

FUTURE IN FOCUS: USING FUTURE VISION TO DRIVE STRATEGIC PLANNING

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WELCOME!



Shannon Porter has built an extensive career in the disability services field, with experience spanning Medicaid eligibility, Social Security Disability Determinations, IDD services, and 15 years at a Center for Independent Living. During her tenure, she has worked in Assistive Technology and Durable Medical Equipment, Home and Community-Based Services, and has served as CEO since 2018. Beyond her professional role, Shannon is the proud parent of three grown children—two daughters living in Portland, Oregon, and a son serving in the U.S. Army. She and her husband make their home in Springfield, Missouri, where they enjoy life with their two spoiled dogs, Ellie and Franklin.

Born and raised in mid-Missouri, Jess Frahm serves as Executive Director of Heartland Independent Living Center, bringing a deep personal connection and a diverse background in the medical field, teaching, and human resources. Inspired by her father, who used a wheelchair for the last 15 years of his life, Jess combines empathy, leadership, and strategic vision to advocate for independence and inclusion. She is committed to empowering individuals with disabilities to live life on their own terms, and outside of work she enjoys traveling with her husband and adult children, supporting live music—especially her husband’s band—and spending time outdoors gardening, reading, or watching the sunset.

WORKSHOP GOALS

Affinity Diagrams - a tool for uncovering shared vision

Defining Vision - Using top 3 objectives to craft a vision statement

Assess the Gap - compare where you are (the current state) to where you want to be (the future state)

Achievable Reach - Set annual goals

Track Progress - using monthly metrics and accountability

Essentials for Successful Planning

- Everyone is represented at all levels of the organization
- Provide equity around the table - no rank in the team
- Assume positive intent
- Safe place to be heard
- Don't let perfect get in the way of better



CASE STUDY

CIL in Crisis



2017-2020

Change Crisis - Funding Cuts, Rebranding, Leadership Changes, Staff Turnover



2020-2022

Pandemic - Office closures, Program stagnation, Continued turnover, Ongoing financial stress



2023 - 2024

Post Pandemic - Lack of brand recognition, Need to rebuild programs, Lack of capacity for outreach, Need for revenue diversification



2024 - 2025

Strategic Focus - Clarified long term vision, identified short term goals, developed monthly metrics of success

AFFINITY DIAGRAM EXPERIENCE



“What does the ideal future look like
for people with disabilities in your
community?”

AFFINITY PROCESS PART 1

Casting Vision

1 Sticky Note Per Idea

In one sentence or word,
describe your idea

Use as many sticky notes as
you have ideas

Clarity of thought or idea



“What does the ideal future
look like for people with
disabilities in your community?”

AFFINITY PROCESS PART 2

Next Step

Share Ideas

Place sticky notes on wall

NO talking!



BRINGING VISION INTO FOCUS PART 1

Silently group similar thoughts and ideas together

Continue to rearrange sticky notes until they are all grouped into themes

Still NO Talking!



BRINGING VISION INTO FOCUS PART 2

Summarize each group into one sentence or phrase

Assign value to each idea 1 - 3 - 9

It's ok to agree to disagree

Determine top 3 ideas



CASE STUDY EXAMPLE



Empower: abilities used this method to bring 15 staff from all levels and departments for a 3 day strategic planning workshop.

We set the ground rules to create a welcoming, inclusive and safe environment where all voices were respected and heard.

The affinity process demonstrated that we all had a similar vision for the organization and collectively crafted our 5 year vision, by identifying our top 3 objectives.

EMPOWER: ABILITIES VISION FOR THE FUTURE

Top Level Objectives

1. Empower: abilities provides a full range of disability services.
2. Empower: abilities is known throughout the service area as the disability experts.
3. Empower: abilities invests in our team, who carry out our mission.

Vision statement:

Empower: abilities provides a full range of disability services and is known throughout our 8 counties as disability experts because we invest in our staff so can carry out our mission to remove barriers and empower independent living for all people with disabilities.

