STRATEGIC
PLANNING

Boone County Family Resources Strategic Plan

FY 2024

Contents

Background:

As part of the annual and ongoing strategic planning process, leadership of Boone County Families Resources (BCFR) were engaged in a brainstorming and goal setting session facilitated by the UMKC Institute for Human Development on June 30, 2021 for Fiscal Year 2022-Fiscal Year 2026. Using the concepts and tools of the Charting the LifeCourse framework, members of the management and leadership team engaged in collaborative discussion around the vision, challenges, successes, and innovations of BCFR. This was used to develop a new Strategic Plan. The plan is updated annually and accomplishments from the previous fiscal year are notated.

The Strategic Planning Process:

To begin the strategic planning process, the leadership team was asked to identify what they wanted for people and families in Boone County. Conversely, the group was prompted to identify what they do not want for people and families, strengthening and crystalizing the vision. By defining the goal for people and families, Boone Country Family Resources can more easily establish and assess their role in supporting individuals to reach their goals.

Shared Vision for People and Families:
- Hope, inclusion, acceptance
- Feel welcome/ heard
- Person Centered services
- Tools for good life
- Supported and included
- Choice/Access/Awareness/Accessibility
- Have connection
- To be own advocates

Identifying Needs to Reach the Vision for People and Families:

In order to further clarify the role BCFR may play in achieving the vision for people and families, the group brainstormed around the "three buckets," or individualized support needs: Discovery and Navigation (what information individuals and families need?); Connecting and Networking (what relationships and community support systems do individuals and families need?); and Goods and Services, (what tangible goods and services do individuals and families need?) to reach the vision. This process helped to solidify the vision and ground the team on what is practically needed to make the identified vision a reality.

Identifying a Vision for Boone County Family Resources:

Within the context of what is wanted for people and families, the group identified their vision for how BCFR can specifically help to "fill the buckets". A trajectory was utilized to support the group to identify what is wanted, and what is not wanted, for BCFR as an organization. By outlining what IS wanted and what is NOT wanted for BCFR, the leadership team has a clear, streamlined process for decision making. When faced with a choice, the team can assess which option will move them toward their vision, and ensure they are not engaging in activities that move them away from the vision.

Building on Strengths and Addressing Opportunities

Establishing the vision for individuals, families, and BCFR provided the context for the leadership and management team to brainstorm current strengths to build upon and opportunities for improvement. While it is important to celebrate the yearly successes and achievements, it is also beneficial to identify barriers, challenges, and what is not going well to better understand the areas for improvement.

Strengths and Opportunities

- Focus on DEI efforts and representation (diversity, equity, inclusion)
- COVID pay for supporting an individual in Supported Living with COVID
- Regular assessment of staff pay and incentives to increase recruitment and retention
- Outreach/ Social media
- Virtual all staff meetings -communication and coordination across integrated teams
- Ability to work remotely for many identified positions
- Sense of pride and culture at BCFR
- Continued grant partnerships with UMKC-IHD
- Comprehensive array and quality of supports and services
- Solid funding and budgeting
- Staff recruiting and targeted hiring, committed staff
- Individually planned services
- Able to continue operation without interruption
- Flexibility and innovation
- Electronic filing
- Increase in competitive employment benefits package
- Being more green
- Adapting to change
- Accessible and professional staff and spaces
- Welcoming environment to staff and individuals
- Improved and increased accessible training opportunities
- IT continually researching and implementing best practice recommendations for security and access
- Making agency processes more streamlined
- Employee awareness committee building connections
- Good teamwork and sense of team (Teams supporting one another and collaboration between departments)
- New building has heightened awareness of agency
- Supportive work environment
- Commitment to continuous improvement
- Strong commitment to staff and recognition for work
- Value Based Purchasing Planning group participation

Weaknesses and Threats

- High staff turnover
- Increased focus on DEI efforts is needed
- Sound issues at the main office
- Physical location causes some segregation (floor levels)
- Ability to make time for employee involvement
- Need to increase name brand recognition in community (as employee and as provider)
- Accessibility for aging individuals in supported living
- Staffing concerns among service providers
- Losing personal touch due to remote work
- Need to increase focus on natural supports rather than paid supports
- Need to improve outreach to rural community
- Complex services and processes for individuals to navigate
- Communicating initiatives across teams
- Completion of projects
- Not responsive or slow decision making
- Need to be more adaptable in structure and procedure changes
- Value Based Purchasing

Identifying Priority Goals:

To continue to refine a clear set of focus areas and goals, the leadership/ management team worked together to brainstorm tangible next steps to move toward the established vision. This discussion was valuable in determining strategies to inform "the how" piece of BCFR's strategic plan.

