



First Resources Corp.

Connect. Engage. Empower.

July 2024-June 2027 Strategic Plan

2024-2027 Strategic Plan

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Introduction of the 2024 Board of Directors

Ellen Moreland, President
John R. Webber III, Vice-President
Heidi Altfillisch, Secretary
Daniel O'Rourke, Director
Amber Pargmann, Director

Kevin Carr, Director
Julie Olson, Director
Dr Dixie Holden, Director
Sandra McReynolds, Director

Introduction of the Management Staff

Susan Woodford, Executive Director
Colette Edmundson, Chief Financial Officer
Codie Amason, Chief Operating Officer
Jennifer Reynolds, Human Resource Director
Cindy Kurtz Hopkins, Director of Supported Employment
Lori Drummond, Director of Disability Services

Gabby McLeland, Director of Disability Services
Thomas Young, Director of Maintenance
Stephanie Gehlhaar, Director of Compliance
Sadie Cook, Director of Marketing
Stephanie Millard, Director of Mental Health Services
Kirk Condon, Director of Behavioral Health Services

First Resources Corp's Driving Focus

Our Mission: First Resources Corp provides community-based programs with integrity and respect that inspire hope and contribute to the well-being of the people we serve.

Our Vision: First Resources Corp exists to provide quality services for people based upon their individualized needs and desires. First Resources Corp exists within communities to enhance the abilities of those served and to be productive participating members of their families and of their communities.

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Our Core Values:

Service Excellence

- Evidence-based practices and programs
- Well trained staff
- Person-centered approach
- Improving lives

Open Communication

- Honest
- Candid
- Timely

Constant Respect

- Respectful dialogue
- We work together to create inclusion built on trust, respect, & dignity for all.
- Don't judge.
- Accept people where they are at

Professional Development

- Ongoing training
- Opportunity for growth
- Passionate staff
- Professional Evaluation

Innovation

We promote an innovative culture and attitude. We think differently and strive to apply innovative thinking and creativity to everything we do. Innovation is a key driver for our growth. Daily, we demonstrate innovation by:

- Being creative to solve our clients' problems.
- Being proactive in anticipating change
- Sharing knowledge and experience through teamwork
- Continuously challenging to be the best

First Resources Corp's Origins

First Resources opened its doors in September 1987 as a not-for-profit agency servicing people with disabilities in a sheltered workshop setting. Since that time, we have expanded our services to a wide variety of human service programs that reflect our commitment to the First Resources Corp's mission to serve children, families, and people with disabilities. The programs include:

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- 1988 Started residential services with the opening of an 8 person RCF-ID home in Sigourney, IA.
- 1988 Started family and children's services and in-home family counseling services.
- 1993 Started Home and Community Based Services
- 2011 Started CHOICES mental health drop-in centers.
- 2012 Started substance use programs.
- 2015 Started Crisis Stabilization Services.
- 2020 First Resources and Tenco Inc merged.
- 2021 Started Integrated Health Home (IHH) services.
- 2022 Started Intensive Residential Service Homes (IRSH).
- 2022 started Habilitation Day Hab programs.
- 2023 Started Individual Placement Supports (IPS).

First Resources Corp's Current Services

Disability Services: These services are provided to people who have an intellectual disability, a brain injury, or a chronic mental illness.

Services include:

- Hourly SCL- Provide one to one staff support needs identified in the program plan. Services are scheduled with individuals based on their choice and address skills such as: activities of daily living, individual advocacy, personal safety, communication, community skills and socialization. Services can be for children or adults on the ID or BI Waivers.
- Daily SCL- Provides staff support in a site home for 8-24 hours per day based on the person's needs. First Resources manages 25 homes in the following communities: Bloomfield, Centerville, Knoxville, Oskaloosa, Ottumwa, Fairfield, Sigourney, and Burlington. Services are for adults on the ID or BI Waivers.
- Home Based Habilitation- Provides a skill development service that teaches chronically mentally ill adults how to maintain their mental health symptoms to function appropriately and live independently in the community. To be eligible adults must have a diagnosed mental illness and have Medicaid.

