



THE SUMMIT CENTER **2022-2025** STRATEGIC PLAN





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INTRODUCTION



This document provides the background information and details of the **July 2022 - December 2025 Strategic Plan** of The Summit Center (Summit).

The timeline for this Strategic Plan is as follows:

3rd - 4th Quarters 2022
1st - 4th Quarters 2023
1st - 4th Quarters 2024
1st - 4th Quarters 2025

STRATEGIC PLANNING PROCESS AND PARTICIPANTS



Summit's strategic planning process was led by Mary Beth Debus, President of Program Savvy Consulting (www.programsavvy.com), a professional with direct experience in facilitating strategic planning processes.

STAKEHOLDER ENGAGEMENT PROCESS

INTERVIEWS

The consultant conducted 13 one-on-one interviews with various stakeholders. These included funders, referral sources, affiliates, partners, donors, and collaborators.

The key questions guiding the interview centered around:

- the nature of their relationship with Summit and how they have utilized Summit's services.
- the main strengths and unique role Summit fills in the community.
- concerns about Summit's work.
- recommendations for Summit's future planning.
- what other organizations or resources they use to support their needs.
- opportunity to add any other comments.

DEVELOPMENT OF THE STRATEGIC PLAN

The information from the stakeholder process was used by staff and board to develop this Strategic Plan.

BOARD OF DIRECTORS PARTICIPANTS IN THE STRATEGIC PLANNING PROCESS

OPERATING BOARD

Mark E. Brand, Esq.
John R. Cinquino
Kathy Ralabate Doody, Ph.D.
John Gavigan
Elizabeth Schachtner
Eric Saenger
Ken Sniatecki

FOUNDATION BOARD

Neil Arnold
Dave Aston
Joe Brown
Cindy DeMarti
Tom Rosenecker
Andrew Ryan

STAFF PARTICIPANTS IN THE STRATEGIC PLANNING PROCESS

Stephen R. Anderson, Ph.D., BCBA-D, LBA, Chief Executive Officer
Lisa A. Foti, CPA, Chief Financial Officer
Amy Jablonski, Psy.D., BCBA-D, Vice President-Education and Behavioral Health
Diana Schmit, M.S., Vice President – Community and Adult Services
Mary Bennett, M.S.Ed., SBL, SDL, Summit Academy Principal
Ashlee Bronson, Assistant Director – Community Services
Pamela Giangreco-Marotta, Director - QA and Administrative Services
Sue Keenan, Director – Human Resources
Kara Lee, CFRE – Director – Development
Wendy Loverme, Director – Community Services
David Meichenbaum, Ph.D. – Clinical Director-Behavioral Pediatrics Clinic
Bill Schriever - Consulting Chief Information Officer
Johanna Shaflucas, M.S.Ed., BCBA, LBA – Clinical Coordinator – Behavior Support
Ellen Spangenthal, Director – Communications and Marketing
Susan Whittaker, Ed.D, SBL – Former Summit Academy Principal
Dana Zakes, CPA – Director - Finance

ACTIVITIES AND DATES

DATES	ACTIVITY	DESCRIPTION
January – February 2022	Interviews with stakeholders	Mary Beth Debus completed 13 interviews with a diverse group of stakeholders.
March 2022	SWOT analysis	Strategic Planning Core Team comprised of board members and staff participated in a two-hour SWOT analysis and identification of assumptions.
March 2022	Integration of content for review	Consultant developed a draft SWOT analysis for consideration by board and staff based on board/staff analysis and stakeholder feedback.
April 2022	Recommendation of foundational content	Strategic Planning Core Team met to review, edit, and agree to foundational content of plan.
April 2022	Adoption by Board of foundational content	At Board of Directors meeting, the board received a presentation on the process and outcomes to date and voted affirmatively that the content presented was a proper representation of Summit and should be used for the development of the plan.
May 2022	Identification of strategic priorities	Strategic Planning Core Team identified three strategic priorities from which to develop the plan.
June – July 2022	Development of strategic priorities	Three groups met to develop the goals, objectives, timelines, resources, owners, teams, and measures for each of the Strategic Priorities.
September 2022	Recommendation made to submit to Board of Directors	Strategic Planning Core Team completed a final review/edit and determined the plan was ready for board review and vote.
September 20, 2022	Board of Directors approves Strategic Plan	Board of Directors discussed and voted to adopt the 2022 – 2025 Strategic Plan.



