

# **NILP Five Year Strategic Plan**

**July 1, 2023 – June 30, 2028  
(Fiscal Years: FY24 to FY28)**



## GOALS FOR FY2024- FY2028

### **Goal #1**

Enhance and maintain a development strategy through fundraising & marketing.

### **Goal #2**

Recruit, develop, and retain a diverse workforce.

### **Goal #3**

Maintain well-qualified and diversified Board of Directors.

### **Goal #4**

Assess and update Information Technology (IT) and operational infrastructure to meet current organizational demands.

### **Goal #5**

Expand physical presence in our service area.

### **Goal #6**

Continue expanding NILP services to un-served /underserved populations

### **Goal #7**

Maintain facilities and building operations.

**Goal 1 — ENHANCE AND MAINTAIN A DEVELOPMENT STRATEGY THROUGH FUNDRAISING AND MARKETING**

- 1. Refine messaging to increase understanding of our services and impact among consumers, funders, and volunteers.**
  - a. Coordinate elevator pitch training for Board and Staff during FY 2024.
  - b. Set up individual meetings with Program Managers and Directors 1-1 to draft content specific materials to be included in the one agency document in 2024.
  - c. The Marketing Team and the VP of Programs will review materials developed from the 1-1 meetings and compile a unified draft agency document that will be shared with Managers/Directors.
  - d. A final draft agency document will be presented to senior leaders of Executive Committee for final approval and Marketing will publish.
  
- 2. Develop and implement new opportunities for internal and external stakeholders to engage with our mission and create impact.**
  - a. Work with Human Resources to develop an application and process for onboarding Volunteers and Interns.
  - b. Create Volunteer and Intern position descriptions and post online.
  - c. Create Annual Calendar of Events, including opportunities for staff, donors, volunteers, and consumers.
  - d. Plan and execute 1 new annual engagement opportunity (in addition to Golf in June, Annual Meeting in October, & Legislative Forum in March).
  
- 3. Develop and implement an outreach plan for consumers.**
  - a. Create one pamphlet in multiple formats covering all services, aligned with our Annual Report.
  - b. Program leads are to identify and build relationships with shared consumer agencies.
  - c. Evaluate the need for a Bilingual Community Liaison during the 2<sup>nd</sup> year of Strategic Plan.
  
- 4. Diversify funding sources to increase new revenue.**



- a. Develop and implement a Grants Management and Community Relations strategy through researching grant associations and foundations related to our target population.
- b. Research and evaluate the cost and return for hiring a Grants position.
- c. Develop and implement a Monthly Giving Program in Year 2 of the Strategic Plan.
- d. Increase our Annual Partnership Program with two new corporations by Year 2 of Strategic Plan.

**5. Diversify funding sources to increase unrestricted revenue.**

- a. Create Annual Development Plan, that aligns with the Annual Calendar of Events, to increase communications and engagement with the community, and increase the Independence Fund by 10% annually.
- b. Research and conduct needs assessment to determine viability of a Training and Education Program.

**Goal 2 — RECRUIT, DEVELOP, AND RETAIN A DIVERSE WORKFORCE****OBJECTIVES:**

- 1. Create and implement competitive pay scales to ensure competitiveness among Human Services providers in our geographic location.**
  - a. Conduct a marketplace compensation study to determine if our compensation structure is competitive utilizing the Providers' Council Salary Compensation statistics as part of the research process to benchmark NILP wages.
  - b. Conduct a survey of local providers in each of the sub-sectors such as: PCM agencies, ILC Colleagues, Local Aging, and DDS Human Services providers.
  - c. Research with MassHire, local colleges, and Indeed reviews of competitors to enhance the broader human services marketplace.
  - d. Based upon the research, develop salary ranges for all staffing levels. i.e., Entry Level, Mid-Management, and Senior Leadership based on education and work experience.
  
- 2. Enhance the employee benefits portfolio by identifying additional benefits options to attract and retain top talent, as well as improve employee productivity and engagement.**
  - a. Research NILP demographics data and 704 reports over the past 5 years.
  - b. Provide a utilization report on current staff benefit use in the aggregate.
  - c. Research and interview other human service providers (by size and demographics) that currently utilize Cafeteria Plans with alternative benefit options identified.
  - d. Conduct an employee benefits survey to identify desirable benefits offerings.
  - e. Research and compare our total compensation with other agencies.
  - f. Expand the employer-sponsored retirement plan to include a matching contribution within 3 - 5 years.
  
- 3. Expand the current tuition assistance program to include tuition reimbursement for programs not eligible through the current Tuition Remission program and for graduate level studies.**

- a. Write specific eligibility guidelines and application process and communicate with staff.
  - b. Research and evaluate the process of tying the Graduate studies reimbursement to length of stay, i.e., non-competes and employment obligations.
- 4. Review the current performance management tool and practices and develop an enhanced Performance Management tool and Tracking System.**
- a. Review the current utilization, timeliness, and accessibility of NILP Performance Management tool.
  - b. Conduct focus groups with staff and separately with Managers to identify strengths and weakness of current tool.
  - c. Draft an enhanced performance tool and conduct test audits utilizing the new tool with a select group of managers across the various depts.
- 5. Create a committee that will research Enterprise Performance Management System to consolidate training, development, and performance management in one platform.**
- a. Lead an Executive Committee project to research and develop the potential of an Enterprise Performance Management System.

