



## Lucas DD Strategic Plan 2024 – 2027

A road map of more than 130 initiatives and objectives grouped into 4 main goals.

- Exceed customer expectations
- Increase efficiency and effectiveness
- Improve employee engagement
- Responsible financial stewardship

Completing these goals will improve our operations and culture and help us exceed expectations we have of each other, of the individuals we serve, their families, providers, and the community at large.

# Goal: Responsible Financial Stewardship

## Objective: Internal Branding

Initiative: Brand expansion - Lead: Nabil Shaheen, Public Information Manager

Measure: Updated branding

Target: Complete brand updates by end of 2025

Action Plan	Description	Status & Metrics
Create Weekly Publication Program	Create weekly publication program for internal and external communication	<b>In Progress:</b> "The Almost Weekly" internal email and "Friday Update" external email has been consistently delivered. Still need to work on comms for niche audiences: i.e. Providers, families, etc.
Redesigned Email Newsletters and Deployment Schedule	Redesign look and lock in consistent delivery schedule of email newsletters to providers, community, etc.	<b>In Progress:</b> Friday Update redesign is complete. Need to refresh look and delivery of provider newsletter.
Redesigning Board Brochures	Assess the current stock of brochures by department and build a generic overall brochure for the Board as a whole.	<b>In Progress:</b> 9 brochures have been identified as needing to be created and/or redone. 1 has already been printed, 2 are awaiting final approval, and 6 are in progress.

## Objective: Optimize Financial Resources

Initiative: Explore alternate funding streams - Lead: Stephen Tucker, Director of Finance

Measure: New funding streams

Target: Increase in potential revenue

Action Plan	Description	Status & Metrics
Grant Research	Research how to obtain more grant money for programs.	<b>In Progress:</b> Currently looking into grant money from Ohio DD Council to fund innovation projects.

Review current process for Max ROI	Review all programs and processes to ensure they are running smoothly and fiscally sound	<b>In Progress:</b> Work with County & Oracle.
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## Initiative: Waiver and waitlist - Kristin Aemisegger, Director of Service and Support Administration

Measure: # of waivers annually

Target: Determine annual amounts needed

Action Plan	Description	Status & Metrics
Policy WLA		<b>Completed!</b> This was updated and trained to staff in October 2024 to align with the new WLA rule.
Waitlist Assessment Action Plan	Implement new waitlist rule and train staff.	<b>Completed!</b> The new rule training was completed in October 2024. New rule timelines have also been implemented. <ul style="list-style-type: none"> <li>• Waitlist assessments completed: 72</li> <li>• Met 15-day timeline to complete WLA: 43</li> <li>• Family re-scheduled putting outside 15-day timeline: 29</li> <li>• Met 45-day timeline for submission: 72</li> </ul>
Policy 1-5.1 & 4-10 WAITING LIST FOR SERVICES	Policies 1-5.1 and 4-10, regarding the Waiting List for Services, will be reviewed and updated to align with the goals outlined in the strategic plan and to ensure compliance with Rule 5123-4-01.	<b>In Progress.</b>

# Goal: Customer – Exceed Customer Expectations

## Object: Improve Customer Experience

Initiative: Community employment - Lead: Lori Balogh, Community Inclusion and Employment Manager

Measure: Individuals employed in the community

Target: Increase # of individuals in competitive employment

Action Plan	Description	Status & Metrics
Building Team for Successful Employment Planning	Confirm the successful transfer of the employment navigators to the SSA department.	Completed:
Group Goal: 4a - Cross Train all areas of the Community Inclusion department	Cross train all CCT staff on all areas of Community Inclusion - this includes SALUTE, FANS, Special Olympics, and Employment	Completed: all staff are knowledgeable and able to assist in any area of Community Inclusion.
Develop Client Employment Tracking System	The goal is to record numbers for reporting purposes.	Completed: EN coordinator is checking everything in Brittco – employment paths, EN caseloads, and the number of OOD Referrals.

Initiative: Provider support - Lead: Sarah Diesch, Director of Provider Support

Measure: Customer satisfaction

Target: Increase customer satisfaction

Action Plan	Description	Status & Metrics
Explore & Expand Service	Hold discussions jointly with providers and internal staff to identify gap areas and areas to expand. Hold discussions with providers that have an interest in each of the identified areas Determine barriers and find solutions to those barriers	In progress: We have providers willing to serve multi-system youth. A community of practice has been developed, and training and discussion continues.

