



BISM Business and Strategic Plan: A Blueprint for Expanding Community Based Opportunities

Ohio Department of Developmental Disabilities

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BISM Business and Strategic Plan: A Blueprint for Expanding Community Based Opportunities

Introduction

This business plan developed by Koinonia Homes (KH) provides a blueprint for adult day services operated by the wholly owned subsidiary Koinonia Enterprises (KE) that will offer substantial opportunities for community inclusion and choice based on individual interests and abilities. The key component of this blueprint for KE, community-based day services program is centered in the development of a fiscally sustainable model that can ensure program excellence. However, the business plan also includes redesign for other program components in order to sustain a program that incorporates best practices and achieves meaningful and measurable outcomes for people supported by KE.

Part I of the business plan will lay out the key components of the model. It begins with a description of the program model then details out important program components including: 1) sustainable funding and follow up steps to ensure and monitor long term sustainability; 2) location and development of the appropriate building space for effective provision of service 3) required investments in technology to accomplish the program goals, 4) effective program staffing including restructuring of agency staffing, training and recruitment; 5) modification of policies, procedures and systems to support a safe, sustainable and effective program, and 6) gradual piloting and roll out of community based supports particularly in the context of the phased in post COVID reopening. Part II is an implementation/strategic plan providing in a table form the next steps for development of the LIFE Adult Day Services Model.

Part I: The LIFE Adult Day Services Model

Description

The LIFE Model will offer significant opportunities for community inclusion and choice based on each person's desire for community engagement with the goal of expanding horizons and increasing engagement in meaningful community activities. Participants assessed at Life Level 1 through the LIFE Canvass will be offered a full week of community-based activities. Participants assessed at Life Level 2 and 3 will be supported up to a third of their time in community activities of choice at a minimum of a 1:3 ratio.

The LIFE model will depend on technology to support people in making choices and engaging in the community. The Choices App will be a resource for staff and participants to help identify interests and find activities in the community that meet their needs. Coordinator level staff, with support of program managers, will be matching small groups of people by interest and geography and developing schedules around interests. They also will match staff with these groups by both

geography and interest. They will be aided in available internet technology in doing that including google maps that will enable them to match staff with participants, and to see where people with similar interests live in proximity to each other.

The model will also depend on cell phone technology to keep staff in ongoing contact with supervisors, participants, families, and natural supports in the community. One of the strengths of Ohio services, that can support effective community engagement, is the regulatory flexibility that participants do not have to be in line of sight at all times that they are being supported. One staff person can effectively support three participants in the community, and encourage community inclusion, by rotating among participants engaged in different activities at one community-based site.

For example, three people may volunteer at a food pantry/soup kitchen with one person supporting office-based staff, another person helping with food storage and inventory, and another person helping in the kitchen. The support professional will provide guidance and support to the food pantry staff, rotating direct contact, but staying available by phone with all community partners.

Fiscal Sustainability of the Model

A key desired outcome for the BISM grant was to ensure that the envisioned community-based LIFE model was fiscally sustainable. The team separately analyzed costs of support services for people supported by waiver funding and people supported by Intermediate Care Facility (ICF) funding, ascertained the additional cost of services, reviewed current revenue sources, and then looked at ways to restructure the current use of funding that had been designed around facility-based services to create an effective funding strategy.

The team has concluded that a reallocation of ICF funding from KH's Transportation Division to the KE division will support program staff that will be working holistically with people supported by KE, bringing them to facility and community-based services, supporting them in group facility-based activities, supporting them in community activities, and working in small groups in community hubs.

This blueprint lays out the fiscal analysis that supports this business model broken down into 1) cost and revenue analysis for waiver services; 2) cost analysis for ICF services; 3) comparison of anticipated costs with costs from base year 2019; and 4) potential available funding from current transportation ICF allocations.

Waiver Program Services

KE can achieve a fiscally sustainable LIFE Model that provides community-based day services at least ten hours a week to all waiver participants by 2023.

This analysis is based on data about life levels and staffing ratios for the 28 people receiving services as of February 2021. For this business plan, we then extrapolated those costs and revenues to current number of participants (42) and projected increases over the next two years, in numbers served, costs and revenues.

