



Seeing beyond disability.

2018-2020 Strategic Plan

**INNOVATING AND ENGAGING
FOR TOMORROW**

Dear Reader:

Recently, YAI celebrated its 60th anniversary. What began as a very small, not-for-profit serving seven people with intellectual and developmental disabilities (I/DD), has grown to become one of the largest I/DD providers in New York State, annually supporting over 20,000 children and adults. Today, YAI operates hundreds of programs that cover the lifespan including information and referral; residential, day, and employment services; medical and clinic services; respite; crisis intervention; summer camps; travel; and recreational opportunities.

Throughout YAI's history, the I/DD field has evolved significantly and is now beginning a transition toward a managed care environment utilizing a value-based payment model. To transition successfully and continue to thrive under this new model, it is incumbent on YAI to proactively prepare and position itself to pursue innovation and engagement across all fronts and with all stakeholders.

Given the changing landscape, the Board of Trustees and I felt strongly that it was an ideal time for YAI to embark on a formal strategic planning process. We very much wanted to create a thoughtful and well-conceived playbook to ensure YAI's sustainability, growth, and success in the years ahead.

Developing an effective strategic plan requires discipline, foresight, introspection, and candor. YAI's Strategic Plan is the result of a year's worth of work and reflection from myself, the Senior Leadership Team, and our Board of Trustees. We realize that in order for this plan to prove successful, the strategies it contains must allow for flexibility. This necessitated that the final product be an authoritative yet user-friendly roadmap that takes into account and allows for the possibility of real-time detours, rather than a static tome that upon completion collects dust on a shelf.

Our plan carefully reflects YAI's current position within the I/DD field, our relationships with our partners, and our standing within the communities we support. It establishes meaningful priorities and outlines clear opportunities for improvement and growth, which we will pursue to the best of our abilities.

For YAI, the next several years present promising and exciting opportunities. Our strategic goals align with New York State's mandate that, starting in 2018, the I/DD field must begin its transition toward managed care and value-based reimbursement. These goals include diversifying our funding streams, embracing technology, and furthering our mission through holistic supports and services that are community-based and person-centric.

YAI's commitment to actualizing this Strategic Plan represents our promise to the people we support and their families that, no matter what, we will continue to provide opportunities of the highest caliber that are built around the universal tenets of living, loving, working, and learning.

Yours truly,

George Contos
Chief Executive Officer

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OVERVIEW

Introduction to YAI

YAI is one of the largest intellectual and developmental disabilities (I/DD) service providers in New York State and has been providing services and supports to children and adults with I/DD and their families for 60 years. Focused on *Seeing Beyond Disability*, YAI actively promotes opportunities around the four universal tenets of living, loving, working, and learning in order to empower and enhance the lives of the people and families it supports.

YAI offers management services to a network of agencies in New York and New Jersey. With over 4,000 staff, the YAI Network provides supports and services to thousands of children and adults with I/DD. Programs and services offered by the YAI Network include residential services, day services, employment services, Medicaid service coordination, community habilitation, primary and specialty healthcare, therapies, family support services, recreational programs, autism services, education programs, and information and referral services.

Relevant Background

Since its establishment in 1957, YAI has striven to be one of the premier providers of I/DD services in New York State. In many ways, the organization has succeeded in this endeavor as satisfaction surveys consistently indicate that both individuals being supported by YAI and their families are highly satisfied, especially with regard to health and safety. This progress has not come easily. YAI and the I/DD field face complex political, economic, social, and technological realities that often shift more rapidly than some organizations can keep up with. To remain a leader in the field, YAI must have a clear vision, a coherent strategy, and the flexibility to adapt and address threats and opportunities that arise.

One significant strategic challenge YAI and the I/DD community currently face is potential reductions in funding for I/DD services at the federal and state level. With the push to rein in spending, the future funding of Medicaid and Medicaid-supported home and community-based services is highly uncertain. Federal legislation, as well as potential state-level policies, will have a significant impact on how people access and experience publicly funded services and how states contract with service providers.

Currently, New York State is shifting its service coordination approach for the I/DD community by establishing Care Coordination Organizations (CCOs). Under this new system, CCOs will provide people with I/DD and their families with choice with regard to providers of healthcare and long-term services and supports. Conflict-free case management via CCOs is a significant step toward managed care and decisions YAI makes now about this new model will likely have an impact on its future.