The leadership and management team compared their responses of priorities and key actions to focus on with the survey responses from internal and external stakeholders surveys in February 2020. Overwhelmingly, the group expressed that they felt they had "a finger on the pulse," as the responses between the survey and discussion were very closely matched, validating the priorities that were identified. Additionally, the stakeholder survey also matched the management team feedback, which indicated the team is accurately aware of the areas for improvement.

To categorize and analyze the large amount of feedback from the group, themes from all the discussions were identified to establish key areas of focus for moving forward with specific planning. These key focus areas were used for outcome and goal development.

Focus 1	Identification of well-defined priorities, projects, statuses, and accomplishments to enhance transparency and accountability
Define Success	We will know we have accomplished this goal when we have identified well-defined priorities, projects, statuses, and accomplishments that guides decision making about additional initiatives to be included in an agency plan.

Focus 2	Efficient and effective services delivered by skillful, high quality, diverse, committed workforce
Define Success	We will know we have reached this goal when we have increased employee retention, satisfaction, and able to recruit quality applicants.

Focus 3	BCFR is a well-known community partner and employer, and the community recognizes the positive impact BCFR has on individual lives
Define Success	We will know we have accomplished this goal when there is an increase of referrals by current employees, an increase in referrals for individuals served from rural school districts, and there are increasing opportunities for BCFR to participate in community outreach.

Focus 4	Anticipate the needs of individuals served across the lifespan through innovative projects, pilots, initiatives, and planning
Define Success	We will know we have reached this goal when the agency is participating in cutting-edge, best practice initiatives that respond to unmet needs.

The Agency FY23 Action Plan and Report Card:

These key focus areas were used for outcome and goal development. Small workgroups were formed to develop an action plan and identify potential goals that would support accomplishing the focus area. Director's Team reviewed these goals on August 24, 2021 to further narrow and "parking lot" ideas for the future, as not everything can be accomplished at once or during a global pandemic.

Focus 1	Identification of well-defined priorities, projects, statuses, and accomplishments to enhance transparency and accountability
Define Success	We will know we have accomplished this goal when we have identified well-defined priorities, projects, statuses, and accomplishments that guides decision making about additional initiatives to be included in an agency plan.
Additional Notes Regarding Completion of Focus Area 1	This focus goal was completed in FY22. By the end of FY22, enough priorities had been completed that it was determined the priority projects list could be merged with the greater agency strategic plan; although, status reports will continue to be given during Director's Team meetings.

Focus 2	Efficient and effective services delivered by skillful, high quality, diverse, committed workforce				
Define Success	We will know we have reached this goal when we have increased employee retention, satisfaction, and able to recruit quality applicants.				
Outcome/Goal	Point Person	Employees Responsible for Completion	Goal Completion Date	Share and Report Progress To	Status of Outcome/Goal
Create new strategies to recruit and retain high quality staff	Human Resource Manager	Recruitment Committee and Director's Team	June 30, 2023	Management Team Quarterly Meeting	In Process
Develop Mentorship and/or Ambassador Program to increase retention	Coordinator of Training and Quality Assurance	Director's Team	June 30, 2023	Management Team Quarterly Meeting	Completed
Evaluate potential participation in the DSP Apprenticeship Program with DMH	Director of Supported Living	Supported Living	June 30, 2023	Management Team Quarterly Meeting	Completed
Additional Notes Regarding Completion of Focus Area 2	After conducting several focus groups with current employees, it was determined that a mentorship or ambassador program would not assist in retention at this time. Other strategies related to retention were deployed instead. The DSP Apprenticeship Program with DMH was evaluated. The Department changed much of the original concept of the program and it was decided that BCFR would not participate at this time.				