	<p>Work together to define best practices for service delivery</p> <p>Develop action plans</p>	<p>We are also gathering data for identified needs for after school programming. Have identified one provider who is currently assisting in this area. Gathering data to determine if there is a need to expand further.</p>
Foster collaborative relationships with providers	<ul style="list-style-type: none"> <li>• Gather feedback from providers on what support, training, business practices, recruitment and retention needs they have.</li> <li>• Hold joint small group meetings to determine what areas we can partner in and focus on</li> <li>• Develop action plans from the small group meetings</li> <li>• Implement</li> </ul>	<ul style="list-style-type: none"> <li>• <b>In progress:</b> We continue to meet every other month with the small group of providers planning the agency meetings. Provider participation has increased and meeting dates have already been scheduled for the rest of the year. Last meeting did have an increase in provider participation.</li> <li>• </li> <li>• <b>Goal:</b> Increase provider participation by 10%.</li> <li>• </li> </ul>
Provider Support Survey	<ul style="list-style-type: none"> <li>• Determine events/times to gather feedback</li> <li>• Determine all questions to ask</li> <li>• Create survey</li> <li>• Send out survey</li> <li>• Develop process to ensure gathering feedback remains ongoing</li> <li>• Develop mechanism for processing and determining action steps and reportable items</li> </ul>	<ul style="list-style-type: none"> <li>• <b>In progress:</b> The survey was completed in June 2025. While there was not an overwhelming response to the survey; responses did include topics providers would like to have. This will be included in our department planning. The survey resulted in a 3.7 satisfaction rating.</li> <li>• </li> <li>• <b>Goal for 2025:</b> Receive a satisfaction level of 3.</li> <li>• </li> </ul>
Provider Support Professional Development	<ul style="list-style-type: none"> <li>• Identify committee members</li> <li>• Determine topics of need/interest</li> <li>• Identify trainers</li> <li>• Meet monthly to determine next month's training</li> </ul>	<p>Completed: Training remains on-going. We are moving to every other month for the whole department. There is a committee that meets monthly to determine and schedule the training for the group.</p>

Communication with internal and external customers	<ul style="list-style-type: none"> <li>Determine methods to communicate with internal and external customers.</li> </ul>	<b>Completed:</b> Larc Lane Conversations continues on an almost monthly basis.
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## Initiative: Listening to customers - Lead: Julie Esparza, Director of Children's Department

Measure: Customer satisfaction

Target: Increase customer satisfaction

Action Plan	Description	Status & Metrics
Feedback Program Set up - Complete	We are implementing a program to collect feedback both internally and externally. To achieve this, we will set up physical and electronic suggestion boxes. Additionally, multiple surveys will be distributed to gather customer satisfaction scores across all areas of the organization.	<b>Completed:</b> Survey Monkey has been set up as our HIPAA compliant survey tool. 3 Surveys have been completed. 2 Surveys are currently being used for client feedback. 2 Surveys are being built for future release.
Parent Cafe	In partnership with The Ohio Children's Trust Fund, we will help facilitate a Parent Café. A Parent Café is a welcoming space where parents from all walks of life can come together to share their stories, experiences, worries, fears, and wisdom, while building community and strength.	<b>In Progress:</b> Parent Café was postponed but goal remains to have at least 1 session for the Early Intervention team in 2025.
Create Listening Program for Parents of Children Ages 3 -6	Support families of children served age 3-6 for needs in development, medical issues and family/community needs: Establish procedures and protocols for all tiers of support and implement	<b>In Progress:</b> Starting to implement and working on survey needs. All procedures are completed and work on the survey has begun. The goal is for 1 survey to go out to families who have DD eligible children ages 3-6 and get responses.
Create Listening Program for Young Athletes interested in Special Olympics	Young Athletes – promote with the support of Special Olympics as they provide curriculum for us to facilitate group activities: Variety of locations and groups for families to attend	<b>In Progress:</b> Obtaining feedback from current participants and learned that families asked for more sessions. Currently running 4 different geographic areas and will continue to expand.
Provider Support Survey	To gather feedback from providers on the quality and effectiveness of support services offered by our organization. This helps identify areas for improvement, enhance collaboration, and ensure we are meeting the	<b>In progress:</b> Survey is in draft form with members of PS Leadership.

	needs of providers to ultimately benefit individuals with developmental disabilities.	
SSA Survey	To evaluate the performance and effectiveness of our Service and Support Administrators (SSAs) in meeting the needs of individuals and families. This feedback allows us to identify strengths, address challenges, and improve overall service delivery.	<b>In Progress:</b> Revamped SSA survey has been built. Needs further editing before being sent.
Community Inclusion Surveys	To assess the performance and effectiveness of our Community Inclusion team in supporting individuals to engage meaningfully in their communities. This feedback helps us identify strengths, address challenges, and enhance the quality of our programs. Some surveys will specifically focus on areas such as Special Olympics and travel training to ensure these initiatives are meeting the needs and goals of the individuals we serve.	<b>In progress:</b> 3 Surveys have been built. 1 Survey is already being utilized in the field.

## Initiative: Increase customer engagement - Lead: Organizational Culture & Inclusion Manager

Measure: Customer satisfaction

Target: Increase customer satisfaction

Action Plan	Description	Status & Metrics
Collaborate with provider agencies on DEI initiatives that promote an inclusive work environment and improve communication between Lucas DD and providers.	During the first year, create 4 opportunities to collaborate with provider agency administrators within the DD system. Collaboration will include: <ul style="list-style-type: none"> <li>• Education and Development (Training)</li> <li>• Conflict Resolution</li> <li>• Mutual Support (Shared Learning, DEI Consultation, Active Allyship)</li> <li>• Feedback Loop</li> </ul>	<b>Not Started:</b> On hold pending the hiring of a new Organizational Culture & Inclusion Manager.
Attract and retain a diverse talent pool to create an inclusive workplace.	<ul style="list-style-type: none"> <li>• Create and review semi-annual DEI Data Reports to monitor the success of recruitment and retention initiatives</li> <li>• Increase the number of employees who identify as a minority from 22% June 30, 2024, to 25% by December 31, 2025</li> </ul>	<b>In Progress:</b>

