

**The Institute of  
Professional Practice, Inc.**

## **20/20 VISION**

**Strategic Plan Report 2017-2020**

**Lou Giramma, CEO**



## CONTEXT & ACKNOWLEDGEMENTS

Welcome!

As IPPI's Board Chair, I am excited to present our Strategic Plan for the next three years! I believe it represents a bold statement about our value as an organization and our commitment to providing outstanding service to our communities well into the future. It represents such a clear picture of what we hope for ourselves as we implement it through 2020 that we are affectionately calling this our **20/20 Vision**.

I want to thank the many dedicated employees, Board members, new friends and old for their time, insights, passion and, frankly, openness to taking a long, hard look at both our organization's strengths and opportunities for growth and improvement. It is a true privilege to be involved in an effort like this with such talented and committed people.

We are justifiably proud of our work with many of the most vulnerable and inspiring individuals and families in multiple states, and of the positive impact our presence has on the communities in which they live. We endeavor, on a daily basis, to empower individuals and communities in incredibly meaningful ways. We strive to develop greater understanding and acceptance, and to celebrate the many achievements in the lives of the people we serve.

I am proud that we did not hesitate to look for opportunities for improvement through this process. The full potential in our organization can only be realized by periodically taking stock of where we have been and what we aspire to be.

I invite you to read through this Strategic Plan. Think of this as a map for a three-year journey. Get to know it. Please ask questions - and expect answers. Even if the answer is "we don't know yet", your questions will help us. I hope you will find in it, as I did, the inspiration that comes from the opportunity to make a difference.

Thank you. I look forward to hearing from you and seeing this ambitious plan unfold!

**Michael Chater,**  
**Board Chair**

September 1, 2017

## **EXECUTIVE SUMMARY: STRATEGIC PLAN 2017-2020**

IPPI began as a Vermont-coordinated response to a need for integrating people with significant developmental difficulties as states began the process of de-institutionalizing supports and recognizing the value of having people live in their own communities. We responded quickly and adapted to those needs in New Hampshire, Massachusetts, Connecticut and Maryland, while keeping our roots with corporate offices in Vermont.

Once established, IPPI adapted further to the local needs of those communities, and expanded our core competencies to provide high quality supports to an expanded range of needs, utilizing well-researched and evidence-based practices at the heart of our work. As our founders moved on, we recognized the time was right to take stock of all that we have accomplished over the past 30 years. We saw this as a time to realign our efforts in the best interest of continuously improving our services and the manner in which we organize ourselves for greatest efficiency and sharing of leading practices. We have been, after all, an innovative and adaptive organization at our heart, so there is much to gain through this self-reflection.

As a result of this work, we have identified a vision to work towards over the next three years that focuses on harnessing the internal strengths of the organization across all its geography and programming to allow for more efficiency and effectiveness in leveraging our whole to benefit those we serve today, and those we will serve tomorrow. The four priorities we have chosen will allow us to see our value in the evolving landscape with sharper, 20-20 vision. These priorities build upon IPPI strengths – both through new opportunities and improving existing systems. They will require new ways of thinking, expanded partnerships, additional resources, and highly engaged staff and board members. When successful, we're confident that more lives and communities will be improved as a direct result of the work of IPPI.

My genuine gratitude to all Board members and staff who contributed to this significant scope of work; your efforts will reward IPPI for years to come.

**Lou Giramma,  
Chief Executive Officer**

September 1, 2017

# STRATEGIC PLANNING PROCESS

## Purpose & Methodology

By design, and to the credit of Board and senior leadership, this strategic plan is informed by two distinct studies. The first, a robust Organization Assessment that looked at our internal strengths and development opportunities, given the lifecycle of the organization. A willingness to take a robust look at oneself takes courage and desire to improve, and this was adopted with vigor by Board and staff alike.

Second, a complementary outward-focused Environmental Scan researched those external influences and trends that will impact both the individuals and families we support, and the business aspects of our work. This includes demographic and socio-economic data, as well as political, regulatory, and peer organization analyses to prepare for the future and to ensure we are a continuously learning organization that routinely seeks information on research-proven leading practices in the field.