Cost Analysis

Cost analysis was based on current staff wages and hours of service for the sample group. The team developed alternative cost analysis for minimum staff to individual ratios of 1:3 and 1:4 and supervisory caseloads of either 20 people or 25 people. The cost analysis was based on programmatic information developed through the LIFE Canvass assessment for 28 participants enrolled in waiver in February 2021 during the height of the pandemic. At that time, nine participants were at LIFE Level 1 and under the criteria developed by the team would be open to and benefit from a full day of community-based program. Nineteen (19) people were at Life Level 2 and 3, and the team designed the model for them based on spending 10 hours, or a third of their day program time in community activities.

The costs for manager level staff and non-personnel costs were based on 2019 financial information. While the team recognizes that ADS direct service staff work 40 hours a week, for this summary analysis, costs will be based on the actual service hours provided to waiver participants. The team is assuming that staff will serve both waiver and ICF participants and can fill out their 40-hour week with services to ICF participants, particularly transportation support. (See analysis of ICF costs and revenues below.)

Keeping in mind best practices and revenue constraints, this business plan analyzes the viability of services at a minimum of 1:3 ratio and 1:4 ratio, with a supervisory caseload at the larger caseload of 25 participants.

As part of the BISM implementation plan, these numbers will be further revised and updated over the coming months. In particular, rental costs for building or community space are uncertain at the time of developing this business plan and there have been recent changes in non-direct personnel costs.

Table 1 below provides cost analysis at the two different ratios for 42 participants.

Table 1. Cost of Waiver Services: 42 Waiver Enrollees

Cost Category	1:3 Ratio/Supervisory Caseload=25	1:4 Ratio/Supervisory Caseload=25
DSP Costs	288,146.00	246,125.00
Coordinator Costs	80,444.75	80,444.75
Other Allocated Costs from KE 2019 Financials (23%)	296,340.00	296,340.00
Total Costs	664,930.75	622,909.70

Cost/Revenue Comparison

The team also projected waiver revenues generated by services to 42 waiver participants including maximum revenues and revenues based on an 85% attendance rate. Maximum potential revenues for 42 participants was \$694,963. Revenues based on an 85% attendance rate was \$590,718.

Table 2 provides a cost/revenue analysis for 42 waiver participants.

Table 2. Cost/Revenue Analysis for 42 Waiver Enrollees

Revenue and Costs	1:3 Ratio/Supervisory Caseload=25	1:4 Ratio/Supervisory Caseload=25
Revenue at 85% Attendance	590,718.00	590,718.00
Costs	664,931.75	622,909.00
Surplus (+) or Deficit (-)	-74,213.75	-32,191.00

This business plan projects that within two years, KE's adult day waiver services can achieve a balanced budget, while providing people with a significant opportunity to engage in activities of choice and interest in the community benefiting from a 1:3 staffing ratio. Table 3 illustrates the incremental increases in revenues and costs, assuming direct support staff at a 1:3 ratio and supervisory caseloads of 25. For this analysis, we use the 1:3 ratio because best practice suggests developing a business plan based on this ratio if a balanced budget within a reasonable period. We note that other program costs could increase over time, requiring some small growth beyond 56 participants to achieve a balanced budget.

Table 3. Balanced Budget through Expansion to an Economy of Scale

Number Served	July 2021 - 42 served	July 2022 - 49 served	July 2023 - 56 served
Revenue	590,718	689,170	787,623
Costs DSP/Coordinator	368,589	430,020	491,451
Other Program Costs	296,340	296,340	296,340
Total Costs	664,929	726,360	787,791
Surplus (+) or Deficit (-)	-74,211	-37,190	-168

Continued expansion in ADS waiver enrollment to 56 over the next several years is a very achievable goal. There are already another 3 candidates in the pipeline. In addition, at least some of the remaining 9 participants in the STEP program may choose to remain in KE services. There is an opportunity for marketing an innovative community-based day program geared to community inclusion and choice to these participants and other community members with disabilities.

Adult Day Supports for ICF Participants

ICF participants in KE adult day services comprise over 76% of current enrollees. Ensuring that ICF funding can support community-based day services model is key to a sustainable business plan.

