

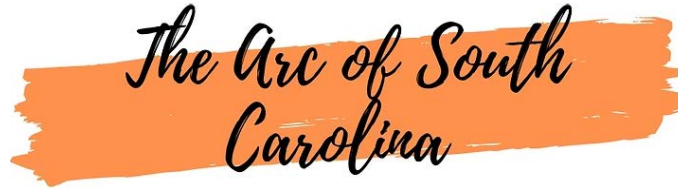


Organizational Assessment Results and Summary
October 19, 2020

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[Data Analytics](#)



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Executive Summary

- Background

The Arc of South Carolina is a non-profit, grassroots organization, founded in 1957 by a small group of parents and other individuals concerned about the rights of people living with developmental and intellectual disabilities (ID/DD). In conjunction with The Arc of the United States, we continue to advocate for the rights and full inclusion of all children and adults with these disabilities. We provide leadership in the areas of advocacy, education, health, employment, public awareness, prevention and research. We are a state-wide agency with extensive experience working with adults with ID/DD and broad networking capabilities to successfully coordinate and implement programs for individuals with intellectual and developmental disabilities. The Arc of South Carolina’s mission is to promote and protect the human rights of people with intellectual and developmental disabilities and actively support their full inclusion and participation in the community throughout their lifetimes.

- Objective

An organizational assessment is a planned systematic review of an organization’s processes, work environment, and organizational structure. The objective is to assess the dynamics at work in our organization and use that information to help design the preferred future state of our organization. In other words, the organizational assessment sets the stage for strategic planning by telling you where you are so that you can effectively plan for where you want to go.

The assessment process guides the development of recommendations and action plans to support achievement of organizational objectives. The approach is to collect data and analyze factors that impact organizational performance to identify areas of strength as well as opportunity.

- Methodology



There are several different types of tools and techniques used to scale an organization's existing and future conditions. These different strategic tools help with decision-making and deciding a way forward. SOAR analysis is a strategic planning method which benefits an organization by placing an emphasis on their current strengths and opportunities, and creates a vision of future aspirations and the results they will achieve.

The acronym SOAR stands for strengths, opportunities, aspirations and results. It is a strategic tool used for analyzing an organization's current strengths and vision of the future for developing its strategic goals. This tool should prompt and support organizational reflection, decision-making, and improvements.

When conducting a SOAR analysis, the fundamental questions to be answered are:

- What are our strengths?
- What are our best opportunities?
- What will be our preferred future?
- What are the measurable outcomes that will tell us we've achieved that vision of the future?

Soar analysis looks at both the present and the future and helps the organization move forward. The strengths and opportunities are looking at the present whereas aspirations and results look toward the future and sow a way forward for the organization.

Using the information gathered from the organizational assessment, and participation of employees and stakeholders, we will be able to identify our organization's unique strengths, capabilities, resources and assets. We will also discover the desired results and aspirations that produce a persuasive vision of the future using the best of the past and that also motivates and challenges the status quo. We will identify opportunities that have the most potential, write goals for each of the strategic opportunities, and find measures that will help track our success. Finally, we will plan actions and execute a plan for each identified goal.

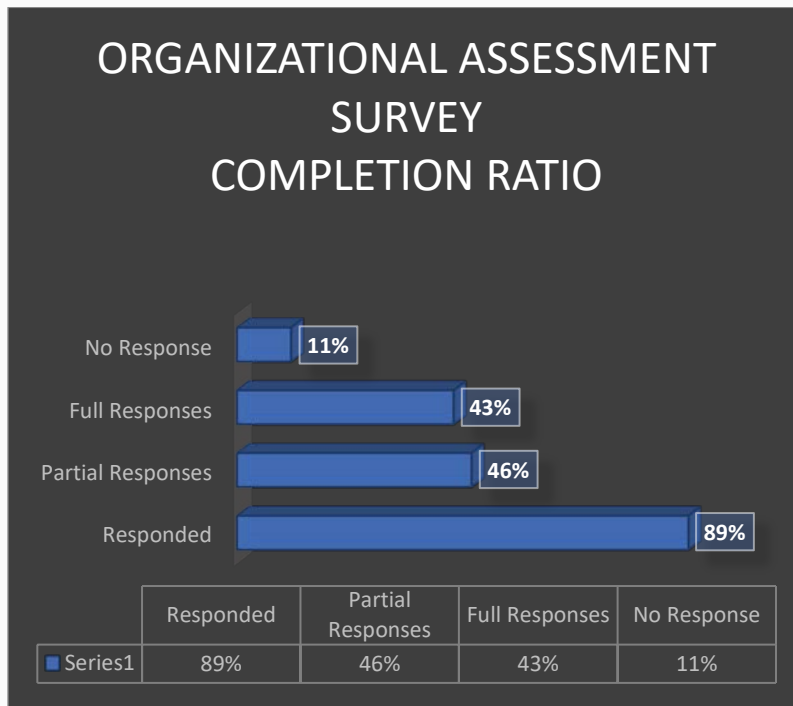
On October 12, 2020, using Google Forms, an organizational assessment survey was sent to 28 staff members and board members.