Our chosen methodology was to adapt the Applied Strategic Planning Model<sup>1</sup>. This model follows a process by which our members and key stakeholders created our own vision for the future and develop the necessary goals and strategies to achieve that future. Within this model, we selected a partnership approach with our chosen consultants, Cope & Associates, Inc. (Williston, VT), that promoted team building and developed internal capacity and competence to continue to conduct this type of scanning and review into the future. It also supported our talent development by providing stretch activities to selected staff who had demonstrated initiative and ability in their current roles. A Strategic Planning Steering Committee comprised of Board members and staff provided project oversight and input throughout the process, sponsoring the activities and applying rigor to our quality assurance process; their work was then reviewed and additional insights added through a series of Senior Leadership Team meetings.

## Data Collection

We organized our research through establishing four work groups, each with an area of focus, and each with a set of guiding questions from the Board that set out the scope of their work and the key questions they needed to gain insight to, and form responses for

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<sup>1</sup> Goodstein, L. D., Nolan, T. M., & Pfeiffer, J. W. (1992). *Applied Strategic Planning: An Overview*. San Diego, CA: Pfeiffer and Company.

analyses and decision-making. Their activities included reviewing internal data and documentation, conducting interviews, engaging subject matter experts, and researching current research and emerging practices.

Data Collection		Areas of Discovery	Leader
<b>WORK GROUPS</b>	<b>Industry - Field</b>	Trends in integrated service research and development; local and regional competition; trends and opportunities in recruitment.	Elizabeth Sellinger, PhD, BCBA-D
	<b>Customer</b>	Customer satisfaction; donor satisfaction; partner relationships; funder priorities; trust; communications; access to people and information; and stakeholder and partner priorities.	Ashley Davis
	<b>Legislative</b>	Potential legislative and political initiatives that may impact services and funding, and the effectiveness of current legislative and regulatory relationships and advocacy efforts.	Susan Sczerzenie, PhD, BCBA-D
	<b>Internal</b>	Identification of core values; employee satisfaction work environment including work/life balance; identification of core processes.	Rachelle Asante
<b>ORGANIZATION ASSESSMENT</b>		Employee satisfaction, Board satisfaction, innovation climate; evaluation of key business processes, comparison of programs to mission.	Cope & Associates, Inc.

## Analyses & Key Themes

Information gathered from the work groups and organization assessment were combined and analyzed together. By looking at everything in combination, common themes and key findings were identified.

## Retreat

Board members, senior leadership, and work group leaders participated in a Strategic Planning retreat on June 1 and 2<sup>nd</sup> 2017. The purpose of the retreat was to wrestle meaningfully with the information and analyses, and come to consensus on the path forward for the organization. The retreat also provided an opportunity for rich dialogue between board members and staff around the mission, vision and core values that guide all of our work.

## Integrated Functional Work Plans

Following the retreat, leadership worked together to finalize the goals developed in the retreat. Specifically, functional action plans were designed to identify how to implement the goals. These action plans included strategies, action steps, resource allocation, and key performance indicators (KPIs) to measure success.

## MISSION, VISION & CORE VALUES

IPPI began with a belief that everyone in our communities can add value and enrich the lives of all who live there, and that through high-quality, research-tested supports we can enhance that experience.

This belief is reflected in a revised **IPPI mission:**

*We build strong communities by empowering individuals.*

This mission is inspired by a **shared vision:**

*IPPI is the provider of choice, enriching individual lives and strengthening families and communities every day.*

Both mission and vision are underscored by the following **Core Values:**

***Employ methods that work.*** Through using proven methods employed through trained professionals, we provide known, highest quality services.

***Commit to teamwork & partnership.*** Through using the wisdom of many and leveraging all of our available resources, we promote leading practice.

***Respect human rights.*** At the heart of all that we do is the fundamental belief that all individuals will be treated with dignity and self-determination.

***Create opportunities through innovation.*** Continue to invoke our spirit of innovation through promoting initiative and supported pilot processes.

***Serve with compassion.*** In all that we do, we are compassionate and celebratory of all that defines the human condition.

***Lead with integrity.*** Be consistent and authentic in our words and our deeds, no matter who is watching.

Beyond our Core Values, we went further in developing **Operating Principles**, that provide further guidance on *how* we go about our vital work:

***Ensure all systems support the point of contact with the person served.*** A statement of clear intention that all that we do must add value to an individual's experience.