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- Community Support Services (CSS)- Provides support for adults with mental illness in monitoring their mental health symptoms and functioning for the purpose of promoting and maintaining positive mental health. To be eligible adults must have a diagnosed mental illness and have Medicaid.
- Basic Individual Respite- Provides one to one supervision to allow caregivers a break from the care of their child during non-work hours. Services can be for children or adults.
- Group Respite- First Resources offers a group respite that allows the individual time to socialize with peers of their choosing. Services can be for children or adults.
- CDAC- (Consumer Directed Attendant Care) is a service that assists an individual with self-care tasks, which the individual would typically do independently, but their disability does not allow them to. Services are for adults.
- Adult Day Habilitation (ADH/HDH)- Provides staff support to minimize isolations while increasing socialization and community integration needs of individuals.

Supported Employment Services: These services are provided to adults who have an intellectual disability, a brain injury, or a chronic mental illness. The development of vocational and independent living skills is the principal purposes of the programs. Individual plans are designed to assist the individual to meet goals related to their own particular vocational needs. Services include:

- Small Group Employment – Provides staff support and training for 2-4 adults in a community-based job.
- Job Discovery- Provides assessment of a person’s work interests through community-based job exposure.
- Job Development- Provides support to help a person research job openings, complete applications, and work with employers to develop a job.
- Job Coaching- Provides on-site coaching to help a person learn and/or maintain the skills necessary for his/her job.

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- Individual Placement and Support (IPS)- Provides support for people with serious mental health issues to find and work at jobs of their choosing.

Mental Health Services: These services are provided by First Resources Corp and include a variety of services provided both to children and adults regarding mental health needs. Services include:

- Mental Health Drop-in Centers CHOICES – (Center for Hope, Opportunity, Inspiration and Change in an Environment of Support). Provides individuals needing mental health support an opportunity for socialization, encouragement towards independence and connections to community resources. CHOICES is a peer operated community center that offers mental health resources and groups in a supportive environment.
- Residential Care Facility (RCF) – Provides transitional support for adults with chronic mental illness as they transition back into community living.
- Integrated Health Homes (IHH) – Provides support, advocacy, health promotion, and resource connection for people with mental health diagnosis to achieve overall wellness and independence.
- Intensive Residential Service Homes (IRSH)- Provides support to assist individuals with intense mental health and behavioral needs who cannot live independently. The program aims to assist the client in improving their independent living skills so they can return to their communities.
- Peer Support Services – People who have experienced recovery from mental health disorders support others in their recovery. Note: these services will start in the fall of 2024.

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Behavioral Health Services: These services are provided by First Resources Corp and include a variety of services provided both to children and adults regarding addressing mental health needs and substance use disorder treatment needs. Services include:

- Behavioral Health Intervention Supports (BHIS)- Provides skill development for children with a diagnosed mental illness to manage their behaviors and to retain self-control so they can function age appropriately at home, school and in the community. BHIS also offers tools and techniques to the child's family to enhance and maintain a supportive environment at home. To be eligible children must be between the ages of 3-18 and have Medicaid.
- Residential Substance Use Treatment Services – Provides short term inpatient treatment in which professionally trained staff provide the 24-hour care and support needed to rebuild one's life. Services currently include:
 - *Hope House* specializes in providing residential drug and alcohol addiction treatment to pregnant women and/or parents with children. This program is unique in that children attend treatment with their mother so the family can recover together. Hope House staff recognize addiction as a disease that affects all aspects of a person's life. Therefore, our treatment programs are equipped to provide additional services to support their recovery.
 - *Oak Meadow* specializes in providing inpatient drug and alcohol addiction treatment. This program teaches how to avoid relapse, learn about the disease of addiction, and provide a therapeutic approach to support recovery.
- Outpatient Substance Use Disorder Treatment Services - provide treatment for adults who abuse substances. The specific treatment services are as follows:
 - *Substance Use Assessments*: The clients provide information to the counselor regarding the extent of addiction or substance use. The counselor assesses the level of care needed to provide an effective, personalized addiction treatment plan. This is conducted with interviews and surveys requiring honest and open communication from the client. This includes OWI assessments.
 - *Intensive Outpatient*: Designed specifically for those who are experiencing relapse from drugs and alcohol and have a history of frequent relapse, this program serves as an educational intervention so that clients can learn social, physical, and emotional effects of drugs and alcohol. Clients receive three, three-hour group sessions per week, and a weekly hour individual session. The IOP duration is 4-6 weeks.