This business plan concludes that a fiscally sustainable program model for KE participants with ICF funding is achievable by restructuring of staff responsibilities and reallocation of ICF funding from Koinonia's Department of Transportation. This analysis is supported by a cost analysis of the proposed model and an analysis of available revenues based on 2019 ICF funding allocations to KE and Koinonia transportation.

Cost Analysis

The cost analysis for ICF participants was similar to that of the waiver participants. The team completed all LIFE assessments for these participants, and all were at a Life Level 2 or 3. Under the team's framework, a program for these participants would assume that all ICF participants in KE adult day services would spend approximately a third of their program week (10 hours) engaged in community-based activities. Alternative cost scenarios were performed, based on 1:3 and 1:4 staff ratio. Data was also gathered about each person's support needs so that if the person needed a higher level of support in the community, the cost analysis assumed that higher level of support. At least 52 people, needed at least a 1:3 ratio of staff support, and 28 people needed 1:2 or greater. Many needed a higher level of support. Alternative cost scenarios were also developed for supervisory caseloads of 20 and 25.

Keeping in revenue constraints as well as best practice, this business plan will analyze the viability of services at a minimum of 1:3 ratio and 1:4 ratio, with a supervisory caseload at the larger caseload of 25 participants. As part of the BISM implementation plan, these numbers will be further revised and updated for current management salaries and anticipated non-personnel costs over the coming months. Rental costs for building or community space are uncertain at the time of developing this business plan. In addition, there is current uncertainty about the impact of levels of service during COVID on the contracted revenue for ICF services.

Costs were analyzed for the 137 participants for whom support requirements were available. If numbers served are somewhat higher, costs will be slightly higher than estimated here. Costs were based on current wages and an 8-hour workday. All KE staff are paid based on a 40-hour work week even if the hours of program time are 6 hours. For waiver services we assumed costs at 6 hours a day because it is probably that by matching ICF and waiver participants, staff can be provided 40 hours of work through support of ICF participants, particularly transportation to and from services.

Table 4 below provides cost analysis for the two different ratios.

Table 4. Cost Analysis for ICF Enrollees

Cost Category (137 people)	1:3 Ratio/Supervisory Caseload=25	1:4 Ratio/Supervisory Caseload=25
DSP Costs	1,423,719.00	1,351,144.20
Coordinator Costs	242,394.00	242,394.00
Other Allocated Costs from KE 2019 Financials (76%) Plus Nursing Costs	1,044,098.00	1,044,098.52
Total Costs	2,710,211.00	2,637,636.72

There is a relatively small difference in costs for a 1:3 and 1:4 ratio. That is because most people receiving ICF support require a minimum ratio of 1:3 in the community and many require a higher staff to individual ratio.

Cost/Revenue Comparison

Determining available ICF revenue is complex. Koinonia receives ICF funds for all services and then contracts with KE to provide day services. The ICF allocation to KE services is a complex formula based on covering the costs of active treatment for the entire day program within the limitations of revenue received for ICF participants.

For this business plan, the potentially available revenue to cover the costs of community-based day services will be extrapolated based on 2019 revenue allocations from one of the two ICF divisions. In 2019, Koinonia operated two ICF units, one KPU was fully owned by Koinonia, the other KCS was owned by the county but operated by Koinonia. Each division roughly had the same number of participants and are now both owned directly by Koinonia. Therefore, analysis here will estimate potential available revenues by doubling the revenue allocated directly from Koinonia to KE in 2019.

The BISM team recognized that the program could cover some of the wages of KE staff, working full forty-hour weeks, by restructuring staff jobs to include transportation of ICF participants to and from their day program day. Therefore, it was useful to look at the ICF allocations to both KE and the Koinonia transportation department.

The combined allocation from ICF funds in 2019 to KE enterprises and the KH transportation department was 1.6 million dollars. Of this 1,074,000 was allocated to KE enterprises and the balance of \$526,000 was an allocation to the transportation division used for the most part for transportation to the KE facilities. Doubling these allocations, the anticipated revenue for KE alone would be 2,148,000 and the anticipated revenue for KH transportation would be \$1,052,000.

