

STRATEGIC PLAN 2023-2026



▶ **iHOPE** ▶ **Manhattan Star Academy** ▶ **Premier HealthCare** ▶ **National Institute for People with Disabilities of New Jersey**

A Letter From the CEO

YAI provides person-centered support for children and adults with intellectual and developmental disabilities (I/DD). Although the person-centered nature of our work remains as important today as it was when YAI was founded in 1957, the pace of change in our field demands that we remain alert to the evolution in programming, methods, and the changing demographics of our community so YAI can always affirm that the people we support have every available opportunity. In everything we do, we must remain committed to upholding our mission of seeing beyond disability and providing opportunities for people to live, love, work, and learn in their communities.

At a forward-thinking organization like YAI, keeping track of change is a responsibility enshrined in our day-to-day workflow. While legacy programs continue to comprise the bedrock of our portfolio, our service offerings have expanded to meet new demands and optimize advances in smart technology, mental health services, and remote formats for service delivery. Over the last several years, YAI has learned to pivot, so our services now include crisis resolution support for people with I/DD and behavioral health needs; programs for preschool-age children; and operation of New York City's preeminent school for children with traumatic brain injuries. We deliver telehealth services, provide supported employment opportunities, and train people with I/DD and their caregivers in everything from providing informed sexual consent to traveling safely on the subway. Our catchment area has expanded far beyond the New York metropolitan area to include California, New Jersey, and Upstate New York. Our expertise has been called on internationally in New Zealand, Saudi Arabia, and South Korea. As is true with the population at large, the demographic of the people we support is growing older, which will soon require focused attention on dementia care planning and ways to help people with I/DD age in place.

Over the last year, YAI's Board of Trustees and senior leadership shared perspectives about what YAI and its network of affiliates might accomplish between now and 2026. This strategic plan is organized around six pillars with interwoven objectives that present an organization alert to the challenges of a fluctuating funding climate, an uncertain labor market, and a greater need to demonstrate transparency to a broad range of stakeholders. This plan takes the long view of YAI's aspirations so we can monitor effectiveness over time, provide programming that meets evolving needs, and fortify the administrative, fiscal, and marketing infrastructure required to maintain services of the highest possible caliber well into the future.

YAI released its first strategic plan in 2018 when New York State had planned a move to managed care. Anticipating that seismic shift, we wanted to ensure that our programs would make a successful transition to the new model. Though this new strategic plan presages an equally dramatic shift, it looks and feels very different. Presented with a series of numeric targets over a similar four-year period, some of our efforts can be quantified to gauge increases in the number of people receiving services, variations in the kinds of supports YAI offers, and growth in the geographic range over which services are provided. Even acknowledging our ability to measure,

YAI holds no more important goal than quality — an assurance that every person who receives services from YAI and its affiliates could find no more capable and concerned organization, equipped for both immediate and long-term needs and the flexibility to move, as needed, wherever our field travels next.

No one could have imagined the profound changes YAI would face in March 2020 when the coronavirus pandemic required us to pause some programs, expand others, and prepare the people we support and our staff for a once-in-a-lifetime “real-time detour” that altered our personal and professional lives every day for the past three years. As I write this, our region — in fact, the entire world — is asking whether the changes we have introduced to overcome the pandemic will remain part of our lives forever, or whether the familiar world we left behind will ever come back. Regardless of our answer, YAI’s new strategic plan was created in the spirit of anticipating the unexpected. Here, we look for enduring opportunities to leverage YAI’s expertise to support more people in ways that are new, innovative, and better.

Yours sincerely,

Kevin Carey
Chief Executive Officer

Approved July 2023

Mission

YAI and its network of affiliate agencies offer children and adults with intellectual and developmental disabilities (I/DD) and their families a comprehensive range of services. YAI is committed to seeing beyond disability, providing opportunities for people to live, love, work, and learn in their communities.

About YAI

Nearly five million people in the U.S. are diagnosed with I/DD. Approximately 57 percent of people with I/DD have three or more chronic conditions.

With more than 4,000 staff and over 300 programs, YAI provides supports and services to thousands of children and adults with I/DD and their families. Services offered by YAI include supported residences; site and community-based day habilitation; supported employment; primary, specialty, and therapeutic healthcare; family support; arts, culture, and recreation; autism evaluations; preschool, primary, and middle school education; and information and referrals. YAI also provides community partners and corporations with resources that equip them to hire people with I/DD and support them on the job, consulting services to peer agencies in the U.S. and international NGOs, and training on numerous I/DD, workplace, and compliance subjects. YAI's advocacy has been a powerful change agent in Albany, where policies and financial decisions are made that determine staff wages, eligible program expenses, and the overall climate of I/DD services in New York State. With a focus on seeing beyond disability, YAI delivers its services in person-centered ways that are focused around the four universal tenets of living, loving, working, and learning to empower and enhance the lives of the people and families it supports.

