

Reach High | Achieve

Strategic Plan

2026

Reach High, Achieve More

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Family Residences and
Essential Enterprises, Inc.

2026 Strategic Plan for the FREE Network

We are pleased to present the 2026 Strategic Plan for the FREE Network. The plan focuses on our three core pillars – Financial Sustainability, Workforce Development, and Quality and Outcomes. It builds upon the progress made in the past and will help forge our path for the future. As always, the plan remains focused on our mission and vision.

Overarching the plan details is our commitment to being a data driven organization. Our focus is on core data that will help measure the success of our strategies and help determine our direction going forward. Behind the scenes we will be working on policies for data governance, and we will be building a data warehouse to allow us to examine how finances, workforce, and service quality interact. We will advance our use of Artificial Intelligence as a tool toward greater efficiency and effectiveness.

A key piece of our data plan is implementation of a new Electronic Health Record to replace our current outdated systems. The effort is led by our Application Support Director, working with a group of subject matter experts from our operations and support divisions. A group from the executive team has been formed as a steering committee, to review key decisions and to ensure the project is kept on target and on budget.

We have developed Key Performance Indicators (KPIs) for each of our objectives. Although we will set targets in some areas, 2026 will be a year in which we develop our baseline for many of our KPIs.



Objective 1: Financial Sustainability

Goal: Strengthen financial stability by optimizing service capacity, leveraging data for decision-making, and investing in sustainable technology.

Strategies & Initiatives

1. Enhance Service Efficiency and Utilization

- Conduct a program gross margin profitability analysis by service line. Focus on both positive and negative trends to improve decision-making and optimize resource allocation.
- Identify and address underutilized capacity.
- Implement data dashboards tracking occupancy, staffing ratios, and service revenue per individual.

2. Improve Financial Decision-Making through EHR and Data Integration

- Select and implement a new Electronic Health Record (EHR) that integrates billing, documentation, and outcome data.
- Establish financial data linkages between the EHR, payroll, and accounting systems to improve accuracy and forecasting.

3. Expand Funding and Revenue Opportunities

- Develop an annual grant and partnership strategy aligned with service growth areas.
- Analyze Revenue and Expense from consulting contracts to determine feasibility as a financial tool to sustainability. Develop a pricing model by service line to ensure equity.

Key Performance Indicators (KPIs)

KPI	Metric	Frequency
Program Utilization and Revenue Maximization.	% of Target Census for 'at risk' services Direct salary expense per \$ of revenue earned	Monthly
Financial Margin	% net operating margin Gross margin by service line	Quarterly
Billing	Days in AR	Monthly
Grant Growth	\$ in new grant revenue year over year	Quarterly

Objective 2: Workforce Development

Goal: Attract, develop, and retain a skilled, mission-driven workforce that delivers high-quality supports.

Strategies & Initiatives

1. Focus on Recruitment and Hiring to improve 1-year retention rate.

- Consider pre-hire testing, assessment tools, and exposure to the actual environment as ways to reduce both voluntary and involuntary separations in the probationary period.

2. Enhance Employee Experience and Retention

- Implement employee recognition dashboards highlighting tenure, training completions, and contributions.
- Implement Dayforce Engagement Survey Tool.
 1. Conduct stay and exit interviews to identify drivers of turnover.
 2. Conduct frequent, brief employee satisfaction surveys.
- Pilot alternative scheduling options (e.g., 4-day weeks, flexible shifts) to improve work-life balance.

3. Build Workforce Competence through Training and Technology

- Track statistics (retention, # of incidents, successful transfers) of employees who select elective training.

4. Leverage Data for Workforce Planning

- Create dashboards that display employee vacancies, turnover trends, overtime, and training compliance for managers.

Key Performance Indicators (KPIs)

KPI	Metric	Frequency
New Hire Retention	% of staff retained in the first 12 months	Monthly
Training Completion	% of staff completing required trainings on time	Quarterly
Vacancy Rate	% of open positions	Monthly
Employee Satisfaction	Engagement survey average (1–5 scale)	Annual
Employee Separations	% of voluntary vs involuntary	Monthly
Completed Performance Evaluations	% of completed performance evaluations	Monthly



Objective 3: Quality and Outcomes

Goal: Improve the quality of supports and outcomes for individuals served through integrated data systems and continuous feedback.

Strategies & Initiatives

1. Implement a Unified Electronic Health Record (EHR)

- Select and implement an EHR system that serves all residential and community-based programs.
- Ensure system supports real-time documentation, outcomes tracking, and data sharing across departments.
- Involve frontline staff in user testing to ensure the platform is accessible, intuitive, and relevant to their work.

2. Develop and Deploy Data Dashboards for Frontline Use

- Create role-specific dashboards (e.g., direct support staff, program supervisors, clinicians) focused on actionable metrics. Include key quality indicators: attendance, goal progress, health alerts, accidents and incidents, and satisfaction scores.
- Provide training and support to ensure staff use data daily for decision-making.

3. Use Data to Drive Quality Improvement

Establish a Data Team from a cross-section of the organization to review trends in incidents, satisfaction, and outcomes quarterly.

- Create feedback loops with families and individuals served to incorporate their input into service planning.
- Establish a strong safety culture through hazard identification, risk assessment, and training for all staff.
- Complete the installation of dual facing cameras to track driver assessment and target training as needed.

Key Performance Indicators (KPIs)

KPI	Metric	Frequency
Participant Satisfaction	Avg. satisfaction score (1–5 scale)	Annual
Health and Safety	Audit Outcomes # of plant safety reportables identified on audit. # of comp and auto claims. Average scores for driver safety.	Quarterly