Staff Members (19)

Margie Williamson, Executive Director
 Becky Peters, Director of Operations
 DeAndrea McMullen, Director of Case Management
 Rachel Harry, Case Management Supervisor
 Alyssa Rosenfeld Tanczos, Case Manager
 Joe Covey, Case Manager
 Brittany Lowder, Case Manager
 Kaci Mize, Case Manager
 Ashleigh Little, Case Manager
 Connie Brown, Case Manager
 Derek Smoot, Case Manager
 Lebresha Ratchford, Case Manager
 Carly Tindall, Case Manager
 Olivia Richardson, Case Manager
 Sarah Ellegood, Case Manager
 McCall Rice, Case Manager
 Liz Hawkins, Case Manager
 Lucy Townsend, Case Manager
 Bryan Antonoff, Case Manager

Board Members (9)

Megan Anderson, President
 Rob Mendenall, Vice President
 Joseph Morgan Leath, Treasurer
 Shay Shealy West, Secretary
 Danni Bloom, Board Member
 Kappy Carter, Board Member
 Lisa Christian, Board Member
 Jackson Wools, Board Member
 Walter Riggs, Board Member
 Dave Moen, Board Member



- Results

Organizational Assessment Survey Questions & Responses

The following information is a brief summary of the survey results, with duplicate answers eliminated to keep this report succinct. If the wording was slightly different, however, the information was included. The unedited survey responses and data analytics are located [here](#).

Q1-Strengths: What are we most proud of as an organization?

- Making a difference in people's lives
- Hardworking staff and case workers
- People first, person-centered
- Going above and beyond any other organization for our clients
- Helping individuals and families daily so they can be happy
- Relationships that are built between clients and case managers
- Advocacy efforts to protect human rights of people with disabilities, while promoting a life free from limitations that can be actualized with the proper knowledge and resources
- Strong fiscal responsibility because without it we wouldn't be able to provide the world class care that our clients have come to expect
- Dedication and compassion for our clients
- Supporting case management needs state wide
- Becoming the crowning jewel for progressive change in our state when it comes to providing services to our clients
- Quality of our service to our clients

Q2-Strengths: What makes us unique?

- The structure of the SC Arc, beginning with the passion of its executive director and staff
- Personal experience; making people feel like family
- Person centered approach, monitoring process, supportive decision making
- Personalized approach to how we serve our clients
- Passion, love, time, and dedication they spend helping their clients and families
- Relationships we have with our clients and the involvement we have with the families
- Promoting independence for our clients while educating families on the restrictions and limitations that come along with obtaining legal guardianship
- Having case managers in every region of the state; very knowledgeable staff members
- Providing support to individuals across the spectrum of needs and abilities; supporting all ages
- Knowing how to do our job; effective at creative solutions for services needed
- Going the extra mile when others do the bare minimum; seeing the value of our clients; building trusts so we can better help our clients

- Being a smaller organization means more a personalized service for our clients
- Commitment to families that need services that are not waiver funded
- Unique culture that is based on openness and truth
- Being located all over the state, we hold ourselves to a high standard
- Hard work and frequency of contact with our clients
- Quality case management
- Our people and their passion
- Compassions; consistency; communication

Q3-Strengths: What is our proudest achievement in the last year or two?

