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*Boundless Miracles, LLC*

*Where Miracles Abound Everyday!*

## Strategic Plan

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**October, 2021**

## EXECUTIVE SUMMARY

Boundless Miracles, LLC was created in order to provide quality services to individuals with intellectual and developmental disabilities. Many of the founding members of Boundless Miracles, LLC have personal experience with caring for individuals with intellectual and developmental disabilities that goes far beyond just being part of their job, permeating their own natural families. Understanding first-hand how difficult it can be to find qualified staff and providers whose top priority is supporting individuals with intellectual and developmental disabilities with integrity and compassion, and providing quality habilitative services, Boundless Miracles, LLC was formed in an attempt to seek out and employ the most qualified Professionals and Para-professionals in the field to support those consumers we serve.

Boundless Miracles became a limited liability company in 2009 with one owner and began providing quality services to recipients eligible for the I/DD Medicaid Waiver in September 2009. In August, 2014, the ownership was changed to two owners at 50% each. Since then, the management team of Boundless Miracles, LLC has been working to strengthen and improve the services provided to those with intellectual and developmental disabilities. Part of strengthening and improving services is continually participating in the process of strategic planning.

Boundless Miracles, LLC provides services under the NC Innovations Waiver (effective February 1, 2013). Those services changed in October, 2016 to include Community Living and Supports (a combination of In Home Skill Building and Personal Care), Respite Services, Community Networking and Residential Supports for AFLs. The service change was implemented as consumers annual plans were renewed to be completely phased in by September 30, 2017.

Boundless Miracles, LLC is proud to employ the most qualified management staff available, with a management team amassing a combined total of 60 years in the field of Mental Health/Intellectual and Developmental Disabilities, including personal and professional experience. Other strengths and capabilities include having a Qualified Developmental Disabilities Professional with many years of experience serving as our Clinical Director, maintaining strong relationships with professional individuals who can support the organization, including other Mental Health/Intellectual and Developmental Disabilities/Substance Abuse agencies, lawyers, politicians, and doctors, and upholding a reputation of integrity and outstanding moral fiber.

## DEMOGRAPHICS OF THE SERVICE AREA

Cleveland County is a rural area with approximately 98,078 people and 38,555 households according to the 2017 census. The following table identifies more of the demographics of Cleveland County:

General Demographics	
Population	98,078
Median income for family	\$37,793
Population below poverty line	21.7%
Racial Makeup of Cleveland County	
White	75 %
Black or African American	20 %
Native American	0.3 %
Asian	0.9 %
Other Races	1 %
Bi-racial or Multi-racial	1 %
Hispanic or Latino	2 %

## STRATEGIC PLANNING

Boundless Miracles, LLC is dedicated to providing compassionate, innovative, individualized, quality services to persons with intellectual and developmental disabilities and their families. Our professional employees work with consumers and families within our community, Cleveland County and the surrounding areas, to access natural supports and create opportunities to meet the needs of persons with intellectual and developmental disabilities. Natural supports for consumers include people in their lives who are not paid to provide support to them, such as family members, members of the clergy, friends of the family and/or consumer, co-workers, neighbors, and any other persons that are important to the consumer.

Boundless Miracles, LLC will always make consumers our top priority. It is our duty to assist them in finding and creating natural resources within our community to meet the needs of each consumer and their families.

It is the goal of Boundless Miracles, LLC to assist consumers and their families in realizing their dreams and to participate as active members of treatment teams in order to facilitate true person-centered planning. Person-Centered Planning is utilizing a team approach, including professional staff and natural supports, to develop goals that are based on the individual's wishes, desires, goals and aspirations in order to assist them with developing a greater level of independence and maintaining their placement in their community.

### **Issues faced by the organization**

Any organization will have issues to face at various points in their journey of reaching their mission and unfortunately, Boundless Miracles, LLC is no exception to this phenomenon. Issues faced by our organization include the ever changing legislation regarding Medicaid services and changes necessary to integrate whole person health care, changes in payment for services which are moving from fee for service rates to Value Based payments which there is still a lot of unknown surrounding. Boundless Miracles transitioned to Electronic Health Records in 2018 and was connected to the NC HealthConnex in 2019. Although that requirement has been rescinded, we will maintain our connection because we believe that it will be useful in the future for more changes being implemented.

In early 2020, all provider agencies that provided any type of Personal Care services were required to begin Electronic Visit Verification (EVV) through the EHR. This was a big change for our staff and it has been a challenging adjustment. Staff are required to use EVV when providing Community Living and Supports which includes Personal Care services. Staff are required to check in when they arrive at the consumer's home and check out when they leave. GPS is part of the EVV so that the location of the provision of services can be tracked. Some staff are continuing to forget to check in or out and it has been a lot of work for us to keep up with.

The concern regarding Medicaid rates or payments is founded upon historical evidence. Prior to the downfall in the economy, the rates for I/DD services typically increased with each budget renewal. However, in the past years, rates decreased dramatically, thus making it difficult to profit by providing these services. In 2013 the MCO became the authority for setting rates for services and they maintained the rates without reduction. However, in October of 2016, changes were made to services (the combination of habilitative services and personal care to Community Living and Supports) which

decreased the rate on habilitative services but increased the rate on personal care. With this in mind, Boundless Miracles, LLC is cautious regarding the future and being able to maintain qualified personnel to ensure quality care to our consumers. However, in 2018, Partners began discussions regarding Value Based Payments for providers. Partners has always focused on outcomes for consumers as a priority and this will allow providers who are providing quality services to have the opportunity to be reimbursed at higher rates. One of the issues is deciding what the benchmarks will be for IDD providers because we are all so different in the services that we provide. It is hard to determine standard benchmarks for all providers when we are so diverse. Boundless Miracles has participated in these discussions to help Partners outline their benchmarks and we are confident that we will be able to meet and exceed any benchmarks that are determined. We believe this presents a financial opportunity for us to receive a higher rate of reimbursement. This is scheduled to change when Medicaid reform begins with Tailored Plans for our consumers possibly in 2022.