The shift to managed care for I/DD providers is part of New York State's Medicaid reform which aims to transition 80-90% of managed care organizations to value-based payments. By moving to value-based payments, the State intends to prioritize outcomes and reduce costs associated with the current fee-for-service model. I/DD service providers like YAI will be financially incentivized to track and meet specific outcome measures. This explicit link between quality (versus purely quantity) of services and financial reimbursement creates both opportunities and risks for I/DD providers and managed care organizations. Providers that are best able to achieve outcomes and demonstrate value are well positioned to succeed in the future.

In addition to systemic changes in Medicaid reimbursement, the Office for People with Developmental Disabilities (OPWDD) is placing greater emphasis on people's ability to self-direct and self-determine services. To promote meaningful activities and stronger community inclusion, I/DD providers must (a) ensure people have full access to the benefits of community living including the ability to receive services in the most integrated setting possible, and (b) advance a person centered philosophy where health and long-term services and supports are addressed in a manner that reflects individual

preferences and goals (with services being directed by the person receiving them or a chosen representative).

In response to changes within the I/DD field, YAI continues to implement innovative models and make operational changes to position the organization for success. For example, YAI recently transitioned to a regional model designed to improve coordination of services among different departments within a region. Although the transition has proven to be successful in many respects, YAI still has much work to do to realize the full potential of this new organizational structure.

As a financially stable nonprofit, YAI is also committed to vigorously exploring growth opportunities as the shift to managed care and need to be cost-efficient favor secure and large providers. This growth will allow YAI to provide supports to a greater number of people, increase the range of services available, and spread overhead costs more broadly. Any additional revenue and cost savings realized can be reinvested in efforts to improve quality and build capacity. Enhancing YAI's service offerings while maintaining quality will strengthen its position within a managed care environment.

For the reasons described above, YAI has selected an ideal time to establish a strategic plan for the organization. During uncertain times of policy and funding, large nonprofits like YAI benefit from having a shared vision that enables its leaders to work on common goals that aim to strengthen organizational capacity and outcomes.

The Strategic Planning Process

With support of the Board of Trustees, YAI leadership engaged in a strategic planning process to establish a unified strategy that would strengthen and prepare the organization for the future. An international consulting firm, ICF, was retained to facilitate the process with Health Management Associates (HMA) providing subject matter expertise related to healthcare and I/DD policy.

