



OE Enterprises Strategic Plan

2026–2029

MISSION

Enhancing the lives of persons with disabilities through advocacy, education, and employment.

VISION

We aspire to create a world where individuals thrive and find purpose in their journey.

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Organizational Overview

OE Enterprises is a mission-driven nonprofit dedicated to advancing employment, independence, and inclusion for individuals with disabilities across North and South Carolina. With a 50-year legacy of service, OE blends high-quality programming with strategic partnerships, operational excellence, and a deep commitment to person-centered care.

In 2025, OE supported 658 individuals through a diverse network of programs—transition services, Project SEARCH, Meaningful Day Services, Community Employment, AbilityOne federal contracts, and Business Services. These programs are made possible by more than 110 community partners and a highly skilled workforce of 122 staff members.

OE operates three major program hubs in Alamance, Orange, and Randolph counties, while employment and transition services extend across multiple regions in North Carolina and federal custodial operations expand into South Carolina. Each site contributes to a unified mission: creating pathways to independence, meaningful work, and a stronger, more inclusive community.

The 2026–2029 Strategic Plan builds on this foundation—strengthening service quality, supporting and growing our workforce, expanding community partnerships, and ensuring sustainable organizational growth. Together, these pillars provide a roadmap for long-term impact, operational strength, and continued mission-centered excellence.

Board of Directors

Ingrid Conley	President
Lionel Phillips	Treasurer
Kevin Cain	Secretary
Charlie Cleary	Member
Jimmy Greenlee	Member
Evans McKinney	Member
Jannylle Pitter	Member

Leadership Staff

Amy Miller	CEO
Audra Kea-Hamilton	CFO
James Flowers	Director of Service Contract Division
Murphy Faber	Director of Transition Services
Bridget Watson	Director of Meaningful Day Services
Denise Puryear & Jasmyne Davis	Community Employment Managers

This strategic plan reflects a thorough organizational assessment informed by the voices of individuals served, staff, the Board of Directors, and community stakeholders. OE Enterprises analyzed survey feedback and conducted an organizational SWOT review to determine the most critical areas of focus for this planning cycle.

Through a systematic assessment of our strengths, weaknesses, opportunities, and threats, we identified the priorities that shaped our goals, desired outcomes, and long-term direction. From this analysis, four strategic pillars emerged as the foundation for our path forward:

1. Person- Centered Excellence
2. Workforce Development and Retention
3. Community Connections
4. Organizational Sustainability

Pillar 1: Person-Centered Excellence

By December 2028, and as measured by 85% participant satisfaction and internal quality rate, stakeholders will indicate that OE delivers high-quality, individualized, and safe rehabilitative services to OE participants by full implementation of person-centered thinking practices, semi-annual staff training, and sustained compliance with organizational policies, procedures, and all applicable health and safety standards.

Timeline/Context	SMART Objective	Expected Outcomes	Artifacts
Year 1 (2026): Staff Capacity & Culture Building	By December 2026, 80% of OE program staff will complete foundational training in person-centered thinking, including safety practices, and each service site will establish daily practices that honor individual choice and autonomy.	<ul style="list-style-type: none"> - 80% of OE staff complete training (verified by logs). - Each site documents daily person-centered practices. - 90% compliance in safety audits. - Evidence of participant autonomy in service delivery. 	<ul style="list-style-type: none"> - Daily schedules - Skill development plans (staff & participant) - Training logs - Person-centered plans - Safety logs - Audits - Interest surveys
Year 2 (2027): Embedding Person-Centered Thinking in Practice	By December 2027, OE will integrate person-centered thinking tools (e.g., participant profiles, learning logs, safety trainings) into 75% of participant service plans and	<ul style="list-style-type: none"> - 75% of participant plans include person-centered tools. - Quarterly team reviews completed and documented. - Staff demonstrate consistent use of learning logs and participant profiles. 	<ul style="list-style-type: none"> - Daily schedules - Training logs (staff & participant) - Participant safety training & role play outcomes - Person-centered plans - Safety logs

	daily routines, and conduct quarterly team reviews to assess alignment with person-centered values.	- Increased participant engagement in planning.	- Audits - Satisfaction survey
Year 3 (2028): Evaluation & Continuous Improvement	By December 2028, demonstrate a 20% improvement in participant-reported autonomy and satisfaction (via bi-annual surveys), and use feedback from staff and participants to refine person-centered thinking practices across all CRP programs.	- 20% increase in satisfaction and autonomy scores. - Feedback loops established (surveys, focus groups). - Adjustments made to training and service delivery based on feedback. - Documented improvements in person-centered practices.	- Daily schedules - Training logs (staff & participant) - Participant safety training & role play outcomes - Person-centered plans (with data collection) - Safety logs - Audits - Satisfaction survey

Pillar 2: Workforce Development & Retention

By December 2028, OE will strengthen organizational culture by enhancing employee growth and engagement, ensuring that 80% of employees have access to role-specific required training and clear development pathways, while achieving a minimum 85% staff satisfaction rate in the areas of professional growth and support, demonstrating a workforce that is skilled, engaged, and deeply committed to advancing the organization's mission.