YAI provides support to thousands of people with I/DD, their families, employers, and community institutions.

On any given day...

- YAI's residences provide 800 people with a safe, comfortable home.
- Crisis stabilization supports are provided to 500 children and adults with I/DD and co-occurring mental health diagnoses.
- More than 50 people receive services in the community or in their homes through community habilitation.

- More than 385 people clock in to paid jobs through YAI's supported employment program.
- Over 800 people participate in enriching day habilitation activities.
- Premier HealthCare sees 205 people for medical, dental, and mental health visits.
- Teachers and therapists at the International Academy of Hope (iHOPE) and Manhattan Star Academy (MSA) say "Good morning" to more than 240 children.

Changing the Landscape for I/DD Services

When YAI marked the 50th anniversary of the notorious Willowbrook State School exposé in 2022, the agency had an opportunity to consider the long arc of changes to the field of I/DD supports and services. YAI, a pioneer in community-based programs, is one of many providers in the New York area that must struggle with an unsteady climate of public support. Even as demand grows for the kinds of services YAI offers, providers like YAI are not always able to access the resources needed to ensure truly exceptional support.

There are many external factors influencing this including the low profile of the field of I/DD support in general, competition for private funding, and the burdens of an aging population whose needs grow more acute each year. Without question, however, our field's paramount challenge is staffing. Even absent the oversized burden of the COVID pandemic, recruiting and retaining talented people to do the difficult work of direct support is a challenge. Beginning in 2020, that challenge became nearly insurmountable as low unemployment rates and remote work options increased competition for talented people. Compounding that problem, direct support pay does not reflect the importance or difficulty of the job. Although YAI is always alert to opportunities to advocate for staff wages, public funds for staff have not kept up with inflation and labor market demands. Low wages lead to staff turnover, which in turn, impairs the quality of services we provide.

Many YAI residential programs have been in operation for decades, which means people we support there have aged, reflecting another national trend. Long lives are an encouraging sign, but older people require different kinds of support, ranging from the facilities they use to a steep increase in their medical needs. To cite one example, Alzheimer's disease, which affects 50% of people with Down syndrome in their 60s, is prevalent in many YAI homes, so staff must be trained to provide appropriate care.

A few signs of hope include the increased use of smart technology, pioneered at YAI through private funding in the absence of Office for People with Developmental Disabilities (OPWDD) support, which increases independence for people YAI supports and liberates staff from certain daily tasks so they can focus on more engaging interactions. Another sign of hope is new thinking about day programs—greater exposure to the community, pre-vocational experience, and more targeted outreach to prospective employers have upended the conventional day habilitation model.

As a large provider, YAI is well-positioned to weather many of these changes and emerge with new ideas. Our strong financial and administrative infrastructure equips us to move into new modes of service delivery and to succeed in new geographic regions where the mix of available I/DD services remains conventional. Our 2023-26 Strategic Plan places YAI within the current landscape for I/DD services and illuminates a path through these challenges to provide more and higher quality support to the people who most need it.

Pillars of the Strategic Plan

This strategic plan is built around six pillars, each with its own goal:

Pillar	Description	Strategic Objectives
1 Operating Excellence	YAI's infrastructure will reflect best-in-class operational practice.	1.1 Reduce incidents of neglect. 1.2 Increase adherence to regulatory policies and decrease agency risk. 1.3 Enhance two-way communication with YAI families. 1.4 Ensure senior leadership is best-in-class.
2 Access and Expansion	YAI will introduce innovative models of support to serve a greater number of children and adults with I/DD.	2.1 Enable older people with I/DD to more easily age in place. 2.2 Enhance preparedness and placement of adults with I/DD for wage-earning jobs in the community. 2.3 Enrich supports that complement daytime learning for young people with I/DD. 2.4 Provide support to more people with co-occurring I/DD and mental health diagnoses and other complex needs. 2.5 Increase access to smart technology for people with I/DD. 2.6 Expand access to high-quality support provided by YAI affiliate agencies. 2.7 Optimize mix of programs to provide high-quality support to more children and adults with I/DD.
3 Employee Experience	YAI will attract and engage a committed workforce who are interested in building a lifetime career in the field, invested in YAI's mission, and aligned with the foundations of YAI's culture – quality, collaboration, accountability, respect, professionalism, and joy.	3.1 Sustain a workforce able to deliver the highest quality of services to the people we support. 3.2 Create exceptional employee experience. 3.3 Enrich employees' understanding of opportunities for career growth and development. 3.4 Build visible cadre of volunteers to support program staff and serve as a pipeline to career development in I/DD.
4 Diversity and Inclusion	YAI will cultivate a culture of inclusiveness and diversity of opportunities, ideas, and experiences for all.	4.1 Equip women and BIPOC leaders for promotion within YAI. 4.2 Structure leadership to reflect demographics of our workforce and people we support. 4.3 Create opportunities for employees and people we support to share their cultural identities.