- Learning and becoming better everyday
- Growth and expansion as an organization
- Providing top quality, uninterrupted care and exceptional case management during the midst of a world-wide pandemic
- Expansion of our case management services
- Getting nursing staffed continuously for a client, monthly staff trainings, google drive
- Fighting for our clients for their needs and supports
- Expanding to serve more areas
- Managing the influx of new cases when other providers are shutting their doors
- Hiring Becky- she has the tools/experience/dedication to grow the nuts and bolts aspects of the office/case management/employees, etc., enabling us to send Margie out to do the true advocacy work that this organization was designed to achieve
- Quality case management

Q4-Strengths: How do we use our strengths to get results?

- Getting the right people in the right roles and utilizing their talents
- Teamwork
- Always finding a way; leaning on others who may be more experienced
- Advocating for others; going above and beyond
- Identifying strengths and utilizing them when managing caseloads
- Using knowledge and love for helping individuals get results; having the heart to help when others do not
- Understanding each client and their needs allows for the best services to be provided
- Providing and assisting clients with the tools and resources available to educate, empower, and help them achieve their goals
- Building relationships with our families to identify the needed services
- Uniting as a group to focus on priorities, while reinforcing core values and inspiring action to get results; synergy drives high performance
- Using the staff and their drive to continue our growth on positive results
- By not spending time on weaknesses and pushing through barriers with our strengths

- Using our voice to be an advocate for those who may not have a voice
- Continuing to fight and be persistent
- Personal care/response from case manager provides higher quality of care to clients
- Passion for the job keeps us going as well as the perseverance to be the best when helping clients and families
- Decisions to move forward are made by encompassing how all parties that are involved have a voice and how those decisions will affect all involved in the outcome
- Continuing to look into the issues that our clients face until we are able to find a solution, or until all possible solutions have been exhausted
- Knowledgeable case managers to assist clients
- Great training of highly motivated people
- Involvement at the state level; speaking up on client's concerns and needs

Q5-Strengths: What do we provide that is world class for our clients, our industry, and other potential stakeholders?

- Quality staff
- Professionalism
- Diversity, case management approach
- Vigorous work ethic
- Time, dedication, love, effort, and passion; showing clients you care means a lot
- Providing services that adhere to the client's specific needs
- Top quality case management based on a person-centered model
- Constant communication, community events, and resources
- Connecting children, adults, and families to a wide range of resources; providing a continuous source of information, referral and support during times of transition of crisis
- Advocacy
- Service delivery
- Providing clients with services, advocacy, and an extension to understanding the options of a better life for their family or for the client
- Knowledge
- Availability
- Providing services to all clients and families, no matter the funding
- Holding up core values that are dedicated to honesty and truth; "What you see is what you get"
- Compassion, caring, and hardworking case managers
- Tenacity
- Increasing independence and self-advocacy
- Consistency; efficient processes for meeting clients' needs during a national pandemic

Q6-Opportunities: What are the top 3 opportunities on which we should focus our efforts

- Patient care; advocacy; strong public image
- Direct involvement with clients; managing future cases with individuals; becoming aware of other state Arc programs and how they are working
- Time management; efficiency; client services
- Support; communication; dedication and passion
- Building trust; attending events that put the Arc out into the community; being more involved with clients outside of just case management
- Self-advocacy; independence; education of civil and human rights
- Client services/needs; community assistance/resources; Medicaid assistance
- Community education; advocacy; training for self-advocates, parents, siblings, professionals, and other community members regarding employment options
- Pay for staff; fundraising; additional advocacy/services
- Mentoring case managers; solidifying the management team with goals and clear expectations
- Focusing on clients because their wants and needs are not always guaranteed; advocacy; programs
- Training for services; outside training; more knowledge about services
- Making ourselves more known to families who need help or assistance after early intervention stops
- Develop opportunities for growth within the organization to allow current employees to see they have a home where they can dedicate their careers; develop the advocacy aspect of the organization to involve multiple positions around the state (teaching and training individuals that become organizers that teach and promote more self-advocacy within our clients and their families; find more ways to become a more sustainable that can be less dependent on state monies where possible
- Advancement; recognition; self-care
- Education for parents/advocates; rights education for our clients; general education for clients
- Independence; quality of life; equity
- Meeting needs of expanding case load; fundraising; thinking outside the box to meet needs

Q7-Opportunities: How can we best meet the needs of our clients?