THE SUMMIT CENTER, originally known as The Language Development Program and later as Summit Educational Resources, was founded in 1973 in the kitchen of Nancy Harris, the mother of a child with a profound hearing loss. Today, with a staff of more than 450 professionals and expertise in autism treatment, Summit is WNY's leading non-profit provider of evidence-based educational, behavioral health, adult, and community services to more than 1,000 children and adults each year.

Summit offers more than 30 programs through its four main divisions: **Early Intervention & Education, Behavioral Health, Community, and Adult**. Our goal is to help children and adults with autism, developmental disabilities, and behavioral challenges lead the most independent and fulfilling lives possible.

Summit's school, Summit Academy, and Early Autism Program operate based on the principles of applied behavior analysis (ABA) – identified by hundreds of scientific studies as the most effective method to teach students with autism and other special needs. In 2022, Summit launched Summit Academy Enhanced, an intensive assessment and treatment program for students with autism who exhibit significant challenging behaviors.

The Community Division offers a variety of respite, leisure, daily living and social skills programs and services as well as a variety of parent training services. Summit's **Adult Division** provides specialized community-based day habilitation, employment services and job coaching, as well as pre-vocational training. Together, these two divisions serve more than 400 individuals.

The Behavioral Health Division, through its Behavioral Pediatrics Clinic, offers insurance-based and private pay counseling and therapy for children and adolescents struggling with behavioral, social, and emotional challenges. The division also offers school consulting and professional training.

The Summit Center is a designated Regional Center for Autism Spectrum Disorder (RCASD), committed to providing information and practical strategies that are supported by scientific research. Through the Western New York RCASD, Summit provides conferences, workshops, and trainings throughout the year for educators, parents, and other professionals.

In addition to its programs and services, Summit has developed a comprehensive, web-based software called SummitUP which has been implemented in Summit Academy and licensed to other schools/non-profit agencies.

Summit's staff includes licensed psychologists with significant experience in the identification, treatment, and education of children with autism. The team also includes doctoral level educators and physical therapists, board certified behavior analysts, and more than 120 masters level professionals in education, speech pathology, occupational therapy, and other related professional disciplines.

VALUES



OPTIMISM

We expect the best of our efforts and ourselves.



RESPECT

We treat each other as we wish to be treated – with honesty and empathy.



ACCOUNTABILITY

We are committed to excellence and to demonstrating improved outcomes for those we serve.



INTEGRITY

We act ethically and responsibly in all our endeavors.



COLLABORATION

We achieve results through the cooperative efforts of our team, families, volunteers, and other stakeholders.



ADAPTABILITY

We seek opportunities to innovate and respond appropriately and flexibly to change.

ASSUMPTIONS



We have made the following assumptions that we believe are relevant to the next three years and influenced what we chose as our Strategic Priorities:

- 1 Staff recruitment and retention will continue to be challenging throughout the time of this Strategic Plan.
- 2 Summit will have a new CEO during the timespan of this Strategic Plan and there will be other leadership changes as well.
- 3 There will continue to be a demand for Summit services, particularly in the area of challenging behaviors.
- 4 Summit's approach will continue to be evidence-based.
- 5 Technology will continue to grow and play a role in success.
- 6 Nonprofits will continue to merge and engage in other partnerships/collaborations.
- 7 Collaborations with other organizations will become increasingly important.
- 8 Demand for teachers will continue to increase.
- 9 Financial resources will remain scarce and COVID-related funding will end.

SWOT ANALYSIS



The purpose of the SWOT analysis is to identify the Strengths, Weaknesses, Opportunities, and Threats impacting Summit. Strengths and Weaknesses are focused internally, where Opportunities and Threats are focused externally. The following is the outcome of that analysis.

STRENGTHS

- The Summit Center has a solid reputation for evidence-based practices and expertise in supporting people with autism.
- The staff and leadership at The Summit Center are central to Summit's success.
- Summit's investment in technology enables efficiencies, consistencies, and flexibility as needed.
- Financial and fundraising processes are strong.



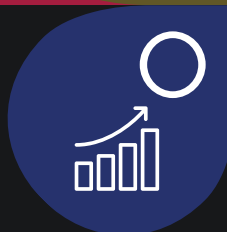
WEAKNESSES

- The staff at The Summit Center experience burnout and stress due to staffing shortages.
- Program offerings and locations can be limiting.
- Summit is struggling to prioritize and operationalize innovative programs, practices, and products.



