strategic Plan have been the construction of a \$19 million state-of-the-art educational facility in Pennsylvania, expansion of services to the underserved in North Carolina through the founding of Melmark Carolinas, and becoming approved as an early intervention autism specialty provider as well as adult services growth opportunities, including planning an innovative and creative adult community opportunity, in New England. Enhancement and alignment of education, professional development and training opportunities consistently across all divisions continues to achieve our goal of a highly skilled workforce. Melmark is expanding and raising the quality of service delivery systems at Melmark and throughout the country by disseminating and replicating the Melmark Model of Program Development and Clinical Treatment through peer-reviewed publications, presentations and EnvisionSMART™ innovative technology including EnvisionSMART™'s proprietary educational and clinical management software and books. Two books authored by Melmark professionals were published during this time. The first book entitled *Functional Analysis: A Practitioner's Guide to Implementation and Training* was published in 2019. The second book entitled *Organizational Behavior Management Approaches for Intellectual and Developmental Disabilities* was published in 2021. This book contributed to a much needed update to the field of OBM, the last being done in 1998. Melmark currently has a publishing contract to produce four EnvisionSMART™ practitioner guidebooks. The first book in that series, entitled *Training, supervision, and professional development in human services organizations: EnvisionSMART™, A Melmark model of program administration and operation*, is written and in production most likely to appear in late 2022. The second book in that series entitled *Clinical systems and programming in human services organizations: EnvisionSMART™, A Melmark model of program administration and operation* is currently being written and expected to be submitted to the publisher in August 2022. The third and fourth guidebooks

in the series are two to three years in the making, the titles and authors still to be confirmed. While the list is long, some other achievements include a focus on fiscal responsibility, Pennsylvania rate setting advocacy, Massachusetts private school rate setting advocacy, ongoing organizational systems assessments, a new unifying and streamlined website, board structure and reporting solidification, as well as increased diversity, and philanthropic planning.

Then came the year 2020. This year brought unprecedented times to our world, nation, states, communities and Melmark. The three years of progress and achievements on our strategic objectives by our leadership teams and highly skilled and compassionate workforce provided a firm foundation for Melmark to be successful in the midst of the historic COVID-19 pandemic trials and social unrest. The children and adults we serve, their families, our supporters and Melmark's heroic staff all came together as one to carry on our inspiring mission during times unlike any we have seen in recent history. Our cross-divisional leadership teams were exceptional at managing every aspect of the pandemic and should be commended for their efforts while still moving the organization forward.

**The year 2020 also brought the most significant financial development in Melmark's history – the establishment of the Anne and Brutus Kenan Fund through an epic \$21.5 million endowment gift.** Anne and Brutus' lives have been transformed by Melmark's programs and the fund will allow their lives to positively impact countless other individuals. While we are humbled by this gift and responsibility, it speaks to the importance of building upon the strategic plan, which has set such a firm foundation.

After five years, it is now time for a refreshed Strategic Plan. Prior to beginning the Strategic Planning process, in October of 2021, all Melmark senior leaders attended a diversity, equity and inclusion professional development program in part to further inform our strategic plan processes as well as to update organizational corporate social responsibility. Then in November 2021, Melmark's Senior Leaders across all divisions met in Pennsylvania to celebrate our achievements, review our ongoing progress and add new strategic objectives. Senior leaders at each division then held planning meetings at their respective state division to create plans that will roll up into the overall Strategic Plan. As was the case in 2017, our planning process focused on how to achieve a culture that reflects a mission first organization, ensuring every individual we serve receives the highest quality of service every day consistently regardless of location. Our goal was to enhance our

program models, which over the past six years have been framed to correspond to two public health frameworks.

1. A public health framework that aims to promote a global common understanding of care and learning, as well as facilitate assessment and integration of care and learning systems and services within existing health and social care systems. The framework will: be person centered and aligned with each individual's values and preferences; optimize functional ability over time and compensates for loss of intrinsic capacity; be provided in the community, as appropriate and aligned with an individual's choices; provide integrated services in a continuum; include services and education that empowers an individual; and, emphasize support for our workforce.
2. That our organization is both culturally competent and practices with cultural humility. Those tenants are consistent with our mission and vision.
  - a. Gaining cultural knowledge
  - b. Developing cultural self-awareness
  - c. Holding systems accountable
  - d. Understanding and redressing power imbalances (Tervalon and Murray-Garcia, 1998)

The resulting overall Organizational Strategic Plan provides clear strategic direction to carry out our mission first vision and mission and the results are contained within this report.

This 2022 Strategic Plan comes at a critical time as Melmark begins to move through the founder succession planning process. Our goals and objectives will set the framework for the next phase of leadership in building upon almost 25 years of experience in developing state-of-the-art programs predicated on an evidence-based commitment to Organizational Behavior Management and Performance Management Training Research. We have had the opportunity to build on the incredible legacy we have inherited. With each generation of leadership, we have learned more. We seek to serve that legacy through mission-based work informed by contemporary science. We believe we do our best work for the individuals served when we do. I am looking forward to Melmark's continued growth and development as a result of the implementation of this strategic plan guiding us into the future.

We appreciate the work of all involved and would like to acknowledge Dr. Peter Dams whose guidance and expertise were instrumental throughout this process. The Senior Leadership team of Melmark has a great deal of passion and enthusiasm for this Strategic Plan. We

believe its implementation will drive Melmark's success for generations to come and those endowed with leading the vision.

With deep gratitude as we join together on these initiatives,

**Rita M. Gardner, M.P.H., LABA, BCBA**

President and Chief Executive Officer





## Our Guiding Principles

### Our Mission

Melmark is a multi-state human service provider with premier private special education schools, professional development, training, and research centers.

