OAK TREE SUPPORT SERVICES
INTEGRATED CULTURAL, ACCESSIBILITY AND STRATEGIC PLAN
2023-2026

INTRODUCTION

Oak Tree Support Services has taken this important step of developing an integrated cultural, accessibility and strategic plan in order to help the organization remain viable well into the future and ensure that they continue to strive toward goal achievement and serving the mission and vision outlined by its stakeholders.

The strategic planning process is a means to provide all stakeholders including people who work, refer, receive, or pay for services with a clear picture of who Oak Tree Support Services is currently and what it strives to be in the future. This Strategic Plan is basically a road map which has taken into consideration multiple factors both internal and external as well as feedback from multiple groups of people who either influence or benefit from the services which are provided.

Oak Tree Support Services' strategic planning process starts off with a clearly stated mission statement (why we exist), vision (what we want to be years from now) and set of organizational values (beliefs which guide actions and decisions). These three essential areas, developed by the leaders and approved by the C-suite, drive the strategic plan.

Program Overview

Background: Oak Tree Support Services (formerly known as Mentoring Professionals) was developed in 2017 and currently serves people with medical assistance and/or a state waiver who are at risk for homelessness or in need of additional support services. Our primary pool of individuals is adult; however, children under the age of 18 may also be served in some programs. There is no cost to individuals unless there is a copay or spend-down. Services include Housing Support Services, Employment Services including working with Vocational Rehabilitation, 24-Hour Emergency Services, Individualized Home Services, and Transitional Moving Services. Our goal is to work with individuals in a person-centered way, to support and maintain them in their home.

Who We Serve: Oak Tree Support Services provides services to individuals on waivers and through various medical assistance programs. Services are provided to those who are at risk for homelessness, those needing assistance getting and/or keeping employment, individuals requiring assistance with independence and socialization skills.

Mission: Oak Tree Support Services' mission is to eradicate homelessness by meeting people where they are and helping them get to where they want to be through county and federal programs including housing, employment and independence supports.
Through person-centered tools and planning, we support people to achieve the change they want while embodying unwavering integrity with a joyful presence.

Vision: By 2027, Oak Tree Support Services will be moving to a national stage as a support services company in states outside of Minnesota. Oak Tree Support Services will continue to provide high quality services within Minnesota and continue to add additional services as they are available and appropriate to our mission and model.

Values: Oak Tree Support Services has beliefs which drive the organization. Core values include:
- We don't give up on people
- We do the right thing when no one is watching
- We are change

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- We listen to help
- We bring joy

Demographics: Minneapolis has a population of 418,075 and is the largest city in Minnesota. It is the 45th largest city in the United States. The population density is 8,225 per square mile with a total population of 5.72 million people throughout the state of Minnesota. The current population growth is 1.08% a year. Minnesota currently ranks 22nd in population in the United States. The median age in Minneapolis is 32.3 years compared to the Minnesota average of 37.8 years with 50.3% identified as female and 49.3% identified as male. Minneapolis has many different languages spoken. English is the primary spoken language with 77.96% of people speaking English. Spanish is spoken by 7.94%, Other Indo-European Languages make up 2.8% and Asian and Pacific Island languages make up 3.9%. Other languages make up 7.4%

Minneapolis Breakdown By Race:
- White: 61.3%
- Black or African American: 18.41%
- Two or more races: 6.87%
- Asian: 5.65%
- Other race: 4.58%
- Native American: 1.33%
- Native Hawaiian or Pacific Islander: 0.04%

(Information obtained from Worldpopulationreview.com)

Social Determinants of Health: The social determinants of health are the conditions in which people are born, grow, live, work and age. These circumstances are shaped by the distribution of money, power, and resources at global, national, and local levels. The social determinants can be grouped in the following five categories:

- Economic Stability — Poverty, Employment, Food Security, Housing Stability

- Education — High School Graduation, Enrollment in Higher Education, Language and Literacy, Early Childhood Education and Development

- Social and Community Context — Social Cohesion, Civic Participation, Discrimination, Incarceration

- Health and Health Care — Access to Health Care, Access to Primary Care, Health Literacy

- Neighborhood and Built Environment — Access to Healthy Foods, Quality of Housing, Crime and Violence, Environmental Conditions