***Use established evidence-based methods/disciplines.*** Reiterating our commitment to using only valid methodologies in our work.

***Employ data-driven decision-making.*** Recognition of the value that analyses of relevant information brings to our decision-making.

***Invite stakeholders into decision making process.*** A commitment to engaging individuals, families and other invested people to benefit from their wisdom.

***Commit to transparent processes.*** A pledge to engender trust through all of our transactions with all of our stakeholders.

***Encourage entrepreneurship.*** Promoting innovation married to the market to leverage our business acumen.

***Invest in research and development to promote innovation.*** Maintaining our proud tradition of being a leader in our field by constantly seeking improvements to what we do.

***Share expertise and act as a resource internally and externally.*** Promote shared wisdom and efficiencies internally, and interact as an active community voice.

## OUR INTERNAL ORGANIZATIONAL HEALTH

The Institute of Professional Practices, Inc. is a healthy, fiscally sustainable organization positively impacting individuals and families across a multi-state area.

We incorporate established, researched, evidence-based practices across a range of programs that are regionally managed and adaptable to local needs. We are recognized by our partners for the quality of work we provide, and for the compassionate manner in which we deliver those services.

It was also quite clear from the internal organization assessment that we do not yet capitalize on the potential we have for leveraging economies of scale. Each new state program, as it took root in response to those early opportunities for community-based services, created its own systems, processes and organizational design to support operations. Each was operating almost as an independent organization.

One universal desire expressed by staff and Board alike through this process was for IPPI to become a single culture, a single “brand” known for its quality and impactful services and for its operating efficiency throughout the Northeast. This recognition and the desire to be a true learning organization that continuously improves is at the heart of who we are. This vision focuses our attention with new vigor.

The state of IPPI is strong, and we are determined to strengthen it further in these next three years to be adaptable and responsive to the shifting landscape, and to the needs of individuals and families who can benefit from our work.



## OUR EXTERNAL LANDSCAPE

The external landscape in which IPPI operates is complex and changing. We recognize that there are places where political and policy issues are determined without our input, and there are other places where we may strengthen our influence through clear expression of our interests at significant forums and through vital relationships.

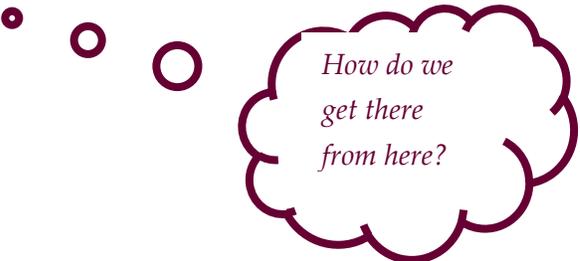
In these next three years IPPI will seek to be more intentional in our partnerships and our relationships, to enable us to better understand our evolving landscapes and to better prepare ourselves to take advantage of opportunities and to mitigate risks.

We also developed a heightened awareness of the changing demographics and the impact that will have on future need for services, and for the types of service that will be sought by families. We have committed to monitoring this and sharpening our self-awareness for the strengths we have in clinical areas, and where we might evolve to match the shifts in needs.

The competitive landscape in which we operate is also significant. We wrestled with the tendency for non-profit organizations to be modest with regard to business ambition. Yet we came to a realization that by strengthening our business functions we add value to the individuals by stewarding our resources more efficiently and by attracting and retaining top quality employees. This translated to a goal to become the employer of choice within our field.

In our related research into the field of developmental abilities, we engaged in meaningful dialogue about our standards for quality and outcomes, relative to some external standard, or benchmark. We also analyzed the meaning of evidence-based practices, and sharpened our common definition of this to mean practices that were also supported by real research and proven impact.

In sum, we have raised our understanding of the complex environment in which we work, and how we wish to relate to that those environmental factors more intentionally, and in a better-informed manner. We will be instituting mechanisms to continuously assess the environment and our capacity to respond meaningfully from both a service perspective and a business perspective.



*How do we  
get there  
from here?*

## OUR THREE-YEAR STRATEGIC INITIATIVE

Our intense work led to four strategic goals to support the overarching initiative to culminate in IPPI being better organized, more nimble and deeper as an organization in terms of both our core competencies and our business operations.