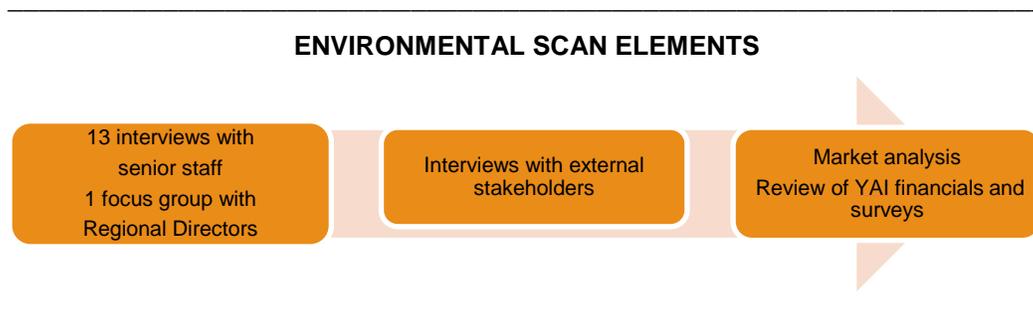
STRATEGIC PLANNING OVERVIEW



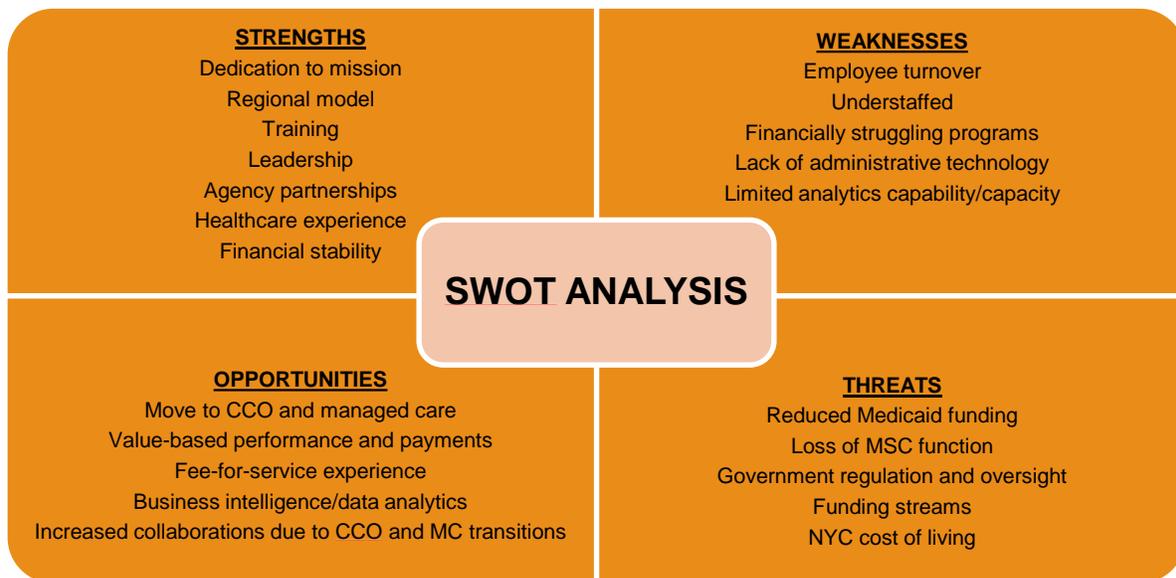
Phase I: Environmental Scan

A two-phase approach was used to guide YAI leadership during the strategic planning process. Known as the Environmental Scan, the first phase consisted of three major elements.

- 1) PEST analysis - involved interviews with 13 YAI senior staff and a focus group with Regional Directors to identify the political, economic, social and technological issues impacting the industry and YAI.
- 2) External review - consisted of interviews with external stakeholders on YAI's strengths, weaknesses, and opportunities for growth given the anticipated changes in government funding. People interviewed included representatives from state government, a provider association, a parent advocacy group, and an I/DD managed care organization.
- 3) Market analysis - included a review of relevant literature as well as analysis of federal and state policy with regard to the current status and anticipated changes in the I/DD marketplace.



Information from the Environmental Scan provided the foundation for the development a SWOT analysis that was used during the second phase of strategic planning. This SWOT analysis allowed senior leaders to identify organizational strengths and weaknesses as well as external opportunities and threats that could impact YAI's ability to succeed and grow in the future. The following matrix presents some of the strengths, weaknesses, opportunities, and threats that were identified.



Phase II: Strategic Planning Sessions

Upon completing the Environmental Scan, senior leaders engaged in five days of strategic planning sessions. These sessions highlighted findings from the Environmental Scan and SWOT analysis and guided senior leaders toward the development of specific goals and strategies for the organization using a three-year time frame.

Specifically, YAI leadership identified seven goals intended to build on YAI's strengths while positioning the organization to address the needs and opportunities of the future. As these goals were identified, senior leaders also considered YAI's recent success in securing numerous new awards from OPWDD to develop residential and day habilitation opportunities in NYC, Long Island, and Westchester as well as the START Resource Center. These opportunities are projected to open during the next few years and represent over \$20 million in revenue from new programming. This significant growth will require the need to hire and train new staff to oversee and deliver services. YAI will need to factor in this significant growth as it pursues the strategic goals outlined below.

GOALS AND STRATEGIES

Goal 1: Obtain an A+ report card for quality in a value-based environment

New York State is actively undergoing payment reform and is committed to reaching 80% value-based payments in the upcoming years. This shift away from fee-for-service represents a fundamental change in how payments are determined for Medicaid service providers. YAI has consistently strived to maintain quality services, but the prospect of value-based payments introduces an explicit financial incentive for I/DD providers to continuously enhance the quality of services. To qualify for payment under a value-based payment system, providers will need to demonstrate the achievement of various metrics related to health, safety, employment, least restrictive residential opportunities, self-direction, and Personal Outcome Measures (POMs), to name a few.

YAI has already begun to implement key metrics in anticipation of value-based payments and as part of its broader commitment to quality improvement. A little over four years ago, the organization began working with the Council on Quality and Leadership (CQL) and had several staff certified as Personal Outcome Measures (POMs) trainers and interviewers. To date, YAI has conducted over 75 POMs workshops, trained nearly 600 staff, and conducted over 600 interviews. The impact of POMs is noteworthy as staff members have recognized its value in developing more person centered plans. POMs has also played an important role in providing people with less restrictive residential opportunities. YAI remains firmly committed to the POMs initiative and will maintain its relationship with CQL.