**Goal 3 — MAINTAIN WELL QUALIFIED AND DIVERSIFIED BOARD OF DIRECTORS****OBJECTIVES****Board Development Committee:**

David Bradburn, Gary Hale, Mark Kelly, and Kevin Hatch

- 1. The Board Development Committee will recruit representative diverse board members and manage Board Member terms.**
  - a. The Board Development Committee and NILP Agency Representative will monitor and report the over 51% Board Member representation of individuals who self-identify with a disability on an annual basis.
- 2. Board Members shall conduct outreach and recruitment to the Town and City Commissions on Disability in NILP's service area and NILP consumer base.**
- 3. The Board Development Committee will engage Board Members with ongoing activities to recruit ambassadors and volunteers with Board activity.**
- 4. Board Development Committee will coordinate monthly ongoing Board training segments into the Board Meetings schedule and conduct new Board Member Orientation and Training regarding Board functions and the development of succession plans with Board Officer roles.**
- 5. Board Development will conduct, on an annual basis, a Board Self-Evaluation for reporting and assessment of board recruitment and training needs.**

## **Goal 4 — ASSESS AND UPDATE INFORMATION TECHNOLOGY (IT) AND OPERATIONAL INFRASTRUCTURE TO MEET CURRENT ORGANIZATIONAL DEMANDS**

### **OBJECTIVES**

- 1. Assess our current security systems and update the IT hardware and software— ongoing annually.**
  - a. Consult with external IT support to monitor cyber threats monthly.
  - b. Research keyless entry systems and request bids to identify cost effectiveness during year one.
  
- 2. Increase staff technology competencies through continuous learning opportunities to ensure optimal use of NILP hardware and software.**
  - a. Conduct survey to assess staff IT knowledge and needs assessment in Year One.
  - b. Provide staff with regular IT training for basic, intermediate, and advanced levels.
  - c. Provide individualized coaching and offer external IT training and support where appropriate.
  - d. Conduct quarterly meetings with Program Managers to ensure technology is meeting current programmatic needs.
  - e. Establish annual IT/Program Leadership meetings to plan for future program-specific needs.
  
- 3. Increase consumer technology access and communication.**
  - a. Conduct consumer survey regarding access to technology resources in the home.
  - b. Identify opportunities to leverage the use of technology as a service delivery method, i.e.: texting, website communication.
  - c. Increase the percentage of consumers who provide an e-mail address for on-going communication.
  
- 4. Conduct a needs assessment of current telephone system to identify internal and external gaps causing system interruptions.**





- a. Research and compare alternate phone systems to determine if the current system is adequate to support current and future business needs.
  - b. Conduct a financial analysis of the cost for transitioning to a new system.
- 5. Streamline agency-wide electronic filing processes to meet contractual and compliance standards.**
- a. Implement electronic file Record Retention system.
  - b. Conduct annual Quality Assurance throughout the organization.

**Goal 5 — EXPAND PHYSICAL PRESENCE IN OUR SERVICE AREA****OBJECTIVES**

- 1. Recruit and attract staff to serve the underserved Khmer and African American population in the Greater Lowell area.**
  - a. Provide outreach to community organizations to improve consumer and partner relationships.
  - b. Plan specialized community events on a calendar basis throughout the year.
  
- 2. Explore new office locations with increased accessibility for staff and consumers within our service area over the next 3-5 years.**
  - a. Research commercial real estate market and ownership opportunities.
  - b. Review findings and prepare cost analysis to present to the Board of Directors.
  - c. Research the Public Transportation access for commercial sites.
  
- 3. Develop a staffing model to determine capacity and space requirements, including potential growth over the next 3-5 years.**
  - a. Evaluate the hybrid model staffing currently in place in Year One through a staff survey.
  - b. Prepare staffing model requirements and minimum space determinations.
  - c. Evaluate program, staffing, and space requirements regarding administrative versus field staff and technology requirements.

## **6th Goal — CONTINUE EXPANDING NILP SERVICES TO UN-SERVED/UNDERSERVED POPULATIONS**

Our avenue and pathway to increasing services to underserved populations is by expanding our peer work force and increasing our services that address co-morbidities for those who need and want Independent Living Services.

### **OBJECTIVES**

- 1. Recruit and maintain staff who represent underserved populations.**
  - a. Identify the under-represented staff populations and develop a recruitment strategy.
  - b. Host multi-cultural community events on an annual calendar basis to recruit and retain diverse NILP staff.
  - c. Leverage the NECC partnership in building a Peer Workforce reflective of IL (Independent Living) values and inclusiveness.
  
- 2. Conduct outreach, education, and advocacy in the community to provide access to peer support for populations otherwise underserved.**
  - a. Provide technical assistance to community-based agencies regarding the value of peers in the workforce.
  - b. Provide professional development and advanced education opportunities through NILP scholarships, tuition remission, and peer training to underserved populations in our communities.

**7<sup>th</sup> Goal —MAINTAIN FACILITIES AND BUILDING OPERATIONS****OBJECTIVES**

- 1. Maintain and monitor HVAC, sprinkler, and facility infrastructure needs and perform preventative maintenance annually.**
- 2. Research vendors, request bids, and evaluate quotes when appropriate.**
- 3. Manage Transportation logistics for our consumers, advocacy events, and staff consumer requests in a timely and cost-effective manner.**
- 4. Maintain and monitor vehicle preventative maintenance and prepare a purchasing schedule with the vehicle life span.**
- 5. Apply for MARTAP, state transportation funding resource, to acquire a new replacement wheelchair lift-equipped vehicle to meet our growing consumer's needs during this five-year plan.**
- 6. Manage Transportation staff and monitor certifications.**
- 7. Review and update NILP's Emergency Preparedness and Business Continuity Plan, as well as a "shelter in place" plan.**
- 8. Collaborate with IT and Finance to research the cost effectiveness of installing a new Staff Security Card building access system.**