Utilize strategies to build a DEI culture that extends across the organization, including individuals served, providers, and community stakeholders.	<ul style="list-style-type: none"> <li>• During the first year, attend 4 community events organized by Lucas DD to provide individuals, families, and providers the opportunity to learn about Lucas DD's DEI initiatives</li> <li>• Enhance DEI SharePoint site and collaborate with communication department on a social media campaign</li> <li>• During the first year, include a minimum of 1 DEI related question on internal and external surveys <ul style="list-style-type: none"> <li>• During the first year, offer 6 platforms for open, safe, respectful DEI dialogue</li> </ul> </li> <li>• Offer 1 training session, workshop, on online training</li> </ul>	<b>Not Started:</b> On hold pending the hiring of a new Organizational Culture & Inclusion Manager.
Robust Unified Sports Program	10% each year growth of unified sports participation.	<b>In Progress:</b> Partnership with Lourdes a success so far.
Grow Little Lighting Teams	Meet with schools quarterly to go over options through 2027. CI Coordinator Sherrie Hathaway to meet with 5 schools per quarter through the 3-year strategic plan	<b>In Progress:</b> Team has already met with 7 schools in the first quarter of 2025.
Continue FIT games with current provider and add 2 more providers 2027	increase FIT games (for individuals who cannot participate in skilled Special Olympics programs) to 2 more providers	<b>In Progress:</b> Already underway with FIT games at Anne Grady Services, 2 more locations to be determined.
Engaging SALUTE Members in Community Resource Events	Involve SALUTE members in opportunities to assist at resource events for education of programs and services	<b>In Progress:</b> SALUTE members are well represented at an increased number of events where they are talking about Lucas DD programs and services.
Assist schools with IEP goals of advocacy	Currently we work with 3 high schools and would like to add 3 more High schools through. One in 2025, one in 2026, one in 2027	<b>In Progress:</b> The team has met with representatives from Anthony Wayne High School.
Continue with Community Safety Programs	– bike safety, stranger awareness, travel training, and pedestrian safety. Increase participation in safety programs by 10% each year until 2027, recreate safety programs back into providers – 20 Day Habs by 2027 having safety programs discussed. Recreate loose the training wheels program by Summer of 2025(maybe 2026)	<b>In Progress:</b> Completed consumer scams education at Triad in February 2025. Travel training is currently being conducted with 3 area high schools, Northview, Southview, and Whitmer, which includes mock trips to the Franklin Park Mall on an actual TARTA bus. Safety City planning is underway with TF&RD. The plan is to host an event at Lucas DD in September.
Maumee Valley Country Day School	We are meeting with Maumee Valley Country Day School as a panel with 2 individuals about their disability, advocacy, and inclusion. The date is 2/11/25.	<b>Completed:</b> 3 members of SALUTE participated in a panel discussion on Feb. 11, 2025 led by upperclassmen at Maumee Valley Country Day School. Individuals served by the Board discussed the importance of advocacy and inclusion through their own personal stories.



## Initiative: Innovative projects - Lead: Craig Meyer, Project Manager

Measure: # of new projects

Target: Determine baseline projects annually

Action Plan	Description	Status & Metrics
Exploring Audio Recording Solutions for Improved Efficiency	Evaluate the feasibility of implementing audio recording tools for meetings, case notes, and investigations to enhance efficiency and accuracy across departments, including MUI and SSA. This initiative aims to streamline documentation processes, reduce errors, and support more effective communication and record-keeping.	<b>In Progress:</b> Microsoft Dictation & Transcription tools are currently being reviewed by Legal and the Privacy Team for approval. We also continue to explore other tools.
Board Policy 2-4.3	Writing new policy on AI & LLM use	<b>Completed:</b> The new policy on AI and LLM use has established clear guidelines for responsible implementation, ensuring data security, compliance, and efficiency while maximizing the benefits of emerging technology for Lucas DD.
Developing a 24/7 Chatbot for Enhanced Website Support	Design and implement a chatbot for the Lucas DD website to provide 24/7 assistance by answering questions about the Board and its services. This initiative aims to improve accessibility, streamline information delivery, and enhance user experience for individuals seeking information at any time.	<b>Completed:</b> Alex the Advocate is now live at LucasDD.org and has improved accessibility, streamlined information delivery, and enhanced the user experience for all visitors of our website.
Seating Chart Application	Create a way to show, update and share a seating chart for the SSA department. The goal is to replace software currently in use.	<b>Completed:</b> The new system for displaying, updating, and sharing the SSA department seating chart has successfully replaced the previously used software, resulting in cost savings. This improvement has streamlined updates, enhanced accessibility, and ensured more efficient space management.
Multi-System Youth and Adults - Build Connections with community agencies (hospitals, Ohio Rise, Children Mental health, schools, courts, etc.)	<ol style="list-style-type: none"> <li>1. Find SSA department liaisons to connect with community entities.</li> <li>2. Determine outside partners and set up meetings to learn about that agency and provide education on LCDD.</li> <li>3. Develop informational page and keep updated.</li> </ol>	<b>In Progress:</b> We continue to build community connections with community agencies. There are SSA department liaisons for the 4 major mental health agencies. Most recently, we presented to Harbor caseworkers in regard to intake/ eligibility / funding.