<p>5</p> <p>Development and Diversification</p>	<p>YAI will pursue diversified funding streams that include states and municipalities outside of New York, international consulting, and private sector sources.</p>	<p>5.1 Optimize existing administrative resources and expertise through new affiliate relationships or providing management services to other organizations.</p> <p>5.2 Diversify funding with unrestricted private support.</p>
<p>6</p> <p>Awareness and Understanding</p>	<p>YAI's mission and purpose will become familiar to a far greater number of people.</p>	<p>6.1 Increase key stakeholder knowledge of YAI and its mission.</p> <p>6.2 Strengthen earned media profile.</p> <p>6.3 Influence I/DD policymaking and public funding.</p>

Pillar 1: Operating Excellence

Goal: YAI's infrastructure will reflect best-in-class operational practice.

As a provider agency whose actions affect thousands, from people supported in our programs to children in our schools, to employees on the frontline, to families and caretakers, YAI must always be transparent in its actions. Our ability to provide support in perpetuity relies on maintaining and enhancing a strong fiscal, reputational, and administrative profile. Pillar 1 asks that we focus on operational improvements, including creating easy-to-access dashboards that reflect quality and compliance standards in real time and using data to identify possible systemic issues in service delivery, billing, and person-centered planning.

The plan takes a similar approach to communication with families – our most important constituency after the people we support. Although regular outreach to YAI families has been consistent over the last several years, the plan commits YAI to improve communication and response to families whose trust we must never take for granted. This, along with sound succession planning, steel YAI for a bright future, no matter the landscape.

Strategic objective 1.1: Reduce incidents of neglect.	How we will be successful <ul style="list-style-type: none">o Determine core programs and services to be included in quality dashboard and prioritize key quality metrics (2023 Q2).o Enhanced data-gathering to identify and address program areas and geographic regions with heightened levels of exposure (2023 Q3).o Review system at appropriate intervals (ongoing).o Implement Electronic Medication Administration Record (eMAR) to improve health and safety of people we support and reduce med errors (pilot in 2023 Q2, fully implemented by 2024 Q2).
	How we will measure success <ul style="list-style-type: none">o 56 percent decrease in substantiated claims of neglect, from 46 to 20 percent.o 61 percent decrease in health and medication citations from 26 percent to 10 percent.

	<p>Executive Team Leader</p> <p>Chief Quality, Compliance, and Ethics Officer</p> <p>Chief Program Officer</p> <p>Director of Technology</p>
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<p>Strategic objective</p> <p>1.2: Increase adherence to regulatory policies and decrease agency risk.</p>	<p>How we will be successful</p> <ul style="list-style-type: none"> ○ Enhanced data-gathering into new front-facing dashboard (2023 Q4). ○ Incorporate dashboard metrics to identify programs and regions with exposure to adherence risk (2024 Q1). ○ Provide ongoing system oversight in accordance with the annual compliance work plan (ongoing). ○ Create an updated and accessible policy and procedure manual (2024 Q1).
	<p>How we will measure success</p> <p>Introduction of transparent compliance dashboard to monitor risk in all core services.</p>
	<p>Executive Team Leader</p> <p>Chief Quality, Compliance, and Ethics Officer</p> <p>Director of Technology</p>

<p>Strategic objective</p> <p>1.3: Enhance two-way communication with YAI families.</p>	<p>How we will be successful</p> <ul style="list-style-type: none"> ○ Revamp Family Advisory Council (FAC) by expanding membership to include all programs and stakeholders and streamline agenda and cadence of meetings (2024 Q1). ○ Devise mechanisms for families to share concerns and feedback (2024 Q2). ○ Commit to responding to inquiries within two business days (2024 Q2). ○ Introduce policy for encouraging staff to share parents/caregiver concerns for agency follow-up (2023 Q4).
	<p>How we will measure success</p> <p>Annual constituent satisfaction survey.</p>

	<p>Executive Team Leader</p> <p>Chief Executive Officer</p> <p>Chief Program Officer</p> <p>Senior Director Communications</p>
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<p>Strategic objective</p> <p>1.4: Ensure senior leadership is best-in-class.</p>	<p>How we will be successful</p> <ul style="list-style-type: none"> ○ Devise skills-building curricula for senior leadership focused on management training and scenario planning (2024 Q4). ○ Hold brainstorming sessions with senior leaders to identify and implement novel mechanisms that support leadership stability (2024 Q1). ○ Produce annual summit with leaders and secondary leaders to cultivate succession planning and discuss professional goals, future planning, and resources required to support evolution in I/DD services (2023 Q3). ○ Implement annual 360 evaluation of senior leadership team (2024 Q1). ○ Recruit and hire outstanding, high-performing individuals to fill open roles on the senior leadership team (ongoing).
	<p>How we will measure success</p> <ul style="list-style-type: none"> ○ Dynamic, well-developed succession plan for each identified key leadership position. ○ Reduction in senior leadership turnover. ○ Senior leadership evaluations reflect improved performance and alignment with agency goals.
	<p>Executive Team Leader</p> <p>Chief Executive Officer</p> <p>Chief Human Resources Officer</p>

Pillar 2: Access and Expansion

Goal: YAI will introduce innovative models of support to serve a greater number of children and adults with I/DD.