- Listening first and not prejudging
- Continuing advocacy; promoting self-advocacy
- Identifying needs first and then figuring out possible resources
- Listening and striving to help clients with their daily living
- Understanding each client's individual needs
- Implementing the person-centered model, which allows the client's needs and wishes to be better understood

- Continuing to communicate and build relationships with our clients and the people in their support system
- Continuing to provide a wide variety of services, supports, and advocacy (to include public policy advocacy, person-centered and financial planning, and recreational activities)
- Continuing to hire staff
- Talking to our clients and listening to their needs, discovering needs they may not even know that have
- Continuing to provide services
- Staying on top of/ahead of needs to make sure they are being met
- Going 3-4 deep with questions when assessing; having empathy and stop thinking some families are “all good” or “don’t need anything”
- Develop a dedicated staff that is invested in the long haul (staff retention)
- Maintain ethics, quick response times, and providing clients time to discuss what services they need and what concerns they have
- Speaking directly to the clients and their parents to develop a plan that keeps their unique needs in mind
- Service coordination based on individual needs
- Do what is expected/needed
- Remaining consistent

Q8-Opportunities: What are possible new markets, services, or processes?

- Corporate presence; showing companies how they can make a difference
- Having case workers actually work with the care providers
- Seeking providers to have caregivers for our clients, if possible
- More local organizations that we can work in conjunction with to carry out services
- Driver’s education courses; sex education; peer mentors
- Move toward more direct services (pre-employment training, manufacturing, community integration, interpersonal skills where we could teach our clients to use zoom or other social media/video communications)
- Early intervention; additional grants; more advocacy efforts at the state house through grass roots initiatives
- Fundraising
- Funding for extra therapies when school is not providing therapy; transportation service that assists with clients who are not residential, even for nonwaiver clients; tutoring for children with special needs or funding to help provide this service
- Schools
- HASCI
- Trainer position developed
- Support groups
- Rotating grant run programs through each county

Q9-Opportunities: How can we reframe challenges to be seen as exciting opportunities?

- Focusing on solutions and not obstacles
- Seeking what is to be learned and share amongst one another
- Showing outcome through the success of individual plans
- Setting real and tangible goals and expectations
- Seeing every challenge as an opportunity to learn
- Not getting overwhelmed with challenges-stay calm and relaxed; communicating with each other to resolve the challenge
- Finding new opportunities or ways to obtain services for our clients
- Creating innovative, new ways to deliver services that meet our client's needs
- Using online collaboration to accomplish more tasks (socialization, training, collaboration)
- Maintaining a good mindset
- Using challenges to teach us new opportunities to help our clients and new case managers
- Using challenges to help us advance our careers within the organization
- Margie has does this very well as our director
- Getting employees to understand the bigger picture of the importance of their work will allow them to take on the challenges with a badge of honor; bring in a super star social worker from an outside agency to give pep talks, teach classes, hold sessions to inspire how a dedicated life in this field can be worthwhile
- Through positive support and reinforcement
- Helping change the thought process from being a challenge to an opportunity
- Better explaining the purpose of the opportunities and how they will help our clients
- Increasing staff pay so they feel more valued

Q10-Opportunities: What new skills do we need to move forward?

- Stronger technical usage; move head on into the next generation of services
- Teamwork (making sure everyone is on the same page)
- Training case workers to work with other care providers and facilitators
- Evolving with whatever is needed to help our clients
- Stronger communication; leadership
- Refresher training opportunities; increased communication
- A dedicated IT team to support our case managers so our executives can spend more time on their job descriptions and assisting our clients as needed
- Better communication skills within the organization
- Better training for our staff
- Continued training on the person-centered model; navigating through the COVID-19 pandemic in the most effective way
- Finding diverse funding sources- fundraising, public charities, private donors, etc.

- Better management of organizational changes; improved prioritization; conclusively establish an organizational structure of management
- Increased consistency within the company and everyday work
- Empathy, knowledge, and a passion for social justice
- Continued development of a dedicated staff that will stay for the long haul
- Building a strong foundation; knowing the basics
- Transparency and training on new methods/updates and tools
- Decreased case loads
- Independence; autonomy; open communication

Q11-Opportunities: When we explore our values and aspirations, what are we deeply passionate about?

