



Elwyn
Est. 1852

Strategic Plan

2018 – 2022

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Executive Summary

In 2017, the Elwyn Board appointed Charles McLister to be Elwyn's ninth President and CEO. McLister reconstituted the organization's leadership team (Appendix 1), explicitly established the agency's Core Values (Appendix 2), and launched a Strategic Steering Committee—comprising members of Elwyn's leadership, its board of directors, and a cadre of expert volunteer advisors—to develop a 5-year strategic plan that will carry the organization through 2022 (Appendixes 3, 4, and 5).

Over a full year, the steering committee and Elwyn's board of directors participated in a process of discovery (to reveal the organization's identity and its purpose) and of imagination (to determine the organization's future and its potential for greatness). The Elwyn team examined comprehensive market research, geographical trends related to both demand and funding, internal capabilities and historical performance, and the candid perspectives of a variety of stakeholders, including employees at all levels and the family members of Elwyn clients. In addition, the process included a two-day retreat for the board and the executive team, as well as a multitude of sessions covering a variety of topics, including Elwyn's opportunities for brand cultivation and reputation-building, its growth strategies (both through organic means and aligned acquisitions), its long-term prospects for fundraising, and its ability to monetize assets to fuel strategic initiatives.

Most important, the committee and board collectively agreed that Elwyn must have a plan that will guide the organization into its next era, and that the plan should provide for a path to long-term sustainability. In other words, we must create a Forever Elwyn by 2022.



The following is a summary of the strategic plan and the final product of the process described above. Elwyn is grateful to all the members of the organization who participated in the creation of this important document, especially the board of directors and the steering committee members who contributed their time, their energy and imagination, and their valuable content expertise.

Elwyn’s Mission, Vision, and Strategic Declaration

Vision

By the end of 2022, Elwyn will be the most relevant and effective provider of education, treatment, and support services for children and adults with intellectual and developmental disabilities, autism, and related behavioral health issues.

Mission

Through personal commitment, collective talent, and innovation, Elwyn supports individuals with diverse challenges in shaping distinctive, meaningful lives. We will create an enduring mission to enrich the quality of life for individuals in our care.

Core Values

- Integrity – We want the facts and value the truth.
- High Expectations – Our performance is unrivaled.
- Safety – We protect physical and emotional safety for all of our members.
- Accountability – We are ALL-IN and focused on results.
- Sustainability – Elwyn’s mission is essential to the world.

Strategic Declaration

Over the next 5 years, we will build upon our long-standing record of adaptation and innovation to create a Forever Elwyn inspired to enrich the quality of life of the persons we support. Specifically, we will:

- Invest in our employees
- Grow our core services
- Invest in technology and innovation
- Modernize our property and real estate assets; and
- Create trust with the families of the children and adults in our care.



Elwyn's Strategic Impact

Elwyn believes we can transform the experiences of vulnerable families in the City of Philadelphia, whereby thousands of children with autism and related behavioral health issues will receive swift and effective early intervention services to interrupt delays and accelerate learning. Additionally, we will provide support for families as they work to fulfill the promise of their children. To this end, Elwyn will build a highly accessible central intake process, cultivate a robust and mobile network of practitioners and educators, and unify the delivery of culturally-informed services in the city.

We also imagine a comprehensive continuum of care for families in the region, originating in the Philadelphia community and extending to the Elwyn Pediatric Campus at Media, where we will build a modern, state-of-the-art school and an expanded residential program for dually diagnosed children, as well as new pediatric inpatient programming for intensive, short-term crisis stabilization.

Finally, we will grow our capacity to support adults with autism and intellectual disabilities in New Jersey and California by expanding a bold and extraordinary clinical model that provides lifelong access to people with severe behavioral challenges and complex medical needs, leveraging the promise of families as we celebrate the life of every individual in our care.



Elwyn's Service Triangle

Elwyn adopted the concept of the Service Triangle in 2017 with the belief that it is the key to our sustainability and the foundation of a "Forever Elwyn." Since 1852, Elwyn has cared for individuals with intellectual disabilities, autism, and related behavioral health issues. Simply put, caring for these individuals is in our DNA. Nonetheless, by adopting the notion that truly extraordinary support requires collaboration, we enjoin family members and employees to our pursuit of excellence.

The Service Triangle elevates an individual's loved one to the standing of equal member in the organization. This allows us to partner with parents, siblings, and other loved ones to guide care and education and function as quality assurance agents. Regarding employees, the Service Triangle is underpinned by the notion of "servant leadership,"¹ in which the most important employees do not reside at the top of the organizational chart, but instead inhabit the positions closest to the individual we support.

