

STRATEGIC PLAN

3-year Strategic Plan (FY 2025 – 2027)





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EXECUTIVE SUMMARY







In 2023, Chimes embarked on a strategic planning process, guided by the leadership of President and CEO Steve DaRe, the Chimes International Board of Directors, and our dedicated senior leadership team. Together, we are committed to ensuring the future success of Chimes, which has steadfastly supported the most vulnerable members of society for over 75 years. This 3-Year Strategic Plan is about planning for the future, but, even more importantly, it is about transforming challenges into opportunities, igniting passions, and embracing our mission to make a greater impact in the years to come.

The 3-Year Strategic Plan sets a clear path for sustained growth, operational excellence, and stakeholder engagement. Chimes, with a long-standing history of innovation and service, remains dedicated to expanding our comprehensive programs, including day and residential services, a school for individuals with intellectual disabilities, employment opportunities, and behavioral health services.

As part of the planning process, our Vision, Mission, and Values were evaluated and updated to align more closely with our current goals and objectives, but also to serve as a daily reminder of why our work is so impactful and important. Chimes envisions a world where people with differing abilities choose their own path to an enriched and empowered life. Our mission is to create an inclusive community that enables individuals to thrive by providing holistic support, advocacy, and innovative solutions that enhance independence, well-being, and a sense of belonging. Guided by our values of Caring, Empowerment, Collaboration, Quality, and Fun, Chimes fosters a compassionate culture grounded in accountability.

Developing the Strategic Plan demanded extensive stakeholder engagement, including staff surveys, listening sessions with the parents and guardians of participants, a Board of Directors retreat, and director and above level leadership conference. The plan focuses on three primary goals:

- Engaging stakeholders to foster advocacy and innovation
- Achieving sustainable growth through mergers, acquisitions, and new ventures
- Maintaining operational excellence by leveraging expertise, establishing best practices, improving efficiency through technology, aligning resources, and modernizing compliance

The 3-Year Strategic Plan paves the way for Chimes to uphold its tradition of excellence. By empowering individuals with disabilities, Chimes aims to enhance their quality of life through innovative and effective services. Together, we are fostering a future filled with hope, inspiration, and unparalleled support.



"The best way to predict the future is to create it."

- Peter Drucker

The Case for Strategic Planning at Chimes

Chimes began its journey in 1947, as a special education day school in a Baltimore church, serving just five students with intellectual developmental disabilities. Over the years, Chimes has grown significantly, expanding our programs to meet the evolving needs of the individuals we support. Our mission has always been about delivering impactful results and making a tangible difference in the lives of the most vulnerable members of our society. Today, Chimes supports more than 26,000 people and has 3,500 employees. We offer a wide range of services, including residential, day habilitation, vocational programs, and behavioral health services, across six U.S. states, the District of Columbia, and Israel.

Chimes has consistently adapted to meet the changing needs of our community, ensuring that our mission to empower individuals with disabilities and enhance their quality of life is always at the forefront. With a commitment to delivering demonstrable results, Chimes remains dedicated to helping our participants achieve their fullest potential and live as independently as possible.

In 2023, key hires were made to the executive leadership team including appointing a Chief Executive Officer and Chief Operating Officer. These roles were critical to bringing stability, capability, and capacity to the senior management team of Chimes. One of the first initiatives undertaken was to develop a strategic plan involving our Board of Directors, multiple layers of management and our primary stakeholders. The purpose of the plan was to ensure the organization remains client-centered with relevant programs and services.

A second key priority was to enhance our robust financial foundation. Chimes operates in a market characterized by tight funding and shrinking margins, where size and scale can significantly influence success. Recognizing this, leadership is committed to leveraging Chimes' extensive geographic footprint, substantial size, and diverse service portfolio to foster growth both organically and through strategic acquisitions. Additionally, as a mature organization, it is imperative to ensure that operational excellence remains at the core of all endeavors, driving quality, innovation, and capacity. This multifaceted approach underscores our commitment to sustaining financial health, fostering growth, and achieving long-term success.