- Our clients and people in general
- High quality; direct services to each client
- Helping others
- Advocacy
- Client care; production
- The well being of our clients and their families; making sure they are getting all they need
- Providing the best services to fit our client's needs
- Promoting self-advocacy and independence while educating and protecting their civil rights
- Being a voice for our clients
- Supporting people with I/DD so they can learn the skills to increase independence and promote inclusion in the community
- Sitting in the circle with our clients and families
- Standing up for what is right to ensure that people are served well
- Supporting individuals to achieve their goals and helping them cross barriers along the way
- Helping clients and families live their best possible life
- Making sure our clients have the opportunity to pursue their goals; ensuring they are not being discriminated against
- Arming our clients with the knowledge required in today's world
- Outstanding compassionate service to clients
- Client involvement in decisions about their services and needs

Q12-Opportunities: What strategic initiative (project, program and processes) would support our aspirations?

- I would hope all would
- Inservice training of staff; written expectations for staff

- It's a delicate balance
- More training on new programs or processes
- Having local organizations become aligned with the values we hold (ABLE-SC)
- Training on advocating for residential placements, IEP's, etc.
- Enhancing national and state policies, practices, and sustainable systems that result in improved supports to families; repairing the damage caused by a long history of discrimination, segregation, and denied access to opportunities
- A review of staff salary; IEP advocacy; clarified transition processes and fact sheets for families that would provide them with information across each era in time (EI, transition, adulthood)
- Advocacy group/trainings
- Assisting with some of the programs
- Supports for employment; supports for independent living
- Programs that offer funding/support
- Self-advocacy group; more program like the one that have been done in the past
- The Buddy Program- getting clients companions
- Increased outreach to elementary, middle, and high schools
- Parent support groups
- Fundraising

Q13-Results: Considering our strengths, opportunities, and aspirations, what meaningful measures would indicate that we are on track to achieving our goals?

- Increased productivity; financial soundness
- Client satisfaction
- Families not transferring; increase in new referrals
- Communication and cooperation from other agencies regarding our client's needs
- Results verified by progression
- Seeing progress
- Providing more opportunities for independence
- Witnessing clients achieve their goals with our support
- Measuring the distance between how far we have come and how far we have to go and using that information to create a roadmap to success
- Growth through referrals from other agencies; our reputation at DDSN; the networks that have been formed due to an amazing executive director
- Establishing a plan with guidelines and putting it into action
- Ability to fundraise
- 100% employee retention for 2 years; having Margie at the statehouse full-time
- Employee satisfaction
- Feedback from clients
- Staff feeling more valued

Q14-Results: What resources are needed to implement vital projects?

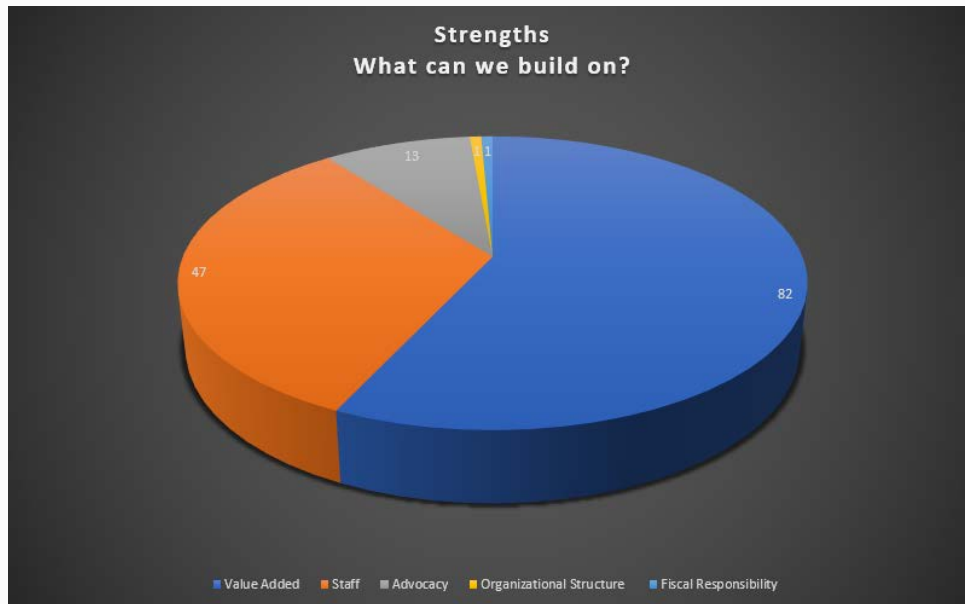
- People; time
- Funding; staff involvement; presenters with expertise, motivation, and a drive for success
- Proper training
- Knowledge
- Vision alignment with more local organizations
- Planning; dedicated team; effective communication; critical thinkers; negotiators; time management; evaluation of potential risks
- Higher reimbursement rate for case managers
- Fundraising expertise
- Information and resources to support new projects

Q15-Results: What are the best rewards to support those who achieve our goals?

