THE WHOLE PERSON · CENTER FOR INDEPENDENT LIVING

Strategic Plan

Fiscal Years 2027 – 2029

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STRATEGIC PRIORITY 1

Referral & Partnership Growth

GOAL

Position TWP as the partner of choice for healthcare providers, schools, community organizations, and non-disability partners by building trusted, visible, and sustainable referral pathways that increase referral volume and enhance community impact within three years.

1.1 Establish Benchmarks

- **1.1.1** Collect and validate current referral, partner, and satisfaction data to create baseline metrics for each partner type.

  TARGET Q1 2027

- **1.1.2** Standardize data definitions and record benchmarks in Contact Relationship Management (CRM), CILSuite, or a shared data storage to enable accurate tracking of future growth.

  TARGET Q1 2027

- **1.1.3** Include in a dashboard or report.

  TARGET Q1 2027

1.2 Enabler Initiative

- **1.2.1** Develop a modular referral partner toolkit (core messaging, customizable inserts for different partner types)

  TARGET Q1 2027

1.3 **Conduct quarterly relationship-building meetings with the United Healthcare, Sunflower, and Healthy Blue MCO case managers, to increase referral volume by 15%.**

- **1.3.1** Conduct structured outreach to MCO case managers (quarterly relationship-building meetings, co-branded referral guides).

  TARGET Q4 2027

1.4 **Launch referral awareness campaigns and staff training sessions in at least 5 schools and libraries, generating 50 new consumer referrals.**

- **1.4.1** Establish school and library referral pipelines (training sessions, awareness campaigns).

  TARGET Q4 2027

1.5 **Formalize collaboration agreements with at least 3 like-minded organizations to expand services and build consistent relationship management practices using a CRM to ensure continuity when staff changes (Ability KC, Voc Rehab.**

- **1.5.1** Formalize new and strengthen existing partnerships with like-minded partners and expand services (joint service initiatives, shared referral agreements). Build consistent relationship management practices including using a CRM to ensure continuity when staff changes occur.

  TARGET Q4 2028

1.6 **Secure partnerships with 3 additional non-disability organizations (e.g., Habitat, BikeWalk KC) and participate in 6 co-hosted community events to increase visibility and reach.**

- **1.6.1** Build alliances with non-disability community orgs (Habitat, BikeWalk KC, Pawsperity) to co-host events and expand impact.

  TARGET Q4 2028

- **1.6.2** Increase presence at community events and fairs with branded collateral and accessible information.

  TARGET Q4 2028

STRATEGIC PRIORITY 2

Organizational Continuity, Development, & Succession

GOAL

Create a thriving organizational culture where staff are knowledgeable about TWP programs, supported in their work-life balance, and able to deliver consistent, high-quality services through effective development, retention, continuity planning, and succession, regardless of turnover.

2.1 Establish Benchmarks

- **2.1.1** Collect and validate baseline measurements to determine the effectiveness and key results of initiatives in this strategic priority. Example data to collect: onboarding time, post-onboarding competency score, turnover, staff satisfaction, and process efficiency.

  TARGET Q1 2027

- **2.1.2** Document results in a shared dashboard to track progress and guide improvement efforts.

  TARGET Q1 2027

2.2 Launch a centralized knowledge repository with at least 80% of core program content and critical role knowledge documented and accessible to support continuity of services, staff transitions, and consumers.

- **2.2.1** Develop a digital knowledge management platform with role-specific content and consumer self-service capabilities.

  TARGET Q4 2027

2.3 **Implement a standardized onboarding and role transition program for all new hires and internal role changes, ensuring 100% completion within their first 30 days.**

- **2.3.1** Design and implement standardized onboarding curriculum with educational modules, quizzes, checklists, and mentorship pairings.

  TARGET Q3 2027

2.4 **Develop and deliver quarterly cross-training and educational refreshers to build shared understanding of programs and roles for all staff, achieving at least 85% participation rates.**

- **2.4.1** Establish a quarterly education calendar (compliance, service standards, consumer engagement best practices).