For YAI to be successful within a value-based payment environment, the organization must continue to integrate a person centered philosophy and outcome measurements into its services. This can be achieved by defining quality standards for management and staff throughout the organization and incorporating these standards into its practices. YAI will need to educate its workforce on "value-based" quality standards (as defined by NYS), how to measure them, and how to achieve them. With the recent Care Coordination Organization (CCO) application, the State has already defined some quality metrics that cover both long-term supports and services and health care. YAI also intends to develop and leverage appropriate systems and technology to both improve care coordination and person centered services as well as track and measure value-based outcomes. The following strategies are designed to meet YAI's goal of continuously enhancing quality to achieve superior outcomes in a value-based environment.

Strategy 1.1: Educate our workforce on how New York State has defined “value-based” quality

Action Plan		Timeframe	Responsibility
Initiative 1.1.1	Develop informational materials on the field’s definition of quality	2018	Person Centered Services Committee
Initiative 1.1.2	Disseminate information to managers and staff	2018	Communications
Initiative 1.1.3	Develop and disseminate additional information as quality metrics and value-based outcomes are further defined by the field	2019, 2020	Person Centered Services Committee, Communications

Strategy 1.2: Establish a data system to enter and track value-based metrics

Action Plan		Timeframe	Responsibility
Initiative 1.2.1	Identify reliable sources of data	2018	Research
Initiative 1.2.2	Establish a data system to enter and track metrics	2018	IT, Research

Strategy 1.3: Train select staff on entering and tracking value-based metrics

Action Plan		Timeframe	Responsibility
Initiative 1.3.1	Train select staff to enter data at a pilot region	2018	Research, Programs
Initiative 1.3.2	Train select staff to enter data at remaining regions	2019, 2020	Research, Programs

Strategy 1.4: Strengthen initiatives related to the person centered philosophy

Action Plan		Timeframe	Responsibility
Initiative 1.4.1	Continue person centered trainings/initiatives and POMs workshops	2018, 2019, 2020	Person Centered Services Committee
Initiative 1.4.2	Integrate POMs and/or other related information into our electronic system	2018	IT
Initiative 1.4.3	Integrate POMs and/or other related information into person centered plans	2018	IT

Goal 2: Improve the recruitment, retention, and satisfaction of the workforce

Turnover is an industry-wide issue within the I/DD field. The work of Direct Support Professionals (DSPs), though rewarding in many ways, can also be very challenging. Unfortunately, compensation for these roles is often not sufficient to retain employees for long periods. Although YAI’s employee turnover rate is below the industry average (19% compared to 25%), this level of turnover creates additional recruitment and training costs and disrupts the relationships between DSPs and people they support. Shortages of DSPs lead to increases in overtime costs for DSPs and increased workload among their supervisors. To address these challenges, YAI will place an even greater focus on improving the recruitment, retention, and overall satisfaction of its workforce.

To mitigate challenges regarding compensation, YAI will focus on positioning the organization as an employer of choice by focusing on the social value and intangible benefits of working in the I/DD field. This is an especially important strategy given that the average entry level salaries for front-line support professionals are often lower than alternative job opportunities in the healthcare sector. YAI will also promote employee retention and satisfaction by offering a long-term career track, supporting skill enhancement, and emphasizing employee appreciation. These efforts are intended to build and maintain a positive work environment that encourages employee engagement and collaborative working relationships. YAI will also utilize technology to improve workflows and processes that create administrative burdens. This includes both technology that directly supports staff, as well as that helps staff to improve the timeliness and effectiveness of service delivery.

Frontline managers should be actively involved in workforce improvement efforts, as they are often YAI’s biggest retention tool. By empowering Regional Directors to effectively and efficiently manage their staff, YAI can encourage improvements in the workforce and identify best practices used within the regions that can be scaled. The strategies outlined below intend to address YAI’s goal of improving recruitment, retention, satisfaction, and productivity of the workforce.

Strategy 2.1: Empower Regional Directors to manage effectively and share best practices with the rest of the organization

Action Plan		Timeframe	Responsibility
Initiative 2.1.1	Increase Regional Directors’ knowledge of and feedback on budgets	2018	Programs, Fiscal
Initiative 2.1.2	Create forums to share best practices (e.g., coordinator meetings, electronic newsletters, blogs)	2018, 2019, 2020	Communications, HR

Strategy 2.2: Develop initiatives that enable YAI to acquire and keep enough of the best people

Action Plan		Timeframe	Responsibility
Initiative 2.2.1	Identify and document positions to highlight career paths (including growth opportunities and professional development)	2018	HR, Programs
Initiative 2.2.2	Develop incentive programs to improve morale and retention (e.g., team awards, promotion recognition)	2018, 2019, 2020	HR