Focus 3	BCFR is a well-known community partner and employer, and the community recognizes the positive impact BCFR has on individual lives				
Define Success	We will know we have accomplished this goal when there is an increase of referrals by current employees, an increase in referrals for individuals served from rural school districts, and there are increasing opportunities for BCFR to participate in community outreach.				
Outcome/Goal	**Point Person**	**Employees Responsible for Completion**	**Goal Completion Date**	**Share and Report Progress To**	**Status of Outcome/Goal**
Develop an incentive program for current employees to promote BCFR as an employer (Indeed reviews, social media posts, etc.)	Amy Parris	Recruitment Committee and Director's Team	December 22	Management Team Quarterly Meeting	Completed
Identification of individuals to reach out to for potential additional opportunities for growth as a community partner and employer	Amy Parris Jamie McElwain	Content Creation and Recruitment Committees and Management Team	June 2023	Management Team Quarterly Meeting	Completed
Development of a new agency website that provides increased accessibility and ease of navigation for all end users	Amy Parris Brian Hulett	Temporary	January 2023	Management Team Quarterly Meeting	Completed
Re-Branding of agency letterhead, brochures, business cards, etc. to be fresh and better match new website	Amy Parris	Content Creation Committee and Director's Team	June 2023	Management Team Quarterly Meeting	In Process
Additional Notes Regarding Completion of Focus Area 3	A Community Outreach Incentive (COIN) program was developed to incentivize staff to share their experiences as an employer. The agency has participated in many more community events throughout the year and plans to continue. The agency developed an published a new agency website that is more accessible.				

Focus 4	Anticipate the needs of individuals served across the lifespan through innovative projects, pilots, initiatives, and planning				
Define Success	We will know we have reached this goal when the agency is participating in cutting-edge, best practice initiatives that respond to unmet needs.				
Outcome/Goal	**Point Person**	**Employees Responsible for Completion**	**Goal Completion Date**	**Share and Report Progress To**	**Status of Outcome/Goal**
Determine where there may be unmet needs by individuals served (increasing footprint in rural areas and with teens)	Matt Hoff Mark Satterwhite	Program Directors and team	March 31	Management Team Quarterly Meeting	In Process
Partner with Institute for Human Development (IHD) at University of Missouri Kansas City (UMKC) in their grant work to improve the health of individual's served	Matt Hoff	Family Support Management Team	June 2023	Management Team Quarterly Meeting	In Process
Reform choices program in Family Support to provide better access and use of the service	Joanie Chenault	Family Support Management Team and Administration	September 2022	Management Quarterly Meeting	In Process
Reconceptualize HBSS program in Life and Work Connections to provide better access and use of the service	Mark Satterwhite	Life and Work Connections and Administration	June 2023	Management Quarterly Meeting	In Process
Plan for a more accessible Supported Living building to replace one of the current aging, less accessible buildings	Natasha Sigoloff	Supported Living and Administration	June 2023	Management Quarterly Meeting	Completed
Additional Notes Regarding Completion of Focus Area 4	The plans for a more accessible SL building were postponed. Updates to the current buildings are in place as well as all staff offices were moved to the upper levels to provide one more apartment on a lower level that is accessible. All other goals are still in process.				

The Agency FY24 Action Plan:

After reviewing progress from the previous year and identification of additional projects BCFR has committed to, BCFR leadership determined that the focus areas identified in previous years would be the same for the current year, as progress continues to be made in these areas. The Action Plan from the previous fiscal year was edited and updated with new outcomes and goals for FY24 (see below). Progress of these will be reviewed with Director's Team on a regular basis and progress will be shared quarterly with Management Team.

Focus 1	Efficient and effective services delivered by skillful, high quality, diverse, committed workforce			
Define Success	We will know we have reached this goal when we have increased employee retention, satisfaction, and able to recruit quality applicants.			
Outcome/Goal	**Point Person**	**Employees Responsible for Completion**	**Goal Completion Date**	**Share and Report Progress To**
Create new strategies to recruit and retain high quality staff	Jamie McElwain	Recruitment Committee and Director's Team	June 30, 2026	Management Team Quarterly Meeting
Enhanced methods to assure BCFR climate/culture is inclusive and equitable using the agency's Cultural Competency, Diversity and Inclusion Plan goals	Jessica Porter	Director's Team and the Diversity, Equity, and Inclusion Committee	June 30, 2026	Management Team Quarterly Meeting

Focus 2	BCFR is a well-known community partner and employer, and the community recognizes the positive impact BCFR has on individual lives			
Define Success	We will know we have accomplished this goal when there is an increase of referrals by current employees, an increase in referrals for individuals served from rural school districts, and there are increasing opportunities for BCFR to participate in community outreach.			
Outcome/Goal	**Point Person**	**Employees Responsible for Completion**	**Goal Completion Date**	**Share and Report Progress To**
Re-Branding of agency letterhead, brochures, business cards, etc. to be fresh and better match new website	Amy Parris	Content Creation Committee and Director's Team	June 30, 2024	Management Team Quarterly Meeting
Increase community awareness of assistive technology options, emergency planning for disability services, and general developmental disability knowledge using the agency's Accessibility Plan goals	Jessica Porter	Director's Team, Emergency Committee and Management Team	June 30, 2026	Management Team Quarterly Meeting