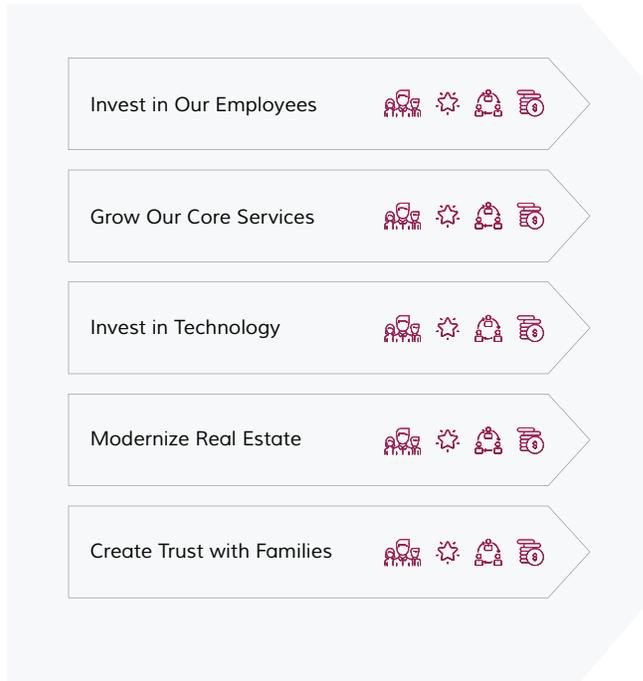


The concept may seem simple, and it is, but that does not mean it is easy. In fact, it takes deliberate planning and discipline to regard families with admiration when they are critical of our performance. Similarly, employees come to Elwyn with a burning passion we can either choose to fan, or through our policies and practices, carelessly extinguish.

By committing to the Service Triangle, we understand that it is not enough to simply mean well - we must be transparent, dedicated, purposeful, and humble, because each person's promise is realized through the promises that we fulfill.

1 Greanleaf, Robert, K., (1970), "The Servant as a Leader."

Strategies



Results

- Net Asset Strength
- The Elwyn Pediatric Campus at Media
- Expansion of Elwyn's Extraordinary Clinical Model in NJ and CA
- A Highly Visible New Brand to Accompany an Unrivaled Reputation
- A Western Corporate Headquarters
- Rigorous Advocacy for the Service Triangle
- \$25M of Philanthropic Support
- Unified Service Delivery for Children and Families in Philadelphia



Elwyn Strategies

Strategy #1: Invest in Our Employees

Deploy resources to optimize recruitment, retention, and training to create a powerful employee workforce

Elwyn's most valuable asset is its workforce of 5,000 dedicated teachers, clinicians, direct support professionals, supervisors, and administrative staff who embody the mission of the organization. Over the next 5 years, Elwyn will make substantial and deliberate investments in its workforce across the organization. These investments will wrap around the various components of our human capital life-cycle, from recruitment efforts and onboarding, to continuous learning and training opportunities for all staff. This strategy will also include investments in compensation and benefits so that Elwyn can attract an eager and professional workforce, which it will retain at a rate that distinguishes Elwyn from its competitors.

- Engage employees and practitioners by establishing competitive compensation, delivering a powerful training experience, and supporting the workforce in the assembly of a broad array of life skills
- Install Elwyn's electronic health record to foster employee effectiveness, ensure client safety, and establish a culture of service excellence
- Provide an advanced and robust leadership development program for managers at all levels
- Establish a dynamic HR business partner (HRBP) model to support supervisors as they protect our Core Values, train and coach staff, and produce loyalty, professional competencies, and workforce retention
- Install strong performance management habits within the leadership team and transparent metrics for the organization
- Develop a vigorous grow-our-own pipeline for teachers with a focus on retention, consistent service delivery from school paraprofessionals, and Individual Education Plan (IEP) integrity
- Create a mobile, technology-driven, and professionalized practitioner workforce in Philadelphia
- Use marketing, technology, and internal collaboration to boost Service Triangle employee recruitment by an order of magnitude



Strategy #2: Grow Our Core Services

Grow relevant and sustainable programs via organic expansion and strategic affiliations

Elwyn will strengthen services within three core competencies—special education and early intervention, behavioral health services (BHS), and support services for persons with autism and IDD—which will enable responsible growth through both organic expansion and targeted acquisitions. These activities will grow revenue and net assets such that Elwyn maintains its competitive advantage within the industry, influences the decisions of elected and appointed officials as it relates to funding and best practices, and guards the company from organizational risks or uncontrollable events.

Organic expansion will occur where Elwyn is already positioned for growth, such as California (and the western U.S.), New Jersey, New England, and Philadelphia. Targeted acquisitions will be made in optimal geographic regions, contingent upon market conditions such as demand, alignment, and funding. Finally, because Elwyn has adopted a deliberate and focused criteria for both types of growth, this plan will result in the production of consistent surplus in the category of net operating income, allowing for additional reinvestment.