Action Plan		Timeframe	Responsibility
Initiative 2.2.3	Develop partnerships with organizations that can be a pipeline of talent (e.g., local colleges, professional associations)	2018, 2019, 2020	HR
Initiative 2.2.4	Implement a comprehensive Performance Management System to encourage feedback, coaching, and career development for supervisors and above	2018, 2019	HR

Strategy 2.3: Position YAI as an employer of choice

Action Plan		Timeframe	Responsibility
Initiative 2.3.1	Develop initiatives to address staff needs (e.g., enhanced training, tuition reimbursement, legal services)	2018, 2019, 2020	HR
Initiative 2.3.2	Organize teams to encourage collaboration and learning across regions (e.g., model mentoring and supervision)	2018, 2019, 2020	HR, Programs
Initiative 2.3.3	Implement “IT’S A CAREER, NOT A JOB” campaign (e.g., videos, testimonials)	2018, 2019, 2020	Communications, HR

Strategy 2.4: Streamline processes by embracing technology and enhancing operational efficiencies

Action Plan		Timeframe	Responsibility
Initiative 2.4.1	Strengthen workflows within HR and programs to improve recruitment, onboarding, and performance management (leverage technology as much as possible)	2018	HR, Programs, IT
Initiative 2.4.2	Implement an automated platform that responds to staffing needs and allocation of resources	2018, 2019	IT, Programs
Initiative 2.4.3	Assign IT staff to each region to implement solutions and provide ongoing support	2018, 2019, 2020	IT

Goal 3: Lessen YAI's dependence on current funding

One of the most significant challenges faced by YAI is its reliance on Medicaid funding. With over 95% of YAI funding coming from Medicaid (split between Federal and State), any reductions to Medicaid funding across the board or in YAI's individual reimbursement rates will have considerable impact on its capacity to provide high quality I/DD services. Although initial efforts to repeal the Affordable Care Act and cut Medicaid funding were thwarted, the political threat to Medicaid remains high. The high level of risk to YAI's core funding mechanism has motivated YAI to find alternative and sustainable sources of program funding.

Fortunately, there are multiple avenues for additional revenue that YAI has only minimally explored to date, including privately funded programs and services, expansion in New Jersey, I/DD consulting services, and alternative financing opportunities. As these opportunities vary in terms of potential for revenue generation, risk, impact, feasibility, sustainability, and other factors, YAI will conduct further analysis to prioritize those with the greatest potential.

One priority area YAI has already identified is the development of new and existing relationships with donors. Fostering donor engagement can increase financial support for years to come, and donations can help offset funding shocks that might result from changes to Medicaid legislation. Historically, YAI's commitment to donor engagement has been inconsistent, but the organization has since begun to make significant investments in terms of staff and resources to sustain advancement efforts. The following strategies aim to meet YAI's goal of diversifying its funding streams.

Strategy 3.1: Foster engagement with donors to increase financial support

Action Plan		Timeframe	Responsibility
Initiative 3.1.1	Identify top donors and develop a stewardship plan	2018, 2019	Advancement
Initiative 3.1.2	Develop targeted naming and sponsorship opportunities (e.g., by program, region, area of interest)	2018	Advancement
Initiative 3.1.3	Develop cultivation plan for top corporate and private foundations with disability interests	2018	Advancement
Initiative 3.1.4	Develop planned giving campaign for targeted donor base	2019	Advancement
Initiative 3.1.5	Develop a plan to increase and sustain online and monthly giving	2018	Advancement

Strategy 3.2: Enhance capacity to provide consulting services nationally and internationally

Action Plan		Timeframe	Responsibility
Initiative 3.2.1	Identify areas of YAI expertise that would contribute toward a consulting division	2018	Special Projects Committee
Initiative 3.2.2	Conduct market research to identify potential consulting opportunities	2018	Special Projects Committee

Initiative 3.2.3	Develop a business plan to set objectives, identify resources needed, assess pro-formas, and focus opportunities	2018	Special Projects Committee
Initiative 3.2.4	Enact business plan	2019	Special Projects Committee

Strategy 3.3: Explore new lines of business through affiliations and partnerships

Action Plan		Timeframe	Responsibility
Initiative 3.3.1	Identify disability agencies that may be seeking partnerships or affiliations (e.g., no succession plan, distressed entity)	2018, 2019, 2020	Special Projects Committee
Initiative 3.3.2	Prioritize list and begin discussion with targeted agencies for potential affiliation/partnership	2019, 2020	Special Projects Committee
Initiative 3.3.3	Market YAI as an inexpensive alternative for management and administrative functions	2019, 2020	Special Projects Committee