The BISM team recognized that the allocation of \$2,148,000 to KE alone would not cover the cost of operating a model program that meets the desire and need for community inclusion for a third of the program week. However, a reallocation of services and funding from KH’s transportation department would be the key to a sustainable business model. The BISM team, once expanded to include director of transportation Maureen Schroder, developed a model in which KE staff provide

active treatment including facility supports, community integration supports and transportation to both community and facility-based services.

KE staff can provide transportation to ICF participants using the smaller vehicles maintained by both the ICF residences as well as vehicles maintained by the Koinonia transportation department. A significant portion of the approximate \$1,052,000 allocated previously to the transportation can be reallocated to support the KE program, supporting the cost of adding in a community-based component.

Under this reallocation, almost 3,200,000 (approximately 2,148,000 KE allocation and 1,052,000 Koinonia transportation allocation) would be available to cover the adult day services programming for ICF participants, estimated above at 2,710,212. There would be some additional costs for maintenance, fuel etc., associated with this assumption of transportation. The initial estimate of these costs at least \$75,549.61. After these costs are deducted, the available ICF funding would still cover the estimated costs of providing people in the ADS program community-based day services for at least 10 hours a week at a 1:3 staff to individual ratio or at any higher ratio required.

If significant portions of the transportation allocation can be restructured toward KE services, there could even be a cushion in revenue to allow for higher staff wages for some premium shifts, as well as to add more coordinating staff. While this business plan is based on coordinator caseloads of 25 participants, more coordinating staff will promote more meaningful services and will ensure that staff absences do not reduce the ability of KE to sustain the community-based activities. We estimate that the additional cost of reducing coordinator caseloads to 20 participants, would be \$93,842.50 including \$67,871 for ICF services and an additional \$25,982 for waiver supports.

Comparison of Staffing Costs—LIFE Model and 2019 ADS Program

We calculate the combined increase in staffing costs compared to the baseline 2019 year to be \$837,094.

Table 5 shows the 2019 costs of direct support staff and supervisors compared with projection of costs for direct support workers and coordinators under the LIFE ADS model. The data for the projection model breaks down direct support workers and coordinators into waiver and ICF programs with each category. That information is not available from the 2019 data.

We note that the estimate of projected costs is based on the full costs of staff assuming staffing at the ratio required for participants in both the facility and in the community. To the extent in 2019 staffing hours were lower than that indicated by ratios because of staff turnover, 2019 costs might be different than a full costing out of facility-based costs based on ratios.

Table 5. Additional Staffing Costs in LIFE ADS Model Compared to 2019

Cost Category	KE Financial Data 2019 (75 participants)	Projected Model (includes fringe) 181 participants	
Direct Support Workers Total	788,919.00	1,711,865.00	
Waiver		288,146.00	
ICF		1,423,719.00	
Coordinators	196,257.00	322,838.75	
Waiver		80,444.75	
ICF		242,394.00	
Direct Care Fringe	212,434.00		
Total Costs	1,197,610.00	2,034,703.75	+837,093.75

Achievable Fiscally Sustainable Model

This business plan supports the recommendation that the proposed LIFE Model is a fiscally sustainable business model that will enhance opportunities for community inclusion and choice. Reallocated revenue from the Koinonia Costs and revenues will need to be reanalyzed and updated to take into account fast moving changes in the fiscal environment including updated ICF contract reimbursement, projection of rental costs, and the impact of the new Work Life Balance initiative. However, this business plan provides a framework for analyzing these changes in the business environment. In Part II, the implementation plan outlines additional detailed analysis required as part of the gradual roll out of this model.

Staffing Component of the LIFE Model

The LIFE ADS model, with its significant community inclusion component, will need a larger number of staff, including staff with talent for supporting inclusion and choice in community-based activities. Development of the model will mean recruiting and retaining staff who match the community-based aspect of the program. Issues KE will address in structuring the model include:

- Recruiting sufficient number of staff who have good driving abilities. Not all staff will need to drive but many staff will during some of their time driving a small group of 3 participants into the community or back and forth from their homes.
- Drafting new job descriptions for support workers and coordinators that includes and emphasizes support in community activities and the values of community inclusion and choice during that support.
- Recruiting enough staff to support people at the required ratio in the community. This recruitment will be implemented over time as the agency pilots and then expands the community-based aspect of the program.
- Hiring new coordinators as the community-based component of the program rolls out to include more and more people enrolled in the ADS program.