Focus 3	Anticipate the needs of individuals served across the lifespan through innovative projects, pilots, initiatives, and planning			
Define Success	We will know we have reached this goal when the agency is participating in cutting-edge, best practice initiatives that respond to unmet needs or improve services provided.			
Outcome/Goal	**Point Person**	**Employees Responsible for Completion**	**Goal Completion Date**	**Share and Report Progress To**
Determine where there may be unmet needs by individuals served (increasing footprint in rural areas and with teens)	Matt Hoff Mark Satterwhite	Program Directors and team	June 30, 2026	Management Team Quarterly Meeting
Partner with Institute for Human Development (IHD) at University of Missouri Kansas City (UMKC) in their grant work to improve the health of individual's served	Matt Hoff	Family Support Management Team	June 30, 2026	Management Team Quarterly Meeting
Reform choices program in Family Support to provide better access and use of the service	Joanie Chenault	Family Support Management Team and Administration	December 2023	Management Team Quarterly Meeting
Reconceptualize HBSS program in Life and Work Connections to provide better access and use of the service	Mark Satterwhite	Life and Work Connections and Administration	December 2023	Management Team Quarterly Meeting
Improve stakeholder satisfaction and services by managing associated risks using the agency Risk Management Plan goals	Jessica Porter	Director's Team, Compliance Director	June 30, 2026	Management Team Quarterly Meeting

Programmatic and Business Function Goals and Priorities

In addition to the key priority goals set for BCFR as a whole, each program and some business functions have identified additional goals and performance indicators to work towards and meet on a quarterly or annual basis. Some of these overlap and support BCFR's priority goals, and some function completely separately to assure the agency runs effectively and efficiently, that feedback is regularly considered, and that each program is accessible to stakeholders. In some cases, goals and performance indicators were established to compare with National Quality Indicators of Health. These will be reviewed along with BCFR's identified priority goals during quarterly Management Team meetings and can be found through the agency's intranet (SPOT) at any time for review.

Supported Living

Objective	Measure	Interval Reported	Reported By	Applicable To	Performance Indicator
Individuals in SL are supported in maintain their health and well-being	Goal is 95% of individuals obtain their required annual medical services within 60 days of the original due date	Annually	Director of Supported Living	All Individuals in Supported Living	Access
Individuals in SL are active participants in their chosen planned outcomes	Goal is 75% of individuals participate in at least 2 self-identified planned outcomes that help them to thrive, connect and achieve	Quarterly	Director of Supported Living	All Individuals in Supported Living	Effectiveness
Individuals in SL have natural supports, as desired, and are actively engaged in their community	Goal is to ensure that all individuals have meaning connections to non-paid supports and their community if they do desire	Quarterly	Director of Supported Living	All Individuals in Supported Living	Access
Individuals in SL receive services with the proper amount oversight by a Program Manager	Goal is 100% of the time individuals receive the proper amount of oversight by a Program Manager as decided on by the planning team	Quarterly	Director of Supported Living	All Individuals in Supported Living	Efficiency
Individuals in SL believe that services have helped them to lead a good life	Goal is 90% of individuals believe that SL services have helped them to lead a good life as collected through the satisfaction survey and reported in Teams	Annually	Coordinator of Training and Quality Assurance	All Individuals and Families in Supported Living	Satisfaction/ Feedback
Individuals in SL believe that staff treat them with respect	Goal is 90% of individuals believe that staff treat them with respect as collected through satisfaction surveys and reported in Teams	Annually	Coordinator of Training and Quality Assurance	All Individuals and Families in Supported Living	Satisfaction/ Feedback

In addition to the objectives and measures below that Supported Living will strive to achieve, they also plan to track the following data to determine trends, provide analysis, and determine future objectives.