	4. Offer for partners to do a lunch n learn to introduce self and agency to SSA department.	
Multi-System Youth and Adults - Law Enforcement	<ol style="list-style-type: none"> <li>1. Explore the Noris system: training, screenshots/videos.</li> <li>2. Offer education about DD services, TIC.</li> <li>3. Develop "Cops and Coffee" with LCDD staff.</li> <li>4. Collaborate with providers to develop training for law enforcement.</li> <li>5. Explore having an SSA at CIT training.</li> </ol>	<b>In Progress:</b>
Multi-System Youth and Adults - Youth respite home	<ol style="list-style-type: none"> <li>1. Complete RFP and choose provider to staff and run Vosper home for children's respite home.</li> <li>2. Explore housing and develop RFP for multi -system adult home.</li> </ol>	<b>In Progress:</b> RFP was completed and awarded to ViaQuest as the provider. Home construction has been completed, and it is fully furnished. Last quarter two youth moved in, in December and one youth began using the home and planned respite once a month.
Build Data Team	The goal of building a <b>Data Team</b> at Lucas DD is to bring together Data Analysts and Business Analysts for regular training and collaboration. Through ongoing meetings, team members will share best practices, discuss data challenges, and improve the use of various data applications and resources. This initiative aims to enhance data accuracy, consistency, and efficiency across departments while fostering a more cohesive approach to data management.	<b>In progress:</b> Meetings are taking place on a regular basis. The team is documenting their ideas and processes for the goal of sharing with everyone. We are currently looking at Power BI to generate reports and dashboards to help team members retrieve data.
Strategic Plan Process Creation	The <b>Strategic Plan Process Creation</b> aims to implement the new Strategic Plan process across leadership and the entire organization. This initiative will establish structured methods for tracking tasks, goals, and action plans while ensuring clear communication of progress. All efforts will align with <b>Ohio Rule 5123-4-01 (C)</b> , ensuring compliance and transparency in strategic decision-making and execution.	<b>In Progress:</b> Smartsheet currently being used to track initiatives and action plans. The next step is to transition from Smartsheet to <b>Office 365</b> for improved integration and efficiency. Additionally, a <b>Master Plan Report</b> has been created to centralize tracking and communication, ensuring alignment with <b>Ohio Rule 5123-4-01 (C)</b> while enhancing strategic oversight across the organization.

# Goal: Internal Process – Increase Efficiency and Effectiveness

## Objective: Improve Operational Performance

Initiative: Improve communication - Nabil Shaheen, Public Information Manager

Measure: Employee engagement survey trust and communication questions

Target: Increase score performance

Action Plan	Description	Status & Metrics
Better Education for Lucas Co. Residents	Developing material and seeking opportunities where we can increase brand awareness in the community. Utilizing tech and ai for improving communication.	<b>In Progress:</b> We've added a chatbot and a new accessibility widget on our website. Very impactful presentation at Rotary Club of Toledo in March. Appearances on different podcasts this year. Continue to push media relations for increased footprint with different audiences.
Explore new social media platforms for the Board.	Exploring what other social media platforms make sense for us to join based on feedback from individuals served and community members.	<b>In Progress:</b> Our new TikTok channel has 89 followers, 148 likes and more than 14,623 views of our videos. Looking to add more platforms as needed.
Reaching One Lucas DD	Breaking down internal/ external silos and filling any communication gaps that are preventing us from optimal execution of our mission.	<b>In Progress:</b> "The Almost Monthly" Podcast launched, featuring conversations with one staff member per episode so that we can get to know each other beyond our job titles. Comms Specialist involved early in conversations for bigger events like Inclusion Fair, Snowy Social, etc. Uniform email signature created and shared with all staff including directions on how to upload it to Outlook.
Create Communication Plan	Develop a system to ensure communication throughout the entire organization is accurate and relevant.	<b>In Progress:</b> Cascading message being shared monthly.
Customer Service (External) - Community Agencies	1. Consistent presentations for community agencies, schools, etc. to educate on DD services.	<b>In Progress:</b> Debi Tyree presented to Harbor caseworkers in regard to intake/ eligibility / funding. Created and printed a

	<p>2. Provide information for agencies to provide to families about DD services.</p> <p>3. Continue to develop monthly check in meetings with agencies that work directly with individuals (LCCS, Ohio Rise, Mental Health, etc.)</p>	<p>new brochure to be able to give to agencies to give to families. Check ins happen with the 4 major mental health agencies and Lucas County Children services. Ongoing to set up with other community agencies.</p>
Customer Service (External) - Persons Served / Guardians / Families	<p>1. Explore different ways to disseminate important information (videos, pamphlets, etc.)</p> <p>2. In person training series for individuals' guardians and families</p> <p>3. Continue supporting and developing more events (Transition fair, Inclusion fair, ice cream social, support groups, etc.)</p> <p>4. Develop a "cheat sheet" for important things and transitions in someone's life.</p> <p>5. Consistent check in's, monitoring and updating of information (SSA change, surveys, vacations, FMLA leaves, etc.)</p>	<p><b>In Progress:</b> Continuing creation of brochure of services. Work continues in creating cheat sheets for transitions.</p>
Customer Service (External) - Providers	<p>1. Dual training with providers and SSA department on important topics that affect the individual and services.</p> <p>2. OISP language to be clear and understandable for all.</p> <p>3. Understanding each other's roles (DSP, SSA, etc.)</p> <p>4. Q&amp;A sessions</p> <p>5. Partner with provider liaisons for meetings, etc.</p>	<p><b>In Progress:</b> Still working on the idea of dual training with providers and SSA's. Provider liaisons have been attending more meetings and more involved with case specific things in order to keep a positive relationship with providers.</p>

