



## **Business Plan**

**For April 2021 to April 2024**

**This plan was created by funds from Ohio's Innovation Grant**

### **1. Executive Summary –**

Downsize Farm was founded as a family business in 2007 on a 2.5 acre property in rural Ohio. In an entrepreneurial spirit, Bob and Midge Custer aimed to create greater opportunity for their two sons with Down's syndrome. Prior to the birth of Downsize Farm, the Custer's spent years dairy farming, helping with 4-H, and responding to local farming community callings. This experience led to the premise for Downsize Farm—a program where people with disabilities could cultivate personal growth through learning by doing. Here, individuals could learn about basics of gardening, cooking, baling hay, and animal care.

Learning by doing has remained a cornerstone philosophy for Downsize Farm, but the **path for** programs and activities has grown drastically. In 2014, we launched Downsize Jobs, a vocational program devoted to helping individuals with disabilities cultivate job skills to gain competitive community employment. Downsize Farm also launched an employment team, utilizing Vocational Rehabilitation services, and have established their position as community leader in helping individuals with disabilities to gain competitive community employment. The Organization aims to change the community view that people with disabilities are contributors, rather than consumers.

In 2020, the daughter of Bob and Midge Custer, Bobbi McKee took on the role of CEO. Bobbi aims to take Downsize Farm's growth to a new level through established programs of Day Hab Vocational, Employment and Residential. Downsize Farm also aims to strategically grow financially through sound process and marketing. Among imminent change, the new Downsize Farm will keep its philosophy of learning by doing at the forefront. As our Organization motto states, Life is Looking up at Downsize Farm.

**2. Foundation for the Business Plan**

Prior to creating this business plan DF conducted an assessment of the organizations strengths, and opportunities they wanted to build on and weaknesses that needed to address over the next three years. Stabilizing the finances, Increasing revenue, Expanding new Services and Marketing, ensuring DF is in alignment with the State’s direction and Assistive Technology

2. Mission Statement

**"DOWNSIZE FARM IS A PATH AND A PARTNER OF HELP AND OF HOPE TO LIVE PURPOSEFUL AND PRODUCTIVE LIVES."**

3. .Snapshot of the Business Plan

<b>Year One Infrastructure 4/21-4/22</b>	<b>Year Two Expand and Strengthen 4/22-4/23</b>	<b>Year Three – Ohio Shared Living (OSL) and plan for the next 3 yrs.4/23-4/24</b>
Establish an Advisory Board	Continue to monitor the strategic plan and business	Expand OSL into a vibrant innovative service
Create strategic Plan	Determine what new services will be implement in year two and three	Create a vision for OSL and how it is an effective approach for community inclusion
Strengthen fiscal systems	Implement a self-employment service	Design a marketing plan for OSL that includes the use of social media
Explore additional funding	Lay the foundation for Pre-ETs And SEE services	Formalize OSL process with written protocol
Strengthen Employment Services Explore how expanding the use of technology could increase independence	Continue and expand infrastructure systems form year one and lay the foundation for year three expansion.	Set date to ramp up and unveil the expanded service
Expand Marketing strategies	KPI will be in place and monitored for employment services	Start the planning process for 2025 -2027

**The goals and objectives in this plan will be monitored and evaluated on a bi-yearly schedule and as necessary modifications will be made to insure progress.**

## **Goal One**

**Create an advisory board (AB) that can support DF and cultivate the agencies connections.**

### **Objectives**

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- I Create a document that delineates the AB role. Create and a document that addresses expectation of membership with AB 5/21.
- II Hold the first AB meeting by 6/21 and then quarterly thereafter.
- III In the first AB meeting review the business plan will be reviewed for feedback.

Rationale: DF having both a business plan and a strategic plan that are in alignment will strengthen the agency and provide a clear understanding to stakeholders and staff on the path DF is taking.

## **Goal Two**

**The strategic Plan will be created that aligns with the business plan.**

### **Objectives**

- I The Executive Director will seek volunteers from the AB to assist in the process of creating the agency's strategic plan by 8/21.
- II The Executive Director will create several survey monkeys to be sent to targeted stakeholders by 8/21.
- III AB will hold at least one focus group with staff to solicit feedback from them for the strategic plan.
- IV The AB with the Executive Director will review the survey monkeys sent to stakeholders, data from DF services, and information obtain from the focus group to determine which areas will be addressed in the strategic plan by 9/21.
- V A strategic plan will be developed and posted on DF website by 11/21.

## **Goal Three a & b**

**3a DF will implement sound fiscal practices that result in the agency having services that are sustainable.**

### **Objectives**

- I DF will work with its accountant to have separate budgets for each program by 5/1/21.
- II Payroll cost will be assigned to the program were the staff works and cases were a staff is divided between two programs the cost will be shared proportionately by 5/1/21.

- III The Executive Director in partnership with the Governing Directors of the programs will establish Key Performance Indicators (KPIs) for each program by 5/31/21
- IV If needed DF will arrange training for Program Governing Directors to understand how to read the financial information and spreadsheets related to the budget. 5/31/21
- V DF will set expectation for each program Director to review their expenditures on a monthly bases against the budget projections and the KPIs by 6/30/21
- VI All programs' financial status will be reviewed on at least quarterly at the Program Directors meeting starting 6/30/21 and then ongoing.
- VII For any new or expanded services there will be a cost analysis conducted prior to implementation starting 7/21 and then ongoing.
- VIII KPIs for enrollments and attendance in all departments will be established by 6/21 and then monitored monthly by each Program Director.