Oak Tree Support Services person's served social determinants of health may include the following conditions:

- Employment

- Quality of Housing and Housing Stability

- Education; primarily High School Graduation

- Discrimination

- Incarceration

- Crime and Violence

Legislative/Regulatory Environment:
Oak Tree Support Services works with federal, state and county agencies for providing employment and housing services to their clients. Leadership will continue to dialogue with all payers to advocate for clients and to ensure continued coverage for all services. Leadership will closely follow federal, state and county legislative

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issues related to waivered and non-waivered services, both new and/or ongoing, and will advocate and educate accordingly.

Technology:
Oak Tree Support Services is creating and will implement a comprehensive technology plan. The plan will include the ability to support ongoing business functions including systems to support efficient operations, effective service delivery, and the performance improvement activities of the organization. Currently the organization provides computers and cell phones for the staff to utilize in independent working. Oak Tree Support Services does not provide any equipment to our people-served, they are responsible for their own technological needs. The physical site of Oak Tree Support Services uses video cameras inside the facility for safety and security. These cameras are owned and operated by the owner of the building in which Oak Tree Support Services rents space.

Strategic Pillars: Oak Tree Support Services has made a commitment to achieve excellence in each of these areas:

- <u>Service and Quality</u> – Goals in this pillar address persons-served satisfaction measurement, service access, effectiveness and efficiency of services provided, expectations of referral sources and other stakeholders, and performance measurement for improvement purposes.
- <u>People</u> – Goals in this pillar address personnel related areas such as employee engagement, employee satisfaction, and effectiveness of recruitment and retention strategies.
- <u>Finance</u> – Goals in this pillar address ways to improve the financial results and ensure long term viability of the organization. This includes both revenue and expense strategies as well as ensuring operational processes are in place to protect the organization in the future.
- <u>Growth</u> – Goals in this pillar address ways to grow volumes of persons-served, types of services provided and locations for services provided, as applicable.

As a component of strategic, accessibility and cultural planning of the organization, consideration of legislative and regulatory issues are included.

Internal Analysis: Strengths – Oak Tree Support Services has strengths in many areas. Below are some key strengths that will help work toward success in reaching the vision.

- Dedicated teams
- Person-Centered Approach
- Committed and Multi-faceted Leadership
- Rapport with community and cultivated relationships
- Partnership with DHS
- Multiple areas of services and funding
- Depth of legislative knowledge
- Adaptability and Flexibility

Internal Analysis: Weaknesses – There are areas that Oak Tree Support Services perceives as posing a potential barrier to reaching the vision, as noted below:

- Continuous changes in state and federal policy necessitating changes in Oak Tree Support Services policies and procedures
- Staff turnover
- Low reimbursement rates for services
- Infrequent feedback on quality of staff notes
- Siloed Divisions

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External Analysis: Opportunities – Considering an analysis of the external environment, Oak Tree Support Services has identified areas of opportunity as follows:

● Improved public image, increased public awareness
● Maintain CARF accreditation
● Use technology to improve client care and efficiency
● Further develop redundancies and succession plans
● Interdivisional case collaboration and coordination of care
● Expand footprint and scope of services
● Financial reporting by division

External Analysis: Threats – Considering an analysis of the external environment, Oak Tree Support Services has identified potential areas which pose a threat to reaching the vision, including:

● Changes to state regulations requiring accreditation and policy changes
● State and federal cuts to funding Medicaid and managed care
● Ability to recruit and retain talented employees
● Associated costs of doing business
● Technology
● Rate of growth

Integrated Accessibility: Accessibility is defined as being multi-faceted and an integral part of the strategic plan. Accessibility addresses all areas including physical locations and programs for persons served, families, employees, volunteers, referral sources, etc. Oak Tree Support Services has assessed their accessibility in the following areas, noting potential and real barriers, and has integrated strategies into the Strategic Plan which will result in greater access for persons served and others accessing their programs.

Architecture – This area relates to physical barriers within the service sites
  1. Current suites are partially accessible to persons with physical disabilities.
  2. Current suites are leased within a building that is owned by another company.