We are committed to enhancing the lives of individuals within diverse communities with autism, intellectual and developmental disabilities and their families by providing exceptional evidence-based and applied behavior analytic services to every individual, every day.

### Our Vision

Our vision is to expand and raise the quality of service delivery systems throughout the country by disseminating and replicating the Melmark Model of Program Development and Clinical Treatment.

## Our Core Commitments

### Compassionate Care

Melmark provides a diverse and inclusive culture of ongoing care, support and respect for the individuals we serve, their families and our staff.

### Integrity in Everything We Do

Melmark consistently assesses the fidelity of organizational, staff, and performance management systems to ensure educational and clinical standards are achieved and maintained.

### Highly Skilled Workforce

Melmark applies performance-based training and professional growth opportunities to enhance the skill set for a diverse and inclusive workforce.

### Evidence-based Practices

Melmark uses scientific evidence and performance data to inform all decision-making.

### Unified Culture

Melmark values all stakeholders without exception to disability, age, gender, gender identity, sexual orientation, race, color, ethnicity, religious affiliation, national origin, geographic location, service line, tenure or professional credentials. We are a unified culture to ensure fulfillment of our mission and vision.

### Best Outcomes

Melmark affects positive change in the quality of life of the individuals we serve within our diverse and inclusive communities by implementing data-driven trend analyses.

## Our Unifying Strength



The name **Melmark** brings us to the core of our mission – enhancing the lives of individuals with a broad range of disabilities in accordance with the founders’ original intent for their daughter, Melissa. When the founders of Melmark New England introduced evidence-based practice to Melmark, our legacy as an organization was strengthened and enhanced.

In order to achieve our mission and vision, Melmark relies on our entire community which includes, primarily, the individuals we serve. **Every Individual** served maintains our focus toward one unified and inclusive vision as we fulfill our mission **Every Day**.

Our compassionate and highly skilled workforce is key to the fulfillment of our **Mission First** culture. Every employee, in every program, department, and division in our organization is committed to moving forward as a highly skilled, unified culture utilizing consistent performance-based outcomes to inform our evidence based decision-making processes.

Our Mission First culture thrives on engagement from a diverse community of supporters including families, board members, volunteers, friends and philanthropic partners. We value all stakeholders without exception to disability, age, gender, gender identity, sexual orientation, race, color, ethnicity, religious affiliation, national origin, geographic location, service line, tenure or professional credentials. Through ongoing leadership and significant experience in developing state-of-the-art programs predicated on an evidence-based model, commitment to Organizational Behavior Management and Performance Management Training Research, Melmark is a clinically sophisticated leader in the field. Together, as one unified culture, we are **Mission First. Every Individual, Every Day** as we expand and raise the quality of service delivery systems throughout the country.



## Our Strategic Framework

### Our Mission

Melmark is a multi-state human service provider with premier private special education schools, professional development, training, and research centers.

We are committed to enhancing the lives of individuals within diverse communities with autism, intellectual and developmental disabilities and their families by providing exceptional evidence-based and applied behavior analytic services to every individual, every day.

### Our Goals

1. Melmark's organizational culture embodies diversity, equity, inclusiveness, and exudes passion in the implementation of our Core Commitments
2. Melmark's workforce is diverse, inclusive, highly skilled, credentialed, and actively engaged in ongoing educational and professional development activities with strong retention
3. Melmark uses innovation and technology to drive the quality of our service delivery systems and increase the dissemination and replication of the Melmark Model of Program Development and Clinical Treatment
4. Melmark's high-performance practices ensure adherence to our standards of excellence in all services and daily operations
5. Melmark's stakeholders recognize our mission and leadership in the field of high-quality service delivery, professional development training, and research
6. Melmark's funding streams provide appropriate and balanced financial resources to support and expand service delivery and program performance
7. Melmark enjoys significant and diverse stakeholder and philanthropic support that increases raised dollars annually and ensures constituent engagement with related outcomes

### Our Vision

Our vision is to expand and raise the quality of service delivery systems throughout the country by disseminating and replicating the Melmark Model of Program Development and Clinical Treatment.

Compassionate Care | Integrity in Everything We Do | Highly Skilled Workforce | Evidence-based Practices | Unified Culture | Best Outcomes

### Our Core Commitments

## Our Goals and Strategies

### Goal 1: Melmark's organizational culture embodies diversity, equity, inclusiveness, and exudes passion in the implementation of our Core Commitments

Strategic Objectives	Target Date	Owner
1. Identify primary communication channels data that yield desired outcomes (e.g., read email, provide requested information) with the intended party (e.g., employee, family member, vendors)	Jul 2022	Dir of Comms
2. Increase the number of internal and external communications using multi-channel methods to promote all of Melmark's success across the organization (e.g., publications, promotion, social media, etc.)	Jul 2022	Dir of Comms
3. Organizational diversity, equity, and inclusion plan for all employees related to staff and individuals served:	Aug 2022	Pres and CEO
a. All employees trained in DEI Plan	Jun 2023	Pres and CEO
b. DEI Plan shared, discussed and feedback received with all individuals and their families	Jun 2023	Pres and CEO
c. Social validity analysis of DEI initiatives from direct care staff perspective	Jun 2023	COO
d. Employees consistently demonstrating behavior consistent with DEI plan as measures by specific KPI	Jun 2025	Pres and CEO
4. Video tours are housed on the web page and are used to educate stakeholders about the Melmark mission, vision, and service programs (e.g., board orientation, admissions, advocacy)	Dec 2022	VP of Bus Ops
5. Decision whether or not to hire a project manager to work on project and program service expansion	Dec 2022	Pres and CEO
6. Individuals participate in holistic wellness initiatives	Jan 2023	COO

## Goal 1: Melmark's organizational culture embodies diversity, equity, inclusiveness, and exudes passion in the implementation of our Core Commitments