  TARGET Q4 2028

2.5 **Implement at least two staff accountability, mentoring, and well-being initiatives (e.g. visual work boards, flexible scheduling, peer mentoring) that improve staff satisfaction scores by 15%.**

- **2.5.1** Launch staff accountability and well-being initiatives (e.g. visual work boards, flexible scheduling, wellness workshops, recognition programs).

  TARGET Q4 2028

2.6 **Analyze, improve, and standardize at least one core process to reduce reliance on individual roles and improve continuity. Establish a repeatable process improvement approach that can be applied to two additional core processes in Year 2 and three more in Year 3.**

- **2.6.1** Year 1: Analyze and improve one inefficient process to establish a process improvement framework (e.g., intake or billing).

  TARGET Q4 2027

- **2.6.2** Year 2: Apply the framework to improve two additional processes with the highest inefficiency impact.

  TARGET Q4 2028

- **2.6.3** Year 3: Improve three additional inefficient processes, embedding continuous improvement as a standard practice.

  TARGET Q4 2029

2.7 **Identify critical roles and establish basic continuity and succession coverage for at least 80% of those roles through documented responsibilities, cross-training, or internal development plans.**

- **2.7.1** Identify all roles that are essential to service delivery, revenue stability, compliance, and organizational leadership, and establish basic succession coverage for each role to reduce reliance on single individuals.

  TARGET Q4 2028

2.8 **Strengthen organizational continuity planning to ensure uninterrupted service delivery during unexpected disruptions affecting people, facilities, systems, or external partners.**

- **2.8.1** Formalize and maintain an organizational continuity plan that prepares the organization to respond to sudden disruptions, including loss of staff, facilities, vendors, systems, or external partners.

- **2.8.2** Conduct an annual continuity planning exercise to test the effectiveness of its Organizational Continuity & Emergency Readiness Plan.

STRATEGIC PRIORITY 3

Reimbursement & Financial Sustainability

GOAL

Ensure TWP's long-term financial sustainability by maximizing reimbursement, stabilizing the home care workforce, and diversifying funding so services remain high-quality and resilient to policy changes.

3.1 Establish Benchmarks

- **3.1.1** Collect and validate baseline measurements to determine the effectiveness and key results of initiatives in this strategic priority. Example data to collect: current financial and workforce data to establish baselines for reimbursement capture, home care workforce turnover, and revenue diversification.

  TARGET Q1 2027

- **3.1.2** Document results in a shared dashboard to track progress and guide improvement efforts.

  TARGET Q1 2027

3.2 Implement a Voice of the Consumer program to gather information that would direct the development of new services.

- **3.2.1** Implement a Voice of the Consumer program to continuously collect consumer feedback through surveys, listening sessions, and digital engagement tools.

  TARGET Q2 2027

3.3 Complete a competitor analysis to identify effective practices used by other CILs and non-CIL competitors that could strengthen TWP's services and consumer outcomes.

- **3.3.1** Establish an ongoing process of analyzing competitors to identify effective practices used by other CILs and non-CIL competitors that could strengthen TWP's services and consumer outcomes.

  TARGET Q2 2027

3.4 Increase program reimbursement capture by 10% through improved utilization tracking, aide retention, and authorized hours usage.

- **3.4.1** Implement a data-driven reimbursement optimization system (tracking authorized hours, missed visits, and program utilization).

  TARGET Q4 2027

3.5 Design and launch at least one new private-pay service line that generates $150,000 in annual revenue.

- **3.5.1** Design and pilot private-pay in-home services (tiered service models, marketing campaign, pricing structure).

  TARGET Q4 2028

3.6 Implement a home care workforce retention strategy that reduces annual turnover by 20% and improves service continuity.

- **3.6.1** Develop a home care workforce stabilization package (competitive wage advocacy, career pathways, recognition programs, profit sharing).

  TARGET Q4 2028

3.7 Establish a financial resilience plan that identifies 3 alternative funding streams and scenarios to adapt to Medicaid cuts or policy shifts.

- **3.7.1** Develop financial resilience scenarios (3-year projection models, funding diversification plan, contingency strategies).

  TARGET Q4 2029

STRATEGIC PRIORITY 4

Consumer Access & Expansion

GOAL

Ensure that every consumer in TWP's service area, who needs services—regardless of disability type, location, or eligibility—has access to safe housing, reliable transportation, mental health support, and independent living options that promote long-term stability.