The most important measurement of this Strategic Plan will be YAI's ability to provide high-quality support to more people in need. Pillar 2 guides us on how to meet the evolving needs of children and adults with I/DD, expanding and enhancing existing programs and services to accommodate our community as people grow older, navigate complex needs, or rely on new forms of support such as adaptive technology to gain greater independence.

Growth over the plan's four-year period will allow YAI and its affiliates to explore ways of providing services to people who lack adequate support. Our targets for meeting these needs are ambitious but reflect similar rates of growth YAI programs have experienced since 2020.

<p>Strategic objective</p> <p>2.1: Enable older people with I/DD to more easily age in place.</p>	<p>How we will be successful</p> <ul style="list-style-type: none"> ○ Assess people in residential programs to understand and anticipate each individual's needs as they grow older (2023 Q4). ○ Retrofit select YAI residences to accommodate barrier-free living and greater medical oversight (2026 Q2).
	<p>How we will measure success</p> <p>All YAI residents live in homes that pose no obstacles to full access.</p>
	<p>Executive Team Leader</p> <p>Chief Program Officer</p>

<p>Strategic objective</p> <p>2.2: Enhance preparedness and placement of adults with I/DD for wage-earning jobs in the community.</p>	<p>How we will be successful</p> <ul style="list-style-type: none"> ○ Assess people we support in residential and day programs to identify prospects for enrollment in supported employment (2024 Q2). ○ Create a continuum of services from pre-vocational training through internship placements to supported employment to maximize exposure to the world of work (2024 Q4). ○ Increase marketing to existing vendors and other prospective employers to identify job placement opportunities (2023 Q4).
	<p>How we will measure success</p> <ul style="list-style-type: none"> ○ 50 percent increase in participation in supported employment from 400 to 600 people in the first two years of the plan. ○ Additional 50 percent increase over the final two years, bringing participation in supported employment to 800 people.
	<p>Executive Team Leader</p> <p>Chief Program Officer</p>

<p>Strategic objective</p> <p>2.3: Enrich supports that complement daytime learning for young people with I/DD.</p>	<p>How we will be successful</p> <ul style="list-style-type: none"> ○ Create transition program for 18-21-year-olds at iHOPE (2024 Q4). ○ Explore after-hours programming, partnerships, and events at new iHOPE facility (2024 Q1). ○ Enrich seamless service model by increasing opportunities for preschool and high school students at MSA (2023 Q1 for preschool and 2025 Q3 for high school). ○ Introduce after-hours programming (Speech, Occupational Therapy, Physical Therapy, Counseling, Vision, Hearing, Music, Art, and Adaptive Phys Ed) at MSA (2025 Q1).
	<p>How we will measure success</p> <p>Addition, expansion, and enhancement of education services.</p>
	<p>Executive Team Leader</p> <p>Executive Director, iHOPE Executive Director, MSA</p>

<p>Strategic objective</p> <p>2.4: Provide support to more people with co-occurring I/DD and mental health diagnoses and other complex needs.</p>	<p>How we will be successful</p> <ul style="list-style-type: none"> ○ Open residential program for people with co-occurring I/DD and mental health diagnoses in partnership with New York State Office of Mental Health (2025 Q3). ○ Open three crisis stabilization homes in New Jersey (2023 Q4). ○ Open four additional residential homes in New Jersey for people with complex needs (2026 Q4). ○ Pursue expansion of START, an evidence-based crisis intervention method for people with co-occurring I/DD and mental health diagnoses, in California, New Jersey, and elsewhere (ongoing).
	<p>How we will measure success</p> <p>Addition of multiple programs to support people with co-occurring I/DD and mental health diagnoses and other complex needs.</p>
	<p>Executive Team Leader</p> <p>Chief Program Officer</p>