- Enhance Elwyn’s capabilities and unify its brand to build a broad offering of effective, trauma-informed services for children and families in the city of Philadelphia
- Influence Philadelphia’s decision makers by establishing a reputation for service excellence and ease-of-use in early childhood intervention and BHS
- Employ performance management metrics to optimize cash flow from operations and enable strategic growth
- Revitalize and re-purpose the Elwyn Pediatric Campus in Media, PA
- Grow Elwyn’s specialized residential services in California by 10 homes and 45 individuals, establishing a Western Corporate Annex in 5 years
- Grow Elwyn’s specialized services in New Jersey by 17 homes, 50 residents, and 65 day program participants within 5 years
- Grow revenue and net assets by 10% to 15% a year through tactical acquisitions, averaging two affiliations per year
- Implement a healthcare services plan that includes investment in a psychiatry practice and local partnerships with primary care providers



Strategy #3: Invest in Technology

Invest in technology that improves service quality and employee engagement

Elwyn will rely on its superior technology infrastructure and enhanced enterprise systems to recruit and retain a professional workforce and to grow its core services.

Elwyn will invest in both hardware acquisitions and system upgrades over the next 5 years. Specifically, the IT strategy will focus on full implementation of an electronic health record that enables the entire workforce to improve clinical quality and automate service capture and billing. This strategy is critical to the success of service line efforts in Philadelphia, as well as other key geographic regions, and will be essential to the modernization of financial systems. Other enterprise systems will enable faster, more efficient functioning within the HR, development, and other support departments.

- Deliver the highest quality early childhood intervention services by fully installing and adopting the electronic health record (CCP) in Philadelphia
- Create mobile, technology-driven workforce in Philadelphia with significant capital investment in equipment and software
- Establish CCP in Elwyn NJ by the end of FY 2019 and all remaining subsidiaries and core service areas within 3 years
- Install and equip mobility platforms for easy data entry and accountability for Direct Service Professionals (DSPs) and professional staff
- Implement digital communications platforms (e.g., social media, intranet)
- Purchase or convert to cloud-based solutions for all platforms and enterprise systems, eliminating Elwyn's data centers
- Develop and launch an IT onboarding model for M&A activity
- Invest in technology and innovation that improves the employee and family member self-service and connectivity experiences
- Optimize philanthropic fundraising by using technology to provide exceptional stewardship of gifts and develop a robust new prospect pipeline



Strategy #4: Modernize Real Estate

Modernize relevant facilities and monetize non-essential assets to fund growth and investment

Just as technology can be used to create efficiencies, enable growth, and influence culture, the organization's real estate can be similarly transformative when viewed as a strategic tool.

As a significant owner, occupier, and manager of a portfolio comprising over 700 acres and more than 1,000,000 square feet, Elwyn has crafted a strategic plan that recognizes real estate as a mission-critical advantage differentiating us from our peer group.

Guided by our Core Values to create an environment that reflects our commitment to our employees and those we serve, Elwyn's corporate real estate strategy will: (i) modernize Elwyn real estate to dramatically improve quality, suitability of purpose, and financial and operational sustainability; (ii) monetize inessential property and use the proceeds to fund strategic expansion and enhance service delivery; and, (iii) manage our holdings and leases in a way that unifies the portfolio across geographic locations and positions the organization as best-in-class enterprise.

- Continue the transition from Elwyn's intermediate care facility (ICF) environment to community-based and independent age-in-place residences
- Monetize inessential real estate assets to fuel growth and business transformation
- Eliminate all deferred maintenance by modernizing community-based residences and facilities
- Consolidate and relocate Elwyn's corporate and administrative offices to attract professional talent, replenish a retiring administrative and support workforce, reduce overhead costs, and transform the organization's culture
- Develop and implement a best-fit group home growth model for PA, NJ, and relevant new jurisdictions
- Develop and execute the campus master plan, which includes a reduced but modernized acreage and space footprint



Strategy #5: Create Trust with Families

Engage families to improve quality, cultivate reputation, and build enduring trust

Elwyn recognizes families as key stakeholders in the design, delivery, and evaluation of our services. In partnership with our direct support professionals and the individuals we serve, families complete the Service Triangle vital to Elwyn's success. Elwyn acknowledges the essential role played by family members of those served through the organization and will expand efforts to engage family members at the highest levels to aid in the development, implementation, and assessment of programs.

A select group of family members will participate in a Quality Committee, which will report directly to the Board. Others will serve as mentors, ombudsmen, advocates, and fundraisers. When it comes to engaging elected officials and government agencies, there are no more powerful and influential advocates than families, and Elwyn will find new ways to include family members in our government relations strategy. Together we will strive to provide exceptional services and earn a stellar national reputation as the agency of choice for children and adults with intellectual and developmental disabilities, autism, and related behavioral health issues.