Strategy 3.4: Seek expansion opportunities in NJ and other states

Action Plan		Timeframe	Responsibility
Initiative 3.4.1	Clarify YAI's relationship with agencies	2018	Executive Team
Initiative 3.4.2	Develop financial models related to expansion of services in NJ (with a focus on residential opportunities)	2018	Executive Team
Initiative 3.4.3	Explore expansion opportunities in other states	2019, 2020	Executive Team

Goal 4: Enhance YAI's ability to advocate on I/DD issues

The risk of potential changes to I/DD policy and funding by New York State (as well as the implications of managed care for how I/DD services are managed and delivered) means that YAI cannot afford to be a bystander on matters that could drastically impact its ability to provide needed services. To ensure that YAI and the needs of those it supports are adequately addressed in future policy and administrative decisions, YAI must play a more active role in engaging government, advocacy groups, and advisory councils. By strengthening its relationships and expanding participation on relevant government committees and councils, YAI can help steer policy in directions that will improve the lives of individuals with I/DD, while ensuring the programs remain fiscally viable. This engagement will also enable YAI to be better informed of impending policy developments and therefore able to respond more rapidly. Furthermore, YAI is committed to expanding its role on advocacy and advisory groups that can further magnify the message of I/DD providers and people they support. This has the dual benefit of furthering YAI's policy goals while improving its relationships with key stakeholders.

Ultimately, the influence YAI is able to exert on I/DD policy at the state level is dependent on the number of people with I/DD that it supports. For this and many other reasons, YAI intends to extend its services to additional counties in New York State. By consolidating the Rockland County Association for People with Disabilities (RCAPD) into YAI proper and expanding services further upstate, YAI can demonstrate its ambition to be the premier I/DD provider in the region and a leader. The strategies highlighted below are expected to address YAI's goal of enhancing its ability to advocate on I/DD issues.

Strategy 4.1: Increase our representation on government committees and councils

Action Plan		Timeframe	Responsibility
Initiative 4.1.1	Compile a list of YAI's current representation on committees and councils	2018	Senior Leadership
Initiative 4.1.2	Identify committees and councils on which we want representation	2018, 2019, 2020	Senior Leadership
Initiative 4.1.3	Seek/apply for representation on targeted committees and councils	2018, 2019, 2020	Senior Leadership

Strategy 4.2: Better leverage our advocacy and advisory groups

Action Plan		Timeframe	Responsibility
Initiative 4.2.1	Keep YAI's advocacy and advisory groups informed of key changes to policies and programs Groups include: YAI Self-Advocates, Family Advisory Council, DSP Council, Brighter Futures Society	2018, 2019, 2020	Communications, Programs
Initiative 4.2.2	Engage groups in targeted advocacy efforts	2018, 2019, 2020	Communications, Programs

Strategy 4.3: Expand the geographic reach of our services in New York State

Action Plan		Timeframe	Responsibility
Initiative 4.3.1	Finalize YAI's consolidation of RCAPD	2018	Executive Team
Initiative 4.3.2	Develop and implement a marketing plan to highlight YAI's presence upstate	2018, 2019, 2020	Communications

Goal 5: Enhance the reputation and expand the public's awareness of YAI

Among the populations YAI serves, the organization has a positive reputation for the quality of services provided. YAI is also recognized by peer organizations for the quality of its trainings and materials. Despite these strengths and YAI's depth and breadth of experience within the I/DD community, there are still opportunities for YAI to strengthen its brand and reputation in the field. For example, market research suggests YAI may need to demonstrate more of a commitment to collaborate with other I/DD organizations.

As part of its broader effort to enhance its reputation and the public's awareness of its services, YAI is focused on becoming a thought leader in the field. YAI plans to increase participation in conferences and share innovative ideas on YAI platforms to advance a broader discussion on supporting individuals with I/DD and demonstrate YAI's commitment to improving quality of services. YAI will also engage more broadly with audiences throughout the community by developing and sharing specific success stories in both the local and national media. Finally, to further strengthen its credibility as a reputable and fiscally responsible nonprofit, YAI will pursue certifications from leading third-party organizations that evaluate nonprofits. The following strategies intend to meet YAI's goal of enhancing its reputation and expanding the public's awareness of YAI.