Strategic Objectives	Target Date	Owner
7. Assessment of program service systems for ability to maintain fidelity while reducing burden <ul style="list-style-type: none"> <li>a. Research</li> <li>b. Training</li> <li>c. Clinical</li> <li>d. Supervision</li> <li>e. Performance management</li> <li>f. Focus on relationships (immediately above and below)</li> <li>g. General operations within programs</li> </ul>	Jan 2023	VP and CCO
8. Seasoned supervisors (e.g., 3+ years with Melmark) are trained using the curriculum for Level II supervision series	Dec 2023	ED/MNE
9. Administrators have the necessary resources to complete tasks <ul style="list-style-type: none"> <li>a. Assessment of administrators' task resources</li> <li>b. Locate and acquire resources to fill gaps</li> <li>c. Utilize new resources</li> </ul>	Jan 2025	COO

**Goal 2: Melmark's workforce is diverse, inclusive, highly skilled, credentialed, and actively engaged in ongoing educational and professional development activities with strong retention\***

Strategic Objectives	Target Date	Owner
1. Employees learn about benefits, policies, etc. through HR and employee town halls	Jul 2022	Sr Dir HR/MNE/MCS
2. Evidence-based recruitment and retention plan with implementation and accountability across and within departments	Oct 2022	ED/MNE
a. Evidence-based mentoring program with incentives for mentors	Dec 2022	ED/MNE
b. Ensure most appropriate compensation, health and retirement benefit are provided within allowable resource allocation at all divisions	Jun 2023	COO
c. Establish career paths and assess barriers for all levels of employees, including succession planning where appropriate	Sep 2023	ED/MNE
d. Employees participate in activities that promote holistic health and wellness for employees within allowable resource allocation	Dec 2023	COO
e. Melmark has increased partnerships with universities, starting at the Associates level	Dec 2024	Sr Dir HR/MPA
3. International staff working at every division	Jan 2023	Dir Tal Man
4. Clear operational employee communication from top to bottom and bottom to top	Jul 2023	COO
a. Administrators demonstrate leading by example when they are on the floor	Dec 2022	COO
b. Consistent visibility of leadership	Dec 2022	COO
c. Feedback up/down and down/up, including culture of personal accountability and ownership	Jun 2023	COO
d. Leadership collaborates with staff	Jun 2023	COO
5. Supervisor and supervisee relationships are strengthened as measured by staff survey on supervisor relationship and work culture	Sep 2023	ED/MNE

\* All initiatives incorporate the framework from the organizational DEI plan to ensure inclusion of the appropriate DEI factors.

## Goal 3: Melmark uses innovation and technology to drive the quality of our service delivery systems and increase the dissemination and replication of the Melmark Model of Program Development and Clinical Treatment

Strategic Objectives	Target Date	Owner
1. Different resources are used to ensure program staff are not pulled off primary duties for product development needs	Mar 2023	VP and CCO
2. Identify and develop processes to incorporate our proprietary software capabilities resulting in external product development	Jun 2023	VP and CCO
3. Evaluate MEDS software on efficiency, user experience, and adherence to evidence-based principles and terminology	Jun 2023	Pres and CEO
4. Create a plan to beta test with a productization consultant by using Melmark Carolinas as our first business client.	Jun 2023	Dir of Clin Tech / Pres and CEO
5. Evaluate current electronic performance management system and determine whether all components are fully utilized	Sept 2023	ED/MNE
6. The organization uses a standardized process for document retention	Dec 2023	VP of Bus Ops
7. The organization uses a standardized server and network design	Dec 2023	VP of Bus Ops
a. Templates of the Melmark Model of Program Development stored on server	Dec 2023	ED/MNE
b. Establish server structure for templates	Dec 2023	ED/MNE
8. Evaluate software systems and identify areas of improvement for operational efficiencies:	Jun 2025	VP of Bus Ops
a) Asset Management	Dec 2022	VP of Bus Ops
b) HRIS (Human Resources Information Systems)	Jun 2023	Sr Dir HR/MPA/ Sr Dir HR/MNE/MCS/ Dir Tal Man
c) EMR (Electronic Medical Records)	Dec 2024	Sr Dir HC/MPA / Sr Dir HC/MNE

## Goal 3: Melmark uses innovation and technology to drive the quality of our service delivery systems and increase the dissemination and replication of the Melmark Model of Program Development and Clinical Treatment

Strategic Objectives	Target Date	Owner
d) Accounting	Jun 2025	VP and CFO
9. The organization optimizes analysis of new and existing data (big data analysis)	Sept 2024	Pres and CEO
10. The organization develops a parent portal	Dec 2025	COO
11. The organization utilizes integrated software systems	Dec 2025	VP of Bus Ops
12. Ensure organization design and implementation of policies and procedures is consistent across the divisions	Dec 2025	COO

## Goal 4: Melmark's high-performance practices ensure adherence to our standards of excellence in all services and daily operations.

Strategic Objectives	Target Date	Owner
1. Communication practices with employees, individuals, departments, and interdepartmental include outcomes	Jul 2022	Dir of Comms
2. Establish a mechanism to analyze and improve current <u>payroll management</u> systems from onboarding through ongoing employment and separation ensuring most accurate and timely data, is seamless, and the least burdensome to program management staff	Aug 2022	Sr Dir HR/MPA VP of Bus Ops
3. The organizational dashboard is up-to-date and includes DEI metrics	Sept 2022	Pres and CEO
4. EnvisionSMART™ Institute work group develops implementation plan	Dec 2022	Pres and CEO



## Goal 4: Melmark's high-performance practices ensure adherence to our standards of excellence in all services and daily operations.

