

Colorado Bluesky Enterprises, Inc.
STRATEGIC GOALS 2010–2013
UPDATED 3-YEAR PLAN

MISSION

Colorado Bluesky Enterprises, Inc. believes that all persons have the right to live, learn and work in the community with the same dignity, choices, opportunities and responsibilities accorded all citizens.

VISION

- ◆ Ensure, strengthen, and maintain quality of services and supports for people with developmental disabilities and their families.
- ◆ Ensure the stability of Colorado Bluesky's services and supports
- ◆ Ensure programmatic and departmental oversight with trained leaders
- ◆ Ensure fluid communication and transparency with Managers, Board of Directors and Service Organizations.
- ◆ Ensure a work environment that enhances creativity, professionalism, and is customer services orientated.

VALUES

- ◆ Commitment – First and foremost, we are united by our common commitment to enhance the lives of individuals with developmental disabilities.
- ◆ Community – We act in order to enhance our local community. We work to create a supportive and strong environment for the individuals and families we serve.
- ◆ Vision – We are committed to anticipating and being prepared for the future. We are the leaders of the developmental disability services in Pueblo County. We perceive the needs of the individuals we serve and respond to them quickly. We will recognize and plan for the future needs facing consumers and families.
- ◆ Knowledge – We are informed, thorough and maintain a breadth of current and past knowledge that positions Colorado Bluesky as Pueblo's leading source of information. We will always seek to understand the individuals we serve and their needs.

GOALS

1. Ensure quality of service is the foundation of CBEs mission.
2. Maintain a strong Board Leadership and oversight, which reflects the community in all aspects of good moral values and concerns for the population served by CBE.
3. Create a culture of quality and efficiency by compelling CBE to be an employer of opportunity, education, and vision.
4. Develop and implement a technology plan that will lead to improved employee efficiency and institutional effectiveness.
5. Perform all Organized Health Care Systems (OHCS) responsibilities as it pertains to single entry point and case management agency for the Pueblo region.
6. Maintain and oversee Asset Allocation of agency investments and 401 (k) and 403 (b) retirement plans.
7. Competitively manage the Baltimore Court Apartments as a for profit project.
8. Protect and maintain all CBE physical assets.

STRATEGIC QUALITY COMMUNICATOR LIST TO EVALUATE & UPDATE

Goal 1 Ensure quality of service is the foundation of CBEs mission.

Objective 1. Strive for the highest quality program while maintaining compliance with Part C regulations.

Champion(s) Jeff Dunn

Strategy A: Evaluate the current process of the Part C transition process.

Strategy B: Determine strategies to improve the enrollment process.

Strategy C: Ensure that all Part C providers are entering data for the “Results Matter Project” in a timely manner.

Strategy D: Investigate utilization of the Developmental Interaction assistance program.

Manager progress note:

Objective 2. Strive for the highest quality programs while maintaining compliance with Medicaid Standards & DDD Rules & Regulations.

Champion(s) Terri Martinez, Caroline Rosales, Jeff Dunn, Sandra Montee

Strategy A: (Terri) Evaluate BASS programs to ensure ISSPs & contact notes are in compliance with Service Plans.

Strategy B: (Terri) Strategizes creative and educational programs for BASS consumers.

Strategy C: (Caroline) Develop a work plan that address the development of new facilities (i.e. 4-plex home.)

Strategy D: (Sandra) Identify essential duties for the QI Department based on the 3 way contract and relevant DD rules.

Manager progress note:

Objective 3. Ensure the Case Management Department maintains compliance with Medicaid TCM Standards.

Champion(s) Jan Matzen, Jeff Dunn, Michael F. Atlas-Acuña, Sandra Montee

Strategy A: Monitor billing data to ensure TCM (Adult/Babies) compliance.

Strategy B: Develop strategies that will improve the billing process.

Strategy C: Work with the Compliance Committee to ensure random audits are conducted.

Manager progress notes:

Objective 4 Investigate the possibility of CBE becoming a Child Placement Agency.

Champion(s) Caroline Rosales

Strategy A: Review insurance issues with Dennis Flores

Strategy B: Investigate appropriate Websites regarding the application process.

Strategy C: Investigate and develop the need for Policy & Procedures relevant to being a Child Placement Agency.

Strategy D: Determine appropriate funding for placement of individuals (i.e. Independent Contractors, Staffed Facilities).

Manager progress notes:

Objective 5 Investigate the possibility of CBE becoming a provider in the EBD Waiver.

Champion(s) Terri Martinez

Strategy A: Review insurance issues with Dennis Flores

Strategy B: Investigate appropriate Websites regarding the application process.

Strategy C: Investigate the need for Policy & Procedures relevant to being an EBD provider.