<p>Strategic objective</p> <p>2.5: Increase access to smart technology for people with I/DD.</p>	<p>How we will be successful</p> <ul style="list-style-type: none"> ○ Assess people we support for needs and desires that can be addressed through smart technology (ongoing). ○ Incorporate discussion of technology in lifeplan meetings (2023 Q4). ○ Introduce smart hubs in New York State residential programs with designated staff in every program trained to optimize technology, enriching day-to-day life for people we support (2023 Q4). ○ Position Center for Innovation and Engagement as innovative hub for corporations and thought leaders to support smart technology for people with I/DD (2024 Q1). ○ Identify technology partners to assist with technology roadmap (2023 Q3). ○ Leverage private philanthropy and corporate donors to support and expand existing Center for Innovation and Engagement (ongoing).
	<p>How we will measure success</p> <p>167 percent increase in access to technology from 300 to 800 users.</p>

	<p>Executive Team Leader</p> <p>Chief Executive Officer</p> <p>Chief Program Officer</p> <p>Senior Director Advancement</p> <p>Director of Technology</p>
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<p>Strategic objective</p> <p>2.6: Expand access to high-quality support provided by YAI affiliate agencies.</p>	<p>How we will be successful</p> <ul style="list-style-type: none"> ○ Expand capacity for dental services at Premier HealthCare to accommodate 1,300 new patients, including 500 additional young people in the foster care system (50% by 2024 Q4, 50% by 2026 Q2). ○ Assess viability of Premier, MSA, and iHOPE expanding into other regions where YAI provides services (ongoing). ○ Explore opening new Premier HealthCare clinic at Tarrytown Multiservice Center, accommodating approximately 2,000 new patients (2023 Q3 for assessment, if viable 2025 Q3 target opening). ○ Identify and acquire new space to accommodate enrollment growth at MSA of at least 75 students and create new curriculum for high school-aged students (2025 Q3). ○ Increase iHOPE enrollment by 60 students, bringing current space to capacity (2024 Q2).
	<p>How we will measure success</p> <p>44 percent increase in people accessing YAI affiliate services from 8,000 to 11,500 by end of plan.</p>
	<p>Executive Team Leader</p> <p>Chief Executive Officer</p> <p>Chief Program Officer</p> <p>Executive Director, iHOPE</p> <p>Executive Director, MSA</p> <p>Executive Director, Premier HealthCare</p>

<p>Strategic objective</p> <p>2.7: Optimize mix of programs to provide high-quality support to more children and adults with I/DD.</p>	<p>How we will be successful</p> <ul style="list-style-type: none"> ○ Pursue opportunities to open programs for people with I/DD and co-occurring behavioral health needs (ongoing). ○ Conduct rigorous research on need for additional or expanded programming for underserved populations (ongoing). ○ Confirm that prospective opportunities are consonant with economic and political stability, regional labor market, and potential for additional operating support (ongoing). ○ Confirm that program/service objective is aligned with YAI's mission and existing staff expertise (ongoing).
	<p>How we will measure success</p> <ul style="list-style-type: none"> ○ More people with I/DD can access high-quality support. ○ By Q1 2026, no single business line exceeds 65% of total operations.
	<p>Executive Team Leader</p> <p>Chief Executive Officer</p> <p>Chief Program Officer</p> <p>Chief Financial Officer</p>

Pillar 3: Employee Experience

Goal: YAI will attract and engage a committed workforce who are interested in building a lifetime career in the field, invested in YAI's mission, and aligned with the foundations of YAI's culture – quality, collaboration, accountability, respect, professionalism, and joy.

Ensuring qualified and consistent staffing in the direct support workforce continues to be a challenge for voluntary providers like YAI, whose programs benefit from stability; familiar faces providing support and encouragement comfort the people YAI supports and their families and allow program quality to remain high. But with added pressures on the labor market due to the pandemic and its aftermath, the problems of attracting and engaging staff have been magnified. Many initiatives have already been put into place that seek to improve the results of attracting quality staff, including introducing a more immediate compensation platform, improving YAI's presence on external recruitment sites, and shortening the time between an employee's hire date and first day on the job.

Signs of promise should not be interpreted as triumph; although our retention is greater than many other agencies in the I/DD field, YAI still has an unacceptable and unsustainable annual turnover rate. The field's salary limitations mean we routinely lose excellent people to sectors where compensation is greater. Although a significant reevaluation of direct support roles warrants the attention of elected officials and I/DD leaders, the need is too great to wait for wages to rise.

To optimize these strategic objectives for the best possible success, YAI began 2023 by overhauling frontline staff compensation rates and emphasizing the foundations of YAI's culture – quality, collaboration, accountability, respect, professionalism, and joy. Throughout this strategic plan, we commit to monitoring the effect of these increases on workforce stability and the quality of our staffing overall.

Strategic objective	How we will be successful
3.1: Sustain workforce able to deliver the highest quality of services to the people we support.	<ul style="list-style-type: none">○ Implement digital scheduling platform to speed selection of shifts (2023 Q1).○ Initiate programs and supports that go beyond State-mandated trainings to encourage retention of skilled employees (2024 Q4).○ Incorporate employee value proposition in recruitment (2024 Q1).○ Utilize Workday ERP to streamline and automate onboarding procedures (2023 Q3).