### STRATEGIC GOAL #1:

#### Identify growth and innovation opportunities that match our core competencies.

As IPPI has “grown up” in five states, each has developed its own local emphases as we have adapted to the presenting local needs and opportunities. This strategic planning process has given us time to take stock of those variations and to look critically at the consistencies – and the individualities – of how we have interpreted the same mission under these different circumstances and under different leadership styles.

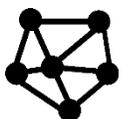
**When successful,** IPPI will unify its environmental scanning to understand the opportunities and challenges emerging in the landscape, and marry this information to a formalized system of program development and intentional partnering.



**STRATEGIC OBJECTIVE A:** Create a reporting structure for current, crucial information in industry, market, demographic, political, and policy environments to inform growth strategies by June 30, 2018.



**STRATEGIC OBJECTIVE B:** Create a system for assessing new and existing initiatives and business development projects that encompass our core competencies by June 30, 2018.



**STRATEGIC OBJECTIVE C:** Increase social capital through networking with other community organizations, groups, and individuals by December 31, 2019.

## STRATEGIC GOAL #2:

### Create a unified identity through leadership alignment.

Again, linked to our localized development, IPPI leadership has tended to take on a local flavor over the years and, as a result, operates in ways that emphasize different aspects of the services we provide. This has enabled IPPI to be responsive to immediate needs of local communities, while layering in degrees of variation in how we communicate, report, and otherwise operationalize the vital work we do.

**When successful**, we will create a unified culture across the organization as a whole, and cascade expectations, values, and brand identity consistently from the Board through senior leadership to regional management teams.



**STRATEGIC OBJECTIVE A:** Formalize board and executive governance structures, roles, and responsibilities by June 30, 2018.



**STRATEGIC OBJECTIVE B:** Create a cultural expectation of integrity-based leadership and skill development across all levels of the organization by December 31, 2019.



**STRATEGIC OBJECTIVE C:** Create a system to protect and leverage brand integrity at all levels of the organization, by June 30, 2019.

## STRATEGIC GOAL #3:

### Maximize efficiencies by enhancing internal systems.

IPPI, Inc. is a large, geographically dispersed organization. We have opportunities to improve quality, streamline talent development, and create significant savings through unifying our operations and administrative practices across all functions.

**When successful,** we will realize significant fiscal and operational efficiencies, and improve our risk management and inter-connectedness across the entire organization.



**STRATEGIC OBJECTIVE A:** Create a three-year Technology Plan to support the objectives and key milestones of the organization's overall strategic plan by December 31, 2018.



**STRATEGIC OBJECTIVE B:** Create a data plan to identify and track Key Performance Indicators that inform decision making at all levels of the organization by December 31, 2018.



**STRATEGIC OBJECTIVE C:** Unify human resource operations and create a consistent talent development strategy across the organization by December 31, 2019.



**STRATEGIC OBJECTIVE D:** Unify financial operations and create intentional financial processes and structures by December 31, 2018.



**STRATEGIC OBJECTIVE E:** Create a culture of operational efficiency by December 31, 2019.



**STRATEGIC OBJECTIVE F:** Develop a comprehensive quality assurance system across all of the organization's service delivery mechanisms by December 31, 2019.

## STRATEGIC GOAL #4:

### Develop our human resources through strengthening internal customer relations.

As with any organization over time, we see the benefit of pressing the “reset” button with regard to the ways we work together. Benefits not only in discrete ways, such as improving morale, and communicating more effectively, but in ways that are greater than the sum of all parts.

**When successful,** we will have an enhanced reputation as an employer and as a partner organization that will strengthen the value of our work, both internally, and with our primary customers, the individuals we serve.



**STRATEGIC OBJECTIVE A:** Create a cultural expectation of excellent service for our internal customers, by December 31, 2018.



**STRATEGIC OBJECTIVE B:** Create a culture of trust, learning and adaptability, by December 31, 2019.



**STRATEGIC OBJECTIVE C:** Become an employer of choice by December 31, 2019.



Customer Team



Industry Field Team



Legislative Team



Internal Team



**The Institute of Professional Practice, Inc.**

**September 2017**