

Triumph Services, Inc.

Live ♦ Work ♦ Play



Strategic Plan: January 2014 to December 2016

Our Roadmap to Future Growth and Sustainability



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Message from the Executive Director

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triumphservices.org.

Triumph Services has supported hundreds of adults in developing and achieving goals, growing in spite of challenges, and planning for the future. The model Triumph uses is simple: Gather a team of people who care about the individual, meet the individual where he is, help the individual understand where he wants to go, and support him to get from point A to point B.

On October 1 and 2, 2013, Triumph Services, as an organization, had the opportunity to receive the same support to plan our future. Twenty-six people, representing nine groups of stakeholders, gathered to be a part of the strategic planning conference, *Triumph's Roadmap to Future Growth and Sustainability*.

Just as Triumph's Support Team provides an interdisciplinary, holistic approach to an individual's success, every member of the strategic planning conference provided a unique view of Triumph as an organization and how it can not only grow, but do so while sustaining the quality that has built Triumph's reputation.

Planning for the future has been a priority from the beginning. We undertook this process to plan our growth in a thoughtful way that preserves our core values. We understand the needs of adults with developmental disabilities are great. We also understand that these needs will continue. *Triumph's Roadmap to Future Growth and Sustainability* provides a way to meet those needs, both now and in the future.

Brooke Stephens
Executive Director

Executive Summary

Overview

On October 1-2, 2013, Brooke Stephens, Executive Director, Triumph Services, Inc., convened a two-day strategic planning conference in Birmingham, Alabama. Twenty-six stakeholders (strategic planners) attended the conference representing the Triumph leadership team and staff, the board and junior board of directors, medical community, program participants and families, government, advocacy groups, and community leaders (See Strategic Planners at Appendix B). The conference resulted in the development of a Triumph strategic plan for the period January 2014 to December 2016 that aligns key stakeholders toward a shared strategic direction.

The Current State

The conference began with a current state assessment by the strategic planners. This assessment acknowledged the external trends and forces impacting Triumph. By conducting a SWOT (Strengths, Weaknesses, Opportunities, Threats) analysis and completing an assessment survey, the following strategic challenges were identified:

Strategic Challenges

- Reliable long-term **funding** to ensure self-sustainment.
- **Recognition** of Triumph's value proposition by key stakeholder groups, e.g., prospective clients, financial donors, job providers, policy/decision makers.
- Maintaining **organizational effectiveness** and culture while transitioning key leadership roles.
- Improving **organizational infrastructure** to better support current and future programs that meet participant needs.

Roadmap to the Future

With a shared understanding of the current state, the strategic planners reviewed the core values, vision and mission statements, and revised the planning assumptions. The planners then engaged in a discussion of ideas regarding the direction Triumph shall take over the next three years. These ideas were organized into the following five strategic focus areas.

Strategic Focus Areas

- **Funding:** Ensure long-term financial sustainability.
- **Growth:** Expand availability of Triumph model.
- **Infrastructure:** Improve organizational effectiveness.
- **Marketing:** Increase awareness of Triumph's value proposition.
- **Programs:** Guarantee quality programs and services.

About Triumph Services, Inc.

Background

Triumph Services, Inc., was founded on August 1, 2007, to offer support to adults with developmental disabilities who have the goal to live independently.

When Triumph began in August 2007, 16 individuals were identified as needing the immediate services of life coaching, supported employment, and social activity coordination. As Triumph began services for these 16 individuals, it was evident that Triumph was serving a group of individuals who have been historically under-served.