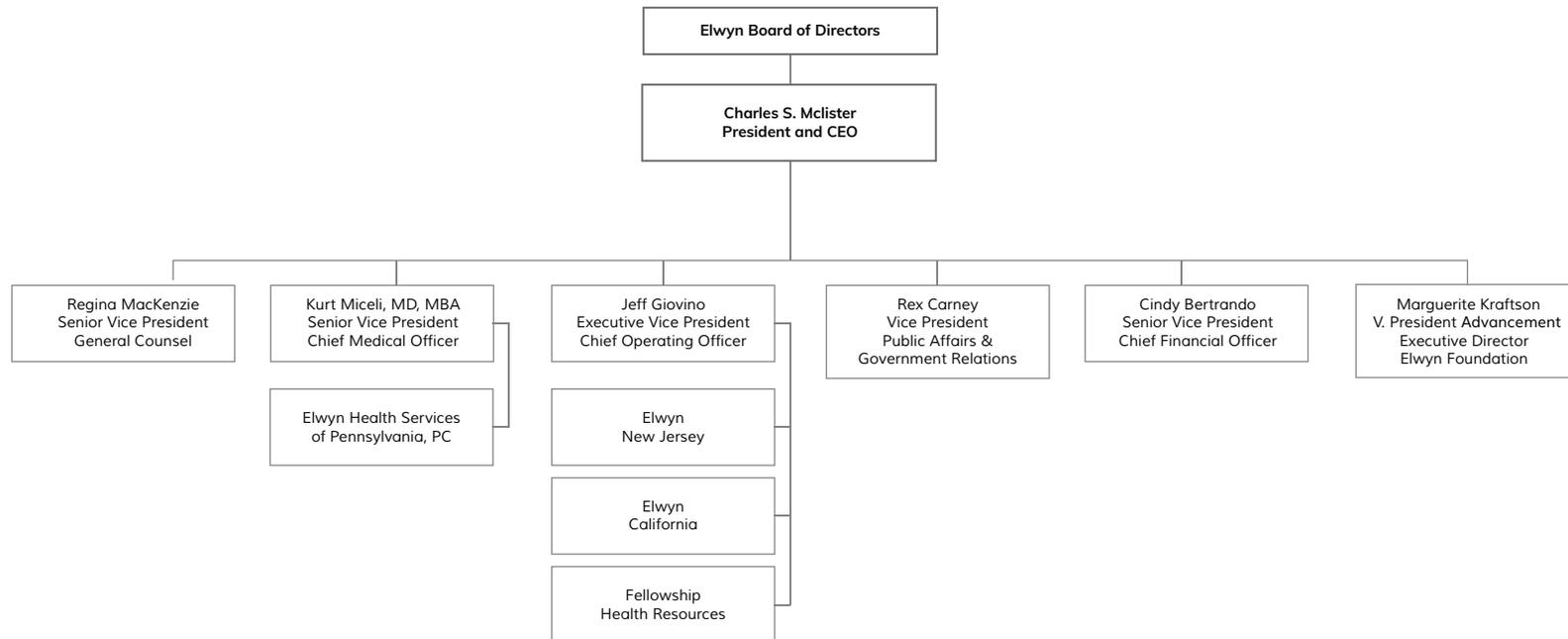
- Elevate the status of families through transparent communication
- Implement technology platforms that enhance family member involvement and confidence
- Enhance service delivery by using family members as Quality Assurance agents
- Develop and implement a formal system of advocacy and mentoring
- Launch company-wide recreational and activity planning in collaboration with families
- Establish a program-based ombudsman apparatus to swiftly and effectively resolve family concerns
- Harness the passion and loyalty of families to engage with public sector payers and stakeholders, particularly in support of new demand



Appendices



Appendix 1 Elwyn Organizational Chart (Executive Team and Reports)