Strategy 5.1: Engage thought leaders to promote forward-thinking concepts

Action Plan		Timeframe	Responsibility
Initiative 5.1.1	Develop a plan to increase participation of "expert" staff in symposiums, conferences, forums, etc.	2018, 2019, 2020	Communications
Initiative 5.1.2	Develop a "Thought Leader" campaign that positions YAI as an I/DD resource	2018, 2019, 2020	Communications
Initiative 5.1.3	Relaunch the YAI international conference and/or regional conferences	2019, 2020	Communications
Initiative 5.1.4	Market YAI's newsworthy advances with technology	2019, 2020	Communications

Strategy 5.2: Effectively promote YAI

Action Plan		Timeframe	Responsibility
Initiative 5.2.1	Develop a marketing plan for YAI including print and digital media for multiple stakeholders	2018	Communications
Initiative 5.2.2	Obtain leading non-profit certifications (e.g., Charity Navigator, GuideStar, Wise Giving Alliance)	2018	Communications

Goal 6: Establish YAI as a technology leader and innovator in the I/DD field

Due to complex medical and/or behavioral needs, people with I/DD may require intense involvement of direct support professionals, round-the-clock supervision, extensive care coordination, and frequent visits to healthcare providers. Not only does this place strain on those providing service and limit their capacity to support more people, it also presents a challenge to YAI's workforce which is already facing recruitment and retention issues. To enhance its ability to provide integrated and person centered services and to manage an increasingly complex portfolio of services and service providers, YAI intends to invest in a variety of promising technologies and innovative approaches.

One area of focus is software and IT infrastructure that allow for improvements in data analysis, visualization, and decision-making. YAI already collects large amounts of data (e.g., HR data, fiscal data, satisfaction data, and POMs), but struggles to process it in a way that enables the organization to take prompt action to address emerging issues and trends. Recent advances in data analytics and visualization are tackling this issue, and exploring these capabilities will help YAI be more responsive to its stakeholders.

Technological developments are also revolutionizing the way services are delivered and accessed. For example, smart home technologies can allow real-time monitoring of residences and ensure rapid responses during emergencies. Additionally, video chat or related virtual technologies can allow people to connect to service and medical providers for some services without the need for costly and time-consuming office visits. Just as technology can help YAI gain greater perspective on what is happening in the field, technologies like electronic person centered profiles and online portals can help keep people with I/DD and their families informed about updates to their life plans, upcoming appointments, and community events. The strategies listed below are designed to meet YAI's goal of establishing the organization as a technology leader and innovator.

Strategy 6.1: Invest in applications and infrastructures for seamless and real-time data visibility

Action Plan		Timeframe	Responsibility
Initiative 6.1.1	Implement an Enterprise Resource Planning solution for HR and fiscal	2018, 2019, 2020	IT
Initiative 6.1.2	Implement a "big data" environment to advance analytics and business intelligence	2018	IT
Initiative 6.1.3	Establish information management systems to allow internal and external information to flow effectively	2019	IT

Strategy 6.2: Invest in person centered technologies (e.g., smart homes, virtual reality)

Action Plan		Timeframe	Responsibility
Initiative 6.2.1	Establish a team that identifies opportunities to implement person centered technologies	2018	Person Centered Services Committee, IT
Initiative 6.2.2	Integrate technological devices and solutions into our current services (e.g., travel training, desensitization)	2018, 2019, 2020	IT, Programs

Strategy 6.3: Develop more accessible and barrier free technologies for the people we support (e.g., WiFi, personal portal)

Action Plan		Timeframe	Responsibility
Initiative 6.3.1	Expand WiFi access for people we support	2018, 2019, 2020	IT
Initiative 6.3.2	Redesign YAI's web assets to ensure accessibility and alignment with the organization's vision	2018	Communications, IT
Initiative 6.3.3	Deploy a compliant web portal for people we support and their families to access resources and service information (e.g., person centered plan)	2018	IT

Goal 7: Offer a comprehensive range of services in preparation for managed care

OPWDD is facilitating a multi-year process that will ultimately see all I/DD services integrated under a broader managed care umbrella. As part of this transition, OPWDD is requiring the creation of Care Coordination Organizations (CCOs) that will be responsible for providing conflict-free case management services to people with I/DD. CCOs are intended to operate independently from I/DD service providers and will be charged to provide “choice” to people with I/DD. However, complicating the notion of conflict-free case management is the State requirement for CCOs to be at least 51% controlled by a network of I/DD providers. CCOs are also considered a first step to the managed care transition.