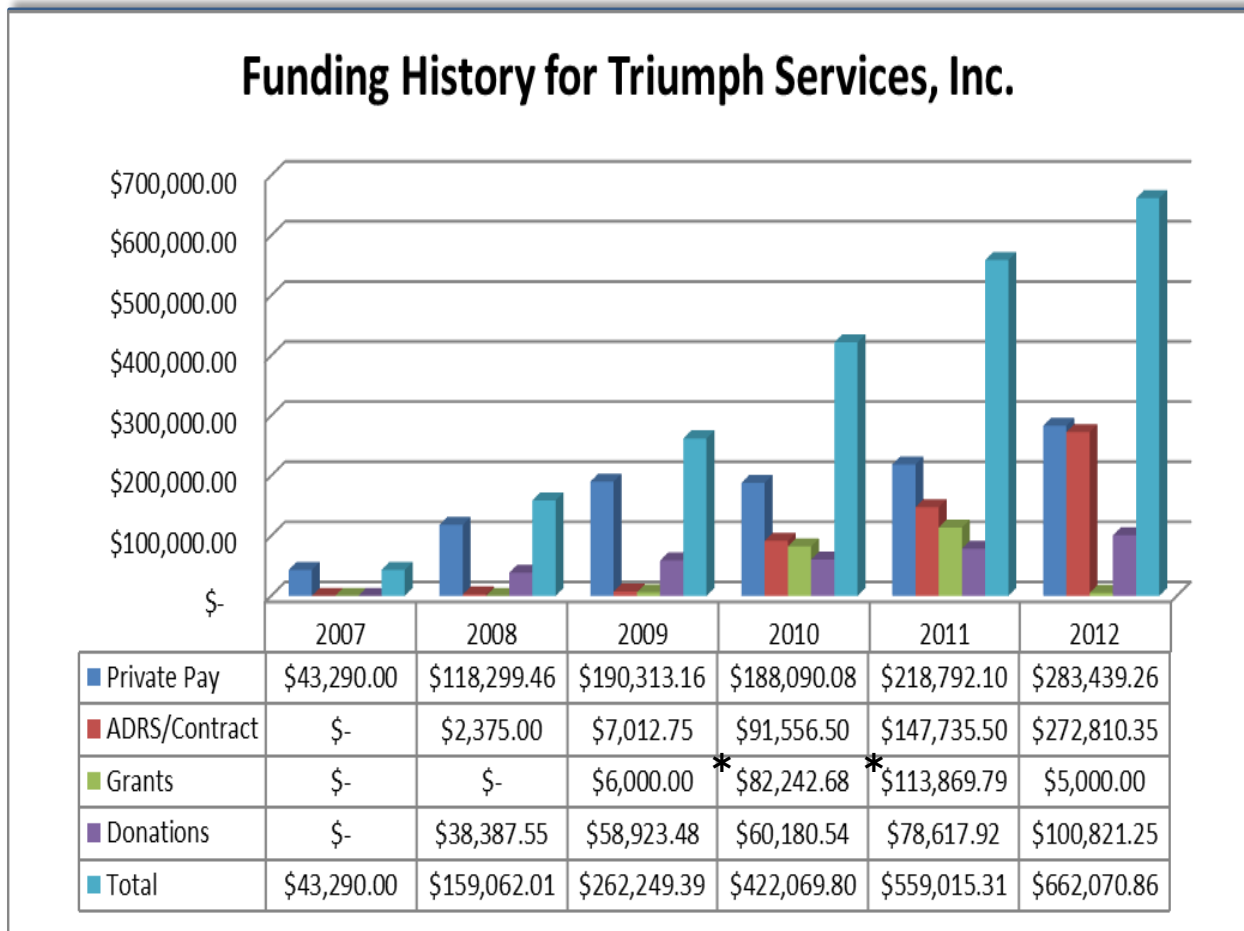
Typically, the individuals served by Triumph do not qualify for a range of private and public supported services. Nonetheless, this is a diverse group of adults who desperately needs our support. It became clear in the early months of operation that Triumph would need to identify other sources of revenue, such as grants or donations, in order to continue providing services to these individuals who had “slipped through the cracks.”