In 2016, the legislation decided to require all Medicaid providers to connect to the NC Health Information Exchange which requires the use of Electronic Health Records. In order for us to meet this requirement, we purchased our Electronic Health Records system from Therap. The process to convert to EHR began in March, 2018 and in January, 2019, we eliminated paper grids and document in EHRs in Therap. This allows staff to increase the time they spend providing services to our consumers and relieves the travel time associated with having to bring their documentation to our administrative offices and completing paper documentation.

There are several issues that Boundless Miracles, LLC is facing which concerns our enrollment with Partners Behavioral Health Management. Boundless Miracles, LLC met the criteria for enrollment and we have successfully met the requirements for monitoring with Partners. Concerns arise regarding the changes the state is making with Medicaid Managed Care and the transition from an MCO to private health care organizations. According to information that we are being given at this moment, all Innovations consumers will not transition from the MCO until 2022 under a Tailored Plan. Standard plans have already begun enrollment for others covered under Medicaid. There is so much we do not know about this enormous change and how it will affect our consumers and our organization that we are very concerned. We will make changes to our plans as we know more about the affect this will have on us.

Boundless Miracles has slowly grown over the course of the ten years that we have been in business and we feel that we have been successful in meeting consumer outcomes and providing quality services. The administrative staff at Boundless Miracles, LLC is highly qualified and each hold outstanding reputations in this community for their superior integrity, exceptional ethical conduct, and admirable moral fiber. One of our biggest issues that concerns us is that we are a small provider in comparison to larger providers who have an array of services and we understand that the MCO may want to decrease the number of providers in the network. We are dedicated to our consumers and will continue to attend trainings and other events held by Partners and the state to ensure that we are in compliance with all the requirements needed to stay viable within the provider network.

Our biggest concern for 2020 is of course, the COVID 19 pandemic and how it has and will continue to affect services for our consumers. Boundless Miracles, LLC has continued to provide services to all consumers and has worked hard to ensure the health and safety of our consumers and our staff. We have implemented the guidelines set for by CDC and DHHS and will continue to follow their

recommendations. There has been some flexibility in service provision and many consumers have had to receive their services within the home and not out in the community but we are all trying to make the best of this situation. Our main concern is the continuity of care for our consumers and their overall health and safety. We also want to ensure the health and safety of our staff who are truly heroes and continue to work on the front lines to provide the much needed services to our consumers.

### **Organizational Goals**

- Boundless Miracles, LLC will engage in a variety of marketing techniques in order to make the company name better known.
- Boundless Miracles, LLC will renew national accreditation through the Commission on Accreditation of Rehabilitation Facilities (CARF) in May, 2022.
- Boundless Miracles, LLC will continue the use of Electronic Health Records and to stay connect with the HIE even though it is no longer required.
- Boundless Miracles, LLC will adhere to requirements for using EVV on all Community and Living Supports services provided.
- Boundless Miracles, LLC will remain enrolled with Partners Behavioral Health Management and transition to a Tailored Plan provider as required in 2022.
- Boundless Miracles, LLC will maintain a fiscally responsible position.

### **Strategy for achieving those goals**

Boundless Miracles, LLC will utilize a variety of marketing techniques, including being a member of the Chamber of Commerce, newspapers and public events in order to market ourselves so that our community is aware that we are present to serve the needs of NC Innovations waiver consumers. Boundless Miracles, LLC will work to renew our three year national accreditation and continue our contract with Partners BHM. In addition to these strategies, Boundless Miracles, LLC will work to operate as a revenue producing entity and keep costs to a minimum. Strategies for achieving this include being energy efficient, reduced overtime hours, participating in provider fairs and ensuring that the most effective means possible for completing tasks are used. We will remain in compliance with the state regulations on EHR and the connectivity to HIE, as well as the EVV requirements with Therap as our vendor.

### **Service Area Needs**

Boundless Miracles, LLC understands that there is a continued need for providers of NC Innovations services. Many other needs exists within the service area, some of which Boundless Miracles, LLC is working toward obtaining and some of which we are not considering at this time, however that is not to say that they will not be considered in the future.

This list is a comprehensive list of the needs of the service area, not necessarily a list of services that will be provided by Boundless Miracles, LLC:

\* Overnight Respite Facility \* Additional Transportation Services \* Care Management Services

## GOALS & STRATEGIES

It is understood that without goals for improvement, people and organizations tend to stagnate. Stagnation does not allow for progress and innovation in the areas of services, structural site, activities, technology, and staffing. Boundless Miracles, LLC never wants to be considered apathetic or archaic. Keeping that in mind, it is important to Boundless Miracles, LLC to continually review and update the secondary goals of the organization that will best assist in the achievement of its primary mission, vision and goal. Boundless Miracles will continue to seek input from our consumers, our staff and other stakeholders within our community to ensure that their opinions and suggestions are incorporated within this plan. Our annual satisfaction surveys assist with us with obtaining their input.