	<p>How we will measure success</p> <ul style="list-style-type: none"> ○ Increase number of shifts/hours filled. ○ Increase length of employee service, specifically decreasing turnover in the first 6 to 12 months.
	<p>Executive Team Leader</p> <p>Chief Human Resources Officer</p>

<p>Strategic objective</p> <p>3.2: Create exceptional employee experience.</p>	<p>How we will be successful</p> <ul style="list-style-type: none"> ○ Enhance compensation of frontline staff (2023 Q1). ○ Introduce benefits that match what employees value (i.e. childcare) (2025 Q1). ○ Incorporate employee feedback into organization-wide initiatives (2024 Q1). ○ Initiate targeted first-year engagement strategy (2024 Q1).
	<p>How we will measure success</p> <ul style="list-style-type: none"> ○ Annual Employee Survey—measurement of employee satisfaction with their day-to-day workplace experience. ○ Staff longevity and increase in retention rates.
	<p>Executive Team Leader</p> <p>Chief Human Resources Officer</p>

<p>Strategic objective</p> <p>3.3: Enrich employees' understanding of opportunities for career growth and development.</p>	<p>How we will be successful</p> <ul style="list-style-type: none"> ○ Implement a comprehensive career path for frontline staff (2025 Q1). ○ Introduce a structured mentorship program (2023 Q1). ○ Train supervisory staff to conduct conversations about growth and development (2024 Q2). ○ Enhance procedures to identify employees' potential and assess performance (2025 Q1). ○ Establish more rigorous criteria for promotion (2023 Q4).
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	<p>How we will measure success</p> <ul style="list-style-type: none"> ○ Monitor interactions with Career Path tool. ○ Monitor number of employees with completed and active Development Plans. ○ Monitor employee feedback on the value of the process.
	<p>Executive Team Leader</p> <p>Chief Human Resources Officer</p>

<p>Strategic objective</p> <p>3.4: Build visible cadre of volunteers to support program staff and serve as a pipeline to career development in I/DD.</p>	<p>How we will be successful</p> <ul style="list-style-type: none"> ○ Conduct needs assessment for prospective volunteer opportunities in programs and schools (2024 Q1). ○ Determine suitable training to equip volunteers for hands-on roles (2024 Q2). ○ Market prospective volunteer opportunities (2024 Q2). ○ Develop volunteer enrichment and social events where prospective careers in the field are explored (2024 Q2). ○ Share open positions with volunteers at regular intervals (2024 Q2).
	<p>How we will measure success</p> <ul style="list-style-type: none"> ○ Number of volunteers remaining engaged with YAI for six months or more. ○ Number of volunteers who convert to employees.
	<p>Executive Team Leader</p> <p>Chief Human Resources Officer</p>

Pillar 4: Diversity and Inclusion

Goal: YAI will cultivate a culture of inclusiveness and diversity of opportunities, ideas, and experiences for all.

YAI's staff of 4,000 is exceptionally diverse; people of color and women represent a majority of our employees. Leadership positions at the Chief and Regional Director level, however, do not represent either our employee base or the people we support. In this area, YAI is committed to making meaningful change.

Following the May 2020 murder of George Floyd, YAI recognized that it needed to do more to support its workforce. In March 2021 YAI opened its Diversity and Inclusion Office, a function charged with guiding YAI and its affiliates toward becoming more supportive employers, cognizant of inequity, and prepared to work hard at eliminating it. Like many of the plan's pillars, these objectives are complementary, building skills and identifying opportunities for people of color and women to ascend to more senior roles, trained and equipped for success.

<p>Strategic objective</p> <p>4.1: Equip women and BIPOC leaders for promotion within YAI.</p>	<p>How we will be successful</p> <ul style="list-style-type: none"> ○ Identify promising leaders with growing professional portfolios across entire organization (2024 Q3). ○ Facilitate creation of a curriculum that focuses on individual strengths and incorporates case studies and real-life opportunities (2025 Q1).
	<p>How we will measure success</p> <ul style="list-style-type: none"> ○ At least one graduating class from a high-performing leaders program by 2024. ○ Increase percentage of women and BIPOC leaders at the director level and above. ○ Implement a program to support historically marginalized groups with career advancement. ○ Regular check-ins with women and BIPOC focus groups to gauge ongoing needs.
	<p>Executive Team Leader</p> <p>Diversity and Inclusion Officer</p>