## Initiative: Process improvement system - Lead: Craig Meyer, Project Manager

Measure: Project completion rate

Target: Determine services

Action Plan	Description	Status & Metrics
Streamlining the Individual Budget Process for Timely Approvals	<p>Review the Individual Budget process for both children and adults to identify the root causes of delays.</p> <p>Develop and implement strategies to improve</p>	<p><b>In Progress:</b> The Individual Budget process for EI has been successfully streamlined, significantly reducing wait times for financial assistance, which previously ranged from days to months. Phase 1 of SSA Individual Budgets are in</p>

	efficiency, reduce processing times, and ensure timely approvals, benefiting individuals and their families.	progress for the first 100 agencies and/or providers with active Individual Budgets. Like EI, streamlining has been successful so far and wait times have been significantly reduced.
Legal Contract Process	Work with MEORC to conduct review of our Legal Contract Process. The goal is to improve the way contracts are managed.	<p><b>In Progress:</b></p> <p>Legal Department met with Steve Long (MEORC) on June 5 and 27 to develop metrics to improve Board's contract process with the following goals identified:</p> <ol style="list-style-type: none"> <li>1. Increase the efficiency of the process/reduce lead and cycle time</li> <li>2. Develop electronic process (discontinue paper)</li> <li>3. Decrease defects in the process (request for contract form accuracy)</li> <li>4. Develop some automation to provide notifications of contract periods</li> </ol> <p>Action Steps:</p> <p>Developed proposed new contract process Meeting with vendors to develop electronic system to support the process. Expect to have quotes by August 1 Present amended Purchasing Policy to Board in September</p>
Payroll Process	Work with MEORC to conduct a review of our payroll process. The goal is to improve the way payroll is conducted.	<b>In Progress:</b> Scope meeting conducted March 19 <sup>th</sup> , 2025
Promote 365 tools to TEAM	Train the team on Microsoft 365 tools such as Power Automate, Power Apps and Teams. The goal will be to have the team identify processes that can be automated and improved.	<b>In Progress:</b> Software update completed by VC3. Training is ongoing for the entire board.
ISP Inspections reduced to 30%	see email RE: SSA Work Study MEORC Strategy Action Plan - Innovation - Process Improvement	<b>In Progress:</b> Due to the large nature of this action plan, we will break this action plan down into further steps. Currently working on implementation of the SSA Trainer program.

Determine Data Discrepancy	There is a huge difference between Brittco & DoDD. We need to determine why and how to fix it	<b>In Progress:</b> Data Team working with Service19 to define data sets.
Developing Brittco User Guides and Support Resources	Document step-by-step instructions and processes for using the Brittco software and database system. Create comprehensive training materials and resources to support users, with the goal of establishing a dedicated point of contact for all Brittco-related inquiries and assistance.	<b>In Progress:</b> Currently working on this with the Data Team.
SharePoint Update	Update SharePoint so that it is more user friendly for the team. This will be in prep for 365. Create a method of organizing documents for the team. Currently, out of date W-9s are in use. How do we prevent that?	<b>In Progress:</b> A survey is in place to get feedback from the team about the current SharePoint system. Various departments have already begun updating their SharePoint pages.

Action Plan - SSA	Description	Status & Metrics
Streamline Processes - Brittco - Forms/ Referrals/ Ohio ISP	<ol style="list-style-type: none"> <li>1. All SSA's to be transitioned to the final OISP module.</li> <li>2. Work with SSA's, SSA Tech, and Data Analyst to ensure that client demographics are updated and correct and kept updated and correct.</li> <li>3. Ensure all needed forms are built in Brittco, prefill where possible.</li> <li>4. Ongoing follow up with Brittco for system development of ISP training guides and example of OISP's.</li> <li>5. Implementation of new OISP process and consistent review of process.</li> </ol>	<b>In Progress:</b> All but 15 plans are in the final OISP module. We continue to work on cleaning up demographics in Brittco. New OISP process has been implemented and is now reviewed at least twice annually.
Streamline Processes - Case Conference	<ol style="list-style-type: none"> <li>1. Evaluate needs of internal support for teaming on challenging cases.</li> <li>2. Re-evaluate the purpose of case conference.</li> <li>3. Develop updated procedures and processes for presenting cases.</li> <li>4. SSA and Management training.</li> </ol>	<b>In Progress:</b> This is ongoing.
Streamline Processes - Safety	<ol style="list-style-type: none"> <li>1. Explore technology options for community safety guidelines - GPS tracker, Emergency response system.</li> <li>2. Set procedure for SSA community safety guidelines.</li> <li>3. Training on personal safety (use of SSC, self-defense blocking techniques, CPI Training, etc.)</li> </ol>	<b>In Progress:</b> 2 and 3 are completed. TPD completed safety training for SSA's and secretaries that work the front desk. Community safety guidelines were updated and reviewed with staff.
Streamline Processes - SSA Job Expectations, SSA Training, on-boarding/"Live Binder" for	<ol style="list-style-type: none"> <li>1. Hiring and Development and Training Manger to assess/address needs of department for training (new and existing staff)</li> </ol>	<b>In Progress:</b> Work is ongoing for this initiative. Streamline Processes – SSA job expectations – Training Facilitator was hired and working on the rest of the goal.