Strategic Objectives	Target Date	Owner
5. Evaluate how leadership continues cross-divisional collaboration to ensure consistency across divisions	Dec 2022	ED/MNE
6. The organization has a branded plan for EnvisionSMART™ Institute.	Dec 2022	Dir of Comms
7. Facilities are developed / acquired based upon ongoing analysis and modification of growth plans	Mar 2023	VP of Bus Ops
8. HR is consistent with job descriptions (incl. required regulatory information), templates, forms, policies etc. across divisions	Jun 2023	Dir Tal Man
9. Organizational quality assurance measures are in place and used for improvement	Sept 2023	Pres and CEO
10. Evaluate role of Quality Improvement (QI) in all divisions to ensure consistent organizational standards	Sept 2023	Pres and CEO
11. All divisions have a comprehensive Emergency Preparedness Plan inclusive of pandemics as well as facilities planning for weather emergencies.	Oct 2023	VP of Bus Ops COO
12. Establish a mechanism to analyze and improve current <u>employee management</u> systems from onboarding through ongoing employment and separation ensuring most accurate and timely data, is seamless and the least burdensome to program management staff	Dec 2023	Sr Dir HR/MPA
13. Ensure systems and templates can be used by others – but are uniform to industry	Jul 2024	VP and CCO
14. Establish a mechanism to analyze and improve and develop as necessary the performance of current <u>operational systems</u> (Asset Management, Electronic Medical Records, Accounting, etc.) ensuring most accurate and timely data, is seamless and the least burdensome to program management staff	Dec 2025	VP of Bus Ops
a. Establish a mechanism	Jan 2024	COO VP of Bus Ops
b. Implementation of mechanism	Dec 2025	COO VP of Bus Ops

## Goal 4: Melmark's high-performance practices ensure adherence to our standards of excellence in all services and daily operations.

Strategic Objectives	Target Date	Owner
15. Develop professional development training and support to ensure employees are proficient in using (new) systems at all Melmark divisions	Dec 2023	COO
a. Asset Management	Jun 2023	VP of Bus Ops
b. HRIS (Human Resources Information Systems)	Dec 2023	Sr Dir HR/MPA Sr Dir HR/MNE/MCS
c. EMR (Electronic Medical Records)	Jun 2025	Sr Dir HC/MPA Sr Dir HC/MNE
d. Accounting	Jun 2025	VP and CFO

## Goal 5: Melmark's stakeholders recognize our mission and leadership in the field of high-quality service delivery, professional development training, and research

Strategic Objectives	Target Date	Owner
1. Disseminate a quarterly report on professional development achievements, publications, and conference presentations	Jun 2022	Dir of Comms VP and CCO
2. A comprehensive marketing and branding plan in place that, among other items, addresses the following considerations:	Dec 2022	Dir of Comms
a. More videos on social media	Aug 2022	Dir of Comms
b. Increase presence related to research and publications related to Melmark research	Aug 2022	Dir of Comms
c. Social Media: How to engage families and staff to tell stories that are division-specific	Aug 2022	Dir of Comms

## Goal 5: Melmark's stakeholders recognize our mission and leadership in the field of high-quality service delivery, professional development training, and research

Strategic Objectives	Target Date	Owner
d. Website updates:		Dir of Comms
(1) EnvisionSMART™ Institute	Sept 2022	Dir of Comms
(2) Diversity, Equity and Inclusion (DEI)/Corporate Responsibility	Dec 2022	Pres and CEO
(3) Talent Management	Dec 2022	Dir Tal Man
e. Address employee reviews of the organization and their experiences	Oct 2022	Dir of Comms
3. The organization will evaluate if sales and marketing outcomes might be improved via a sales and marketing consultant expert	May 2023	Pres and CEO
4. EnvisionSMART™ Institute products and services are accessible for purchase to external entities	Oct 2023	Pres and CEO
5. Stakeholder orientation and training packet in place that orients them to the Melmark system		
a. Donors	Feb 2023	Dir Adv/MNE/MCS Dir Adv/MPA
b. Legislative	Aug 2024	Pres and CEO
c. Regulatory and other Community Partners	Aug 2024	COO
6. Complete EnvisionSMART™ Institute practitioner guidebooks	Aug 2024	VP and CCO

## Goal 6: Melmark's funding streams provide appropriate and balanced financial resources to support and expand service delivery and program performance

Strategic Objectives	Target Date	Owner
1. Create a plan to increase staff and parent skills in understanding reimbursement strategies and utilization review to expand appropriate service funding and implement a communication strategy	Sept 2022	VP and CFO VP of Bus Ops
a. Staff	Sept 2022	VP and CFO VP of Bus Ops
b. Families	Sept 2022	VP and CFO VP of Bus Ops
2. Staff and parents are trained in advocacy. Develop training program for staff and parents in advocacy then track and recognize staff and families who complete.	Sept 2022	Pres and CEO
3. Voter registration campaigns among individuals, staff, and parents	Sept 2022	COO
4. The organization uses widespread advocacy campaigns	Jun 2023	Pres and CEO
5. Increase appropriate diversification of revenue sources through exploration of new program models that align with the mission footprint	Jun 2024	ED/MNE
6. All service funding streams and models in each state division are, at a minimum, cost neutral	Jun 2024	VP and CFO VP of Bus Ops
7. Continue and expand leadership's public policy work in collaboration with other agencies and trade associations	Dec 2025	Pres and CEO
8. Organizational public policy work improves or maintains (if already optimal) current funding streams	Dec 2025	Pres and CEO

## Goal 7: Melmark enjoys significant and diverse stakeholder and philanthropic support that increases raised dollars annually and ensures constituent engagement with related outcomes