- Training for staff in effective support in the community including effective engagement of natural supports.
- Training coordinator and direct support staff in the use of the Choices App to identify resources.
- Effective payroll procedures for allocating staff time. One of the areas to be explored will be how the KE program design complements the Work Life Balance initiative. To the extent staff might combine shifts of KE and ICF residential supports, staff will need user friendly tools and training to allocate their scheduled time correctly.

Technology Component of the LIFE Model

The LIFE ADS Model will benefit from and depend upon the effective use of technology to identify community resources, provide safe and effective sources, and promote community integration. As KE implements the model, it will be further developing and capitalizing on the following technological and digital tools and resources. Staff will need to be marshalled to plan and implement the use of these tools.

- Ready the Choices App to be used for locating resources in local communities. The *Choices* app allows staff or participants to quickly find community-based activities that are appropriate for each person's LIFE Level. Users can quickly get a synopsis of activities happening within a chosen geographic limit near their current location. Users can select activities based on category of interest and immediately receive all the information they will need to participate. A grant has recently been obtained in order to move forward with the app development.
- Utilizing internet search tools, including google maps to match participants and staff by geography and interests.
- Ensuring that all community-based staff and participants have access to cell phones that will be used for maintaining contact with supervisors, DSPs, and community partners.

Building and Community Space for the LIFE Model

Implementation of the model will be rolled out during the same time frame as reopening as the public health emergency eases and restrictions lift. KE will be exploring a range of space alternatives to supplement the one building that is currently available for the facility portion of the program. These alternatives may include a second building and/or a number of smaller hubs leased or contributed by community partners.

The current fiscal sustainability analysis is based on facility costs from 2019 which included two building sites rather than the one currently operating. Over the next months, as KE has developed a plan for building space, including either a single building or multiple small, leased sites, revised business plans can include those numbers.

KE's management team will want to explore the options available keeping the following criteria in mind.

- Locating sufficient space to offer group activities at current facility-based ratios for both waiver and ICF services.
- Recognition of the benefit of small hubs in local communities. Small hubs, strategically located, can reduce transportation time to activities and can promote engagement with community partners.
- Locating space that is within budget allocations.
- Estimating appropriate rental costs for space

Policies and Procedures for the LIFE ADS Model

Community programming requires different types and levels of oversight and additional safety concerns. Staff will need clear guidelines about communication with supervisors about new development, reporting incidents that occur in the field, communicating changes of schedules to supervisors, families, participants, residential staff, and community partners. Procedures will need to be developed for checking driver's licenses and monitoring driving history. Insurance policies will need to be reviewed to ensure that there is coverage for activities in community sites and that policies are updated for changes in the number of staff who may be using motor vehicles.

Piloting and Phased Roll-Out of the LIFE ADS Model

The roll out of this program will be occurring on the background of reopening of the economy and community. It will also need to take into account the current availability of one building for facility-based services. In addition, the Work Life Balance Initiative will impact staff schedules and wages. The implementation of the program will be coordinated in the context of this changing environment.

This business plan recommends a gradual piloting of the community component of the program for both waiver and ICF program enrollees. The timeline will depend on the availability of community options based on the phased in reopening of the economy, volunteer, and recreational opportunities. The business plan recommends phasing in two pilot programs within the next three months as follows:

- Pilot three groups of three waiver participants spending approximately one third of their time in community activities.
- Pilot developing community-based schedules of 10 hours for at least nine participants in the ICF program with a focus on participants who want structured programming but for whom building space is not available.
- Coordinate pilots with KE plans to schedule shifts of ADS services at 1200 Resource Drive.