CURRENT STATE VS FUTURE STATE

GOAL	CURRENT STATE	GAP
Empower: abilities provides a full range of disability services.	New staff and multiple services across 3 departments, staff don't fully understand what other departments do, poor inter-department referrals, lack of ability to promote services in the community	Staff need training in each department and all services offered
Empower: abilities is known throughout the service area as the disability experts.	Lacking brand recognition despite serving the community for 40 years	Lacking of outreach in all counties and outside of metro area
Empower: abilities invests in our team, who carry out our mission.	High staff turnover, lack of experienced staff providing services.	Need an employee retention plan.

TURNING GAPS INTO GOALS

GAP	ANNUAL GOAL
Staff need training in each department and all services offered	1) Create a comprehensive training program covering all departments and services provided. All staff complete training within 6 months of program completion
Lacking of outreach in all counties and outside of metro area	2) Fund a new position to focus on outreach. Develop outreach plan targeting 3 underserved counties. Hire and train new staff to carry out plan. Increase brand recognition and increased number of consumers in targeted counties
Need an employee retention plan.	3) Conduct surveys with staff to assess retention benefits. Assess costs of identified new benefits, increased wages, training expenses, etc. Develop retention plan based on staff feedback. Provide plan to the board for approval. Roll out retention plan.

ANNUAL GOALS & MONTHLY METRICS

PART 1

ANNUAL GOAL	MONTHLY METRICS
<p>1) Create a comprehensive training program covering all departments and services provided. All staff complete training within 6 months of program completion</p>	<p>Month 1-3: Training program developed. (Monthly metric % of training completed) Month 4-12: All staff complete training. Monthly metric # of staff completing training)</p>
<p>2) Fund a new position to focus on outreach. Develop outreach plan targeting 3 underserved counties. Hire and train new staff to carry out plan. Monitor increased brand recognition and increased number of consumers in targeted counties</p>	<p>Month 1-2: Recruit, hire and train outreach coordinator (Metric - staff hired goal date) Month 1-3: Develop comprehensive outreach plan for 3 underserved counties (Metric - plan completion goal date) Month 4-12: Monitor plan implementation (Metric - # of outreach activities completed in each county, # of consumers receiving services from each county).</p>

ANNUAL GOALS & MONTHLY METRICS

PART 2

ANNUAL GOAL	MONTHLY METRICS
<p>3) Conduct surveys with staff to assess retention benefits. Assess costs of identified new benefits, increased wages, training expenses, etc. Develop retention plan based on staff feedback. Provide plan to the board for approval. Roll out retention plan.</p>	<p>Month 1: Staff survey conducted (Monthly metric # of staff surveyed = 100%)</p> <p>Month 2-3: Use survey results to identify top retention requests and assess fiscal impact of new retention benefits. Develop retention plan for board approval. (Metric - plan submitted to board by goal date)</p> <p>Month 4: Share and implement retention plan with all staff members (Metric - plan implementation by goal date)</p> <p>Month 5-12: Monitor staff retention (metric - monitor staff resignations due to lack of benefits, culture, wages, job satisfaction, etc)</p>

STAYING FOCUSED

Monthly check in's for goal progress

Don't play the Blame Game

If a goal target is missed, identify the barrier, make a new plan and move forward. Life happens and we adjust and move on

Reach High

Goals should be a challenge but not an impossible one.

Make sure that you are reaching far enough without being unreachable.

Learning is a Curve

The first year will be full of learning and adjusting to ensure that you are using the correct metrics to measure success.

It is more important to stay focused on the goal and adjust the metrics as needed.

Get back on the Horse

No one and no team is perfect. If you begin to lose focus on monthly progress tracking, get your team back together and get back on track. Don't let your goals die from neglect.

Most importantly - don't let perfect get in the way of better!

Q&A SESSION

We value your questions and want to provide the best answers! To make sure we can do that we ask you to :

- Use the microphone so everyone can hear you (even our hard of hearing friends!)
- Keep the crosstalk quiet so we can continue the conversation
- Share your experience with the group



THANK YOU- REACH OUT & STAY IN TOUCH

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