Appendix 2 Elwyn’s Core Values and Operating Principles

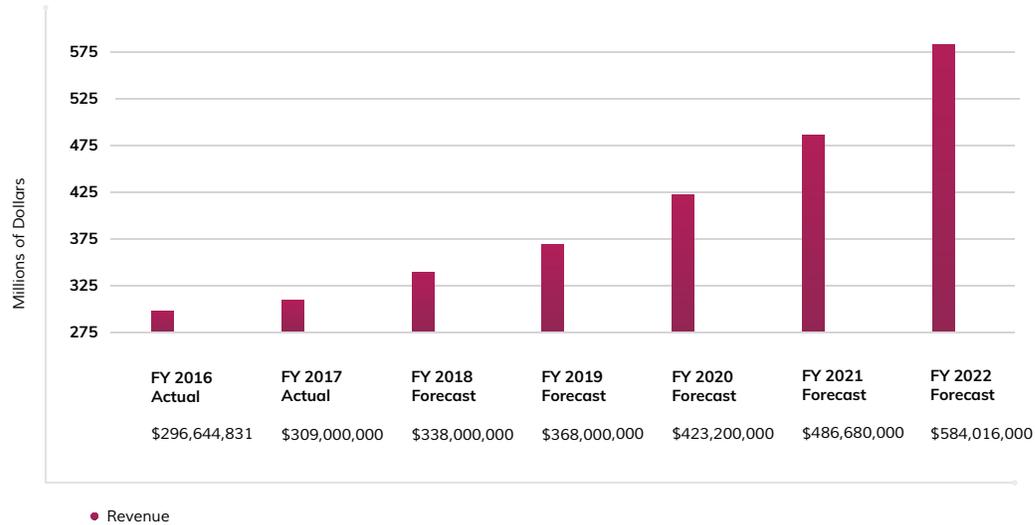
I am a servant-leader, with a passion and enthusiasm for our mission. Because I share Elwyn’s deep sense of purpose, I am fully committed to being part of a collaborative, decisive, and courageous team that creates an organization of continuous learning.

Integrity We want the facts & value the truth.	High Expectations Our performance is unrivaled.	Safety We protect physical & emotional safety for all.	Accountability We are all-in & focused on results.	Sustainability Elwyn’s mission is essential to the world.
I keep my promises, stated or implied. I make my expectations clear to others. I unearth problems so the team has no surprises. I support respectful dissent to produce a continuous learning environment. I am transparent in the application of my duties.	Our services must be excellent and suitable for my own family. I assume that my teammates want to do a great job. I am responsible for removing barriers to excellent care. The most relevant results are those measured closest to service delivery. I believe technology is a strategic lever.	I will do no harm. I honor professional courage by speaking up and expect others to do the same. I produce and ensure a clean and safe work environment. I make decisions that prioritize the well-being of the people we support. I ask questions without hesitation.	I follow procedures, or contribute to improving them. I am both collaborative and decisive. I understand my role in our success. I know when to ask for help and offer my help to others. I have pride of membership. I celebrate our “wins” and contribute to the success of my teammates.	I make decisions that ensure an enduring and permanent Elwyn. I conserve resources as if they were my own. I am willing to try new things for our company. I work for Elwyn’s prosperity and success. I am responsive and attentive to all of Elwyn’s stakeholders. I participate in the process of business development to create a sustainable Elwyn.

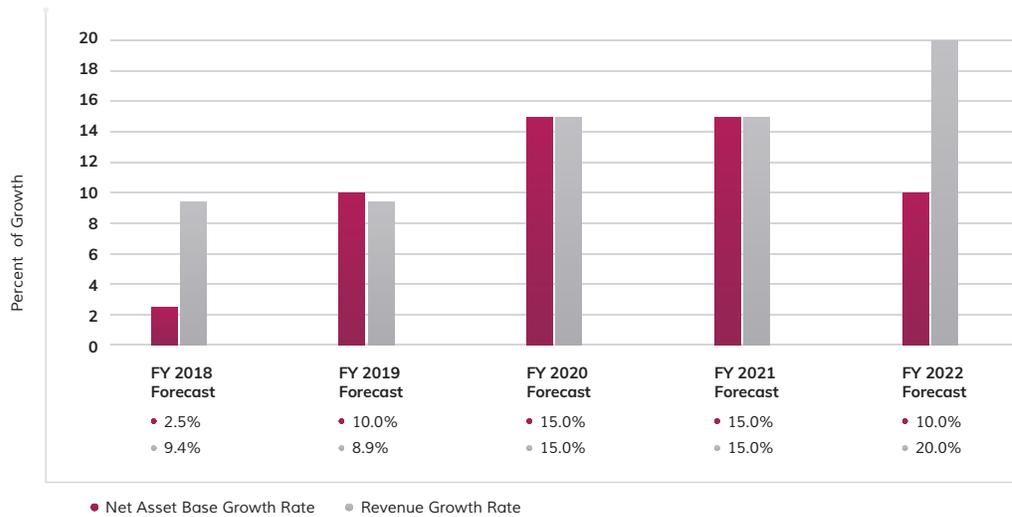
We appreciate our purpose and each other. Success is FUN.
We act as ONE TEAM, but I am responsible for my own behaviors on this team.