Organizational Statements

During the development of the strategic plan, we carefully evaluated and updated our Mission, Vision, Values, and tagline to ensure alignment with our organizational culture and goals. To illustrate their interconnectedness, we utilize a house graphic. The Values form the foundation of Chimes, representing our core principles. The Mission, situated on the main floor, embodies the work we accomplish each day. Above this, the Vision signifies our aspirational future, guiding us toward our long-term goals. Finally, the tagline is depicted as the sun in the sky, a symbol that is instantly recognizable and represents our overarching promise.



VISION

Envision a world where people of differing abilities choose their own path to an enriched and empowered life.

MISSION

The mission of Chimes is to foster a compassionate and inclusive community where individuals of differing abilities and behavioral health needs are supported and thrive. Chimes enables futures by providing holistic support, advocacy, and innovative solutions that enhance independence, well-being, and a sense of belonging.

VALUES

CARING • EMPOWERED
COLLABORATIVE • QUALITY • FUN



Values Statement

The Values of Chimes were established with input from over fifty staff Directors during a leadership summit. The statements below articulate what these Values signify for our organization and how our team embodies them daily. This collaborative approach ensures that our Values resonate deeply within our organizational culture and are actively demonstrated in our everyday actions.

CARING

Leading compassionately to respect, uplift and communicate with our team members and those we support, while valuing diversity in all its forms.

EMPOWERED

Promoting positive decisionmaking and accountability across our organization, we empower every team member to lead from any position.

COLLABORATIVE

Maximizing our collective skills and competencies to achieve common goals.

QUALITY

Striving to deliver exceptional programs and services that exceed the expectations of those we support, aiming to consistently delight our clients and partners.

FUN

Integrating fun into our professional lives by enjoying what we do and the people we work with, while continuing to recognize the serious, important mission of Chimes.

STRATEGIC PLANNING



The Strategic Planning Process

Chimes decided to embark on a strategic planning process in 2024. The core elements of this process included: assessment of the current internal and external environments, engaging the senior leadership team in discussions, and ensuring representation from the board, staff, parents, and guardians. The purpose was to better position the organization for growth and sustainability while building on our existing expertise and capabilities. The strategic planning effort was led by Steve DaRe, CEO, the Quinn Strategy Group, the International Board of Directors and senior staff. The key activities included:

- A kick-off retreat with the International Board of Directors to set direction, goals and timelines
- Multiple meetings with the Senior Leadership Team and leadership at all levels of the organization to assure the strategic plan responded to stakeholder priorities
- Newly developed updates on Mission, Vision, Values and tagline to reflect the new strategy
- Multiple working sessions with the senior leadership team included:
 - SWOT Analysis
 - Competitive Analysis
 - Context Map
 - Historical Strategic Plan Review and Crosswalk update
- Parent/Guardian constituent listening sessions
- Staff survey to gain feedback on strategic priorities
- A board and leadership retreat in April 2024 to discuss stakeholder feedback, review the strategic priorities, and discuss key strategic questions for the organization
- In May 2024, a leadership meeting was held with 50 Director-level staff to share strategic plan
 priorities and objectives which aimed to inspire and gather valuable input for the strategies
 essential to effectively implementing the strategic plan
- An implementation plan was drafted in May and June 2024 designed to guide staff in executing the identified strategies in the plan and establish clear goals to foster accountability and drive our collective success
- A strategic plan overview was presented at the Annual Meeting in June 2024 for key stakeholders
- Future TBD The strategic plan was published in July 2024, with board approval at the September 18, 2024, board meeting

Strategic Planning Outcome

Resulting from the strategic planning process, we developed three primary goals, each underpinned by specific objectives that define what success looks like. These goals are paired with clear strategies, each intending to achieve the desired outcomes. This forward-thinking approach embodies our commitment to excellence and our unwavering belief in a prosperous future for those of differing abilities.



SWOT ANALYSIS

Strategic Plan Building Blocks

The strategic planning process included analysis of internal and external factors that influence the path for future success. Three exercises were undertaken to influence the course of the strategic path with the outcomes depicted in the charts below.