Strategic Objectives	Target Date	Owner
1. Children's services is a high priority fundraising focus for MCS. Annual fundraising goal will be established based on analysis of prior year's support, expectations from current donors and prospects, and projections for future prospect engagement.	July 2022	Dir Adv/MNE/MCS
2. Adult services is a high priority fundraising focus for MNE. Annual fundraising goal will be established each year based on analysis of prior adult services support, expectations from current donors and prospects, and projections for future prospect engagement.	July 2022	Dir Adv/MNE/MCS
3. Adult services is a high priority fundraising focus for MPA. Annual fundraising goal will be established each year based on analysis of prior adult services support, expectations from current donors and prospects, and projections for future prospect engagement.	July 2022	Dir Adv/MPA
<p>4. The annual (Current FY) and three-year fundraising plans will be based on current and future funding needs of the organization, including cross-divisional needs. They will include tasks, activities, measurable outcomes and metrics that are based on fundraising best practices and the organization's advancement resources and history. The organizational fundraising plan(s) will also track:</p> <ul style="list-style-type: none"> <li>a) Specific goals/objectives by division (MCS, MNE, MPA) as they relate to annual giving and direct mail, major gift and planned giving prospects and solicitation, foundation and corporate research and giving, special event management and execution, donor and prospect cultivation, solicitation, recognition and stewardship, and donor communications and engagement.</li> <li>b) industry-standard metrics and baseline for donor renewal, retention and acquisition (cost/\$ raised, cost/renew or acquire donor)</li> <li>c) Special event fundraising (revenue, expense, cost/\$ raised, participation)</li> <li>d) Communications efforts in relation to Advancement success (# of social media imprints, multi-channel marketing, published content – Impact Report. Messenger)</li> </ul>	July 2022	<p>Dir Adv/MNE/MCS</p> <p>Dir Adv/MPA</p>

## Goal 7: Melmark enjoys significant and diverse stakeholder and philanthropic support that increases raised dollars annually and ensures constituent engagement with related outcomes

Strategic Objectives	Target Date	Owner
5. Endowment Campaign Case for Support established. Campaign goal confirmed, donor prospect research conducted, campaign timeline and work plan developed and in execution.	Aug 2022	Pres and CEO Dir Adv/MNE/MCS Dir Adv/MPA
6. Capital projects plan showcases advancement opportunities for future gift solicitations.	Sep 2022	VP of Bus Ops
7. Organization-wide advancement engagement strategies and communication tools will be developed and executed in collaboration with Communications team. Metrics to include but not limited to: a) Number of social media impressions/corresponding donor/prospect activity b) Number of print articles/corresponding donor/prospect activity c) Number of donor-targeted communications/corresponding donor activity	Oct 2022	Dir Adv/MNE/MCS Dir Adv/MPA
8. EnvisionSMART™ Institute is an annual fundraising priority across the organization with the goal to raise \$100,000 each year through philanthropic or government grants. Specific funding targets and revenue goals by division (MCS, MNE, MPA) as appropriate.	Dec 2022	Dir Adv/MNE/MCS Dir Adv/MPA
9. Internal and external stakeholders are engaged in relationships that foster philanthropic support, public advocacy and public awareness. Demonstrated impact of philanthropy on the individuals served is identified and communicated.	Jan 2023	Pres and CEO Dir Adv/MNE/MCS Dir Adv/MPA
10. Create a marketing plan for the EnvisionSMART™ Institute to increase exposure to external stakeholders.	Jan 2023	Dir of Comms
11. Performance data demonstrates efficiencies, cost savings, and reasonable outcomes as compared to activity-specific baseline(s)	Jul 2023	VP of Bus Ops
12. Increase legislative focus by building relationships with statewide legislators and participation in policy groups	Dec 2025	Pres and CEO



# Implementation Schedule

This schedule may be adjusted based on emerging priorities and budget amendments.

Strategic Objectives (sorted by target completion date)	2022	2023	2024	2025	Owner(s)
5.1 Disseminate a quarterly report on professional development achievements, publications and conference presentations	Jun-22				Dir of Comms VP and CCO
1.1. Identify primary communication channels data that yield desired outcomes (e.g., read email, provide requested information) with the intended party (e.g., employee, family member, vendors)	Jul-22				Dir of Comms
1.2 Increase the number of internal and external communications using multi-channel methods to promote all of Melmark's success across the organization (e.g., publications, promotion, social media, etc.)	Jul-22				Dir of Comms
2.1. Employees learn about benefits, policies, etc. through HR and employee town halls	Jul-22				Sr Dir HR/MNE/MCS
4.1 Communication practices with employees, individuals, departments, and interdepartmental include outcomes	Jul-22				Dir of Comms
7.1 Children's services is a high priority fundraising focus for MCS. Annual fundraising goal will be established based on analysis of prior year's support, expectations from current donors and prospects, and projections for future prospect engagement.	Jul-22				Dir Adv/MNE/MCS
7.2. Adult services is a high priority fundraising focus for MNE. Annual fundraising goal will be established each year based on analysis of prior adult services support, expectations from current donors and prospects, and projections for future prospect engagement.	Jul-22				Dir Adv/MNE/MCS
7.3. Adult services is a high priority fundraising focus for MPA. Annual fundraising goal will be established each year based on analysis of prior adult services support, expectations from current donors and prospects, and projections for future prospect engagement.	Jul-22				Dir Adv/MPA
7.4. The annual (Current FY) and three-year fundraising plans will be based on current and future funding needs of the organization, including cross-divisional needs. They will include tasks, activities, measurable outcomes and metrics that are based on fundraising best practices and the organization's advancement resources and history.	Jul-22				Dir Adv/MNE/MCS Dir Adv/MPA
1.3. Organizational diversity, equity, and inclusion plan for all employees related to staff and individuals served:	Aug-22				Pres and CEO
4.2. Establish a mechanism to analyze and improve current payroll management systems from onboarding through ongoing employment and separation ensuring most accurate and timely data, is seamless, and the least burdensome to program management staff	Aug-22				Sr Dir HR/MPA VP of Bus Ops
5.2.a. More videos on social media	Aug-22				Dir of Comms