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- *Extended Outpatient:* At this level of care, it is felt that clients have a firm grasp of the basic concepts for staying sober, working through individual roadblocks and requiring less structure to maintain sobriety. The EOP program is individualized for each client.
- *Individual Counseling:* Clients meet one to one with a Certified Substance Abuse Counselor, to explore issues contributing to substance abuse. A treatment plan will be developed with input from the client, using a holistic approach to treatment.
- *Substance Use Testing* is also offered at the center and includes Hair Follicle, Urinalysis, and Saliva (Oral) drug testing. Tests are performed on site and may be sent to a laboratory for confirmation.

First Resources Corp's Service Area

Appanoose County
Davis County
Van Buren County
Wapello County
Jefferson County

Henry County
Des Moines County
Marion County
Mahaska County
Monroe County

Keokuk County
Washington County
Lee County

Strategic Planning Process Overview

The following data was reviewed for strategic planning:

- Satisfaction surveys from clients served, external stakeholders, and FRC staff.
- Financial reports
- Outcomes Data
- Feedback from the strategic planning Survey Monkey.
- Regulatory expectations
- Impacts of pending legislation

A Strengths, Weaknesses, Opportunities, and Threats (SWOT) Analysis was utilized to compile themes. The SWOT Analysis was as follows:

Strengths: Mission focused. Staff feel supported. Agency works to promote self-care for all. Enhanced wages and benefits for staff. Implementation of huddles. Enhanced IT Security. New electronic health record system (Credible). A variety of trainings offered. Energetic marketing team. New brand. CARF accreditation. Auditing. Responsive maintenance team.

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Weaknesses: Staff absenteeism/turnover. Supervisors being in sites regularly. Workloads. Lack of collaboration throughout the agency. Amount of time/quality of orientation. Training is not being offered in various locations. Adapting training to various learning styles. Lack of a consistent computer usage process. Large geographical area for marketing, IT, and maintenance to support. Lack of signage. Decrease in revenue.

Opportunities: Improved communication/message to everyone. Consistent use of computer programs. Continue development of consistent and simplified systems/processes. Develop substance abuse programs/curriculum. Maximize use of Credible. Improve training plans and opportunities.

Threats: System redesign. Dept of Labor wage changes. Cybersecurity. Out of compliance with training expectations.

Strategic planning meetings were held in May 2024 with the Management Team and the Board of Directors. The SWOT Analysis guided discussions and the development of the 2024-2027 strategic goals. The management team then established the action steps, timeframes, and persons responsible to accomplish each strategic goal. The final strategic plan was approved by the Board of Directors on 6/26/24.

2024-2027 Strategic Goals:

First Resources Corp has established the following Strategic Goals to guide the agency from 2024 to 2027.

Goal 1	First Resources Corp will maintain highly effective leadership to increase its capacity to achieve results.
Goal 2	First Resources Corp will increase community awareness and financial capacity with support of community partnerships, donors, volunteers, and diverse funding streams.
Goal 3	First Resources Corp will have solvent, quality programs that benefit the needs of the clients served.
Goal 4	First Resources Corp will enhance organizational and client safety.

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Implementation Plan for Goal 1: First Resources Corp will maintain highly effective leadership to increase its capacity.			
Objectives	Implementation Strategies	Who's Responsible	Target Date/Updates
Expand succession planning throughout the management team	Internal staff development through leadership training that is dept specific.	Management Team	Ongoing
	Develop key competency skills for each mgmt. position.		December 2024
Increase competency and knowledge base of staff through training.	Develop and implement annual training plan.	HR and Training Committee	July 2024 with quarterly reviews
	Adjust training curricula as needed to meet the needs of persons served.		Annually in June
Increase frontline supervisor competency through training and support	Review Accountability Checklists	Directors	Bi-annually
	Provide consistent supervisor monthly forums/trainings.	Management Team/HR Team	Monthly
	Develop peer review process for Person Centered Service Plans (PCSP).	Directors/COO	December 2024
	Peer review PSCP content	Directors/Coordinators	Starting January 2025
Increase overall knowledge of multiple regulatory requirements for the agency.	Annual mock audit through peer review process	Management Team, Compliance Team, and Coordinators	March 2025

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	Attending trainings related to regulatory updates.	Coordinators and Management Team	As Available
	Maintain links to current regulations on the staff portal	Programmatic and Marketing Teams	Ongoing

Implementation Plan for Goal 2: First Resources Corp will increase community awareness and financial capacity with support of community partnerships, donors, volunteers, and diverse funding streams.

