



2024-2026 Strategic Plan



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Executive Summary



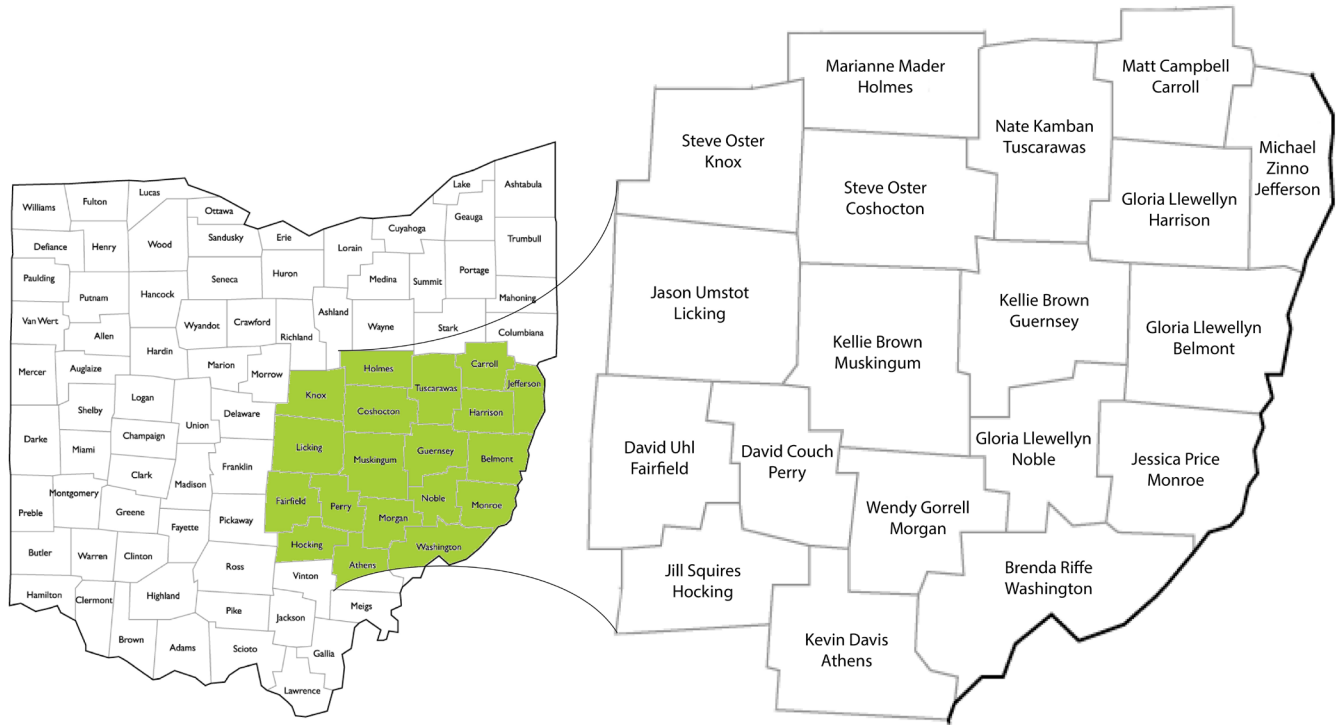
I am proud to share our next strategic plan that will steer the future and improvements for MEORC and our customers. The 2024-2026 strategic plan builds on the intense accomplishments of the past 3 years while setting ambitious goals to lead to new levels of excellence. Our foundational values were simplified and our current mission and vision were revised to solidify our purpose and path to achieve these goals. Our enhanced mission: ***Building strong communities through innovative and collaborative solutions.*** Our improved vision: ***Achieve Excellence Together.*** Achieve Excellence Together means MEORC continuously improves in order to deliver top-notch services to support our customers to do the same so that ultimately the community and clients are supported in the best way possible. This is not just compliance or meeting needs; it is moving above and beyond to excellence!

Last year MEORC supported nearly 300 customers and we were thrilled to have received critical input from numerous customers this year. We received more customer input than ever before and we are appreciative of the constructive feedback from member county boards, providers, our workforce, and other external customers. The strategic planning team employed this information to help determine and analyze our advantages, challenges, and opportunities that resulted in refined strategic goals.

Thank you to everyone who took time to share your thoughts and efforts towards developing this enhanced plan.

Sincerely,
Cathy Henthorn
Executive Director

Board of Directors



MEORC staff participating in a team building activity.



Jennifer Grubaugh at a Provider Fair.