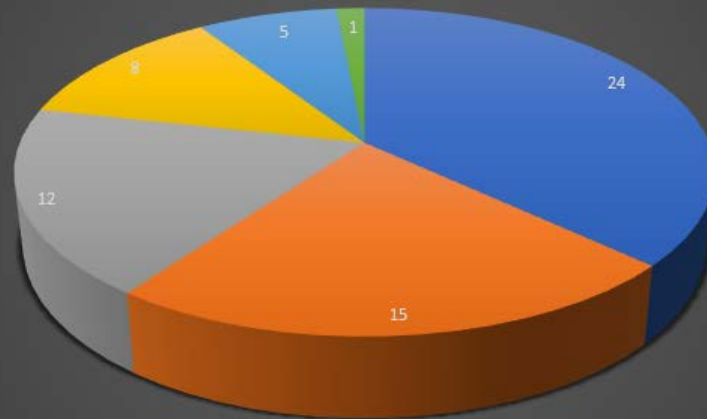
- Success
- Recognition
- Monetary rewards
- Praise, acknowledgement; continued quarterly bonus
- Gift cards; lunch
- Bonuses
- Validation and recognition
- Incentive program; days off
- Opportunities

Conclusion and Recommendations

The infographics below allow us to see the number of times each topic or theme was mentioned during each particular section of the organizational assessment survey. Using this data, we can gauge the level of importance of each topic, according to the survey results that were submitted.

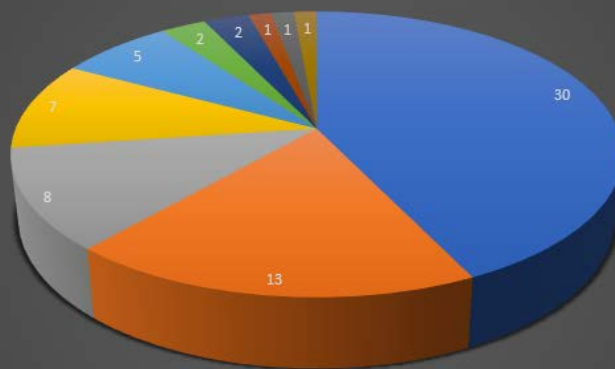


Aspirations What do we care deeply about?



■ Clients & Quality of Services
 ■ Additional Programs/Services
 ■ Advocacy
 ■ Investing in Staff
 ■ Community Collaboration
 ■ Fundraising

Results How do we know we are succeeding?



■ Investing in Staff
 ■ Client Progress/Feedback/Satisfaction
 ■ Increased Productivity & Organizational Growth
 ■ Financial Soundness
 ■ Employee Retention/Satisfaction
 ■ Implementation of Procedural Guidelines
 ■ Agency Reputation
 ■ Ability to Fundraise
 ■ Teamwork/Communication