Manager progress notes:

Objective 6 Investigate billing Medicaid directly for Early Intervention services.

Champion(s) Jeff Dunn, Karen Caldwell, Michael Atlas-Acuña

Strategy A: Gather information needed for billing directly.

Strategy B: Complete appropriate application and other required documents.

Manager progress notes:

Goal 2 Maintain a strong Board of Directors leadership and oversight, which reflects the community in all aspects of good moral values and concerns for the population served by CBE.

Objective 1 Develop a politically savvy committee composed of Board Members and staff as well as interested community members for the purpose of lobbying issues affecting CBE services and programs.

Champion(s)

Michael F. Atlas-Acuña, Karen Caldwell, Caroline Rosales, all CBE Board Members

Strategy A: To build positive working relations with State Legislators and community leaders.

Strategy B: To actively seek new board members that reflects specialties & experience in various professions.

Manager progress notes:

Objective 2 Develop a spreadsheet of the Board of Directors that lists each member, education, experiences, and background for purposes of selecting future members that will compliment the current / future Board.

Champion(s) Michael F. Atlas-Acuña, Mariah Schofield

Strategy A: (Mariah) To update the spreadsheet as new board members are installed.

Strategy B: (Mariah) To present the spreadsheet at board meetings as appropriate.

Manager progress notes:

Objective 3 Develop a Transparency Policy in practice and philosophy.

Champion(s) Pat Morales, Michael F. Atlas-Acuña

Strategy A: Post annual audits, board meeting schedule, & 3 year plan on the CBE website.

Strategy B: Make available documents related to the corporation.

Strategy C: Adopt Alliance Ethical Business and Transparency policies as part of CBE practices.

Manager progress notes:

Goal 3	Create a culture of quality and efficiency by compelling CBE to be an employer of opportunity, education, and vision.
Objective 1	<p><u>Update Job Descriptions that are in compliance with Medicaid and DDD.</u></p> <p>Champion(s) Pat Morales, Mike Atlas-Acuña</p> <p><i>Strategy A:</i> (Mike) Update manager job descriptions.</p> <p>Manager progress notes:</p>
Objective 2	<p><u>Provide a competitive employee compensation package.</u></p> <p>Champion(s) Karen Caldwell, Pat Morales, Michael Atlas-Acuña</p> <p><i>Strategy A:</i> (Karen) Update the current salary schedule as resources become available. <i>Strategy B:</i> (Employee Appreciation Committee) Explore other employee incentive programs. <i>Strategy C:</i> Market current employee benefit package. (Employee forums) <i>Strategy D:</i> Participate in nominating a Direct Care Professional for the DD Awareness Day award. <i>Strategy E:</i> (Pat) Develop a list of CBE benefits.</p> <p>Manger progress notes:</p>
Objective 3	<p><u>Decrease Worker Compensation claims over the next three years.</u></p> <p>Champion(s) Pat Morales</p> <p><i>Strategy A:</i> Track the number of claims and report at managers/Board. <i>Strategy B:</i> Ensure frequent communications with Work Comp providers. <i>Strategy C:</i> Develop a safety program. <i>Strategy D:</i> Attend state Worker Compensation and Association Training/Meetings.</p> <p>Manager progress notes:</p>

Objective 4	<p><u>Decrease the turnover rate throughout the agency with special attention paid to Residential, BASS, Case Management.</u></p> <p>Champion(s) Terri Martinez, Caroline Rosales, Jan Matzen</p> <p><i>Strategy A:</i> (Norman) Track turnover data quarterly. <i>Strategy B:</i> (Norman) report turnover data to managers and Board of Directors. <i>Strategy C:</i> Develop strategies to decrease turnover in affected program areas.</p> <p>Manager progress notes:</p>
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Goal 4 Develop and implement a technology plan that will lead to improved employee efficiency and institutional effectiveness.

Objective 1 Achieve and maintain a database inventory for the process of monitoring current computer hardware status and to determine where and when new equipment would be needed in the future.

Champion(s) Norman Richards, Theresa Rosales

Strategy A: Develop a database of current computer inventory that identifies the unit by number & date purchased.

Strategy B: Develop a replacement list of computers by May of each year for budget consideration.

Strategy C: Consistently evaluate new technology and determine how it can improve employee and agency efficiency.

Strategy D: Secure computer/Technology needs from each department.

Strategy E: Develop a schedule for maintaining the CBE Website.

Manager progress notes:

Objective 2 Establish the IT Department as the billing agent for SLS.

Champion(s) Norman Richards, Theresa Rosales

Strategy A: Continue with entering SLS billing data, producing verification reports.

Strategy B: Take the lead in correcting system problems by working with Spectrum.

Strategy C: Ensure appropriate training is provided to additional computer users as needed.