Strategic Objectives (sorted by target completion date)	2022	2023	2024	2025	Owner(s)
5.2.b. Increase presence related to research and publications related to Melmark research	Aug-22				Dir of Comms
5.2.c. Social Media: How to engage families and staff to tell stories that are division-specific	Aug-22				Dir of Comms
7.5. Endowment Campaign Case for Support established. Campaign goal confirmed, donor prospect research conducted, campaign timeline and work plan developed and in execution.	Aug-22				Pres and CEO Dir Adv/MNE/MCS Dir Adv/MPA
4.3. The organizational dashboard is up-to-date and includes DEI metrics	Sep-22				Pres and CEO
5.2.d.1. Website updates: EnvisionSMART™ Institute	Sep-22				Dir of Comms
6.1. Create a plan to increase staff and parent skills in understanding reimbursement strategies and utilization review to expand appropriate service funding and implement a communication strategy	Sep-22				VP and CFO VP of Bus Ops
6.1.a. Create a plan to increase staff skills in understanding reimbursement strategies Staff	Sep-22				VP and CFO VP of Bus Ops
6.1.b. Create a plan to increase parent skills in understanding reimbursement strategies	Sep-22				VP and CFO VP of Bus Ops
6.2. Staff and parents are trained in advocacy. Develop training program for staff and parents in advocacy then track and recognize staff and families who complete.	Sep-22				Pres and CEO
6.3. Voter registration campaigns among individuals, staff, and parents	Sep-22				COO
7.6. Capital projects plan showcases advancement opportunities for future gift solicitations.	Sep-22				VP of Bus Ops
2.2. Evidence-based recruitment and retention plan with implementation and accountability across and within departments	Oct-22				ED/MNE
5.2.e. Address employee reviews of the organization and their experiences	Oct-22				Dir of Comms
7.7. Organization-wide advancement engagement strategies and communication tools will be developed and executed in collaboration with Communications team.	Oct-22				Dir Adv/MNE/MCS Dir Adv/MPA
1.4. Video tours are housed on the web page and are used to educate stakeholders about the Melmark mission, vision, and service programs (e.g., board orientation, admissions, advocacy)	Dec-22				VP of Bus Ops
1.5. Decision whether or not to hire a project manager to work on project and program service expansion	Dec-22				Pres and CEO
2.2.a. Evidence-based mentoring program with incentives for mentors	Dec-22				ED/MNE
2.4.a. Administrators demonstrate leading by example when they are on the floor	Dec-22				COO
2.4.b. Consistent visibility of leadership	Dec-22				COO
3.8.a. Evaluate software: Asset Management	Dec-22				VP of Bus Ops
4.4. EnvisionSMART™ Institute work group develops implementation plan	Dec-22				Pres and CEO

Strategic Objectives (sorted by target completion date)	2022	2023	2024	2025	Owner(s)
4.5. Evaluate how leadership continues cross-divisional collaboration to ensure consistency across divisions	Dec-22				ED/MNE
4.6. The organization has a branded plan for EnvisionSMART™ Institute	Dec-22				Dir of Comms
5.2. A comprehensive marketing and branding plan in place that, among other items, addresses the following considerations:	Dec-22				Dir of Comms
5.2.d.2. Website updates: Diversity, Equity and Inclusion (DEI)/Corporate Responsibility	Dec-22				Pres and CEO
5.2.d.3. Website updates: Talent Management	Dec-22				Dir Tal Man
7.8. EnvisionSMART Institute is an annual fundraising priority across the organization with the goal to raise \$100,000 each year. Specific funding targets and revenue goals by division (MCS, MNE, MPA) as appropriate.	Dec-22				Dir Adv/MNE/MCS Dir Adv/MPA
1.6. Individuals participate in holistic wellness initiatives		Jan-23			COO
1.7. Assessment of program service systems for ability to maintain fidelity while reducing burden		Jan-23			VP and CCO
2.3. International staff working at every division		Jan-23			Dir Tal Man
7.9. Internal and external stakeholders are engaged in relationships that foster philanthropic support, public advocacy and public awareness. Demonstrated impact of philanthropy on the individuals served is identified and communicated.		Jan-23			Pres and CEO Dir Adv/MNE/MCS Dir Adv/MPA
7.10 Create a marketing plan for the EnvisionSMART™ Institute to increase exposure to external stakeholders		Jan-23			Dir of Comms
5.5.a. Stakeholder orientation and training packet in place that orients them to the Melmark system: Donors		Feb-23			Dir Adv/MNE/MCS Dir Adv/MPA
3.1. Different resources are used to ensure program staff are not pulled off primary duties for product development needs		Mar-23			VP and CCO
4.7. Facilities are developed / acquired based upon ongoing analysis and modification of growth plans		Mar-23			VP of Bus Ops
5.3. The organization will evaluate if sales and marketing outcomes might be improved via a sales and marketing consultant expert		May-23			Pres and CEO
1.3.a. All employees trained in DEI Plan		Jun-23			Pres and CEO
1.3.b. DEI Plan shared, discussed and feedback received with all individuals and their families		Jun-23			Pres and CEO
1.3.c. Social validity analysis of DEI initiatives from direct care staff perspective		Jun-23			COO
2.2.b. Ensure most appropriate compensation, health and retirement benefit are provided within allowable resource allocation at all divisions		Jun-23			COO
2.4.c. Feedback up/down and down/up, including culture of personal accountability and ownership		Jun-23			COO
2.4.d. Leadership collaborates with staff		Jun-23			COO