Appendix 3 Financial Growth Projection (Consolidated)

Revenue

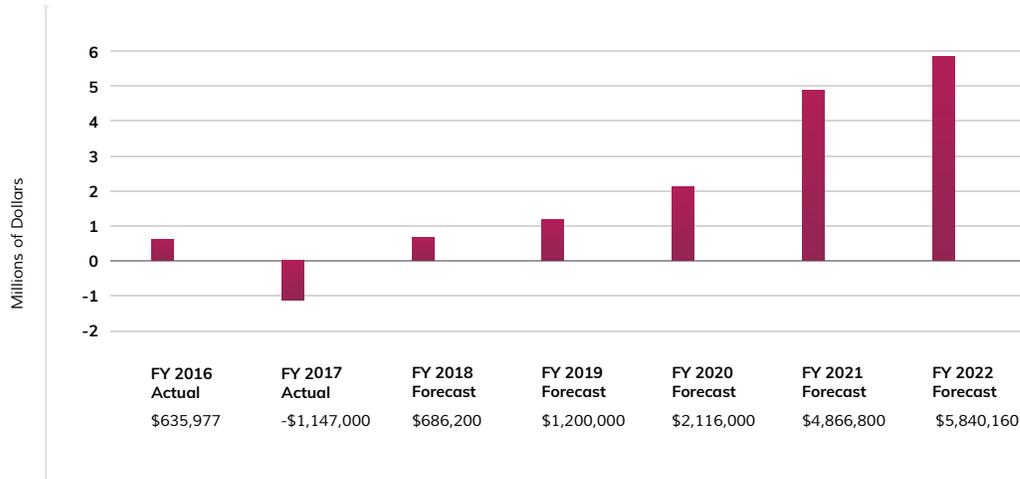


Net Assets & Revenue Growth



Appendix 3 Financial Growth Projection (Consolidated - Continued)

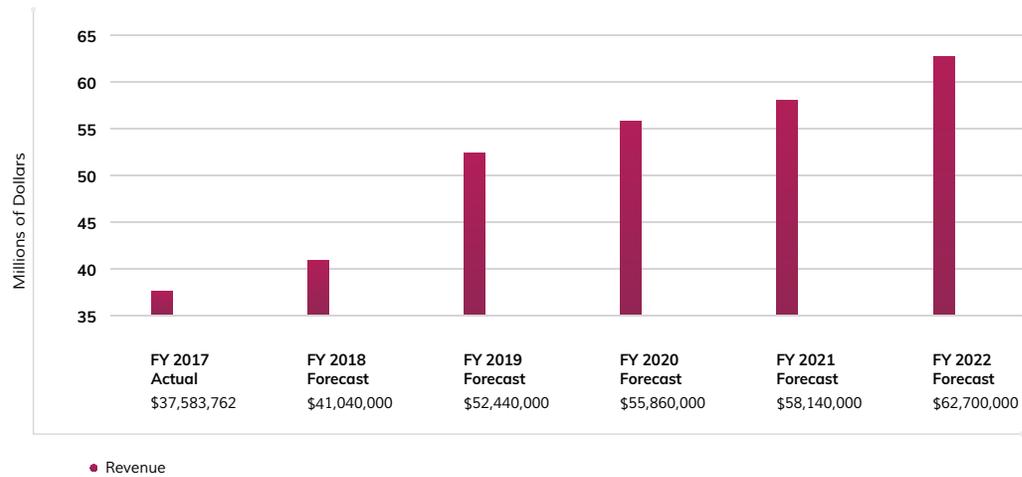
Operating Income



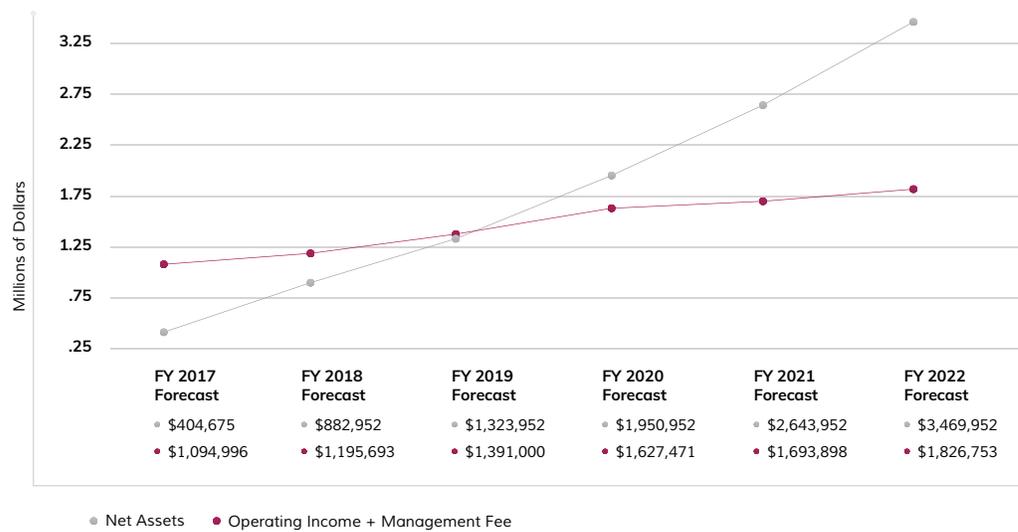
● Operating Income

Appendix 4 Financial Growth Projection (Elwyn California)