<p>Strategic objective</p> <p>4.2: Structure leadership to reflect demographics of our workforce and people we support.</p>	<p>How we will be successful</p> <ul style="list-style-type: none"> ○ Revise job descriptions to use inclusive language (2023 Q4). ○ Target recruitment according to discrete need for BIPOC leaders across YAI (2024 Q1). ○ Leverage leadership relationships to identify promising BIPOC networks (2024 Q1). ○ Execute staffing decisions that increase diversity among agency leadership (ongoing).
	<p>How we will measure success</p> <ul style="list-style-type: none"> ○ 30 percent increase of BIPOC and women at the senior leadership and Regional Director level by end of plan. ○ Increased rate of internal promotions into supervisory/management roles rather than external hiring, showing cultivation of workforce.
	<p>Executive Team Leader</p> <p>Chief Executive Officer</p> <p>Chief Human Resources Officer</p> <p>Diversity and Inclusion Officer</p>

<p>Strategic objective</p> <p>4.3: Create opportunities for employees and people we support to share and celebrate their cultural identities.</p>	<p>How we will be successful</p> <ul style="list-style-type: none"> ○ Regionalize the Diversity Inclusion Coalition for Equity (DICE) to better support staff and DEI initiatives (2024 Q1). ○ Create Employee Resource Groups (ERG) to bring together like-minded employees and allies to network and develop leadership and business skills (2023 Q4). ○ Establish inclusive cultural calendar for YAI staff and people we support (2024 Q1).
	<p>How we will measure success</p> <ul style="list-style-type: none"> ○ At least three successful ERGs meeting consistently by end of 2023. ○ Increase in satisfaction for staff and people we support on diversity metrics noted in annual surveys throughout the plan period.
	<p>Executive Team Leader</p> <p>Diversity and Inclusion Officer</p>

Pillar 5: Development and Diversification

Goal: YAI will pursue diversified funding streams that include states and municipalities outside of New York, international consulting, and private sector sources.

Long-term financial stability is essential to meeting YAI's obligations to the people we support today, tomorrow, and well into the future. One of the most important goals in YAI's 2018-20 Strategic Plan was diversification of funding. With a recognition that over-reliance on Medicaid dollars directed by New York State's Office for People With Developmental Disabilities was a liability to that stability, YAI successfully recalibrated its mix of funders and reduced reliance on Medicaid from 93 percent of all funding in 2018 to 79 percent in 2020.

Parallel to Pillar 2, in which YAI commits to expand access to more people, diversifying support is an important goal in the new plan. The two objectives coalesce in a vision of an agency that recognizes its administrative and programmatic strengths and seeks opportunities to optimize – and monetize – expertise.

<p>Strategic objective</p> <p>5.1: Optimize existing administrative resources and expertise through new affiliate relationships or providing management services to other organizations.</p>	<p>How we will be successful</p> <ul style="list-style-type: none"> o Conduct analysis on potential partnerships including mission alignment, financial viability, potential return on investment, and service compatibility (ongoing). o Explore additional international consulting opportunities to supplement current funding streams and raise visibility of YAI (ongoing). o Target partnerships that complement YAI's needs or gaps (ongoing). o Present analysis and financial pro formas scenarios to Board (ongoing).
	<p>How we will measure success</p> <p>Two new affiliate relationships by Q4 2025.</p>
	<p>Executive Team Leader</p> <p>Chief Executive Officer Chief Financial Officer</p>

<p>Strategic objective</p> <p>5.2 Diversify funding with unrestricted private support.</p>	<p>How we will be successful</p> <ul style="list-style-type: none"> ○ Promote unrestricted giving, including solicitations through planned giving, corporate partnerships, private foundations, and targeted online campaigns (ongoing). ○ Implement centralized fundraising model and gift acceptance policy (2024 Q1). ○ Re-imagine Central Park Challenge (2023 Q4 in preparation for 2024 Central Park Challenge).
	<p>How we will measure success</p> <p>150 percent increase in unrestricted revenue from \$800K to \$2MM annually by Q1 2026.</p>
	<p>Executive Team Leader</p> <p>Chief Executive Officer</p> <p>Senior Director Advancement</p>

Pillar 6: Awareness and Understanding

Goal: YAI's mission and purpose will become familiar to a far greater number of people.

YAI's impact should be recognized on a much greater scale – it is critical to take the mission and passion of YAI to a greater number of people. Although YAI was founded more than 65 years ago, it suffers from lack of name recognition, appreciation, and understanding among the general public. As a result, we face an uphill climb to secure interest among key stakeholders including prospective employees, Board members, elected officials, donors, and event participants. In Pillar 6, YAI is making a straightforward commitment to address visibility by devoting resources to promoting our brand and expertise with the express purpose of attracting interest from groups we need in order to succeed. This will not only bring greater awareness of YAI, but to the mission and purpose of millions of people with I/DD across the nation and the world.