Strategic Objectives (sorted by target completion date)	2022	2023	2024	2025	Owner(s)
3.2. Identify and develop processes to improve our proprietary software capabilities resulting in external product development		Jun-23			VP and CCO
3.3. Evaluate MEDS software on efficiency, user experience, and adherence to evidence-based principles and terminology		Jun-23			Pres and CEO
3.4. Create plan to beta test with a productization consultant by using Melmark Carolinas as our first business client		Jun-23			Dir of Clin Tech Pres and CEO
3.8.b. Evaluate software: HRIS (Human Resources Information Systems)		Jun-23			Sr Dir HR/MPA Sr Dir HR/MNE/MCS Dir Tal Man
4.8. HR is consistent with job descriptions (incl. required regulatory information), templates, forms, policies etc. across divisions		Jun-23			Dir Tal Man
4.15.a. Develop professional development training and support to ensure staff is proficient in using (new) systems at all Melmark divisions: Asset Management		Jun-23			VP of Bus Ops
6.4. The organization uses widespread advocacy campaigns		Jun-23			Pres and CEO
2.4. Clear operational employee communication from top to bottom and bottom to top		Jul-23			COO
7.11. Performance data demonstrates efficiencies, cost savings, and reasonable outcomes as compared to activity-specific baseline(s)		Jul-23			VP of Bus Ops
2.2.c. Establish career paths and assess barriers for all levels of employees, including succession planning where appropriate		Sep-23			ED/MNE
2.5. Supervisor and supervisee relationships are strengthened as measured by staff survey on supervisor relationship and work culture		Sep-23			ED/MNE
3.5. Evaluate current electronic performance management system and determine whether all components are fully utilized		Sep-23			ED/MNE
4.9. Organizational quality assurance measures are in place and used for improvement		Sep-23			Pres and CEO
4.11. All divisions have a comprehensive Emergency Preparedness Plan inclusive of pandemics as well as facilities planning for weather emergencies		Oct-23			VP of Bus Ops COO
4.10. Evaluate role of Quality Improvement (QI) in all divisions to ensure consistent organizational standards		Sep-23			Pres and CEO
5.3. EnvisionSMART™ Institute products and services are accessible for purchase to external entities		Oct-23			Pres and CEO
1.8. Seasoned supervisors (e.g., 3+ years with Melmark) are trained using the curriculum for Level II supervision series		Dec-23			ED/MNE
2.2.d. Employees participate in activities that promote physical health and wellness for employees within allowable resource allocation		Dec-23			COO

Strategic Objectives (sorted by target completion date)	2022	2023	2024	2025	Owner(s)
3.6. The organization uses a standardized process for document retention		Dec-23			VP of Bus Ops
3.7. The organization uses a standardized server and network design		Dec-23			VP of Bus Ops
3.7.a. Templates of the Melmark Model of Program Development stored on server		Dec-23			ED/MNE
3.7.b. Establish server structure for templates		Dec-23			ED/MNE
4.12. Establish a mechanism to analyze and improve current employee management systems from onboarding through ongoing employment and separation ensuring most accurate and timely data, is seamless and the least burdensome to program management staff		Dec-23			Sr Dir HR/MPA
14.5. Development professional development training and support to ensure employees are proficient in using (new) systems at all Melmark divisions		Dec-23			COO
4.15.b. Develop professional development training and support to ensure staff is proficient in using (new) systems at all Melmark divisions: HRIS (Human Resources Information Systems)		Dec-23			Sr Dir HR/MPA Sr Dir HR/MNE/MCS
4.14.a. Establish a mechanism to analyze and improve and develop as necessary the performance of current <u>operational systems</u>			Jan-24		COO VP of Bus Ops
6.5. Increase appropriate diversification of revenue sources through exploration of new program models that align with the mission footprint			Jun-24		ED/MNE
6.6. All service funding streams and models in each state division are, at a minimum, cost neutral			Jun-24		VP and CFO VP of Bus Ops
4.13. Ensure systems and templates can be used by others – but are uniform to industry			Jul-24		VP and CCO
5.5.b. Stakeholder orientation and training packet in place that orients them to the Melmark system Legislative			Aug-24		Pres and CEO
5.5.c. Stakeholder orientation and training packet in place that orients them to the Melmark system Regulatory and other Community Partners			Aug-24		COO
5.6. Complete EnvisionSMART™ Institute practitioner guidebooks			Aug-24		VP and CCO
3.9. The organization optimizes analysis of new and existing data (big data analysis)			Sep-24		Pres and CEO
2.2.e. Melmark has increased partnerships with universities, starting at the Associates level.			Dec-24		Sr Dir HR/MPA
3.8.c. Evaluate software: EMR (Electronic Medical Records)			Dec-24		Sr Dir HC/MPA Sr Dir HC/MNE
1.9. Administrators have the necessary resources to complete tasks				Jan-25	COO
1.3.d. Employees consistently demonstrating behavior consistent with DEI plan as measures by specific KPI				Jun-25	Pres and CEO

Strategic Objectives (sorted by target completion date)	2022	2023	2024	2025	Owner(s)
3.8. Evaluate software systems and identify areas of improvement for operational efficiencies				Jun-25	VP of Bus Ops
3.8.d. Evaluate software: Accounting				Jun-25	VP and CFO
4.15. Develop professional development training and support to ensure staff is proficient in using (new) systems at all Melmark divisions				Jun-25	COO
4.15.c. Develop professional development training and support to ensure staff is proficient in using (new) systems at all Melmark divisions: EMR (Electronic Medical Records)				Jun-25	Sr Dir HC/MPA Sr Dir HC/MNE
4.15.d. Develop professional development training and support to ensure staff is proficient in using (new) systems at all Melmark divisions: Accounting				Jun-25	VP and CFO
3.10. The organization develops and uses a parent portal				Dec-25	COO
3.11. The organization utilizes integrated software systems				Dec-25	VP of Bus Ops
3.12. Ensure organization design and implementation of policies and procedures is consistent across the divisions				Dec-25	COO
4.14 Establish a mechanism to analyze and improve and develop as necessary the performance of current operational systems (Asset Management, Electronic Medical Records, Accounting, etc.) ensuring most accurate and timely data, is seamless and the least burdensome to program management staff				Dec-25	VP of Bus Ops
4.14.b. Implementation of mechanism to analyze and improve and develop as necessary the performance of current <u>operational systems</u>				Dec-25	COO VP of Bus Ops
6.7. Continue and expand leadership's public policy work in collaboration with other agencies and trade associations				Dec-25	Pres and CEO
6.8. Organizational public policy work improves or maintains (if already optimal) current funding streams				Dec-25	Pres and CEO
7.12 Increase legislative focus by building relationships with statewide legislators and participation in policy groups				Dec-25	Pres and CEO