**3b.DF will explore options and resources to expand funding that is beyond Developmental Disabilities during the next year.**

**Objectives**

- I DF will set up a team to explore funding for different possible service options by 7/21.
- II The Executive Director will provide direction to the team on areas of focus by 7/21.
- III The team will present the Executive Director with analysis that includes at least, the pros and cons of each suggested service, the impact on staffing, the need, how technology could assist in structuring the service, the risks and cost benefits of the different services. The recommendations will be submitted to the Executive Director and AB for consideration by 11/21.
- IV Based on the report and recommendations the Executive Director and AB will determine what new services will be implements from 2021 to 2024.

**Goal Four**

**DF will expand its community reach by creating a Marketing Plan that invites community involvement and support based on the data they receive from surveying and interviewing community members.**

**Overall Objectives**

- I DF will update the website to include; the award of the Innovation Grant; a monthly blog, a definition of what is DF by 6/21
- II DF will create on a new videos and content that is germane to the community starting 8/21 and then ongoing.

- III DF will integrate Technology into its entire operations over the next three years and take full advantage of the Technology Ambassadors.

### **Program Team Objectives**

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The Program team<sup>1</sup> will create a survey monkey for their current employers and/or community venues/partnerships. The survey will address what about DF they value and suggestions on what should be expanded on. Survey will be sent by 10/21

- I A survey Monkey will be created for each of the programs by 9/1/21
- II The program team will create a matrix for which responders to the survey monkey will receive a follow-up interview. 9/30/21
- III Follow-up interviews will be completed by 11/30/21.
- IV Based on the results of the survey and interviews the team will consider what services they will expand to meet employers' and community needs or to expand DF's image by 1/22.
- V The each team will develop KPI for new outreach. By 2/22
- VI The employment team will create plan for employer outreach, it will include at minimum: how networking will be used, employment trends in the area, how employers will be engaged beyond hiring (I.e. informational interviews, tours), the creation of an incentive program for clients and employers to create natural connections. how to track employer contacts to individual job seekers, the number of employers that must be engaged each month to secure the desire number of competitive integrated placements annually. By 4/22
- VII The program team will create a plan for community outreach by 4/22.

### **Goal Five**

**DF will be ready for BEST by 1/22 in order to expand and strengthen its employment services over the next three years.**

#### **Objectives**

- I. Research and gather current data on current procedures by 5/31/21.- Gather this data in congruence with OTS report.
- II. Develop and implement prototypes through 7/31/21 to Dec 31/21.
- III. The new prototypes will be implement 1/22.
  - I Formalize the employment discovery process that results in all clients who participate in discovery go through the same steps and there is an approved report that the funder will reimburse. 3/22

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<sup>1</sup> Program team includes Employment, Pre-Voc, & Day Hab

- II A fade plan will be developed to on how individuals in PATH will move to employment, based on newly created KPIs by 4/22
- III Build on the recommendations in The Expanding Services Report created in 11/21, determining what elements need to be in place (i.e. marketing, funding, staff knowledge, etc.) to have a process for self-employment services.; by 6/22.
- IV
- V DF will work with Kyle Corbin to determine the best resources and systems to accurately track data and the analytics to evaluate progress of programs. 12/21DF will track data to analyze the number of individuals who had AVH experience and who had not in order to determine if that experience impacted the success of the CE placements. 12/21
- VI Based on the data DF will set KPI for employment cases by 3/22

### **Goal Seven**

**DF will implement a service to assist individuals to obtain self-employment in 2023.**

#### **Objectives**

- I Set up an intake process that will include discovery for the self-employment services by 7/22.
- II Establish a relationship with a benefits planner who is will to consult on the creation of materials related to SSA benefits and self-employment by 2/22
- III Have KPI determine for self-employment. By 7/22
- IV Create an orientation on self-employment services by 10/22.
- V Reach out to the small business owners and entrepreneurs to find people who are interested in being a mentor to an individual who is on the self-employment track. Starting 9/22 and then on going
- VI Establish a training and protocol for being a mentor.1/23
- VII Screen and secure 5 referrals who are interested in self-employment 10/22.
- VIII Have two individuals participating in the self-employment service by 1/23.
- IX Have two mentors secured and trained by 2/23
- X Have one business plan completed by 5/23
- XI Have three business plans completed by 1/24
- XII Three individuals will be participating with a mentor. By 5/24
- XIII Three individuals will be self-employed by 12/24

### **Goal Eight**

**DF will expand their residential services over the next three years**

#### **Objectives**

- I A vision statement for OSL will be created by 3/ 2024.

- II Based on the vision statement and a review on how the program will change protocols will be written including how families will be selected, and what the process of matching participants to families that highlight their best, by 4/2024
- III Creation of the KPIs for OSL will be created by 5/2024.
- IV Design a marketing plan for OSL that actively includes the use of social media and how to target different groups to insure diversity of both families and individuals with disabilities by 5/24.
- V Highlight OSL on DF website including at least one blog on the service and video clip of a person with a disability and their family talking about the service. 4/24
- VI DF and Hometown Tech will explore forming a partnership to provide remote monitoring to HPC Service in Ohio during 2021.
- VII A needs analysis of local providers for remote monitoring will be conducted by 3/22.
- VIII Depending on the results of the needs analysis a business plan will be created by 7/22.
- IX Projected start date of the possible service will be 1/23.

### **Goal Nine**

**DF will begin the process of evaluating how it wants the service to continue to grow and set new benchmarks for 2025 through 2028.**

#### **Objectives**

- I Start the planning process in 6/24.
- II Review the data and progress made between 2021 and 2024.
- III Determine what areas will align DF for the future.
- IV Create a planning team by 6/24 that reports to the Executive Director.

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