Environment – This area relates to other characteristics of the service setting, such as inter-city or rural, etc.
  1. Due to COVID-19, some visits have been limited to phone calls or in-person visits using PPE.

Attitude –This area relates to attitudes people might have which influence access or treatment, such as certain biases or discriminatory beliefs.
  1. Grow in our maturity of a "one-mind" company with no "us versus them" mentality.
  2. Gender diversity - field is predominantly staffed with females.
  3. Grow in our maturity of non-discriminatory practices.
  4. Social Determinants - Provide employees with a work situation that recognizes social determinants in the workplace and strives to reduce inequalities.

Financial – This area relates to financial barriers which might interfere with someone fully accessing services or benefits.
  1. State and federal cuts to funding.
  2. Inability to fund incidentals such as application fees, co-pays, and spend-downs.
  3. Income limitations for services eligibility.

Employment – This area relates to barriers to gain or maintain employment at local organizations as well as barriers the persons served might have to access employment of their choice, or services to address employment
  1. Adequate ability to provide clients with employment opportunities.
  2. Recruitment of staff with growth.

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3. Income Thresholds
4. Limited transportation
5. Applicable skillsets
6. Mental and physical health issues and acceptance of limitations.
7. Criminal records
8. Hygiene and appearance

Communication – This area relates to the effectiveness of communication between all stakeholders.
   1. Difficulty in reaching new people served to do intakes and begin services
   2. Lack of feedback for quality assurance
   3. Minimal self-promotion
   4. Siloed communication (divisions individually communicating with CMs and Persons Served)

Technology – This area relates to barriers which might be addressed by technology or issues which result from inadequate devices, and from lack of technology which might take the company into the future
   1. Continual need for updated training.
   2. Ongoing increasing need for hardware; maintaining need and cost.

Transportation - This area relates to barriers related to transportation access for persons served or others who access the organization
   1. Procedure for evaluating needs of persons served regarding transportation for work and how to obtain resources in the employment division.
   2. Limited available finances for paying mileage in Independence Services Division.

Community Integration – This area relates to barriers related to persons served being able to access the community and community-based services they choose to participate in.
   1. Housing Division – Helping MA recipients to know they qualify for the HSS program and how to access.
   2. Employment Division – Finding work in the preferred field of the persons served.

Cultural Competency & Diversity - Oak Tree Support Services has recently assessed their organization, including persons served, personnel, and external stakeholders, from a cultural perspective. A summary of barriers found are described briefly below:

Culture and ethnic backgrounds – Oak Tree Support Services has very diverse clients and staff within a diverse larger community requiring diverse approaches to care.
   ● Age – Oak Tree Support Services works primarily with adult individuals. There are times when someone under 18 works alongside a parent or guardian. Oak Tree Support Services provides services with individuals aged 14-21 in the Employment Services Division.
   ● Gender and Sexual Orientation – Oak Tree Support Services needs to keep abreast of the emerging research/knowledge regarding gender and sexual orientation to support the clients and programs.
   ● Spiritual Beliefs – Oak Tree Support Services will address spirituality by exploring the spectrum of local religions to be used in better relating with clients of various spiritual beliefs.
   ● Socioeconomic Status – A homeless and low-income population is served by Oak Tree Support Services requiring knowledge of the issues within this group and the resources available.
   ● Language – Some persons served may need alternative translation methods which may include hiring interpreters and/or working with outside interpreter services.
   ● Race – Oak Tree Support Services desires to hire diverse staff to reflect the racially diverse population of persons served.

Areas with barriers are addressed in Oak Tree Support Service's Integrated Cultural Accessibility Plan.

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Strategic Goals & Plan

In consideration of all the information presented above, Oak Tree Support Services has developed the following strategic goals and plan to be implemented over the next 3 years.

Strategic Priority Area #1:   Service Excellence

Goal: Oak Tree Support Services will develop and provide additional services consistent with the mission and needs of the community.

Key Strategies:

1.1   Further develop programs to promote competitive employment.

- A.   Develop and Implement Self-Advocacy services by 06/30/2024.
- B.   Enforce mileage, timecard, and unit minimum policies and structures within the Employment Services department to promote healthy participation in programs by Employment Specialists by December 2023.