processes, quick reference guides, SSA resignation, mileage	<p>2. Ongoing review and update of current procedures and processes according to review schedule.</p> <p>3. Development of organizational system to connect applicable forms, processes, and training guides in one place.</p> <p>4. Update forms, provide example forms, development of training videos and quick guides.</p> <p>5. Review new SharePoint - organize items according to updated systems and categorization above.</p>	
Review Intake Process Forms	Review with Intake Team the forms used in the Intake Process. The goal is to improve the intake forms.	<b>In Progress:</b> Database is being built in SharePoint. We are currently testing the Microsoft Power Platform.

Action Plan – Finance	Description	Status & Metrics
Cross-training of Finance Department staff so there is a constant flow of work regardless of staff time off.	Cross-training of Finance Department staff so there is a constant flow of work regardless of staff time off.	
Generate new data collection reports	Generate new reports to help with data collection and accuracy of our data, such as number of people served, etc.	
Goal #1 - Support the Agency and its Departments	Support the Agency and its Departments	
Goal #2 - Increase Efficiency Within the Department of Business Operations	Increase Efficiency Within the Department of Business Operations	

Action Plan - CI	Description	Status & Metrics
Create a script of areas of the Community Inclusion department	Create a script to handout with information of who contact in CI as well as what each area does so that the staff can take with them to meetings and use as a resource. We can also use this information during the SSA orientation.	<b>Completed:</b> Script made and Sharepoint landing page was created to complement that.
Enhancing CI SharePoint for Cross-Training	Update the CI SharePoint pages with comprehensive instructional materials and detailed information on various programs and their operations. This initiative aims to facilitate cross-training within the department, ensuring	<b>Completed:</b> Flyers were made, and SharePoint was updated

	staff are well-equipped to support multiple programs effectively.	
Increase CI staff's understanding of the department's various programs through cross-training staff in each area of the department in order to break down silos.	4a Crosstrain all areas of Community Inclusion: SALUTE, FANS, Special Olympics, Travel Training, & Employment	<b>Completed:</b> August 2025 was when CI leadership began discussing how to cross train Community Connections Trainers. Meet to go over each area's procedures, as well as a problem map of how to cross train our staff. We pulled in our professional staff, the specs, to go over a problem map to discuss how to continue quality of programs while staff begin to retire. We also completed this with the CCTs during a department meeting.
Special Olympics Data Processing	The goal of this action plan is to automate the Special Olympics registration process, reducing manual effort and errors while improving overall efficiency. End Goal: Automate the registration process to save time and reduce errors.	<b>In progress:</b> Currently building a database on SharePoint.

Action Plan - EI	Description	Status & Metrics
EI Loan Closet Inventory	Online system for all of our loan items and equipment. Process in place for maintenance of system and of items/equipment	<b>Completed</b>
Tech Solutions for Families	Making sure we are utilizing our tech tools with families and loaning out as needed.	<b>In Progress:</b>
Playground	Finish the full creation – install shed, identify items still needed and obtain	<b>Completed:</b> The shed is installed and the playground items have been relocated into the shed.
Better tracking	3-6 system, PLAY project, Brittco, Eval/Assessment needs, funding	<b>In Progress:</b> Conversations underway about updating Children's Department page on SharePoint as well as the one on the external LucasDD.org site.
Social media improvements	SharePoint and Website section for Children's	<b>Not Yet Started</b>
Quality Assurance - Role expectations	Clarify expectations per role – for onboarding and for consistent Supervision	<b>Completed:</b> Updated onboarding process for new staff; Also updated mentor process to match consistent supervision.
Increase Therapists on staff	Continue providing Evidence-based EI – increase therapists on staff and implement a community contract: Hire PT and SLP and implement community contract for SLP	<b>In Progress:</b> A new PT started in February. Offer has been made to SLP - working on contingencies; potential second SLP will also get an offer.



FSS Process Improvement Review	Conduct a Lean Six Sigma review of the Family Support Services (FSS) process to identify inefficiencies, reduce waste, and implement improvements that enhance system performance and service delivery.	<b>In Progress:</b> We conducted an initial scoping meeting with MEORC to outline project goals. The next steps include mapping the current FSS process and identifying potential areas for improvement.
Expand Family Participation Locations	Community Playgroups; Community events; Young Athlete sessions	<b>Completed:</b> We have restarted at Sylvania Rec and formed new playgroup sessions at Birmingham Library in East Toledo

## Goal: Internal Process – Learning and Growth Improve Employee Engagement

### Objective: Workforce Development

Initiative: Improve HR processes - Lead: Shelly Potridge, Director of Human Resources

Measure: Key HR metrics

Target: Increase performance of HR metrics

Action Plan	Description	Status & Metrics
Professional Development	Develop a comprehensive strategy for employee growth and leadership development, including succession planning, career ladders, CEU expansions, a new learning management system, and internal leadership training.	<b>In Progress:</b> Implementation of new LMS is underway. Framework for succession planning is being developed. Development programs and CEU expansion are making progress. Notes:
Performance Management	Equip leadership with skills in creating standardized SMART goals and utilize 360 feedback to enhance leadership and supervisory effectiveness.	<b>In Progress:</b> Implementation has begun. Initial drafts are being presented to Management on May 21st.