Critical Findings

As part of the Strategic Planning Process MEORC sought information from the following customers and key stakeholders (providers, county boards employees, MEORC employees, and other existing customers). This information was used to identify strategic advantages, strategic challenges and strategic opportunities for the organization. These were the critical findings that supported the development of the vision, mission, values along with the strategy map that will move MEORC into the future.



Cathy Henthorn receiving the Ohio Auditor of State Award for the 7th consecutive year.



Jennifer Grubaugh facilitating a Good Life training for customers.



MEORC's Office of Business Team.



Lacie James and David Mitchell facilitating a LEAN Thinking training.

Advantages

Financial

- MEORC has a long history of successful financial audits and maintains a suitable collective fund for fiscal sustainability.
- MEORC's business model and benefits of membership has promoted affordable service delivery to county boards.

Customer

- MEORC facilitates learning and sharing across the region.
- MEORC identifies challenges and their impact on customer segments to help them plan for the future.
- MEORC's relationship with ONI offers additional opportunities for customers.
- MEORC offers a variety of innovative services tailored to customers' changing needs.
- MEORC has a systematic approach to actively listen to customers and use that feedback to improve service offerings and develop new services in a timely manner.
- MEORC's customer service approach helps retain long-term, loyal customers and attracts new customers.
- MEORC has expertise in designing, managing, and improving work processes.
- MEORC continually develops new service offerings to customers.

Internal Operations

- MEORC has self-evaluation of services and processes to ensure they meet customer and performance expectations.
- MEORC utilizes a variety of technological approaches to provide lean and effective services.

Learning and Growth

- MEORC's culture encourages continued growth and development to ensure that staff have the expertise and competency.
- MEORC continues to build a successful and competent workforce by promoting from within and aligning gifts and talents.
- MEORC recruits and hires talented staff that align with MEORC's culture.
- MEORC has a way to listen to the workforce to increase employee satisfaction and enhance workforce systems.
- MEORC has an IT plan to identify gaps and focus on future technology needs.
- MEORC's culture supports an environment of safety, appreciation, respect, trust, and expertise that contributes to an engaged workforce.
- MEORC's remote workforce fosters flexibility and independence to be responsive to customer needs.

Challenges

Financial

- MEORC may need to adjust the existing financial business model to address changes in state and local government/budgets.
- MEORC competes for scarce resources and does not have a process to monitor competitors.
- MEORC faces challenges to remain competitive with local government job market due to economic impacts and costs of services.

Customer

- MEORC's current marketing and outreach strategies are not fully reaching its intended audiences.
- MEORC's existing process for communicating with external customers is not effective.

Internal Operations

- MEORC is subject to rules and regulations that impact the efficiency of service delivery.
- MEORC has not deployed the approach to evaluate if key suppliers meet internal needs.
- MEORC does not have a systematic way to improve internal processes.

Learning and Growth

- MEORC has not fully deployed a succession planning process to address staff changes that could significantly impact operations.
- MEORC may not be able to capture opportunities for growth due to lack of ability to hire or train staff with the expertise to meet the new demands.
- MEORC has not fully deployed a standard process to capture real-time capacity compared to labor budget.
- MEORC has difficulty providing some services due to varying levels of technology skills and platforms of customers.
- MEORC's current data collection process has gaps that could limit performance improvement.
- MEORC does not have a systematic way to ensure technology is fully utilized by the workforce.



MEORC employees learning and sharing at an all-staff meeting.

Opportunities

Financial

- MEORC could complete a cost benefit analysis to determine renting vs. selling the Avalon Road building.
- MEORC could identify potential external revenue sources.
- MEORC could benefit from reevaluating the current business model.
- MEORC could benefit from exploring the current fee structure for SSA services and provider services.

Customer

- MEORC will focus on building relationships with new county board leadership.
- MEORC will strive toward world-class customer service.
- MEORC could benefit from assessing the competitive market, to ensure relevancy services.
- MEORC can increase availability and topics for in-person training.
- MEORC can offer more specialized online training topics (providers, nurses, SSA, medication administration, CPR/First Aid).
- MEORC can explore expanding brokered services to meet customer needs.
- MEORC will continue to create and launch new services for customers (Multi-system youth, Early Intervention, nursing, medication administration, technology supports, provider oversight, transition employment, customer requests).
- MEORC could expand data dashboards to provide comparative data to make financial decisions.
- MEORC will implement a marketing campaign for county board services and resources.
- MEORC will implement a marketing campaign for provider services and resources.