Under this new structure, it is critical that YAI positions itself as a valuable contributor to a CCO in the near term in order to obtain “a seat at the table” within a managed care organization over the long term. YAI's scale and its dedication to programs that are valued by OPWDD (e.g., employment) and healthcare (e.g., Premier HealthCare) are key assets that can help it to stand out from the crowd. By both improving and expanding upon existing service offerings in the areas of education, employment, and healthcare, YAI can further strengthen its position with respect to the managed care transition.

Education is a vital need for children with I/DD, and it represents a significant growth opportunity for YAI. Currently, YAI offers limited educational services through a network agency, the Manhattan Star Academy (MSA), which serves students ages 5 to 12. MSA has been successful, but the organization has no education offering for ages 13 to 18. At the same time, there appears to be unmet demand for educational services at all age groups in the region. With the appropriate funding and resources, YAI

has the potential to realize an increase in educational service offerings by both expanding private pay education and potentially establishing an 853 school.

Employment programs represent another opportunity to enable people with I/DD to live more meaningful and productive lives. The Supported Employment (SEMP) program is one of the primary ways YAI helps people with I/DD find employment in the community. It involves limited job coaching to help people successfully maintain their employment, but the reimbursement rates for the program make it financially challenging to operate on a small scale. YAI has already centralized the program to operate more efficiently, and it will seek to scale the program and apply lessons learned from regions that have been more successful to those that have struggled. It will also expand programs like the Employment Training Program (ETP) and Adult Career and Continuing Education Services-Vocational Rehabilitation (ACCES-VR) to provide a more comprehensive suite of employment services that meet the needs of people with varying degrees of disability.

Finally, a dedicated healthcare clinic to support individuals with I/DD is a key differentiator that could serve YAI well when transitioning to a managed care environment. As healthcare and other I/DD services will ultimately be managed by a handful of organizations across the state, YAI's experience in both will be invaluable. At the same time, YAI's current healthcare practice, Premier HealthCare, has faced some challenges establishing itself among larger players in the healthcare space and achieving financial sustainability. YAI is committed to the success of Premier HealthCare, and will therefore engage with healthcare industry experts to thoroughly evaluate the current operations and finances of the organization and provide recommendations to improve its long-term viability. The following strategies aim to address YAI's goal of providing a comprehensive range of services in preparation for managed care.

Strategy 7.1: Increase educational offerings by expanding private pay education and potentially establishing an 853 school

Action Plan		Timeframe	Responsibility
Initiative 7.1.1	Clarify YAI's relationship with MSA	2018	Executive Team
Initiative 7.1.2	Develop and analyze preliminary financial models for private pay education, residential school, 853 school, etc.	2018	Executive Team
Initiative 7.1.3	Seek consultation for development of a business plan	2018	Executive Team
Initiative 7.1.4	Enact business plan (locate site, apply for licenses, secure start-up funds, etc.)	2019, 2020	Executive Team

Strategy 7.2: Rebuild our employment department by providing more individualized and person centered services

Action Plan		Timeframe	Responsibility
Initiative 7.2.1	Assess operations and finances of our current employment programs	2018	Employment Team
Initiative 7.2.2	Identify ways to improve operations and finances based on Long Island successes	2018	Employment Team

Action Plan		Timeframe	Responsibility
Initiative 7.2.3	Seek assistance from other nonprofits specializing in I/DD employment services	2018	Employment Team and Senior Leadership
Initiative 7.2.4	Secure funding from diverse sources to support employment services (e.g., OPWDD, ACCES-VR, foundations)	2018, 2019, 2020	Strategic Initiatives

Strategy 7.3: Evaluate how to best position our Article 28s for managed care

Action Plan		Timeframe	Responsibility
Initiative 7.3.1	Meet with commercial insurers to explore partnership opportunities	2018, 2019, 2020	Executive Team
Initiative 7.3.2	Identify ways to better coordinate care and integrate services (including data sharing)	2018, 2019, 2020	Executive Team

CONCLUSION

By engaging in a strategic planning process, YAI is committed to guiding the organization in ways that are thoughtful and focused, especially during uncertain times. The seven goals described herein will provide the entire organization with a clear path to engage in critical decision-making. As the I/DD field navigates the new world of CCOs and managed care, YAI needs to be flexible and responsive to the call for new service models and payment structures. These are important priorities and YAI intends to work in partnership with OPWDD and other entities to ensure that people with I/DD are living the lives that they truly desire. By successfully implementing this strategic plan, YAI will position itself to be an exceptionally strong player in the world of managed care and value-based performance.