Timeline/Context	SMART Objective	Expected Outcomes	Artifacts
Year 1 (2026): Establish Training Foundations	By December 2026, OE will develop role-specific training plans, document annual training requirements in the Learning Management System, and implement professional development pathways for at least 80% of positions.	<ul style="list-style-type: none"> - Role-specific training plans completed for 80% of positions - Annual required training mapped in the Training System - Professional development pathways created and communicated - Clear staff understanding of required competencies and progression 	<ul style="list-style-type: none"> - Role-specific training plans - Annual training plan in Training System - Professional development pathway documents - Competency maps - Training dashboards
Year 2 (2027): Implement & Measure Staff Growth	By December 2027, OE will measure staff satisfaction in growth and support using Annual PDP goals, succession planning documentation, professional development pathway usage, surveys, and year-over-year comparisons of average length of tenure of	<ul style="list-style-type: none"> - Annual PDPs completed with development goals - Succession planning discussions documented - Staff engagement with professional development pathways increases - Baseline satisfaction, engagement, and readiness metrics established - Year-over-year trends reflect 	<ul style="list-style-type: none"> - PDP development goals - Succession planning documents - Training activity reports - Staff satisfaction surveys - Year-over-year comparison reports

	staff.	improvements in clarity and support	
Year 3 (2028): Evaluation & Enhance the Learning System	By December 2028, OE will demonstrate improvements in staff satisfaction, development participation, and readiness for advancement through refined training plans, updated pathways, and strengthened leadership practices.	<ul style="list-style-type: none"> - Improvements shown in year-over-year satisfaction trends - Increased pathway participation - Clear documentation of skill advancement - Data-driven updates made to training plans and PDP processes - Stronger organizational capacity and role readiness 	<ul style="list-style-type: none"> - Year-over-year satisfaction reports - Updated pathways - Revised training plans - PDP summary data - Annual survey and feedback results

Pillar 3: Community Connections

By the end of the strategic plan period (2029), OE will increase community integration for OE participants by establishing sustainable partnerships, increasing participant-led engagement, and fostering inclusive visibility in local communities, as measured by a 20% increase of community partnerships, 20% increase in competitive integrated employment placements, and hosting and/or participating in 2 community events per year.

Timeline/Context	SMART Objective	Expected Outcomes	Artifacts
Year 1 (2026): Partnership Mapping & Engagement Launch	By December 2026, all OE program areas will establish partnerships with a minimum of three local organizations to expand opportunities for inclusive volunteering, social engagement, and employment. At least 50% of Meaningful Day participants will participate in one or more community-based activities. CIE placements will increase by 10% over the prior year with at least 30% of individuals placed maintaining employment for six months or longer.	<ul style="list-style-type: none"> - 3+ partnerships established. - 50% participant engagement in community activities. -10% year-over-year increase in CIE placements - Staff report increased confidence in facilitating community connections. 	<ul style="list-style-type: none"> - Partnership agreements - Community activity logs - Participant interest surveys - Staff training logs - Employment Placement Report
Year 2 (2027):	By December 2027, 60% of	- 60% recurring engagement.	- Event flyers/photos

<p>Deepening Engagement & Visibility</p>	<p>Meaningful Day participants will engage in recurring monthly community-based activities, and each site will host at least one inclusive community event co-led by participants. CIE placements will increase by 10% over the prior year with at least 30% of individuals placed maintaining employment for six months or longer.</p>	<ul style="list-style-type: none"> - 1+ community event per site with participant leadership. - Increased visibility of OE programming areas' participants in local communities. 	<ul style="list-style-type: none"> - Leadership plans - Community feedback forms - Engagement logs
<p>Year 3 (2028): Evaluation & Sustainability</p>	<p>By December 2028, demonstrate a 25% increase in participant-reported sense of belonging and community connection (via annual surveys), and formalize sustainable partnership models with at least two organizations per site.</p>	<ul style="list-style-type: none"> - 25% increase in belonging scores. - 2+ sustainable partnerships per site. - Documented best practices for community integration. 	<ul style="list-style-type: none"> - Survey results - Sustainability plans - Integration toolkit - Focus group summaries

Pillar 4: Organizational Sustainability

By December 2028, OE will strengthen financial health, operational effectiveness, and advocacy efforts by expanding two core programs, increasing funding, and growing the donor base by 10%, ensuring resources support high-quality, mission-driven services and effective advocacy for individuals served.

Timeline/Context	SMART Objective	Expected Outcomes	Artifacts
Year 1 (2026): Program Identification & Donor Outreach	By December 2026, OE will identify two programs for expansion, using feasibility indicators such as headcount growth, funding potential, or new service codes. OE will also diversify donor engagement by increasing outreach through social media, hosted events, and promotion of recurring giving opportunities.	<ul style="list-style-type: none"> - Two programs identified based on headcount, financial projections, or new service codes - Increased donor engagement activity across social media, events, and recurring giving - Baseline donor metrics established 	<ul style="list-style-type: none"> - Feasibility assessments - Donor outreach logs - Engagement metrics - Year-over-year comparisons
Year 2 (January–February 2027): Leadership Decision Window	By February 2027, the leadership team will formally approve or decline proposed program expansions based on feasibility outcomes, projected impact, and operational readiness. If both proposals are declined, the leadership team will document the rationale, identify the barriers contributing to the decision, and initiate a new exploration cycle to evaluate alternative program opportunities or emerging service models by July 2027.	<ul style="list-style-type: none"> - Leadership decisions documented - Expansion timelines confirmed - Resource allocation outlined 	<ul style="list-style-type: none"> - Leadership decision documents - Expansion readiness assessments - Year-over-year comparisons
Year 3 (2028):	By December 2028, OE will evaluate growth	Documented growth in donor	- Donor participation reports

<p>Evaluation of Engagement & Expansion Readiness</p>	<p>and donor diversification using year-over-year comparisons to measure increases in donor participation and readiness for program expansion.</p>	<p>participation - Clear year-over-year trends in engagement and financial stability - Expansion readiness validated</p>	<p>- YOY comparisons - Financial summaries</p>
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Board Approved: December 19, 2025