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A Note From
The CEO

Belinda Kindschi | Chief Executive Officer

I am excited to share the 2019-2022 Strategic Plan that was established by our SA Collaboration Team which is composed of our Administrators, Directors, Chief Operating Officer and myself.

This Strategic Plan sets direction for our organization for the coming three years. Along with the strategic plan itself, you will see the graphic facilitation that was created alongside it.

There are a couple of things to note in the graphic facilitation that, while not directly specified in the strategic plan, were instrumental in informing it:

1. You will see a number of individuals playing instruments. This was a helpful metaphor for us as we continue to come together as one organization. While we all need to be playing the same song, there are different instruments we play.

2. There is a question stated on the graphic, “What’s the optimal structure for us to grow SA?”. In February 2019, SA instituted a new organizational structure which places all service delivery under Karina Briscoe, our Chief Operating Officer. Being in the midst of structure change is part of our current reality and, while our Collaboration Team was not working on structure as part of the plan, this question states the reality that this strategic change is in our midst.

3. There are people everywhere. It is our people that make SA the great place it is. Our commitment to supporting the growth and satisfaction of our people is instrumental. We do people work: keeping people at the forefront of our strategy embeds it with the passion it deserves.
2017-2019 Strategic Plan
Accomplishments-Outcomes

Background: In April 2017, Service Alternatives (SA) established an organizational two-year strategic plan to set the direction and priority for SA to move thoughtfully and boldly into the future. It is based on identified strengths, opportunities, weaknesses and threats; it’s fully in service of actualizing our organizational vision and values.

The plan focuses on three specific strategies.

- **Adaptive Structure:** We will have an adaptive and efficient structure to carry out our services which are guided by our vision and values.
- **Products and Services:** We will have an efficient means to evaluate, measure, and respond to existing, expanding and emerging markets, products, and services.
- **Culture of Engagement:** We will have established 3-5 Culture of Engagement Systems that are consistent and proactive across Service Alternatives.

Throughout this past year, we have been working across our organization to develop tools, systems, and programs to carry out the strategic plan. We are very excited to share the accomplishments and outcomes tied to each strategy:

<table>
<thead>
<tr>
<th>Strategy</th>
<th>Accomplishment</th>
<th>Outcome</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Products and Services</strong></td>
<td>Strategic Planning and Evaluation of Developing New Work Tool</td>
<td>A tool has been established that supports strategic decision making leading to new work development that aligns with our vision and values.</td>
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<td></td>
<td>Strategic Evaluation to determine the discontinuation of contracts or closure of programs</td>
<td>A tool has been established that supports strategic decision making leading to new work development and contract discontinuation that aligns with our vision and values.</td>
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<td>Strategy</td>
<td>Accomplishment</td>
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<tr>
<td>Adaptive Structure</td>
<td>Functional Dashboard</td>
<td>A dashboard has been created that supports deep understanding of efficiencies in job function, minimizing duplication of tasks and allowing for improved specialization. It informs defined and undefined functions within our existing structure which are now being incorporated more completely.</td>
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<td></td>
<td>Service Implementation Tool</td>
<td>A tool has been established that supports efficient and excellent start-up of new work.</td>
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<td></td>
<td>Cross-Organizational Recruitment Project Team</td>
<td>An efficient and functional employee recruitment system is still in design that operates consistently throughout SA and supports leadership to hire qualified, skilled and passionate team members. Following is a list of some of the aspects which have been accomplished: • Applicant tracking system • Screening questions • Base employee interview questions • Consistent reference process • One sheet description of SA benefits • Consistent recruiting &quot;message&quot; • Career Center has been built through ADP</td>
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<td>Marketing Firm Research</td>
<td>A local marketing firm has been established to partner with SA. An SA project manager has been identified to work as the project liaison. Several projects are currently underway.</td>
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<tr>
<td>Strategy</td>
<td>Accomplishment</td>
<td>Outcome</td>
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<td><strong>Culture of Engagement</strong></td>
<td>Direct Support Professionals Week</td>
<td>An annual event occurs, creating meaningful celebration of SA DSP’s.</td>
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<td>Advocate Advisory Council</td>
<td>Bi-annual meetings of two councils provide an opportunity for obtaining consultation from SA’s adult clients served in supported living and employment services.</td>
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<td>SA Value Awards and banquet</td>
<td>Monthly recognition of SA employees who embody SA values is being done and an annual banquet occurs, honoring each value award recipient. A plaque hangs in Everett, celebrating the recipient of the 'Advancing the Potential' award, the person who best exemplifies all SA values.</td>
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<td>Rising Stars</td>
<td>An organization-wide Emerging Leaders training was piloted and now operationalized as an annual opportunity.</td>
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<td>Community Service</td>
<td>Statewide service projects were completed (Special Olympics, Habitat for Humanity).</td>
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<td>Longevity Awards</td>
<td>An organization-wide system was designed and launched for annual longevity awards.</td>
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<tr>
<td>SA’s 35th Anniversary</td>
<td>Celebrations were launched and are continuing until October 2019.</td>
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2019-2022: Where We are Headed