Boundless Miracles, LLC was able to achieve or maintain most of our 2020 goals identified as part of our Strategic Plan.

The following goals and strategies have been identified as part of the 2021 Strategic Plan and Risk Management Plan.

#	Goal		Year
1	Boundless Miracles will continue to engage in a variety of marketing techniques to make the company name better known.	Continue membership with Chamber of Commerce and engage in activities provided to market our company and link with agencies that are relative to our service delivery.	Ongoing2022
		Utilize the Shelby Star and Shelby Shopper to advertise.	
		Continue to recruit experienced and diverse staff to meet the needs of our consumers through job fairs, etc.	
2	Boundless Miracles will increase the number of consumers we provide services for to increase the viability of the company.	Acquire referrals for NC Innovations services and Boundless Miracles.	2022
		Continue contract Partners BHM. Obtain information on new services being provided to expand our array of services.	
3	Boundless Miracles will renew our National Accreditation with CARF International	Review changes to CARF standards and ensure that policies and procedures reflect the standards.	2022
		Participate in survey prior to May, 2022	
4	Boundless Miracles will maintain a fiscally responsible position.	Revenue and expenses will be continuously monitored to ensure that Boundless Miracles is profitable.	2022
		Planning for expenses will occur on a regular basis in order to anticipate operational costs and expenses that may arise.	
		Boundless Miracles will continue to use a CPA to do our monthly accounting procedures to ensure that we maintain a fiscally sound financial status.	
		Staff will be aware of utility usage and execute tasks that are designed to save energy and water.	
5	All employees of Boundless Miracles will work to uphold the moral fiber and reputation of our	All staff will be trained on legal and ethical behaviors, best practices and corporate compliance.	2022
		All staff will be monitored by supervisors and peers to ensure that all staff behaviors are appropriate at all times.	

	company, maintaining a person-centered focus at all times.	Compliance issues will be reported, investigated, documented and reviewed by the Corporate Compliance officer and committee as well as the Quality Management Committee.	
6	All consumer rights will be upheld at all times.	Each employee will be trained on Consumer Rights.	2022
		Each employee will be observed by administration and co-workers to ensure compliance.	
		Compliance issues will be reported, investigated, documented and reviewed by the Client Rights Committee as well as the Quality Management Committee.	
7	Services that are habilitative in nature will be provided in a manner that allows consumers to show progress on individualized goals and an increase in independence.	Each employee will receive training on best practices and Core Competencies upon hire and annually thereafter to support the employee in assisting the consumer in goal achievement.	2022
		Consumer progress will be documented and reviewed on a monthly basis to ensure progress is being made on goals.	
		Consumer goals will be reviewed every 90 days and revised as needed as part of the Person-Centered plan that is developed and reviewed by the Treatment Team of each consumer.	
8	All legal and ethical standards, including best practices, will be observed during service provision by staff.	Each employee will be trained on Corporate Compliance and the Code of Ethics which includes all aspects of the legal and ethical standards expected of all staff.	2022
		Each employee will be observed by administration and co-workers to ensure compliance.	
		Compliance issues will be reported, investigated, documented and reviewed by the Corporate Compliance officer and committee as well as the Quality Management Committee.	
9	Boundless Miracles will maintain a contract with Partners Behavioral Health Management (MCO) to provide services to our consumers and to strengthen our organization's commitment to providing the best quality of services to our consumers and their families.	Complete Performance Outcomes goals and monitor progress monthly.	2022
		Attend monthly provider forums and trainings offered by MCO to ensure compliance with all requirements outlined in our contract.	
		Review policies and procedures to ensure that they align with the requirements of the MCO.	
		Look at our service delivery to ensure that positive outcomes are being achieved for our consumers and for our organization as a whole.	
		Ensure compliance with Provider Roles and Responsibilities outlined in the NC Innovations Waiver.	
10	Attend meetings of Provider Council to stay informed of changes that	The Clinical Director is involved as voting member of the Council which keeps us updated with information.	2022

	are taking place with the MCO.	
11	Continue supporting our consumer advocacy group, the “Miracles Makers” with community projects and meetings that allow them to have a voice in the delivery of their services.	2022
12	Boundless Miracles will maintain EHRs and our connection to NC HealthConnex, as well meet the requirement for ETV for future endeavors.	2022

The following goals and strategies for achievement have been established as Boundless Miracles, LLC benchmarks, as described in the 2020 Performance Analysis:

Goal	Goal Performance
At least 79% of all consumers served by Boundless Miracles will show a 30% increase in monthly goal progress on habilitative goals.	Goal was met 11 out of 12 months with the lowest month being 77% of consumers. Goal will be maintained.
Services will be provided for consumers with less than three (3) reportable incidents per quarter.	Goal was met each month and will be maintained.
100% of consumers will report they feel safe with staff of Boundless Miracles.	Goal was met and will be maintained.
100% of consumers will report they are working on things that they want to learn.	Goal was met and will be maintained.
100% of consumers will report they choose the staff they work with.	Goal was met and will be maintained.
100% of consumers will report they choose the things they do at home and in the community.	Goal was met and will be maintained.
100% of consumers will report that Boundless Miracles staff listen to them and treat them with respect.	Goal was met and will be maintained.
100% of guardians will report they feel their consumer is safe with staff of Boundless Miracles.	Goal was met and will be maintained.
100% of guardians will report that they are involved in all decisions regarding their consumer’s services.	Goal was met and will be maintained.
100% of guardians will report that they participate in the development of their consumer’s short-term goals.	Goal was met and will be maintained.
100% of guardians will report that they choose the staff who work with their consumers.	Goal was met and will be maintained.
At least 96% of guardians will report that quality services are important to the staff of Boundless Miracles.	Goal was met and will be maintained.
At least 96% of guardians will report that the staff of Boundless Miracles strive to meet the needs of their consumer.	Goal was exceeded and will be maintained.
At least 95% of guardians will report that the clinical/administrative staff of Boundless Miracles are accessible when needed.	Only 93% of guardians agreed with this statement. <b>Goal not met.</b> Goal will be maintained.
At least 95% of guardians will report they received needed assistance from the clinical/administrative staff of Boundless Miracles as requested.	Only 93% of guardians agreed with this statement. <b>Goal not met.</b> Goal will be maintained.
At least 95% of guardians will report that the services provided by Boundless Miracles have enhanced the quality of or have had a positive impact on the life/lives of their consumer(s).	Only 93% of guardians agreed with this statement. <b>Goal not met.</b> Goal will be maintained.



At least 95% of agencies/stakeholders will report that the clinical/administrative staff of Boundless Miracles are accessible when needed.	No surveys were returned (possibly due to COVID) so no data is available. Goal will be maintained.
At least 95% of agencies/stakeholders will report they receive needed assistance from the clinical/administrative staff of Boundless Miracles as requested.	No surveys were returned (possibly due to COVID) so no data is available. Goal will be maintained.
At least 97% of agencies/stakeholders will report they feel the delivery of services provided by Boundless Miracles has been helpful to persons served.	No surveys were returned (possibly due to COVID) so no data is available. Goal will be maintained.
At least 95% of agencies/stakeholders will report they regard Boundless Miracles staff as being helpful resources in the Treatment Team Person-Centered planning process.	No surveys were returned (possibly due to COVID) so no data is available. Goal will be maintained.
100% of all consumers who request admission to Boundless Miracles for services we are endorsed to provide will be admitted.	Goal met and will be maintained.
At least 90% of all authorized service units for regularly scheduled services will be utilized to ensure that consumers receive services approved according to their medical necessity.	Goal met and will be maintained.
At least 97% of all consumers, guardians and other stakeholders will report satisfaction with services provided by Boundless Miracles staff.	Goal met and will be maintained.
At least 98% of consumers/guardians who request Respite services will receive Respite as requested.	100% of requests for Respite were fulfilled. Goal met and will be maintained.

The Quality Management Committee reviewed all information collected in the surveys for 2020. There was not as much participation as we would have liked but due to the COVID 19 pandemic and the Governor’s Stay At Home Order during 2020, this was the best that we could do. We mailed out surveys to those we could not reach by phone but did not receive any responses. More information is included in our Performance Improvement Plan.

## **EXPECTATIONS**

### Expectations of Consumers & Guardians

Boundless Miracles, LLC strives to provide quality services to consumers and their families. We work to determine what the expectations of each consumer and guardian for the employees at Boundless Miracles, LLC. This determination is made using several methods, including satisfaction surveys, random quality satisfaction telephone contacts and following up with members of the various committees within Boundless Miracles, LLC that have consumers and/or guardians serving on them. It is the belief of Boundless Miracles, LLC that the basic expectations of consumers and guardians include the following:

- Receive service delivery according to their wishes and preferences;
- Have qualified and appropriately trained individuals providing services;
- Receive services in an environment that is free from abuse, neglect, and exploitation;
- Have their opinions, views, beliefs and differences respected;
- Have trustworthy and reliable staff; and
- Have each and every one of their consumer rights respected.

## **Consumer Rights as Provided to Boundless Miracles, LLC Consumers:**

- Live as normally as possible while receiving treatment
- Make wishes about future treatment known;
- The right to confidentiality and privacy as described in policy;
- Be informed of the qualifications of the professionals rendering the services;
- Exercise all civil rights, unless a court decision has been made to revoke these rights;
- A copy of the treatment plan will be provided to you upon your request. Your treatment plan will be based on your needs and your personal situation; anticipated goals and services provided in order to achieve these goals will be discussed and developed with you, your family, and other appropriate individuals. You will be involved in any decision regarding your course of treatment.
- Be free from physical punishment and unnecessary or excessive medication. Medications shall be administered in accordance with accepted medical standards and only upon order of a physician as documented in the record;
- Refuse medications;
- Be informed of experimental and nonstandard forms of service;
- Expect reasonable continuity of care, i.e. to know in advance, what appointment times and clinicians are available and where;
- Be free from influences in my decision of services and providers and have access to information pertinent to your services in sufficient time to facilitate making a decision;
- Be informed of the cost of service. The cost of your service should be discussed at your first visit or when you schedule your first appointment, including any questions concerning your insurance;
- Be considered legally competent unless otherwise determined by a court of law. You have the right to make all decisions about your care and agree or refuse any treatment or service offered;
- Refuse service or institute due process to terminate relations with Boundless Miracles, LLC;
- Be free from searches of personal belongings except under critical circumstances;
- Be free from abuse, neglect, humiliation, retaliation, financial or other exploitation;
- Be free from restrictive interventions, seclusion and/or restraints employed as punishment;
- Expect special instructions and other requests to be honored when possible;
- The right to access consumer records for the purpose of review or amendment;
- Contact **Disability Rights North Carolina at 1-877-235-4210** (toll free). This is the agency designated under federal and state law to protect and advocate the rights of persons with disabilities; and
- Each consumer will be free from unwarranted invasion of privacy.