OPPORTUNITIES

- The Summit Center has the opportunity to expand through merger and organic growth.



THREATS

- Summit's size and financial resources put the organization at risk.
- The maintenance, growth, and quality of programs are hindered by the shortage of qualified staff.



**STRATEGIC
PRIORITY
1**

EXPANSION

Lag Measure: Summit's expertise in behavioral supports and recognized success in providing quality programs results in growth in the number of people served and program/service options.

Goal 1: Maximize Severe Behavior Program to include collection of outcome data and pursue additional program funding.

Objectives

1.1	Implement staff training plan.
1.2	Develop and maintain expanded physician and medical partnerships and define associated policies and procedures.
1.3	Secure expertise to guide current planning and implementation to attract insurance reimbursement in the future.
1.4	Collect and analyze outcome data to indicate program success.
1.5	Develop implementation plan to secure insurance reimbursement.

Goal 2: Design an innovative housing option for people with autism.

Objectives

2.1	Research innovative housing options for implementation independently or with a strategic partner.
2.2	Define population to be served.
2.3	Write funding proposals that include implementation and sustainability plan.
2.4	Secure funding which leads to implementation of housing option plan.

Goal 3: Develop and offer additional adult services for people with autism and/or complex needs.

Objectives

3.1	Design and evaluate options for adult services that fit within Summit's capacity, align with OPWDD priorities, provide opportunities for collaboration with strategic partners, and achieve sustainability.
3.2	Decide which programs/services Summit will develop/offer (with or without a strategic partner).
3.3	Write funding proposals or develop a financial plan.
3.4	Develop implementation plan.
3.5	Execute implementation plan.



**STRATEGIC
PRIORITY
2**

STAFFING

Lag Measure: A variety of measures will show improvements in recruitment and retention of staff.

Goal 1: : Employee total compensation package will more closely align with the market.

Objectives

1.1	Complete salary and benefits analysis.
1.2	Use survey data to determine how compensation influences recruitment and retention.
1.3	Use salary and benefits analysis results, compensation survey results, exit interviews, and financial resources to develop a total compensation package for staff.
1.4	Develop and implement a communication/education plan to highlight benefits of compensation packages and draw comparisons to competing options.

Goal 2: Develop a succession plan for key leadership positions

Objectives

2.1	Develop and execute succession plan for key executives and leadership team.
2.2	Identify potential internal successors for key leadership positions (referred to as "high potentials.")
2.3	Create professional development plans for high potential current staff to prepare for possible future positions.
2.4	Document process for external recruitment for key positions.
2.5	Develop and implement process for updating professional development plans and analysis related to succession for high potential staff.

Goal 3: Summit adopts new strategies to increase retention.

Objectives

3.1	Develop an employee survey to determine strongest motivators of staff to influence the design of new strategies.
3.2	Explore innovative staffing to address both staff preferences and Summit needs.
3.3	Develop new strategies for Summit Academy to ensure more stable staffing.
3.4	Develop implementation and communication plans for new strategies.
3.5	Implement new strategies and collect data to allow for appropriate adjustments.



**STRATEGIC
PRIORITY
3**

FINANCIAL

Lag Measure: Achieve gross income from fundraising and non-operating (business development) efforts of \$2.7 million over the strategic planning period.

Goal 1: Position Summit to bring in new dollars to the organization.

Objectives

1.1	Develop updated goals for philanthropy to correspond with expansion plans from strategic plan.
1.2	Secure content experts to assist in completing RFPs that require specific knowledge, expertise, or experience (i.e. affordable housing) and to tap into other state and/or federal funding.
1.3	Develop and execute a plan for a full integrated culture of philanthropy that supports growth in major gifts.
1.4	Secure a base of committed donors in planned giving program.

Goal 2: Financial priority is given to funding staffing and securing investments in staff.

Objectives

2.1	Develop financial formulas to meet staffing salary and compensation goals. (See Strategic Priority 2, Goal 1).
2.2	Advocate for compensation rates for staff.

Goal 3: Foundation Board defines itself for the long term and in support of the Strategic Plan.

Objectives

3.1	Foundation Board examines and defines its purpose, goals, and methodology for distribution of money for strategic plan efforts and long-term needs.
3.2	Foundation Board sets annual and event-specific financial goals to advance strategic plan initiatives and meet newly articulated goals.
3.3	Identify funders and secure support to achieve newly articulated goals.





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