Data Tracked	Purpose
# of individuals supported Ages of individuals supported	To analyze the demographics of those supported in Supported Living
# of assistive technology devices available particularly for those over the age of 50 # of appointments by age group # of hospitalizations by age group	To evaluate the needs and assistance required for individuals to age in place

Family Support

Objective	Measure	Interval Reported	Reported By	Applicable To	Performance Indicator
Individuals in FS will be offered a minimum of one home visit per year	Goal is 85% of individuals receive at least one in home visit during the fiscal year	Annually	Director of Family Support	All Individuals Supported by Family Support	Access
Individuals in FS state staff treat them with respect	Goal is 98% of individuals report that staff treat them with respect as collected through the annual satisfaction survey	Annually	Director of Family Support	All Individuals Supported by Family Support	Satisfaction/ Feedback
Individuals in FS receive services and supports from BCFR that help them to lead a good life	Goal is 98% of individuals state their services and supports help to lead a good life, as collected through the annual satisfaction survey	Annually	Director of Family Support	All Individuals Supported by Family Support	Satisfaction/ Feedback
Individuals in FS are able to contact their coordinator and receive adequate support	Goals are: 1. 65% of Coordinator time is spent in direct support to individuals served 2. 10% of engagement time will be spent planning with individuals	Monthly	Director of Family Support	All Individuals Supported by Family Support	Effectiveness
Individuals in FS and their chosen team take part in the planning process of the individual within the required timelines	Goals are: 1. 95% of new persons served will have an initial plan meeting within 30 days 2. 97% of individuals will have an annual plan implemented within 365 days of their previous plan	Quarterly	Director of Family Support	All Individuals Supported by Family Support	Efficiency
Individuals are provided copies of their plans in a timely manner to provide enhanced understanding and communication	Goals are: 1. 95% of initial plans are mailed within 60 days of implementation 2. 97% of annual plans are mailed prior to implementation	Quarterly	Director of Family Support	All Individuals Supported by Family Support	Effectiveness
Individuals will be able to use technology in ways that best suit their needs to access services and communication with their SC	Goal is to increase the number of individuals using various modes of communication tools	Quarterly	Director of Family Support	All Individuals Supported by Family Support	Access

In addition to the objectives and measures below that Family Support will strive to achieve, they also plan to track the following data to determine trends, provide analysis, and determine future objectives.

Data Tracked	Purpose
Average Caseload Size # of FTE positions # of individuals served	To determine if caseload sizes remain consistent over time, or if additional FTE need to be considered.
# of files uploaded electronically # of processes that have been converted to an automated workflow using Office365	To create a more seamless, paperless filing environment for all
Reason for discharge	To better understand why individuals may leave BCFR services

# of UR packets processed # of county authorizations approved Amount of approved county services utilized	To track type and number of authorizations, as well as utilization to determine any changing needs over time

Life and Work Connections

Objective	Measure	Interval Reported	Reported By	Applicable To	Performance Indicator
Individuals in LWC are encouraged to meet personal goals for community integration	Goal is 75% of individuals actively receiving support in setting goals have made progress on those goals	Quarterly	Director of Life and Work Connections	Individuals receiving Community Integration (CI) with LWC	Effectiveness
Individuals in LWC receive direct, engaging, and quality supports	Goal is 75% of staff time is spent in direct service to an individual	Quarterly	Director of Life and Work Connections	Individuals receiving CI with LWC	Efficiency
Individuals referred for community integration will receive adequate supports	Goal is 100% of individuals referred for community integration are admitted into the program within 30 days	Quarterly	Director of Life and Work Connections	Individuals receiving CI with LWC	Access
Individuals are able to obtain employment based on their preferences and needs through a variety of employer and job contacts	Goal is that each CES has at least 6 employer contacts per week	Quarterly	Director of Life and Work Connections	Individuals receiving Community Employment Services (CES) with LWC	Efficiency
Individuals receiving job development services are in the community	Goal is 65% of the time individuals meet with staff for employee development services is in the community	Quarterly	Director of Life and Work Connections	Individuals receiving CES with LWC	Efficiency
Individuals in LWC receiving employment supports were able to obtain employment supports job development assistance in a timely manner	Goal is 95% of individuals receiving employment job development services will have contact with an employer within a month of admission or new search.	Quarterly	Director of Life and Work Connections	Individuals receiving CES with LWC	Efficiency
Individuals referred for employment supports will receive adequate supports	75% of individuals receiving employment job development services locate a job within 6 months of admission or new search.	Quarterly	Director of Life and Work Connections	Individuals receiving CES with LWC	Access
Individuals receiving employment supports are maintaining community employment	Goal is for individuals to maintain their employment positions on average for at least one year	Annually	Director of Life and Work Connections	Individuals receiving CES with LWC	Effectiveness
Individuals in LWC become more independent	Goal is 90% of individuals state they feel more independent after meeting with LWC staff as collected through a satisfaction survey	Annually	Director of Life and Work Connections	All individuals receiving LWC supports	Satisfaction/ Feedback
Individuals in LWC were helped to achieve their goals	Goal is 90% of individuals stated LWC helped them to achieve their goals as	Annually	Coordinator of Training	All individuals receiving	Satisfaction/ Feedback