Services are centered on three aspects of life--living, working, and playing. Triumph offers life coaching (**LIVE**), supported employment (**WORK**), and social-activity coordination (**PLAY**). In addition to these three main services, Triumph offers individual, couples, and group therapy to address the anxiety and depression that is more prevalent in this population. Triumph staff and therapists work together to provide a multidisciplinary team dedicated to supporting each individual in meeting his/her goals. By providing these services, Triumph gives individuals with disabilities the support they need to live independently, an option that is both more inclusive and cost effective than a more restrictive residential placement.

Currently, Triumph serves 240 individuals, of whom 76 percent have a diagnosis of Autism Spectrum Disorder. With the number of individuals diagnosed with Autism Spectrum Disorder growing at an epidemic rate (1 in 88 births), the services Triumph provides are crucial as these children grow into adults. Triumph Service is a CARF (Commission on Accreditation of Rehabilitation Facilities) accredited organization and received national recognition by SEDL as an *Effective Program* in providing employment services for adults with autism.

Triumph partners with other organizations such as the Alabama Interagency Autism Coordinating Council, Alabama Autism Providers Network, Alabama Department of Rehabilitation Services, Alabama Department of Mental Health, Alabama Council for Developmental Disabilities, The Autism Society of Alabama, United Cerebral Palsy of Greater Birmingham, Glenwood, Inc., to ensure that the services we provide are addressing the most important areas of need for adults with developmental disabilities.

Funding History



* Reflects funding from American Recovery and Reinvestment Act



UAB Benevolent Fund



Alabama Department of Rehabilitation Services



A Taste of Triumph

Mission

Triumph Services, Inc., provides community-based support to individuals with developmental disabilities who are trying to live independently.

Vision

Individuals with developmental disabilities are valued as essential members of society and accorded the same dignity and respect as other individuals.

Core Values

We believe that individuals with developmental disabilities:

- Are, first and foremost, individuals deserving of recognition and respect
- Create their own vision and dreams for their lives
- Learn how to manage their homes in their homes, how to perform job skills on an actual job, and how to be social in real social settings.



Strategic Planning Assumptions

- The unemployment rate will have a neutral or negative impact on Triumph participants.
- The Alabama Department of Rehabilitation Services will continue funding for Triumph’s employment program.
- Birmingham, Alabama, will continue to be a highly philanthropic city.
- The need for services will continue to increase for adults with developmental disabilities.
- The Department of Education will continue to provide transition services with a goal of independence for students with developmental disabilities.

Goals and Objectives

Goal 1: Transform funding program to ensure long-term financial sustainability.	
Funding	Objectives
	<p>1.1: By January 2015, annually increase total revenue by 10% from events, grants, and fund drives.</p> <p>1.2: By January 2015, implement a fee structure based on a cost analysis of services provided.</p> <p>1.3: By December 2016, establish a viable endowment donor program that contributes to long-term financial sustainability.</p>

Goal 2: Expand availability of Triumph model to serve additional adults with disabilities.	
Growth	<p>Objectives</p> <p>2.1: By March 2014, develop and implement a plan to protect Triumph’s intellectual property to include the service program model--live, work, play.</p> <p>2.2: By April 2015, develop a training model of Triumph’s service program--live, work, play.</p> <p>2.3: By March 2016, implement the training model.</p> <p>2.4: By December 2016, publish and share results at statewide and national conferences.</p>

Goal 3: Improve organizational effectiveness to best serve participants and to ensure long-term growth.	
Infrastructure	<p>Objectives</p> <p>3.1: By June 2014, expand the capabilities and influence of the Board of Directors and Advisory Council.</p> <p>3.2: By October 2014, complete a comprehensive organizational effectiveness assessment of functional areas and key business processes.</p> <p>3.3: By December 2014, one-half of Executive Director’s time will be dedicated to building partnerships, developing a local and national presence for Triumph, and refining best practices.</p> <p>3.4: By March 2015, implement a robust volunteer program.</p> <p>3.5: By June 2015, implement organizational effectiveness improvements.</p>