Strategy E: Develop a plan on collecting Incident Report data from Services Agencies in order to produce a report.

Manager progress notes:

Goal 5 Perform all Organized Health Care Delivery Systems (OHCDs) responsibilities as it pertains to single entry point and case management agency for the Pueblo region.

Objective 1 Coordinate, communicate and provide billing support and contractual relations with all Service Organizations in the Pueblo Catchment area.

Champion(s)

Jan Matzen, Karen Caldwell, Sandra Montee, Michael F. Atlas-Acuña

Strategy A: Attend technical training sessions sponsored by the State.

Strategy B: Disseminate information to service agencies as appropriate.

Strategy C: Conduct training sessions with staff and services agencies as needed.

Manager progress notes:

Objective 2 Provide oversight and training regarding Medicaid, HCPF and DDD rules and regulations for all Service Organizations and CBE employees.

Champion(s)

Jan Matzen, Karen Caldwell, Sandra Montee, Michael F. Atlas-Acuña

Strategy A: Develop a plan to implement the new Medicaid standard regarding Non Integrated Work Services (NIWS) that will be implemented in 2012.

Strategy B: To participate on the Alliance 27.10.5 committee and implement relevant changes in the management of CBE.

Strategy C: (Mike) Provide management with updates regarding the "Conflict of Interest" issue.

Strategy E: Develop a plan on implementing the new DDD Performance Standards.

Manager progress notes:

Objective 3 Develop a process that maximizes CBEs ability to bill TCM that is within Medicaid/DDD standards.

Champion(s)

Jan Matzen, Jeff Dunn, Michael Atlas-Acuña

Strategy A: Conduct monthly analysis of billing data.

Strategy B: Develop strategies to improve billing process as warranted.

Strategy C: Provide billing reports at manager meetings

Manger progress notes:

Goal 6 Maintain and oversee Asset Allocation of Agency Investments and 401k and 403b retirement plans.

Objective 1 Collaborate and coordinate board investments with Marty Wilcoxson Commonwealth Equity Services.

Champions:

Karen Caldwell, Michael F. Atlas-Acuña, CBE Board of Directors

Strategy A: Ensure Marty Wilcoxson reports quarterly at board meetings

Manager progress notes:

Objective 2 Collaborate and coordinate employee 401k and 403b plans with Valic and Hartford

Champions:

Karen Caldwell, Pat Morales, Michael F. Atlas-Acuña

Strategy A: Coordinate regular meetings with the Valic/Hartford representative.

Manager progress notes:

Objective 3 Schedule financial planning training sessions for employees.

Champion(s): Pat Morales, Karen Caldwell, Michael F. Atlas-Acuña

Strategy A: Develop an employee educational program regarding management of employee retirement plans.

Manager progress notes:

Goal 7 Competitively manage the Baltimore Court Apartments as a for profit project.

Objective 1 Develop a strategic plan as the Tax Credit status expires.

Champion(s)

Michael F. Atlas-Acuña, Karen Caldwell, Board of Directors

Strategy A: Conduct property market analyses.

Strategy B: Determine cost associated with upgrading the property.

Manager progress notes:

Goal 8 Protect and maintain all CBE physical assists.

Objective 1 Evaluate all CBE properties and determine new development.

Champion(s)

Michael F. Atlas-Acuña, Karen Caldwell, Bill Anaya

Strategy A: Develop a plan of upgrading properties.

Strategy B: Determine if additional construction is needed due to growth.

Strategy C: Investigate new housing projects that are in compliance with being a CHDO agency.

Manager progress notes:

Objective 2 Achieve and maintain a database inventory for the process of monitoring current vehicle status and to determine where and when new vehicles would be needed in the future.

Champion(s) Terri Martinez, Leonard Samora

Strategy A: Develop a current list of vehicles that includes a new numbering system that identifies the vehicles.

Strategy B: Develop a list of vehicles that will need to be replaced.

Strategy C: Determine which vehicles will be removed from the fleet and how they will be disposed of.

Manager progress notes:

Objective 3 Investigate the possibility of purchasing a new Administration Building.

Champion(s)

Michael F. Atlas-Acuña, Karen Caldwell

Strategy A: Conduct an analysis of the current property to determine if a new Administration building is needed.

Manager progress notes:

Goal 9 Consider future changes in the DD System.

Objective 1 Develop strategies to model CBEs future as a CCB without CM functions.

Champion(s) Management Team, Board of Directors

Strategy A: Evaluate CCB functions that are likely to remain.

Strategy B: Work on committees through Alliance and DDD to ascertain more info about future trends.

Strategy C: Investigate other program options.

Strategy D: Develop a budget that excludes CM.

Manager progress notes: