

# Service Provider Promising Practice

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## Penn-Mar Human Services: Creating their “2020 Strategic Plan”

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### Background

At the beginning of the transformation process, Penn-Mar recognized the importance of robust strategic planning to understand what the organization needed to do differently to transform. Therefore, Penn-Mar created the 2020 Strategic Plan, a 5-year plan to help focus the organization, and to strategize about how to achieve their objectives.

The 2020 Strategic Plan outlines Penn-Mar’s goal to close its sheltered workshop, with a set of action steps for achievement. The plan set a specific date for closure, as Penn-Mar staff argued that without it, the transformation process would “linger forever.” Penn-Mar established a task force to support the development of the plan.

### Implementation

The strategic planning process started with the creation of a cross-functional task force, composed of 8-10 people. These included representatives from the board and staff from different departments. A senior staff member led the task force, and the organization hired a consultant to work with the team in developing the strategic plan.

The taskforce took roughly 9 months to create the strategic plan, a process that involved several meetings with staff and families. Having a board representative on the task force enabled the board to fully grasp how the plan unfolded, which enhanced their buy-in and support. Constant communication with families during the process ensured that the process was not done in a vacuum.

The cross-functional taskforce created an environment that allowed for candor, enabling staff to have an ongoing dialogue about where they wanted to be, how they were going to get there, and what resources would be necessary to support the transformation. This dialogue was then translated into the plan, which was presented to the board for their input and approval.

A second advantage of having a cross-functional task force creating the plan was that it promoted intra-agency learning, reduced fragmentation, and supported a more holistic approach to planning.

The goal of the 2020 Strategic Plan was to have 70% of Penn-Mar’s services be community-based by 2020 and to place 30 people in jobs per year. These goals provided the backbone for the organization’s new business model, and guided reallocation of resources, including finances and human resources.

The strategic plan was implemented in 1-year increments, each with annual strategic reviews and planning sessions. In these sessions, Penn-Mar reviewed the 2020 Strategic Plan and set shorter-term goals, such as annual job placement and retention targets. The annual review meetings also provided an opportunity to review progress and adjust the plan to the changing context.

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In addition, the review meetings led to changes in transportation arrangements, as well as considerations around new skill sets required. To track progress and to hold themselves accountable, Penn-Mar began a process of data collection, and kept a dashboard where they collected information related to outcomes.

## Impact

A robust strategic planning process enabled Penn-Mar to make progress in several ways. Setting goals helped the organization to take the first step towards workshop closure. The 2020 Strategic Plan clearly articulated the goal and the timeframe for achieving it.

In addition, having a 5-year plan enabled Penn-Mar to set a clear vision for their future, which helped them to be intentional about their actions. As one senior leader said, “You have to set that vision for what your preferred future looks like. And then you can walk backwards from there and figure out how to make it happen.”

The annual review and planning meetings allowed the organization to review progress towards the goal and adjust their plan as necessary.

Finally, the process created a forum for organization members to debate and define their core mission and future goals, which was instrumental in building an agency culture supportive of the transformation.

For more information on this practice contact [thinkwork@umb.edu](mailto:thinkwork@umb.edu)



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