Staffing and Retention	Enhance recruitment, onboarding, and retention efforts by streamlining processes, fostering diversity through partnerships and events, upgrading tools, and implementing surveys and resources to improve employee satisfaction.	<b>In Progress:</b> Onboarding survey is complete. Systems have been updated to streamline the applicant's experience. Posting to start time has improved. Orientation efficiency is being reviewed.
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## Initiative: Improve organizational culture - Lead: Michele Myerholtz, Superintendent

Measure: Employee engagement results

Target: Increase employment

Action Plan	Description	Status & Metrics
Suggestion Box	To improve our culture, we intend to build a system that promotes feedback and ideas.	<b>Completed:</b> Suggestion Box form is live on SharePoint as well as physical suggestion boxes in both buildings. A separate section has been created on SharePoint to provide responses from Leadership to those suggestions.
Define Org Culture	To define what we stand for.	<b>Completed</b>
Customer Service (Internal) - Communication	Improve IT Systems and address how they can be used to support LCDD and SSA Communication. - Development of improved processes and expectations for communication with supervisor / management. Morning Announcement/Video Stream with Updates. Measured by process and Announcement/Stream	<b>In Progress</b>
Customer Service (internal) - Interdepartmental Relationships	1. Development of organization charts with roles and pictures. Post in accessible place. 2. Increase information regarding roles and information sharing (Specialty SSA, Provider Support, HR, CI, etc.) 3. Development and planning of more all-staff events.	<b>In Progress:</b> We continue to meet monthly with all departments.
Customer Service (internal) - New staff training/orientation/re-vamp program	1. Hire training and development facilitator to revamp trainings 2. Develop structured system for shadowing SSA's and other department staff	<b>In Progress:</b> Training Facilitator has started in a new role. Work on revamping orientation and training continues.

	3. Development of written and video user guides for SSA forms, processes and tasks	
Customer Service (Internal) - Professional Etiquette	1. Address cubicle issues (zoom, phone ringers, loud talking, meetings in cubes, cubicle screens). 2. Address non-cubicle issues (lunchrooms, foyer, common areas) 3. "Kindness" training / customer service to co-workers (be nice, smile, say hello/good morning) 4. "Self-Focus" Training (work ethics, responsibility, conflict management, minimize gossip) 5. Training on microaggressions	<b>In Progress:</b> Reviewed cubicle awareness issues with SSA staff.
Trauma Informed Care - Policies/Procedures	1. Policy of Death of Clients will be relooked at to reflect trauma informed practices.	<b>In Progress</b>
Trauma Informed Care - Staff	Develop a designated space for staff to assist with de-escalation, break, etc.	<b>In Progress</b>
Trauma Informed Care - Trainings	1. Keeping families together Crisis Intervention Grant - Train the trainers on debriefing skills for SSA, Providers, etc. 2. Training for management on how to be trauma informed leaders and SSA training on trauma informed approaches to share with Families and model.	<b>In Progress:</b> Psych asst. attended the Training for the Keeping families together grant. She is currently working on developing a training from that for staff.

## Objective: Improve Infrastructure

Initiative: Improve technology - Lead: Andrew Bahnsen, IT and Records Coordinator

Measure: IT plan

Target: Implement IT plan by 2025

Action Plan	Description	Status & Metrics
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Cost Savings	Considering canceling Zoom and Smartsheet services after Microsoft 365 Implementation. This could remove over \$17,000 in costs that are being paid at this time.	<b>Completed:</b> Zoom contract expires October 2025.
Digital Records	Review the system to manage records digitally, study workflows for better processes, and identify records that cannot be digitized. This will make record-keeping more efficient and accessible.	<b>In Progress:</b> Intake folder and Rolling Cart folders for the SSA department are current again and we are pulling same day. For the Scanning Project we are at 420 out of 656 individuals completely uploaded and indexed. For Binders we have uploaded and indexed 136 out of 3,247. SSA Clerks are scanning into the rolling cart folder as we get more caught up on what is already scanned into Intellivue. Clerks will be trained on scanning into that software.
Cybersecurity	Implement key cybersecurity measures, including multi-factor authentication, single sign-on, and password managers. Conduct regular security awareness training for staff, apply security patches, perform penetration testing, and utilize auditing tools to ensure data safety and system integrity.	<b>In Progress:</b> Most Board staff are now using the DUO multi-factor authentication. We are looking to implement Single Sign On for Office@Hand.
Technology Improvements	Implement Microsoft 365, upgrade outdated IT equipment, and complete the Smartphone Project to improve efficiency and connectivity. Explore artificial intelligence solutions and establish an effective asset tracking system to enhance operational performance and innovation.	<b>In Progress:</b> Migration to Microsoft 365 has been completed for all staff. Final preparations are underway to implement the first group of iPhones to staff. New computers are being prepared to be delivered to staff with older equipment.
Education	Develop tailored training programs, analyze external education providers for additional learning opportunities, and conduct a training needs survey to identify and address staff development requirements effectively.	<b>In Progress:</b> Looking into the possibility of bringing in a training provider as part of the implementation to the new Microsoft 365 system