Internal Operations

- MEORC needs to improve internal communication and collaboration across departments.
- MEORC will improve department specific processes.
- MEORC will continue to use the Baldrige application as a self-assessment tool.
- MEORC needs to improve, deploy, and integrate the new mission, vision, and values internally.
- MEORC needs to measure process time for existing services to determine capacity for new services or marketing of current services.

Learning and Growth

- MEORC will continue to develop and improve internal HR processes (career planning, succession, compensation, employee development, recruitment).
- MEORC needs to increase expertise for IT, nursing, SSA services, and financial services to meet the service capacity need.
- MEORC will expand, improve, and integrate IT processes.
- MEORC will benefit from an emergency IT plan, which could include a backup vendor.

Vision, Mission, Values

Vision



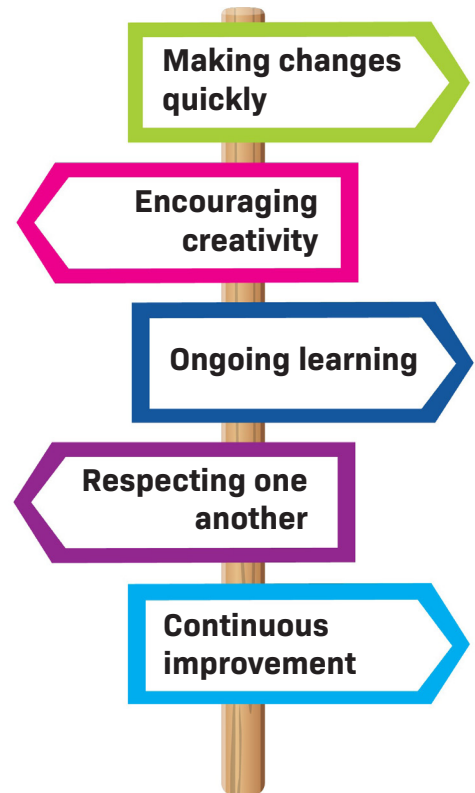
Achieving
Excellence
Together

Mission



Building strong
communities
through innovative
and collaborative
solutions

Values



Next Steps



MEORC will begin to determine the long and short-term Action Plans that need to be developed to address the initiatives identified in the Strategy Map.

Quarterly balanced scorecard updates will be provided to the board and MEORC staff addressing initiatives, key performance measures, and targets.

Strategy Map

Vision	Achieve Excellence Together			
Mission	Building strong communities through innovative and collaborative solutions			
Strategic Goals	Preparing the Workforce for the Future	Proactively Create and Improve Services for Customers	Exceed Customer Expectation	Financial Sustainability
Strategic Objectives		Initiatives	Measures	Targets
<div>Financial</div> <div>Maximize Allocation of Resources</div>		<ul style="list-style-type: none">• Update business model• Review pay structure• Additional revenue streams	<ul style="list-style-type: none">• Budget reports• Employee Engagement score• New customer acquisition• Customers purchasing new business solutions	<ul style="list-style-type: none">• Budget to actual variances within 5%• Employee Engagement score meets benchmark• Meet projected revenue from nonmember customers (include new and returning customers here)• Increase diversification of revenue sources
<div>Customer</div> <div>Create Innovative Solutions</div> <div>Strengthen Customer Relationships</div>		<ul style="list-style-type: none">• Targeted marketing• Building customer relationships: CB & Provider• Develop a plan for new services	<ul style="list-style-type: none">• Customer feedback• Service utilization• Customer loyalty	<ul style="list-style-type: none">• Score 4 or higher on customer satisfaction rating• Maintain service levels to county board members• Increase services utilized by providers
<div>Internal Processes</div> <div>Listen to Customers</div> <div>Improve Organization Performance</div>		<ul style="list-style-type: none">• Develop an improvement system	<ul style="list-style-type: none">• Process improvement results	<ul style="list-style-type: none">• Increase performance of processes
<div>Learning and Growth</div> <div>Optimize Technology</div> <div>Workforce Development</div>		<ul style="list-style-type: none">• Balance capacity• Increase employee expertise• Expand IT plan• Improve HR processes	<ul style="list-style-type: none">• Process time compared to labor budget• Annual HR Report Results• Employee Engagement• Supplier Scorecard	<ul style="list-style-type: none">• Reduce labor budget variances• Determine key HR metrics• Employee engagement scores are at least 4 across all categories• Meet IT requirements
Making Changes Quickly, Encouraging Creativity, Ongoing Learning, Respecting One Another, Continuous Improvement				