### **Expectations of Other Stakeholders**

“Stakeholder” can be defined as “one who is involved in or affected by a course of action. Boundless Miracles, LLC considers “other stakeholders” to be the professionals and individuals within the community who are involved in the treatment of the consumers served in a professional manner or are affected by the service provision. The term “other stakeholders” includes, but is not limited to, Care Coordinators and Provider Specialists from MCO representatives, therapists, social workers, or places of employment for individuals with intellectual and developmental disabilities.

Boundless Miracles, LLC works hard to maintain professional and courteous relationships with other stakeholders. The employees of Boundless Miracles, LLC work closely with Care Coordinators from Partners, social workers from the Department of Social Services, Administration and Faculty of North Shelby School, Vocational Rehabilitation Counselors, and therapists, among others.

Just as with the consumers and guardians, Boundless Miracles, LLC sends satisfaction surveys to agencies and providers who have worked with Boundless Miracles, LLC over the past twelve months. Members of the Boundless Miracles, LLC management team also attend treatment team meetings at which time other stakeholders may freely express their expectations of Boundless Miracles, LLC employees.

It is the belief of Boundless Miracles, LLC that the basic expectations of other stakeholders include:

- Quality service provision to consumers;
- Complete and accurate documentation of service provision;
- Attendance and participation in treatment planning;
- Provide an environment for consumers that is free from abuse, neglect, and exploitation;
- Being respectful of consumers' family situations (including but not limited to cultural, religious, sexual preference, socioeconomic status, etc.); and
- Provide consumers the opportunity to be part of their communities through integrative activities.

According to the surveys completed by other stakeholders in 2019 the following expectations were acknowledged and communicated:

Boundless Miracles employees will:

- Be a helpful resource in the person-centered planning process;
- Be helpful and therapeutic to the persons served by their agencies;
- Be reachable by other stakeholders when necessary;
- Continue to provide assistance to other stakeholders as needed.

## **ENVIRONMENTAL SCAN**

### ***The Competitive Environment***

It is understood that in Cleveland County alone there are numerous private providers that offer NC Innovations services to waiver recipients. Some of these providers have been operating and providing services for much longer than Boundless Miracles, LLC. In order to create and maintain a competitive environment, Boundless Miracles, LLC focuses on resources and capabilities that will provide a competitive edge in order to allow us to continue providing quality services for our current consumers and increase the number of consumers we serve. The resources and capabilities of Boundless Miracles, LLC together form its distinctive competencies. These competencies enable innovation, efficiency, quality, and consumer responsiveness, all of which can be leveraged to create a differentiation advantage. Boundless Miracles completed our fourth CARF accreditation in 2019 in which we did not receive any recommendations from the surveyors. CARF informed us that only 3% of over 60,000 agencies surveyed each year has that distinction.

### ***Resources***

According to the resource-based view, in order to develop a competitive advantage Boundless Miracles, LLC must have resources and capabilities that are superior to those of its competitors. Without this superiority, the competitors simply could replicate what Boundless Miracles, LLC does and any advantage quickly would disappear.

Resources are specific assets useful for creating a differentiation advantage that few competitors can acquire easily. Boundless Miracles, LLC retains the following resources that may be lacked by competitors that we believe gives us a competitive edge over other providers in the area:

- an outstanding reputation of staff and management;
- proprietary know-how of service delivery and management;
- the facility is owned and operated by the owners therefore Boundless Miracles, LLC has a lower debt ratio;
- a low overhead that allows us to provide higher wages therefore ensuring qualified staff;
- offer job shadowing for staff to ensure compatibility for consumers and their families.

Boundless Miracles, LLC offers a variety of activities for consumers and families that many of our competitors do not offer. Because community integration is an important part of our mission we offer activities, including but not limited to:

- large field trips, such as going to local attractions (theme parks, sporting events, museums, historical locations, etc.);
- annual staff and consumer appreciation events;
- holiday activities, such as Easter Egg Hunts, Valentine's Day Dances, Christmas Parties, Thanksgiving Dinner, Independence Day Cookouts, etc.; and
- a variety of social and peer interactions, that focus on increasing socialization skills as well as incorporating other goals, such as decision making or physical exercise (Game Day, bowling, etc.).
- Opportunities to volunteer in the community such as Hospice, YMCA, Senior Center and Nursing homes.
- Note for 2020: Due to restrictions surrounding the COVID 19 pandemic, many of these activities have been suspended due to social distancing, closing of many places and limitations on visitors to Hospice and other places.

Boundless Miracles, LLC also works with consumers and families in an attempt to assist them in identification of resources and natural supports within our community. Consumers and families have access to a resource manual that will assist them in identifying the various agencies and resources in the community and how they can be assisted by these agencies.

Boundless Miracles, LLC also gives the opportunity for any staff member that will be working with a consumer to engage in job shadowing, which is the new staff "shadowing" the experienced staff member while working with the consumer in hopes that the new staff member will be able to see first-hand how to deal with the consumer in a variety of settings, under a variety of circumstances to better prepare them for individual service provision with that consumer. This also allows the consumer and their family to see if the staff is a good fit for their family.