We are establishing ourselves as an industry leader who sets standards of:

- Employment engagement and opportunity
- Products & Services
- Systems & Skills, achieving bold growth and robust profitability.
Strategic Plan 2019-2022

The following plan establishes organizational strategies from which each team formulates actionable and measurable goals and objectives.

**Strategic Plan Lead:** Belinda Kindschi

**STRATEGIES**

**Strategy 1: Systems, Procedures, Analysis and Measurement**

**Strategy Team Lead:** Rob Hays

**Team Members:** Melissa Darlington
Anton Saunsaucie
Troy Schuldheiss
Peter Tang

**Purpose:** Operationalize efficient systems, procedures, analysis and measurement through developing and providing:
- Information Management Systems
- Communication Platforms
- Analytical Frameworks
- Documentation Standards

**Goal:** Develop the Information Management Framework
- Reliably communicate with employees and stakeholders
- Build a contract database
- Build an RFP database
- Build a QA Assessment Tool
- Create a system development intake form
- Develop 'tool' clearinghouse
- Define metrics to measure success
- Define feedback procedure
Strategy 2: Strategic Business Growth

**Strategy Team Lead:** Vener Azurin

**Team Members:**
- Chris Breece
- Brandy Schutz
- Dani McCutcheon
- Ryan Miller

**Embedded Subject Matter Experts:**
- Janet Harding
- Karina Briscoe

**Purpose:** To expand and/or refine our products and services to enable strategic growth

**Goal:** SA will have $27m annual revenue by 2022
- We have a strategic business plan that measures our successes and goals (we get our ROI)
- We have a team of employees who specialize in vetting and developing new work
- 25% of annual revenue comes from sources of revenue based on wholly-owned SA products/trainings
- Mantra: We put 'heart' in your work
- Deliverable: Advise and recommend products and services to sell
Strategy 3: Workforce Development

**Strategy Team Lead:** Larissa Floyd

**Team Members:**
- Jessie DiPardo
- Aelfwynn Freer
- Tim Watt
- Mark DeMonbrun

**Embedded Subject Matter Experts:**
- Renee Stueckle
- Sandra Cohen

**Goal:** Establish a company-wide Workforce Plan

- **Infrastructure**
  - Gaps Analysis
  - Equity
  - Role Clarifications
- **Employee Development**
  - Developing a career path for the person
  - Talent Profile
  - Ongoing manager and administrator training
  - Leadership Development Program
- **Workforce Planning**
  - Forecasting
  - Recruiting Process Implementation (ADP Workforce Now)
  - Refine details of recruiting process
  - Recruiting
  - Onboarding
Strategic Plan Oversight and Reporting

The CEO meets monthly with the Strategy Team Leads for the purpose of maintaining continuous momentum related to strategic plan execution. The Strategy Lead Team provides communication related to:

- strategic plan action that has occurred in the last month,
- strategic Plan action steps occurring in the next month,
- requests for needed resources,
- request for needed supports.

The CEO provides a monthly report to the Collaboration Team summarizing activities of each of the three strategies.

Outcomes are reported twice per year to SA employees and to stakeholders through an update posted on the website.

A final report is completed at the end of each strategic plan.