Goal 4: Increase awareness of Triumph Services to support growth and sustainability.	
Marketing	<p>Objectives</p> <p>4.1: By December 2014, complete a comprehensive market analysis.</p> <p>4.2: By March 2015, develop a tiered marketing plan focusing on corporate and foundation donors, prospective participants, employers, and referral sources.</p> <p>4.3: By June 2015, identify a dedicated resource and/or employee to implement the marketing plan.</p>

Goal 5: Ensure quality programs and services to meet the needs of participants, families, and stakeholders.	
Programs	<p>Objectives</p> <p>4.1: By April 2014, establish quality assurance tools and measures.</p> <p>4.2: By December 2014, begin quality assurance process cycle.</p> <p>4.3: By June 2015, evaluate and communicate results with recommendations for incorporation into decision-making process.</p>

Appendix A: Board of Directors

Darcie Plowden, President
Owner, Sosie Freelance Markeing

David Herman, Vice President
Owner, Herman Medical, LLC

Jason Zarzaur, Treasurer
Chief Financial Officer, CPA, Zarzaur & Schwartz

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Managing Director, CTP, Oakworth Capital Bank

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Richard B. Marchase, Ph.D.
Vice President for Research and Economic Development, UAB
Parent Representative

Katherine Barr
Special Needs Attorney, Shareholder, Sirote & Permutt, PC

Jennifer Couch
Human Resources and Information Technology, The Southern Company

Marty Eason
Parent Representative

Elam Holley
President and CEO, First Partners Bank

Dr. Luis Pineda
Luis F. Pineda, MD, Cooking with Cancer

Nick Gaede
Partner, Bainbridge, Mims, Rogers, and Smith, LLP

Polly Harper
Academic Intervention Teacher, Mountain Brook Schools

Walter Jones
Senior Estimator, Brasfield and Gorrie

Nyya Parson-Hudson
Judge, Birmingham Municipal Court

Jeff Rabren
Senior Vice President of Government Affairs, Regions Financial

Appendix B: Strategic Planners

Melanie Bald, Life Coaching Coordinator, Triumph Services, Inc.

John Christopher Batts, Community Bank Specialist Mortgage Loan Officer, Branch Banking and Trust Company and Triumph Junior Board

*Leigh Belcher, Director of Clinical Services, Triumph Services, Inc.

*Joe Carter, Vice President, Adult Services, Glenwood, Inc.

*Jennifer Couch, Chair, Strategic Planning Committee, Triumph Board of Directors

Marty Eason, Participant Parent

Nick Gaede, Participant Parent

*Teashia Goodwin, Clinical Psychologist

Bama Hager, Alabama Interagency Autism Coordinating Council

Doris Hill, Coordinator of Educational and Community Supports, Center for Disability Research and Service, Auburn University

George Kakoliris, Life Coach, Triumph Services, Inc.

Acquanetta Knight, Director, Policy and Planning, Alabama Department of Mental Health

Mitchell Lord, Participant

Dick Marchase, UAB Vice President of Development and Research

*Davis McCarty, Triumph Board of Directors

Anna McConnell, Alabama Autism Coordinator

*Kim Oliver, Director of Operations, Triumph Services, Inc.

Teri Pinto, Clinical Advisory Committee, Triumph Services, Inc.

Darcie Plowden, Chair, Triumph Board of Directors

Lynn Ravin, Director of Development, N.E. Miles Jewish Day School

Whitt Steineker, Attorney, Bradley Arant Boult Cummings, LLP, and Triumph Junior Board

Cameron Steineker, Participant Family Member

*Brooke Stephens, Executive Director, Triumph Services, Inc.

*Alice Widgeon, Retired Early Intervention Coordinator, Department of Mental Health

Wade Wofford, Counselor, Alabama Department of Rehabilitation Services

* Member Strategic Planning Committee

Point of Contact

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