SWOT Analysis

The SWOT analysis results provided insights into areas to strengthen and challenges to address within the strategic plan. These findings are detailed in the chart below:

CURRENT/INTERNAL

FUTURE/EXTERNAL

S

STRENGTHS

- Strong balance sheet
- Strong executive
- Committed staff
- High-quality programs
- Leveraging data analysis
- Large geographic footprint
- Diverse revenue stream



WEAKNESSES

- Communication
- Morale
- Errors in work
- Bench Strength
- Limited cross training
- Limited extra staff
- Lack of succession



OPPORTUNITIES

- Business Expansion (Organic)
- Customer
 Relationship
- Marketing and Branding "Employer of Choice"
- Grants-duplicate process in other states or at federal level
- For profit opportunities
- IP staff/consulting
- M&A
- Legislative Affairs Rates
- Mental Health Field
- Funding



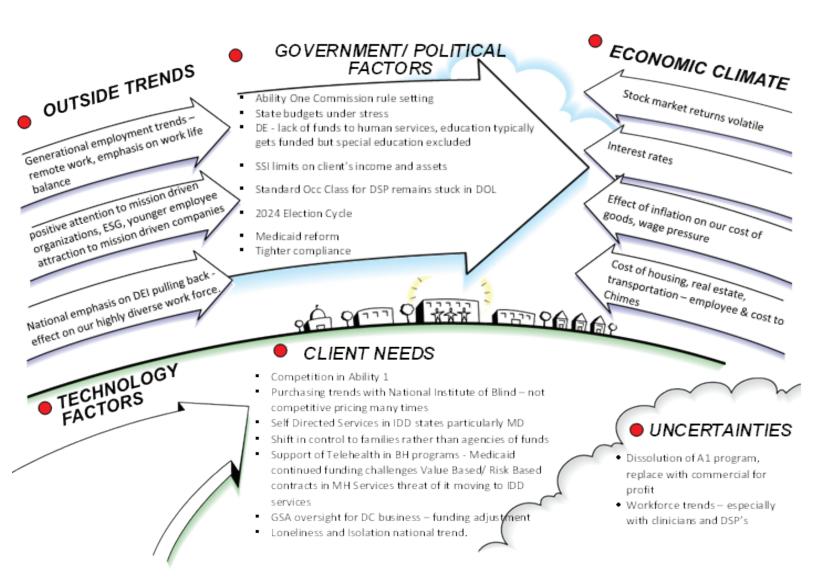
THREATS

- Wage inflation / reimbursement
- Competition
- Lack of partnerships
- Pandemic
- Staffing shortages
- Workforce
- Misalignment of policy outcomes
- Aging population (client and staff)



CHIMES CONTEXT MAP

The SWOT analysis results identified key strengths to build upon and weaknesses to address in the strategic plan. The results are outlined in the Chimes Context Map below:





CROSSWALK FROM LAST STRATEGIC PLAN

The chart below showcases the prioritized actions and decisions for FY 2023 and 2024, along with the remarkable results achieved. Looking ahead to FY 2025, our strategic focus builds on this foundation, aiming to elevate our accomplishments and drive even greater impact.

FY 2023 Areas of Strategic Investements

Description	Action / Decision	FY 2025 Strategic Focus
Competition in Ability One Space	Chimes prioritized operational efficiency, emphasizing staffing ratios, investment in pricing, contracting officers, and business development. Audit review preparation, contracting and pricing process review, and documentation were key drivers for FY 2023.	Our strategy involves sustainable growth by leveraging the business development team and navigating the competitive landscape, despite predicted margin compression.
Separate, Loosely Affiliated Entities	Central agency functions have been consolidated and affiliate relationships built. Structural changes include DC pricing and contracting resources.	Work continues with the focus on Operational Excellence and improving overall communications.
Strong Metrics-Based Reporting System	Chimes was able to achieve a significant increase in wages for DSPs by leveraging Tableau reporting, operational ownership, and finance partnership. Additionally, they developed key performance indicators such as IDD and BH utilization, Ability One Ratio, recruiting pipeline statistics, and turnover analysis, among others to better track their progress and identify areas for improvement.	The Business Intelligence team is collaborating with the operations and finance teams to enhance and broaden the oversight and operational reporting. In order to keep us and the board updated, the strategic implementation plan requires checkpoints and benchmarks throughout its execution. Improving the analytical capabilities of the reporting and increasing the usage of it within the organization is our top priority for FY 2025.
Development & Foundation	Development and Foundation staff invested resources in grants and governmental affairs. Strong grant results and building momentum in lobbying efforts in MD and VA. Started building relationships at the federal level.	Our continued investment will focus on strengthening grant outcomes, and building governmental relationships to impact our Stakeholder Triad.
M&A	Improvements to central agency, culture, and communication processes have set the stage for serious discussion of potential M&A activity.	M&A is front and center related to the sustainable growth strategic plan.
Collaboration	While COVID impacted significant collaboration, progress was made including the Virginia Tech project.	Work to identify new alliances, organizations for collaboration with a strategic focus.