## Owner Key

Pres and CEO	Rita Gardner
VP and CCO	Frank Bird
VP and CFO	Thomas Crofcheck
VP of Bus Ops	William Ahearn
COO	Shawn Quigley
ED/MNE	Helena Maguire
ED/MPA	Maggie Haag
Dir Prog Admin and Clin Svcs	Bradley Stevenson
Dir Ed Serv	Keri Bethune
Dir of Comms	Lindsay Casavant
Dir Tal Man	Mercy Mutindwa
Sr Dir HR/MNE/MCS	Mary Morris
Sr Dir HR/MPA	Lindsey Dunn
Dir Adv/MNE/MCS	Ellen Kallman
Dir Adv/MPA	Ellen Mansfield
Sr Dir Prof Dev/MNE	Jill Harper
Dir Prof Dev/MPA	Jennifer Ruane
Sr Dir HC/MNE	Maria Wizboski
Sr Dir HC/MPA	Dani Block
Dir of QI	Mary Odira
Dir Clin Tech	Andrew Shlesinger
Sr Dir Day Serv/MNE	Silva Orchanian
Sr Dir Res Serv/MNE	Kimberly Duhanyan
Sr Dir Child Ed/MPA	Jennifer Labowitz
Sr Dir Child Res/MPA	Rodney Alleman
Dir Adult Day/MPA	Ashley Benedetto
Sr Dir Consult/MNE	Barbara Cannon
Sr Dir Rehab/MPA	Heather Hirst
Dir Fin/MPA	Cait Johnson
Dir IT/MNE	Chris Flagg
Dir IT/MPA	Dave Donovan
Sr Dir Fac/MPA	Curt Hoff
Dir Fac/MNE	Scott Briley

## Planning Participants

We thank all retreat participants for the input, energy, and enthusiasm!

<b>Rita Gardner*</b>	President and Chief Executive Officer	All Divisions
<b>Frank Bird*</b>	Vice President and Chief Clinical Officer	All Divisions
<b>Thomas Crofcheck*</b>	Vice President and Chief Financial Officer	All Divisions
<b>William Ahearn*</b>	Vice President for Business Operations and Finance, Melmark New England	All Divisions
<b>Rhiana Sherwood*</b>	Director of Communications	All Divisions
<b>Shawn Quigley*</b>	Chief Operating Officer	All Divisions
<b>Andrew Shlesinger</b>	Director of Clinical Technology	All Divisions
<b>Helena Maguire*</b>	Executive Director	Melmark New England
<b>Mary Morris*</b>	Senior Director of Human Resources	Melmark New England
<b>Ellen Kallman</b>	Director of Advancement	Melmark New England
<b>Maria Wizboski</b>	Senior Director of Healthcare	Melmark New England
<b>Jill Harper</b>	Senior Director of Professional Development, Clinical Training, and Research	Melmark New England
<b>Silva Orchanian</b>	Senior Director of Day Services	Melmark New England
<b>Kimberly Duhanyan</b>	Senior Director of Residential Services	Melmark New England
<b>Chris Flagg</b>	Information Technology Manager	Melmark New England
<b>Scott Briley</b>	Facilities Director	Melmark New England
<b>Barbara Cannon</b>	Senior Director of Consultation Services	Melmark New England
<b>Jeanne Kramer*</b>	Executive Assistant	Melmark New England
<b>Maggie Haag*</b>	Executive Director	Melmark Pennsylvania
<b>Lindsey Dunn*</b>	Senior Director of Human Resources	Melmark Pennsylvania
<b>Ellen Mansfield</b>	Director of Advancement	Melmark Pennsylvania
<b>Danielle Block</b>	Senior Director of Healthcare	Melmark Pennsylvania
<b>Heather Hirst</b>	Senior Director of Rehabilitative Services	Melmark Pennsylvania
<b>Jennifer Ruane</b>	Director of Professional Development and Clinical Training	Melmark Pennsylvania
<b>Jennifer Labowitz</b>	Senior Director of Children's Educational Services	Melmark Pennsylvania
<b>Rodney Alleman</b>	Senior Director of Children's Residential Services	Melmark Pennsylvania
<b>Mary Odira</b>	Director of Quality Improvement	Melmark Pennsylvania
<b>Cait Johnson</b>	Director of Finance	Melmark Pennsylvania
<b>David Donovan</b>	Director of Information Technology	Melmark Pennsylvania
<b>Curt Hoff</b>	Senior Director of Facilities	Melmark Pennsylvania
<b>Karen Mattox*</b>	Executive Assistant	Melmark Pennsylvania

## Planning Participants – continued

<b>Keri Bethune</b>	Director of Educational Services	Melmark Carolinas
<b>Brad Stevenson*</b>	Director of Program Administration and Clinical Services	Melmark Carolinas
<b>Mercy Mutindwa*</b>	Director of Talent Management and Executive Recruiting	Melmark EnvisionSmart Institute

\* Denotes member of Organizational Planning Team

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