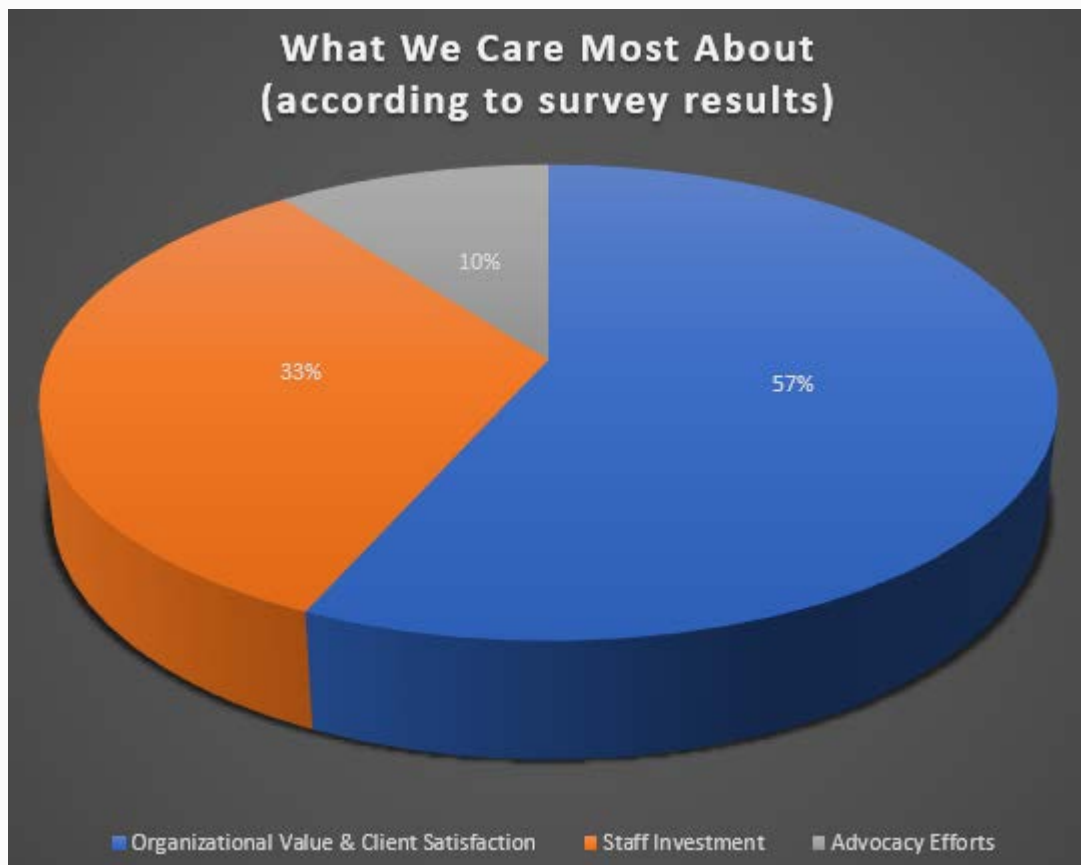
Survey Results Analysis

This chart represents the things that are most important to our organization, according to the survey results.

Organizational Value & Client Satisfaction is a representation organizational expansion, the value that we have been adding to our client's lives, client satisfaction, and our desire to continue growing, adding value and satisfaction to the lives of our clients and their families.

Staff Investment is a representation of the strength of our staff and the desire to increase their resourcefulness and job satisfaction.

Advocacy Efforts is a representation of our current advocacy efforts and our desire to increase those efforts through increased community outreach and education, client and family education, and through state and federal policy initiatives.



It's evident from the results of the organizational assessment that our staff and board members gauge their strengths by the programs and services our clients receive and the satisfaction of the people we serve. Our team has a strong desire to continue adding value to the lives of our clients and families, while aspiring to do even more to help enrich the quality of their lives through additional services and supports. These results show that The Arc of South Carolina is in alignment with the mission, core values, and guiding principles of the organization. Our programs, services, dedicated staff, advocacy efforts, organizational structure, and fiscal responsibility are our **S**trengths.

According to the survey results, the **O**pportunities that our organization would like to focus on include the following: continuing to add value to our clients and families; investing in staff; advocacy efforts; increased public visibility; client education; teamwork; growth/expansion; sustainability; and fundraising.

The staff and board members care deeply about the people we serve. This organization is dedicated to enriching the lives of people who have intellectual and developmental disabilities and their families. The survey results show that our **A**spirations include continuing to provide quality services and incorporating additional services, and programs for our clients and their families. Continued advocacy initiatives are also very important. One respondent mentioned that they would like to see our executive director able to advocate for our clients and families full-time.

How do we measure our **R**esults? How do we know if we are succeeding? Results suggest that we can measure success through employee retention, client feedback and progress, and by increased productivity and organizational growth.

The purpose of this organizational assessment is to provide critical insights needed to develop and launch new directions, goals, objectives, and priorities. This assessment serves as a foundation for strategy development and implementation. In our quest for continuous improvement, I recommend that agency executives and board members meet (virtually or in person) to further brainstorm organizational gaps and opportunities, identify high-priority items and elements that may have less impact but are easy to accomplish, and collaborate to create long and short-term action plans based on organizational objectives. By doing so, we can improve organizational performance and results, leading to improvements in processes, structure, skill development, and cost reduction initiatives.