1.2   Further develop programs to promote growth within the Consulting and 245D Compliance division.
1.2.1

Strategic Priority Area #2: Excellent Quality & Outcomes

Goal: Oak Tree Support Services will fully implement its performance measurement and management plan.

Key Strategies & Measurements:

2.1 Build DDOs/KPIs into Therap
2.1.1.   Oak Tree Support Services will build our KPIs/DDOs (Data-Driven Outcomes) into Therap to ensure quality reporting.

- A.   Oak Tree Support Services will track progress toward our KPIs and utilize them to develop improvements.
- B.   Oak Tree Support Services will develop questionnaires over various mediums to reach the most service recipients and other stakeholders possible.
- C.   Action- Actively work with Therap to build out our KPIs in their DDO platform and ensure they're measuring data correctly.

2.2 Train Staff
2.2.1   Once the KPIs/DDOs are fully implemented into Therap, Oak Tree Support Services will train staff on these KPIs.
- A.   Each division will create supporting/training documentation for their respective divisions.
- B.   Each division will step through how the notes entered by their staff are being calculated towards each KPI.
- C.   Action- Train appropriate staff within 2 months of rolling out the KPIs in Therap.

2.4 KPI Content is Valuable
2.4.1.   Oak Tree Support Services will have satisfied persons served and other stakeholders.
- A.   Oak Tree Support Services will select one day in 2023 to ask each persons served and other stakeholder that they interact with that day to provide feedback on what KPIs are helpful and what may be more meaningful to be tracked.
- B.   Action – In November 2023, each division will request feedback from each person they interact with. The

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results will be reviewed in Q2 2024's Quality Committee of Q1's data.

Strategic Priority #3: Excellence With People

Goal: Oak Tree Support Services will have 35% or less turnover company-wide by 7/31/2024.

Key Strategies & Measurements:

3.1   Oak Tree Support Services will evaluate priorities for recruitment and retention. Oak Tree Support Services will:

   A. Solicit feedback from all staff by 9/1/2023.
   B. Prioritize employee input/requests by 11/30/2023
   B. Plan for implementation of possible benefits/activities by 1/1/2024

3.2   Satisfaction: Company will have satisfied employees. Employees will respond that 70% or more would refer a friend or family member to work in the program.

3.3   Oak Tree Support Services will obtain the pulse of the work environment through soliciting staff feedback every 2 years.

Strategic Priority #4: Financial Excellence

Goal: Oak Tree Support Services will develop and provide the necessary business structure, policies, administration, and financial strength to fulfill the mission of the company.

Key Strategies & Measurements:

4.1   Oak Tree Support Services will stay on budget as measured by financial reports.

   A. Monthly and yearly financial reviews.

Strategic Priority #5: Growth
Goal: Oak Tree Support Services will establish public awareness activities to ensure the long-term growth and financial stability of the organization.

Key Strategies & Measurements:

5.1   Oak Tree Support Services will continue its initiative for increasing public awareness of programs for MA recipients.

   A. Develop best strategies for marketing the services by 6/30/2024
   B. Implement strategies by 12/31/2024.

Strategic Priority #6: Technology

Key Strategies & Measurements: Oak Tree Support Services will implement a technology plan necessary and appropriate to carry out the mission of the organization and to remain competitive in the human services industry.

Key Strategies & Measurements:

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6.1   Oak Tree Support Services will evaluate, purchase, and implement an electronic health record which meets the needs of the clients and programs.

   A.   Create plan to replace Therap with a more flexible system by 12/31/2023.
   B.   Implement new system of record, including EVV, by 03/15/2024.

6.5   Oak Tree Support Services and their Third-Party Vendors will maintain the highest levels of protection of sensitive data.

   A.   Maintain password protection for all confidential information by 6/30/2024.
   B.   Maintain protocols for access to confidential information by 12/31/2024.

This comprehensive plan was initially developed in 2021.
This comprehensive plan was revised on 02/25/2022 to update the goals and remove Behavioral Health Homes from the plan.
This comprehensive plan was revised on 01/11/2023 to update the goals.
This comprehensive plan was revised on 09/18/2023 to update the goals.
This comprehensive plan was revised on 10/23/2023 to update the goals.

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