**Initiative: Improve facility effectiveness - Lead: Nick Bruno, Capital Projects Manager**

**Measure: Project upgrades**

Target: Project completions annually

Action Plan	Description	Status & Metrics
Optimizing Office Space for Full Staffing Capacity	Develop an office plan to accommodate full staffing levels using existing building space, ensuring efficient use of resources without requiring new construction. The plan will identify potential locations for new employees while maintaining a functional and collaborative work environment.	<b>In Progress:</b> Leadership is reviewing the document.
New Admin Entrance	The project involves redesigning the Admin Entrance at Lucas DD by removing the existing canopy over the walkway and replacing it with a new entry structure. The goal is to identify a suitable design that meets the approval of leadership and oversee its construction, ensuring functionality, accessibility, and aesthetic appeal.	<b>Not Started</b>
Admin Outer Entry Improvements	Upgrade the main entrance to enhance accessibility and aesthetics, providing a welcoming first impression for visitors and staff.	<b>Not Started</b>
LLC Outer Entry Improvements	Enhance the outer entryway at LLC to ensure safety, accessibility, and improved visual appeal for clients and employees alike.	<b>Not Started</b>
Mini-Split (HVAC) - Legal	Install a mini-split HVAC system in the Legal department to improve climate control and ensure a comfortable working environment.	<b>In Progress:</b> Waiting on quote
Carpeting - Community Inclusion Offices	Replace the carpeting in the Community Inclusion offices to improve aesthetics and create a more inviting atmosphere for staff and clients.	<b>Not Started</b>
Dehumidifier - Children's/CI	Install dehumidifiers in the Children's and Community Inclusion areas to improve air quality and comfort for all occupants.	<b>Not Started</b>
Utility Sink - Children's	Install a utility sink in the Children's area to enhance functionality and support various activities and maintenance needs.	<b>Completed</b>

Parking Lot Resurface - LLC	Resurface the parking lot at the LLC to improve safety and accessibility for staff and visitors.	Not Started
Changing Table - Admin	Install a changing table in the Admin area to accommodate the needs of families visiting the facility.	In Progress
Changing Table - LLC	Install a changing table at the LLC to enhance family-friendly facilities for clients and visitors.	In Progress: Contract with Contractor
Windows Doors Ceiling Replacement-Admin	Replace outdated windows, doors, and ceilings in the Admin building to improve energy efficiency and create a modern work environment.	Not Started
Windows Doors Ceiling Replacement-LLC	Upgrade windows, doors, and ceilings at the LLC to enhance aesthetics and energy efficiency.	Not Started
Admin Parking Lot - Reseal/Stripe	Reseal and restripe the Admin parking lot to ensure clear markings and improved safety for vehicles and pedestrians.	Not Started
Admin-Update Equipment-Toilets and Vanities	Upgrade toilets and vanities in the Admin building to enhance functionality and ensure a pleasant experience for all users.	Not Started
LLC-Update Equipment-Toilets and Vanities	Update the toilets and vanities in the LLC to improve functionality and accessibility for staff and visitors.	Not Started
LL-Flat Roof Replacement NE/Section	Replace the flat roof on the northeast section of the LLC to ensure structural integrity and prevent water damage.	Not Started
White noise machine (Provider Support)	Install a white noise machine in the Provider Support area to enhance privacy and reduce distractions in the workspace.	Not Started
Storage Shed for EI playground -	<ul style="list-style-type: none"> <li>- Playhouse(s): We're looking at a budget around \$2,000. This may change slightly based on final selection.</li> <li>- Storage Shed: We are more confident in budgeting \$2,000 here.</li> <li>- Year-End Timeline: EI would like to spend these funds this year.</li> </ul>	Completed.

## Rule 5123-4-01 - Ohio Administrative Code | Ohio Laws

### *(C) Strategic plan*

*(1) A county board will develop and adopt by resolution a strategic plan that meets the requirements of sections 5126.04 and 5126.054 of the Revised Code, includes the county board's mission and vision, and addresses the county board's strategy for:*

*(a) Promoting advocacy for and by individuals served by the county board through the person-centered planning process, activities, and community connections;*

*(b) Ensuring that individuals receive services in the most integrated setting appropriate to their needs;*

*(c) Reducing the number of individuals in the county waiting for services;*

*(d) Planning and setting priorities based on available resources to meet the needs of children and adults residing in the county who are individuals with developmental disabilities;*

*(e) Increasing the number of individuals of working age engaged in competitive integrated employment;*

*(f) Taking measures to recruit sufficient providers of services to meet the needs of individuals receiving services in the county; and*

*(g) Identifying and addressing gaps noted in services.*

*(2) The strategic plan will be made readily available to individuals and families who receive services, employees of the county board, citizens of the county, and any other interested persons.*

*(3) A county board will prepare a strategic plan progress report at least once per year. The strategic plan progress report will be made readily available to individuals and families who receive services, employees of the county board, citizens of the county, and any other interested persons.*

*(4) A county board will have a mechanism for accepting public feedback regarding the strategic plan and strategic plan progress reports.*