4.1 Establish Benchmarks

- **4.1.1** Collect and validate baseline measurements to determine the need, effectiveness and key results of initiatives in this strategic priority. Example data to collect: need and availability of houses, need for mental health services among people with disabilities, need for Medicaid application assistance and current success rates, consumer enrollment, retention, satisfaction, and access outcomes across housing, transportation, and healthcare navigation services.

  TARGET Q1 2027

- **4.1.2** Document results in a shared dashboard to measure growth, reach, and impact.

  TARGET Q1 2027

4.2 Enabler Initiative

- **4.2.1** Develop a centralized Consumer Access Taskforce to coordinate housing, transportation, and healthcare navigation solutions.

  TARGET Q1 2027

4.3 **Increase consumer enrollment by 15% through expanded outreach in underserved areas, including blind and low-vision communities and veterans.**

- **4.3.1** Develop and implement a coordinated outreach and enrollment strategy focused on underserved communities by establishing formal referral partnerships, hosting targeted community engagement events, and deploying accessible marketing materials.

  TARGET Q4 2027

4.4 **Increase housing access by facilitating at least 50 safe, affordable housing placements.**

- **4.4.1** Partner with housing authorities and contractors to expand affordable housing.

  TARGET Q4 2028

4.5 **Improve transportation access by offering non-medical transportation in addition to the current medical transportation services.**

- **4.5.1** Expand the existing medical transportation services to non-medical transportation.

  TARGET Q4 2028

4.6 **Launch integrated mental health referrals through strategic partnerships, reaching 75 consumers with dual needs.**

- **4.6.1** Pilot integrated service models combining IL and mental health support through strategic referral partners.

  TARGET Q4 2029

4.7 **Simplify Medicaid application support to increase consumer application success rates by 20%.**

- **4.7.1** Expand Medicaid navigation services and create alternative service pathways for non-eligible consumers.

  TARGET Q4 2028

4.8 **Improve consumer retention rates by 20% and peer support attendance by 25% through enhanced community engagement.**

- **4.8.1** Enhance peer support, consumer engagement, and satisfaction monitoring.

  TARGET Q4 2028

STRATEGIC PRIORITY 5

Innovation & Technology

GOAL

Position TWP as a leader in innovation among independent living organizations by leveraging AI, emerging technologies, and partnerships to deliver more efficient, accessible, and sustainable services.

5.1 Establish Benchmarks

- **5.1.1** Collect and validate current data on administrative time, technology adoption, and partnership engagement to establish baselines for efficiency and innovation outcomes.

  TARGET Q1 2027

- **5.1.2** Use these benchmarks to measure future gains from AI, emerging technologies, and partnerships.

  TARGET Q1 2027

5.2 Enabler Initiative

- **5.2.1** Evaluate ROI for AI and Technology Investments: Conduct return-on-investment and cost-benefit analyses for all proposed AI and emerging technology projects to prioritize those with the greatest efficiency and impact potential.

  TARGET Q1 2027

- **5.2.2** Create an Innovation & Technology Taskforce to identify, vet, and implement emerging tools and partnerships.

  TARGET Q2 2027

5.3 **Implement at least two AI-driven processes that reduce paperwork and administrative tasks by 20%.**

- **5.3.1** Deploy AI tools for case management, scheduling, and document automation.

TARGET Q4 2027

5.4 **Pilot at least two emerging technologies (e.g., smart glasses, speech to speech translation, smart canes, smart home integration) in independent living services, reaching 50 consumers.**

- **5.4.1** Pilot emerging technologies (smart glasses, speech to speech translation, smart canes, smart home integration) in small-scale service delivery contexts.

TARGET Q4 2028

5.5 **Establish 2 new partnerships with adaptive technology or software companies that generate at least $100,000 in combined funding or in-kind contributions.**

- **5.5.1** Build partnerships with adaptive technology and software firms for joint projects and grant applications.

TARGET Q4 2028

5.6 **Expand organizational capacity by engaging 30 volunteers or community mentors annually through structured partnership programs.**

- **5.6.1** Establish structured volunteer and mentor programs (junior board, community mentors).

TARGET Q4 2029