Revenue

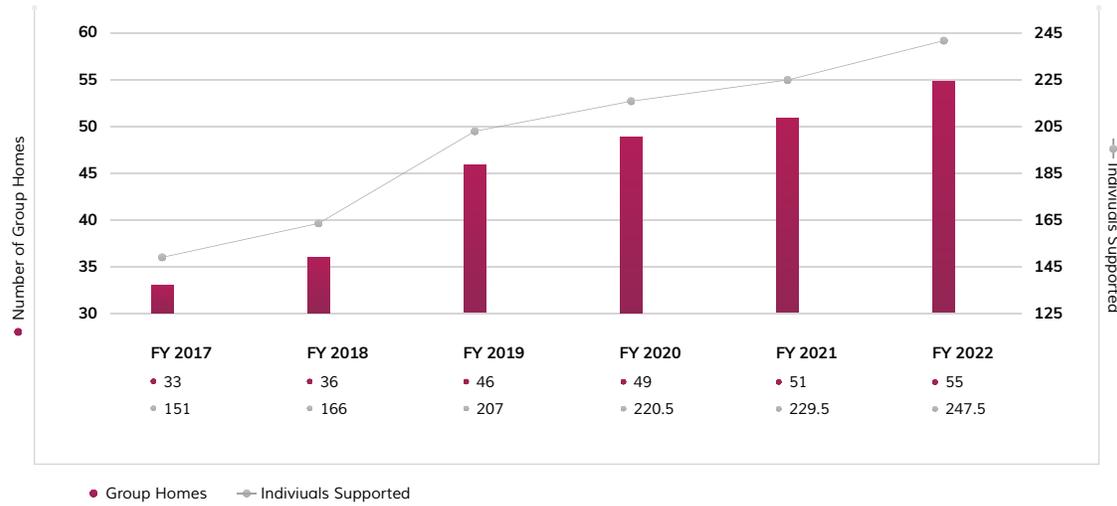


Net Assets & Operating Income + Management Fee



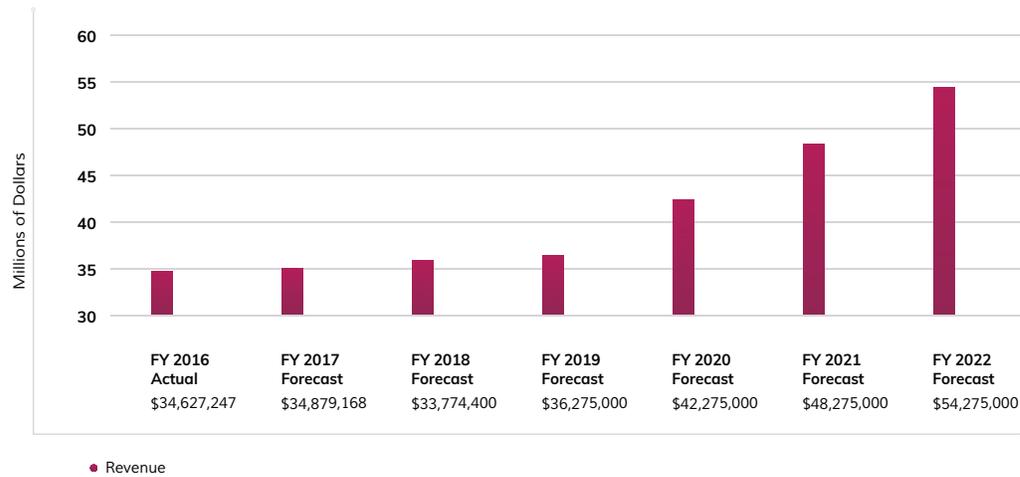
Appendix 4 Financial Growth Projection (Elwyn California - Continued)