GOAL 1: STAKEHOLDER TRIAD FOCUS

Objective

Our commitment to realizing our mission is anchored in supporting our primary stakeholders, known as the stakeholder triad—our **clients/participants**, their **parents/guardians**, and our **frontline workforce**. By focusing on these core groups, we aim to deliver meaningful outcomes and foster an environment of innovation, collaboration, and excellence.



Engage parents, guardians, and advisory councils to create an advocacy program and impact.



Foster a culture of innovation to enhance our service delivery, improve outcomes for all stakeholders and establish Chimes as a thought leader.



Leverage best practices and emerging trends to improve outcomes for the people we serve.



Build partnerships with providers and organizations to leverage resources, expertise, and capacity to benefit the people we serve.



Develop a comprehensive package of benefits, employee experiences, and workplace culture that attracts and retains employees and positions Chimes as an Employer of Choice.



GOAL 2: SUSTAINABLE EXPANSION AND GROWTH

Objective

Growth to serve and support more people with disabilities is the primary driver. Funding in our segment of health and human services will continue to be challenging. Leveraging our infrastructure and fixed costs over a larger revenue base should assure long-term financial success.



Grow through M&A activity, identifying organizations that expand the number of people we serve, grow our revenue, deepen our services, and expand our geographic footprint.



Expand our behavioral health and AbilityOne business lines by identifying opportunities to provide services across our current or new locations and client base, focusing on operating efficiencies and investing resources to support growth.



Acquire or start de novo commercial businesses that support our mission and allow us to monetize skills and processes to other Health and Human Services Agencies through the newly formed for profit corporation.



GOAL 3: OPERATIONAL EXCELLENCE

Objective

This area is the foundation on which all other initiatives will stand. Excellence in service delivery and extraordinary outcomes across all our lines of business will elevate Chimes to a distinguished, high-performing organization. This premium status will not only attract referrals for the individuals we support but also draw in talented new team members and other organizations seeking merger opportunities. With a clear vision of success and an unwavering commitment to quality, we position ourselves as leaders in our field, confidently moving towards a prosperous and impactful future.



Leverage our clinical expertise to deliver high quality outcomes and improve efficiency and effectiveness.



Establish consistent best practices and procedures across Chimes, leading to improved efficiency and productivity and quality care.



Leverage technology to improve client independence/quality of life. Collect, store, and analyze data to inform decisions, optimize operational efficiencies and gain insights into operations.



Align our real estate portfolio to enhance our resources, offer state-of-the-art facilities and manage our costs.



Modernize our QA and compliance approach to better manage risk and meet regulatory requirements.



EMPOWERING LIVES ENABLING FUTURES

CONCLUSION

The development of the 3-Year Strategic Plan at Chimes was a comprehensive effort, involving all levels of the organization and incorporating a thorough analysis of both internal and external factors. This holistic approach not only builds on our past achievements but also provides a clear roadmap for future successes. Each goal, along with its specific objectives, has been meticulously identified, and the corresponding strategies will be assigned to the relevant operating departments. Detailed tactics, supported by individual project plans, are being developed to underpin each strategy, with measurable performance indicators established to track progress towards our goals.

Although ambitious in scope, the leadership at Chimes is confident that the execution of this plan will pave the way for sustained growth and success, positioning us as leaders in our field and inspiring hope for a prosperous future.

NOW WHAT?



SHARE THIS PLAN WITH YOUR COWORKERS!



ENVISION HOW THIS PLAN WILL IMPACT YOUR ROLE.



FOLLOW US ON SOCIALS TO STAY UP TO DATE!



GIVE US YOUR FEEDBACK! WE WANT TO HEAR FROM YOU.