### *Capabilities*

Capabilities refer to Boundless Miracles, LLC's ability to utilize its resources effectively. Such capabilities are embedded in the routines of Boundless Miracles, LLC and thus are difficult for competitors to replicate. It is the belief of Boundless Miracles, LLC that the following capabilities are unique to Boundless Miracles, LLC:

- Strong relationships with Care Coordinators, lawyers, faculty of North Shelby School, Partners Behavioral Health Management, and individuals at the state agencies that can assist with further understanding of regulations that affect our field;
- Clinical Consultant who can provide consultation and assistance to employees and consumers who may be struggling with life stress or other concerns.
- Succession planning for key position within our organization and staff development and retention to ensure the quality of care for our consumers.
- Superior CARF accreditation with no recommendations.

### ***Plans to Increase the Competitive Edge***

Boundless Miracles, LLC understands that in an ever changing environment, we too must make changes. Boundless Miracles, LLC hopes to be able to institute these changes over the next one to five years of operation. Changes include those that will give Boundless Miracles, LLC a greater competitive edge over the other private providers in the surrounding area.

- Offering a mileage reimbursement or stipend for staff since transportation is a large factor in getting consumers out into the community;
- Employing more strategic cost cutting plans to reduce overhead and increase revenue in order to pay the highest possible wages to the most qualified staff members, such as
  - becoming more energy efficient;
  - meeting the requirements for Value Based Payments to increase revenue;
  - abiding by the principle "Reduce, Reuse and Recycle";
  - avoiding duplication of activities in order to save time and money; and
  - having back-up staff members for each consumer to avoid unnecessary overtime rates and to ensure services are provided when they are scheduled.

### ***Differentiation Advantage***

Understanding that competitive advantage is created by using resources and capabilities to achieve either a lower cost structure or a differentiated product, Boundless Miracles, LLC has decided to focus more on the differentiation advantage than a cost advantage. Since the nature of Boundless Miracles, LLC is providing services for consumers and not a "product," differentiation was selected for its ability to extend beyond the physical characteristics of the service to encompass everything about the service that influences the value that consumers derive from it. This means that differentiation includes every aspect of the way in which Boundless Miracles relates to its consumers.

With that in mind, Boundless Miracles, LLC utilizes the capabilities and resources discussed above in order to produce a differentiation advantage in services and management of which other providers in the area cannot boast. It is the hope of Boundless Miracles, LLC that with this differentiation advantage the company will grow and therefore be capable of touching more lives and impacting the community to a much superior magnitude.

### ***The Regulatory Environment***

Boundless Miracles, LLC adheres to all laws and regulations enforced on the Federal, State and Local levels.

### ***The Legislative Environment***

Boundless Miracles, LLC monitors the state website regularly for Implementation Updates and Communication Bulletins. In addition, Partners BHM, our MCO, provides newsletters, Provider Alerts and Bulletins that keeps us abreast of any changes that are affecting state and local services. When information is noted that pertains to NC Innovations waiver services provided by Boundless Miracles, LLC, such as trainings, committee meetings, or community forums, the administrative team will add a goal to this Strategic Plan at that time. The result is that Boundless Miracles, LLC provides services using the most accurate and up to date regulations and legislative requirements at all times.

## **STRATEGIC PLAN REVIEW & UPDATE (2010 § 10.50)**

Understanding that the information held within a Strategic Plan changes often, it is the policy of Boundless Miracles, LLC that this plan will be reviewed and revised as needed, at least annually by the management team. It will be developed with input from consumers through consumer advocacy meetings which are held quarterly, staff meetings which are held quarterly and other stakeholders through Treatment Team meetings and surveys.

Revisions and/or updates will be made as required by changes in the environment or within Boundless Miracles, LLC. These revisions/updates will require a full Strategic Plan Management Authorization upon completion.

The revisions/updates will be made available to employees, committee members, consumers, guardians, and other stakeholders per the Strategic Plan Distribution Guidelines.

## **Action Planning**

It is the goal of Boundless Miracles, LLC to assist consumers and their families in realizing their dreams and to participate as active members of treatment teams in order to facilitate true person centered planning. The following objectives were chosen by Boundless Miracles, LLC when our initial SWOT analysis was conducted because these areas were deemed important for the success of our organization. In order for us to be successful we must let our community know what our organization has to offer consumers and their families. The development of our organization is important for us to remain viable as a consumer driven, quality provider. In order for us to provide quality services to our consumers, we must maintain the high standards of CARF for our national accreditation and remain fiscally responsible. We know that in order to provide the best care for our consumers that we must hire the most qualified and compassionate staff available and observe best practices in our service provision while ensuring that the rights of our consumers are protected at all times.

## **Description of Strategic Planning Process Used**

Boundless Miracles, LLC conducted a SWOT (Strengths, Weaknesses, Opportunities, and Threats) study as part of the internal analysis in order to assist with the development of a comprehensive Strategic Plan. This internal SWOT analysis can be reviewed in more detail below.

All members of the administrative management team were involved in this process. The team discussed various items in the Strategic Plan during regular meetings. Notes on the discussions were kept by the Clinical Director who used them to compile this report. When the initial Strategic Plan was developed at Boundless Miracles, LLC, in 2009, the end result was eye-opening. It is our intention that this process continue to be utilized to identify areas in which improvements can be made in order to increase the probability that the company will prosper, thus touching more lives and impacting our community for many years to come.

### **Internal SWOT Analysis**

The SWOT analysis is comprised of internal factors, Strengths and Weaknesses, as well as external factors, Opportunities and Threats.