Objectives	Implementation Strategies	Who's Responsible	Target Date/Updates
Be responsive to changes of funding streams at the state level	Attend listening sessions or IACP meetings.	Management Team	As scheduled
	Participate in regional meetings in response to new Administrative Service Organization	Management Team	Quarterly
	Explore other state associations that may benefit the agency.	Management Team	Ongoing
Increase external volunteers.	Market FRC to various organizations and persons within the service delivery area	Marketing Dept	Ongoing with Quarterly Updates
Increase FRC representation across the service delivery area.	Identify key leadership to represent FRC at events and community functions.	Management Team	September 2024
	Implement annual marketing plan to be inclusive of service delivery area.	Marketing and designated leadership staff	Annually in April

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	Explore volunteer opportunities for FRC staff to support other community initiatives.	Management Team	7/1/24 and ongoing
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Implementation Plan for Goal 3: First Resources Corp will have solvent, quality programs that benefit the needs of the clients served.

Objectives	Implementation Strategies	Who's Responsible	Target Date/Updates
Increase overall service delivery by 20% annually.	Utilize baseline financial data to determine the growth of each department.	Management Team	7/1/24
	Establish implementation plan for growth for each program.	Director/COO	September 2024 with Quarterly Review
Meet business function expectations of the organization.	Review business functions quarterly.	Director of Compliance	Quarterly (July, Oct, Jan, April)
	Recognize programs that are meeting/exceeding business functions.	COO/Programmatic Directors/Marketing	Quarterly
	Implement Quality Improvement Plan within 30 days for dept falling below the minimum expectation.	COO/Programmatic Directors	As Needed
Enhance the behavioral health program through best practices to meet the needs of persons served.	Utilize outside expertise to enhance behavioral health programs.	COO/CEO	December 2024

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<p>Assess and adjust referral processes to shorten wait times.</p>	<p>Coordinators collaborate with initial pre-screenings.</p> <p>Regular review of referrals to programs.</p> <p>Timely responses and meetings.</p>	<p>Directors and Compliance Team</p>	<p>7/1/24</p> <p>Monthly at Programmatic Meetings</p> <p>Ongoing</p>
<p>Increase collaboration related to discharge processes.</p>	<p>Implement exit interviews/surveys for all programs.</p> <p>Directors to approve all discharges and ensure collaboration amongst teams.</p>	<p>COO/Compliance Team and Directors</p> <p>COO/Programmatic Directors</p>	<p>Monthly at Programmatic Meetings</p> <p>Ongoing</p>

Implementation Plan for Goal 4: First Resources Corp will enhance organizational and client safety through physical design, timely maintenance, and technological security.

Anticipated Outcome:

Objectives	Implementation Strategies	Who's Responsible	Target Date/Updates
<p>Continue to assess, identify, and move according to the needs of service community.</p>	<p>Establish and follow an annual physical design plan.</p> <p>Continue to look for opportunities for physical design improvement and growth.</p>	<p>Director of Maintenance</p> <p>CEO/COO</p>	<p>Annual in May</p> <p>Quarterly</p>

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<p>Increase operational efficiencies while ensuring safety of persons served.</p>	<p>Implement electronic medication administration record (EMAR) system within Credible.</p>	<p>Programmatic team</p>	<p>January 2026</p>
	<p>Explore and implement a client financial system.</p>	<p>Compliance/ COO/Directors</p>	<p>January 2025</p>
	<p>Explore and implement a night supervision program for site homes as deemed appropriate.</p>	<p>COO/Programmatic Directors</p>	<p>Quarterly Review</p>
<p>Increase security of technology systems.</p>	<p>Monitoring through Access Systems and timely follow up on recommendations.</p>	<p>CFO/IT Dept/Access Systems</p>	<p>Ongoing/Monthly</p>
	<p>Establish a technology plan in partnership with Access Systems.</p>	<p>CFO/IT Dept/Access Systems</p>	<p>October 2024</p>
	<p>Implement printer logic for secure printing.</p>	<p>CFO/IT Dept/Access Systems</p>	<p>January 2025</p>
	<p>Annual review of IT inventory and replacement plan.</p>	<p>CFO/IT Dept/Access Systems</p>	<p>October 2024</p>