Specialized Group Homes & Individuals Supported

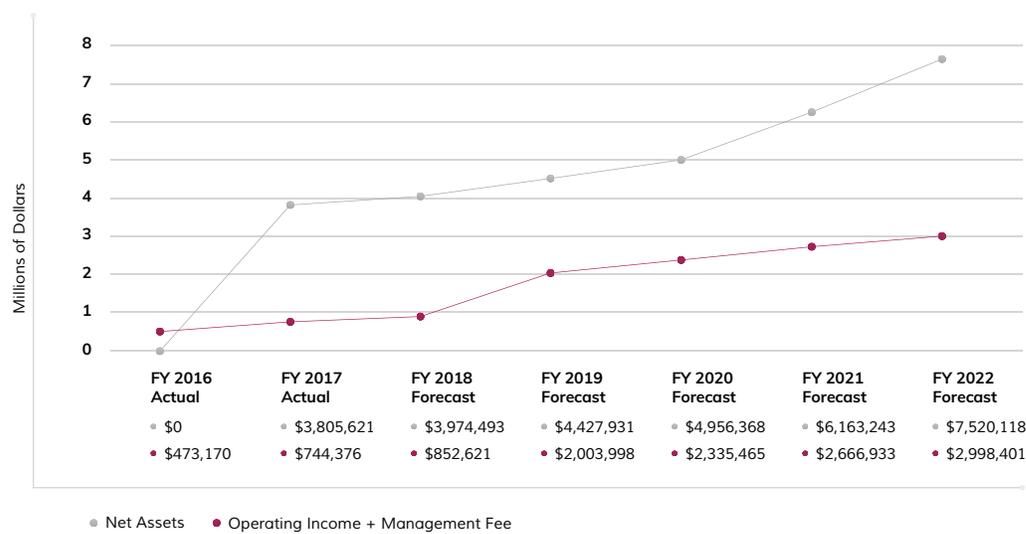


Appendix 5 Financial Growth Projection (Elwyn New Jersey)

Revenue

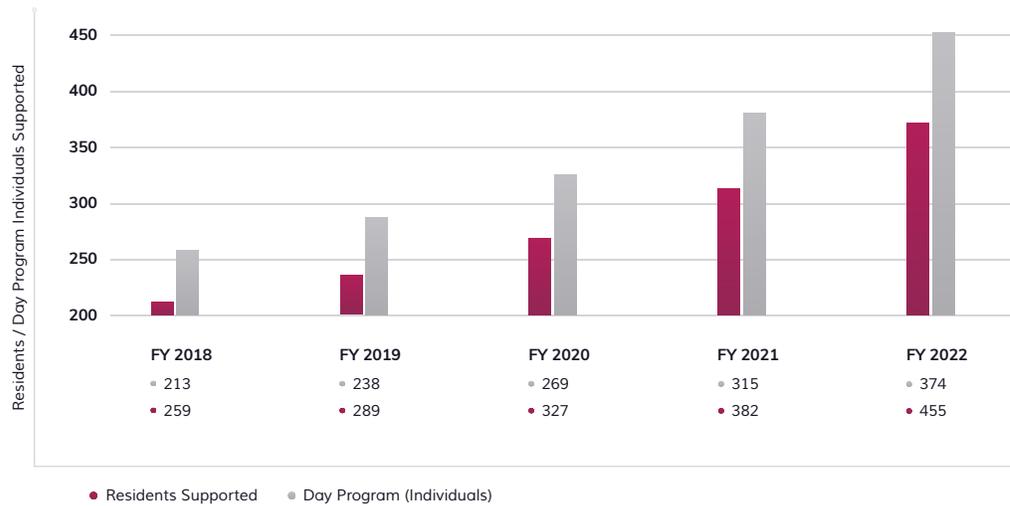


Net Assets & Operating Income + Management Fee



Appendix 5 Financial Growth Projection (Elwyn New Jersey - Continued)

Census Growth Projection



Appendix 6 Elwyn's Board of Directors (FY 2018)

Timothy C. O'Rourke, Chairman	Joseph E. Lundy, Esq.
Charles S. McLister, President	Thomas McCaully
Joan Emmi, Vice Chairman	Richard Rumer
Jared G. Culotta, CPA, Treasurer	Adam Saunders
William P. Curtis, Secretary	James Sebra
Francis D. Burke, Jr.	Steven Silber, M.D.
Francis J. Dunphy	Trudy Slade
Frank Farley, Ph.D.	Judith Strine
Tina Hwang	Jonathon Swatsburg
Christopher Kellogg	Valaida S. Walker, Ed.D.
J. Richard Leaman, Jr.	Alan Wechsler



Appendix 7 Elwyn's Strategic Steering Committee (FY 2018, Volunteer Members)

Bill Curtis

Elizabeth Downs

Ellen Goss

Ed Goss

Geoff Botak

Jim Sebra

Lew Manges

Tim O'Rourke

Steve Silber, M. D.

Rabbi William Kuhn

Helen Leaman

Frank Farley, Ph. D.

Valaida Walker, Ed. D.

Chris Kellogg

Jim Logue

Rich Rumer

Tina Hwang

Agata Reyes

Jon Swatsburg