Through this SWOT analysis, the members of the administrative management team of Boundless Miracles, LLC compiled the following points about our Strengths, Weaknesses, Opportunities and Threats.

#### ***Strengths***

After careful review, the following advantages over the competition were determined to be strengths of Boundless Miracles, LLC:

- Having knowledgeable and qualified administration and employees in the field of Mental Health/Intellectual and Developmental Disabilities/Substance Abuse, with a management team amassing a combined total of 60 years in the field of MH/DD/SA, including personal and professional experience;
- Owning an excellent facility that has been completely renovated to provide the best accessibility possible for the disabled individuals we serve, decreasing the overhead expenses related to mortgage payments;
- Having access to a first-rate training facility for employees, including video capabilities and sizeable seating availability;
- Having an on-site facility to host activities for consumers and families, including birthday parties, fundraisers, consumer committee meetings, and activities that allow consumers to work on their habilitative goals;
- Employing the most caring and compassionate staff available;
- Maintaining strong relationships with professional individuals who can support the organization, including other Mental Health/Intellectual and Developmental Disabilities/Substance Abuse agencies, lawyers, politicians, and doctors; and
- Employees committed to upholding a reputation of integrity and outstanding moral fiber.
- Meeting the high standards of CARF national accreditation with no recommendations.

#### ***Weaknesses***

Boundless Miracles, LLC also assessed its limitations. It was determined that the following are weaknesses of Boundless Miracles, LLC:

- Being a small agency that is not able to offer as many benefits to employees as desired;
- Offering undifferentiated types of services from competitors;

- Having a lack of marketing expertise; and
- Experiencing a high turnover rate of newly hired employees in the field of IDD services.

### ***Opportunities***

Boundless Miracles, LLC believes in opportunities; opportunities for consumers, families, and the future of this company. Founded on the principles of opportunity, as part of the SWOT analysis conducted internally at Boundless Miracles, LLC, the following opportunities for growth and change have been identified:

- Developing strategic alliances, working with other agencies to develop additional services that offer improved profits and longevity.

### ***Threats***

The final component of the SWOT analysis is to acknowledge current and anticipate potential threats to the overall structure of the company, including financial, legal, and moral areas. Those threats have been defined as:

- Persistent, and sometimes disreputable, competition from other agencies who may not hold the same values and beliefs about person-centeredness and consumer rights as Boundless Miracles, LLC does;
- Suspension of services due to COVID 19 when either staff or consumers test positive;
- Legislative changes pertaining to Medicaid Reform;
- Total elimination of IDD services;
- Undergoing unsuccessful audits of medical records or personnel files that result in paybacks or corrective action plans by the MCO or regulatory entities;
- Inability to maintain national accreditation from CARF; and
- Inability to continue enrollment with Partners Behavioral Health Management or contracting with private health organizations as part of Medicated reform.

## **Goals for Advisory Committee**

Boundless Miracles, LLC will have several committees to oversee the operations of our organization. The main committee will be known as the Advisory Committee whose responsibility will be to look at all aspects of the organization. The Advisory Committee will be responsible for the oversight of the finances and adherence to all policies and procedures as set forth in our policy and procedure manual.

The Advisory Committee will review all hiring of administrative staff and be informed of any revisions or additions to the policies and procedures manual. The Advisory Committee will be comprised of various members and will meet quarterly. The Advisory Committee will consist of persons affiliated with the organization who are knowledgeable in the field of intellectual and developmental disabilities as well as community members, consumers and advocates.

Members of the Advisory Committee will also serve on the Consumer Rights Committee and Intervention Advisory Committee. All three committees will meet consecutively on the same day with separate agendas. Minutes of each committee meeting will be kept accordingly. The Executive Director, Clinical Director and/or QDDP will serve on the Advisory Committee as well.



Issues to be discussed by the Advisory Committee:

- Financial statements;
- Personnel;
- Policies and procedures;
- General information regarding consumers served at Boundless Miracles;
- Corporate Compliance Issues; and
- Review reports from Client Rights Committee, Intervention Advisory Committee and the QMC as well as the Corporate Compliance Committee.

## **Budget Planning & Financial Reports**

Boundless Miracles, LLC generates revenue based solely on the services provided to consumers. Each of the consumers has been approved to receive Medicaid funding under the NC Innovations Waiver.

Based on data collected and ideas generated during the strategic planning process, it has become apparent that fundraising can be utilized to offset the costs of consumer activities and supplies. This method may be used in conjunction with the generated revenue from service delivery to meet the financial needs of this company and allow successful application of the Mission Statement, Value Statement and Goal Statement of Boundless Miracles, LLC. We are committed to allocating resources necessary to support accomplishment of this plan.

Boundless Miracles will engage in long term financial planning to support our identified goals and priorities to meet the needs of the consumers we serve. We strive to provide the support our staff need to be successful in their endeavors to provide quality services through workshops and activities.

### Financial Reports

Monthly financial reports will be made available to the Quality Management Committee who will review and revise the budget as necessary. All financial functions will be handled by an outside accounting firm.

## **Monitoring & Evaluation of Plan**

### Responsibilities for Monitoring and Evaluation

It is the responsibility of the Executive Director to regularly report to the management team and the advisory committee about the status of implementation, including progress toward each of the overall strategic goals. As each member of the management team reviews the final copy of this Strategic Plan, each of the goals and time frames that the goals are to be met will be reviewed with them. It is the responsibility for each member of the management team to report to the other members of the management team at monthly meetings and the Executive Director regarding the status toward their achieving the goals and objectives assigned to them.