Because YAI can be a true thought leader, we see this objective enriching understanding of YAI's scope of services, what it means to provide person-centered support, and what policymakers, human service agencies, and civil society can learn from YAI. Building understanding in this way will benefit YAI, and the greater I/DD community and fuel a groundswell of advocacy that will improve the quality of support and the resources to pay for them everywhere that provider agencies like YAI operate.

Strategic objective	How we will be successful
6.1: Increase key stakeholder knowledge of YAI and its mission.	<ul style="list-style-type: none">o Develop a comprehensive marketing and communications plan including needs assessment that targets audiences nationally and internationally (2024 Q2).o Enhance brand identity by evaluating a potential re-branding to see if there will be a return on the investment (2025 Q4).o Utilize YAI's expertise in I/DD to collaborate with well-established national nonprofit organizations on campaigns (2026 Q2).o Support organization-wide staff efforts to raise awareness and understanding of specific programs and initiatives (ongoing).o Increase the reach of YAI's leadership team by participating in local, national, and international conferences and advocacy groups (ongoing).

	<p>How we will measure success</p> <ul style="list-style-type: none"> o Conduct external survey of overall awareness at start and end of strategic plan period. o 20% average annual growth in social media reach across all platforms. o Increase e-newsletter distribution list from 33,000 to 50,000 by Q4 2024. o Collaborate with at least one well-known nonprofit on a joint campaign. o Demonstrate YAI as thought leader by having organizational leadership present to at least four conferences or speaking engagements per year.
	<p>Executive Team Leader</p> <p>Senior Director Communications</p>

<p>Strategic objective</p> <p>6.2: Strengthen earned media profile.</p>	<p>How we will be successful</p> <ul style="list-style-type: none"> o Identify trends in I/DD services nationally and internationally to leverage YAI's contribution to that narrative (ongoing). o Develop relationships with journalists and influencers related to the mission (ongoing). o Create campaigns with strong ties to the mission that have potential to become viral and develop marketing calendar to push out ideas (2024 Q1). o Designate staff as thought leaders trained to contribute to national conversation on I/DD service models, access, and funding (2024 Q3). o Pursue continuous program and affiliate news updates (ongoing). o Five pitches per week to external media, including one at a major national outlet (2023 Q3).
	<p>How we will measure success</p> <ul style="list-style-type: none"> o Secure five or more placements in non-I/DD-specific media annually. o Establish at least two celebrity brand ambassadors with meaningful commitment to YAI. o Establish pipeline for YAI staff and thought leaders to be called upon for media interviews, podcasts, etc. on disability issues.

	<p>Executive Team Leader</p> <p>Senior Director Communications</p>
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<p>Strategic objective</p> <p>6.3: Influence I/DD policymaking and public funding.</p>	<p>How we will be successful</p> <ul style="list-style-type: none"> o Devise advocacy campaign strategy for annual New York State budget cycle (2023 Q1). o Engage people we support, staff, and YAI families to participate in all elements of advocacy campaigns (ongoing). o Contribute meaningfully to peer provider and association advocacy campaign activities (ongoing). o Pursue earned media covering State support of I/DD programs and staff wages (2023 Q2, ongoing).
	<p>How we will measure success</p> <ul style="list-style-type: none"> o Increase number of YAI voices attending rallies, writing to legislators, and making legislative office visits. o Active engagement in provider associations.
	<p>Executive Team Leader</p> <p>Director of Government Relations</p>

Appendix A:

STRENGTHS, WEAKNESSES, OPPORTUNITIES, THREATS

Strengths

- Provision of highly regarded, innovative, person-centered services.
- Highly trained staff with strong initial and ongoing training and development, adhering to well documented policies and procedures.
- Programs that support employment through training and coaching for individuals interested in meaningful employment.
- Strong financial and administrative acumen with capacity to operate quality services in multiple geographies.
- Well positioned for managed care.
- Forward thinking, tech savvy, outside-the-box culture.

Opportunities

- New/expanding services offered through RFPs.
- Advancement/philanthropy opportunities for unrestricted funding and planned giving.
- Re-branding window to create updated awareness of YAI's premier role in the field.
- New and enhanced services focused on evolving needs in autism and aging I/DD population.
- Better advocacy with improved access to government officials.
- Options for geographic expansion bolstered by growing reputation for quality service delivery.

Weaknesses

- Funding challenges and rate inequities in certain programs/geographies.
- High turnover of program staff.
- Composition of upper management and governing body not representative of program staff and people supported.
- Inconsistent results in the areas of compliance and quality.
- Suboptimal structure for provision of management services with lost opportunity for maximizing revenue.

Threats

- Labor shortages for qualified program staff and high turnover.
- Program pauses due to COVID restrictions and workforce challenges.
- Funding challenges and rate inequities in certain programs/geographies from inadequate reimbursement, rate rationalization, and reform.
- Emergence of larger, better-funded operators in certain geographies, including for-profits funded by private equity.