Part II: Implementation/Strategic Plan

This business plan has documented the fiscal sustainability of a LIFE ADS model designed to expand community inclusion and choice. The following implementation/strategic plan in Table 6, provides next steps for KE leadership for roll out of this program in the context of a complex and changing environment. The implementation plan is divided into follow up goals and tasks in the component areas described above: fiscal modeling, staffing, technology, space, policies and procedures and piloting strategies.

Table 6. Implementation Steps for LIFE ADS Model

Action	Responsibility	When will this happen?	Expected Outcome
1.0 Fiscal Sustainability	KE Director, KH Fiscal Team, Director of Transportation, Director of ICF, HR Team	July 2023	Program able to sustain the model
1.1 Updating of Fiscal Sustainability Plan Based on projections of space costs during reopening, Work Life Balance Initiative, updated ICF contracts.	KE Director, KH Fiscal Team, Director of Transportation, Director of ICF, HR Team	Ongoing through September 2021	Update information from baseline 2019 data including updated information on costs of space, new staffing initiatives, and detailed analysis of ICF and transportation costs and revenues
2.0 Staffing	KE Director, HR Team, and Management Team	Ongoing	Maintain adequate staffing
2.1 Revise job descriptions	KE Director and HR Team	August 2021	Job Description that reflects community-based component of work
2.2 Identify and train one or two coordinators who will supervise pilot initiatives	KE Director, HR Team, OL Team, and Management Team	August 2021	Coordinators who understand and are committed to the vision
2.3 Identify and train sufficient staff to staff piloting of community-based component for waiver and ICF services	HR Team, OL Team, and Management Team	October 2021	Designation or recruitment of staff who have talent and capability for community-based services and driving credentials and proficiency.
3.0 Technology	KE Director, KH Fiscal Team, IT Team, Quality Team, Management Team, Marketing Team	Ongoing	Ensure updated technology is identified, purchased, and designed to support staff and participants.
3.1 Complete development of Choices App	KE Director, KH Fiscal Team, IT Team, Quality Team, Management Team, Marketing Team	October 2021	Updating of App that will facilitate identification of community resources
3.1 Mapping of geography and interests of participants and staff to select pilot group	KE Director, Management Team, ICF Team	September 2021	Appropriate groups for waiver and ICF pilots

3.2 Review available technology for pilot staff and participants	Management Team, IT, and direct support team	September 2021	Ensure access to appropriate technology for pilot participants and staff
3.3 Complete identification of interests and potential activities for all waiver participants	Management Team and direct support team	Ongoing	Ensure assessments completed to collect interests
3.5 Complete identification of interests and potential activities for all ICF participants	Management Team, ICF team, and direct support team	Ongoing to be completed by June 2022 (just a proposed date)	Ensure assessments completed to collect interests
4.0 Building Space	KE Director, KH Fiscal Team, IT Team, Quality Team, Executive Leadership Team	Ongoing	Building space identified and obtained
4.1 Identify appropriate space accessible to people's homes and community activities	KE Director, KH Fiscal Team, IT Team, Quality Team, Executive Leadership Team	Ongoing	Availability of smaller building space for group activities including small hubs in local communities in space operated by community organizations such as libraries, community centers, Y's and diverse non-profits
5.0 Policies and Procedures			
5.1 Develop community-based communication procedures	KE Associate Director and Management Team	September 2021	Procedures that ensure health, safety and effective implementation of community-based goals
5.2 Develop procedures for verifying staff driving licenses and records	KE Associate Director and HR	September 2021	Ensuring licensing and qualifications
5.3 Insurance policy review and revision to ensure coverage for community-based activities and staff driving activities	Legal	August 2021	Adequate coverage for program activities
6.0 Piloting and Expansion			
6.1 Select pilot group of people with waiver funding to add community-based component	KE management and direct support team	August 2021	Cohort of people interested in engaging in community activities during their day program week
6.2 Select pilot group of people with ICF funding to add community-based component	KE management and direct support team	August 2021	Cohort of people interested in engaging in community activities during their day program week.
6.3 Develop a schedule for roll out of community-based day services	KE management	December 2021	Roll out plan
6.4 Roll out expansion of community-based day services to all waiver and ICF enrollees	KE management and direct support team	Ongoing through December 2022	Schedule of Community Based Day Activities for all ADS Enrollees