			and Quality Assurance	LWC supports	
Individuals in LWC were satisfied with the way staff treated them.	Goal is 90% of individuals state they were satisfied with the way staff treated them as collected through a satisfaction survey	Annually	Director of Life and Work Connections	All individuals receiving LWC supports	Satisfaction/ Feedback
Individuals in LWC were satisfied with services.	Goal is 90% of individuals state they were satisfied with services as collected through a satisfaction survey	Annually	Director of Life and Work Connections	All individuals receiving LWC supports	Satisfaction/ Feedback
Families who need caregiver support are utilizing HBSS services.	Goal is increased utilization of HBSS services by 10% every quarter. Tracked in Excel	Quarterly	Director of Life and Work Connections	Individuals receiving HBSS services	Access/Effective ness

In addition to the objectives and measures below that Life and Work Connections will strive to achieve, they also plan to track the following data to determine trends, provide analysis, and determine future objectives.

Data Tracked	Purpose
Average Caseload Size # of FTE positions # of individuals served	To determine if caseload sizes remain consistent over time, or if additional FTE need to be considered.
# of files uploaded electronically # of processes that have been converted to an automated workflow using Office365	To create a more seamless, paperless filing environment for all
Reason for discharge	To better understand why individuals may leave BCFR services
# of UR packets processed # of county authorizations approved Amount of approved county services utilized	To track type and number of authorizations, as well as utilization to determine any changing needs over time

Business Functions (Human Resources, Accounting, Training, Outreach)

Objective	Measure	Interval Reported	Reported By	Applicable To
New employee position-based training is completed within the first 6 months of hire	Goal is 100% of employees will complete position-based training within the first 6 months of hire as tracked in TalentLMS	Quarterly	Coordinator of Training and Quality Assurance	All new employees
Employees who have been employed over one year will receive competency-based training annually	Goal is 100% of recertifications of annual training will be completed within 60 days of due date as tracked in TalentLMS	Quarterly	Coordinator of Training and Quality Assurance	All employees
Increase the tenure among employees at BCFR	Goal is 65% of DSPs and 80% of all other employees are employed with BCFR for greater than 12 months and compared to national and state averages	Quarterly	Human Resource Manager	All employees
To hire qualified external applicants in a timely fashion	Goal is that the average time from date of background screen to date received conditional job offer for all positions is 21 days	Quarterly	Human Resource Manager	All new employees and hiring managers
Maintain adequate staffing in Supported Living to ensure quality services	Goal is 30 % or less of open positions on average throughout the FY as collected through Excel	Quarterly	Director of Supported Living	Supported Living
To decrease turnover among employees at BCFR	Goal is 50% or less turnover rate amongst DSPs and 25% or less turnover rate amongst all other employees	Quarterly	Human Resource Manager	All employees
To provide timely annual evaluations to all employees	Goal is 100% of employees receive an annual evaluation within 60 days of the due date	Quarterly	Human Resource Manager	All employees
To be a statewide leader	Goal is to be a part of 2 or more statewide or external initiatives that help support the agency's mission and influence conversations and priorities. Secondary goal is to track staff participation in external workgroups and presentations as they become available	Quarterly	Associate Director	All employees
To maintain and review the agency's budget	Goal is to monthly assess budget impacts and note adjustments and differences in projections	Quarterly	Accountant	All employees

In addition to the objectives and measures below that Life and Work Connections will strive to achieve, they also plan to track the following data to determine trends, provide analysis, and determine future objectives

Data Tracked	Purpose
Average Caseload Size # of FTE positions # of individuals served	To determine if caseload sizes remain consistent over time, or if additional FTE need to be considered.
# of files uploaded electronically # of processes that have been converted to an automated workflow using Office365	To create a more seamless, paperless filing environment for all
Reason for discharge	To better understand why individuals may leave BCFR services
# of UR packets processed # of county authorizations approved Amount of approved county services utilized	To track type and number of authorizations, as well as utilization to determine any changing needs over time