## Evaluating Status of Implementation

The following key questions shall be utilized in monitoring and evaluating the status of implementation of the plan:

- Are goals and objectives being achieved or not? If they are, the staff shall be acknowledged, and rewarded, and the progress shall be communicated to other members of the management team.

If not, then the following questions will be utilized:

1. Will the goals be achieved according to the timelines specified in the plan? If not, then why?
2. Should the deadlines for completion be changed?
3. Does staff have adequate resources (money, equipment, facilities, training, etc.) to achieve the goals?
4. Are the goals and objectives still realistic?
5. Should priorities be changed to put more focus on achieving the goals?
6. Should the goals be changed?
7. What can be learned from our monitoring and evaluation in order to improve future planning activities and also to improve future monitoring and evaluation efforts?

## Frequency of Monitoring and Evaluation

Since Boundless Miracles, LLC does not anticipate experiencing rapid change from inside and/or outside the organization at this time, it has been determined that the following guidelines for frequency of monitoring and evaluation will occur:

- Advisory Committee Members shall be informed of the status of implementation at least on a quarterly basis, at each meeting.
- Management Team Members shall be informed of the status of implementation at least on a monthly basis.
- The Executive Director will be informed of the status of each member of the management team's progress on their individual goals on a monthly basis.

If at any point it is determined by the management team or the advisory committee members that Boundless Miracles, LLC is experiencing rapid change from inside and/or outside the organization, monitoring implementation of the plan shall occur at least on a monthly basis.

## Reporting Results of Monitoring and Evaluation

All information regarding the status of specific goals or the overall status shall be communicated in writing. The reports will include:

1. Answers to the above key questions while monitoring implementation;
2. Trends regarding the progress (or lack thereof) toward goals, including which goals and objectives;
3. Recommendations about the status; and
4. Any actions needed by management.

## Plan Deviation

Boundless Miracles, LLC understands that it is acceptable to deviate from the strategic plan. It is understood that this plan is only a guideline, not a strict roadmap which must be followed. Organizations often end up changing direction somewhat as it continues providing services over the years.

Understanding this, the most important aspect of deviating from the plan is knowing why it is necessary. Prior to deviation or changes in the plan, strategic planning meetings will be held to formulate understanding for all members of the management team regarding why deviation needs to occur and what changes will be made.

## Celebration

Celebration is as important as accomplishing objectives -- maybe more. Without a sense of closure, acknowledgement and fulfillment from a job well done, the next planning cycle becomes a grind.

Understanding this, when accomplishments of goals are made by the management team and staff of Boundless Miracles, LLC, just as the progress of our consumers is acknowledged and celebrated, that progress and accomplishment shall be celebrated. It is only through positive reinforcements that people increase their self-worth and become fully actualized, whether in life or their careers. Boundless Miracles celebrates with staff and consumers during our annual Staff and Consumer Appreciation events held in August. Due to COVID 19, we were not able to have a celebration in 2020 with staff to show our appreciation but we do celebrate them as Heroes and have posted signs at our office to designate that Heroes work here. We also celebrated the Christmas holiday with a meal and gift for staff and consumers as well as delivering fruit baskets to each consumer and their family.

## **Communication of Plan**

The Strategic Plan shall be communicated with employees, consumers, guardians, and other stakeholders based on the types of information that is required for each. In order to protect confidential and/or sensitive information and understanding that not all information contained within the plan and appendices is necessary for consumers, guardians, or other stakeholders. Distribution of the Strategic Plan shall adhere to the guidelines listed below.

### Distribution Guidelines

- Each person of the Boundless Miracles, LLC management team, advisory committee, and quality management committee will receive a complete copy of the plan.
- Understanding that even the newest staff member can gain quick context, appreciation, and meaning from a review of this plan, each employee of Boundless Miracles, LLC will receive a copy of the Strategic Plan and the Action Planning section in the Staff Orientation Manual.
- The Boundless Miracles, LLC Mission Statement, Vision Statement, and Goal shall remain posted in the main office and training facility clearly where consumers, guardians, other stakeholders, visitors, and employees will be reminded for what we stand.
  - Each employee shall also receive information with the Mission, Vision and Goal of Boundless Miracles, LLC on it.

- The Strategic Plan shall be made available for review on the Boundless Miracles, LLC website, [www.boundlessmiracles.net](http://www.boundlessmiracles.net).

The same portions of the Strategic Plan that shall be available to individuals online shall be available to consumers and families of Boundless Miracles, LLC annually.

## STRATEGIC PLAN MANAGEMENT AUTHORIZATION

The signatures below indicates that each member of the Quality Management Committee at Boundless Miracles, LLC has reviewed this plan, approves the contents of, and supports the implementation of the plan.

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Rhonda W. Garrett  
Executive Director, Boundless Miracles, LLC.

Date

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Kimberly Mitchell, BA, QP  
Clinical Director, Boundless Miracles, LLC.

Date

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Ashley M. Clark, QDDP  
Clinical Supervisor, Boundless Miracles, LLC.

Date

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Jill Miller  
HIM Specialist, Co-Owner of Boundless Miracles, LLC.

Date

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Barbara Blanton  
Human Resources Coordinator, Boundless Miracles, LLC.

Date

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Ronald Church  
Co-Owner of Boundless Miracles, LLC.

Date