

CA Group, Inc. used a combination of strategic planning models along with internal and external audits to identify strengths, weaknesses, opportunities, and threats. Internally, a traditional SWOT analysis was used with feedback from all employees, supervisors, managers, Board members, and some individuals served. Externally, a self-review was completed by the CEO and managers and provided to Jeannine Pavlak, SME. Jeannine came to tour, discuss services and models, and meet with the grant committee consisting of employees, Board members, individuals served, and family members. Both the external and internal audit consistently identified similar strengths, weaknesses, opportunities and threats, and a business plan was created based on results.

The business plan consisted of 6 key areas with action plans to determine objectives, resource needs, roles and responsibilities. While the committee members and the SME remained involved, CA Group's internal team set out to begin work on each step. Each step is updated to show progress, needs, due dates, etc. and communicated to other team member by a shared document "Business Model with notes to achieve strategic plan".

Involvement from all employees remained a priority by keeping them updated at meetings and taking in suggestions. This continues to occur by employee meetings with their Supervisors and employee meetings with the CEO to explain the plan and its updates. Further, large sticky pads with leading questions were placed around all locations and offices for employees and individuals to help define our culture, mission, vision, and our core values. This was a great opportunity for involvement from everyone, to clear up any misconceptions and increase buy in. The business plan became the basis for the strategic plan with goals for CA Group to be less reliant on Medicaid and achieve maximum integration.

Multiple sections of the business plan were based on plans being developed, so employees and Board members were challenged to quickly evaluate and begin meeting in committees assigned to each goal and action step to identify further action needed and realistic target dates. By doing so, employees began to see the possibilities and became excited to push ahead and start to try new models. The strategic plan will be revisited and revised ongoing, with employee and stakeholder involvement. Though the goals will not change, CA Group's strategies and tactics will be flexible to ensure we are achieving what we are after.

Jeannine Pavlak, SME has been involved throughout the process via phone and e-mail with employees and committee members. A grant committee meeting was held on July 15 with the SME via phone. We discussed how many individuals and families don't appear to want community based or facility free services, aren't aware of them or the opportunities they can provide (this information was provided to us by families, individuals served, and various County Board partners). Many want to continue the same old way such as paid work in voc/hab.

Our goal is to start new service models for those interested and focus on new ideas more strongly with kids coming up. Further, we will partner with those who have success with the new models and those who have already achieved integrated employment or other integrated services to develop a communications plan about the future of services. The strategic plan timelines were revised with this information in mind and the SME shared additional information on serving

other populations. Timelines are realistic and work will continue to achieve maximum success with new models.

CA Group has been highly involved in community participation and employment for some time. Though in a rural setting, we have been successful in making connections and providing vast opportunities for community inclusion. Some employees have a fear that we will “burn community members and businesses out”. However, employees that buy into integration and explore it every day do not have this fear because they see the possibilities. This is a fear that must stop because it stops us from seeing the possibilities.

We tend to hold back somewhat on encouraging people to move toward the idea of full integration due to individuals and families looking elsewhere to get “the same old service”. This process has given us the tools to be prepared and be confident to begin to educate all stakeholders and change our service models as required by CMS. There are several business practices we have begun to transition to enable us to move forward and there are many more business practices we are set to change over the next 2 years.

Re-branding has been a priority goal to ensure all staff, funding sources, community members, individuals, and families understand and describe CA Group services, expectations and outcomes in the same way. There has been much confusion about the difference between CA Group and the County Board it privatized from, nicknamed Cheryl Ann Programs.

With many surveys from a sample of all stakeholders, including families, individuals served, grant committee members, business partners, Board members and employees, the following was identified: what CA Group could gain if we changed our name, what we could lose if we changed our name, who our customers are ranked in order of importance, and what each customer wants. With the results as our basis, a reputable marketing firm tasked us with brainstorming sessions to further identify what CA Group is and what we will be. We completed a series of activities to determine a new name, logos, and our mission. Employee and individuals were involved with these tasks by the large sticky notes with leading questions that were posted around our service and office areas.

As part of rebranding, it became imperative that a fresh start was needed to allow for independence and exciting changes moving forward. While brainstorming a new name, we focused on key messages to deliver such as career pathways, growth, discovery, personal journeys, the connections between CA Group and the individuals they serve, the connections with the community and businesses, community engagement, and transportation.

To simplify things, we created 3 areas of services. A new identity, logos, mission, vision and tag lines have been created. Further, we evaluated the complexity of our jargon. We want to speak in clear language, for anyone to understand, to better guide those we serve on their career path and path to community engagement. Medicaid billing jargon such as what services are called (voc/hab, ADS, etc.), is complicated and will be left to individual plans and talk with County Boards. Further, words such as “job” means something different to different people: a job in the community or work at a voc/hab site. We have created a “words to use and words not to use” guide for employees. This has helped employees better understand our services and their

roles and how to speak about CA Group in a consistent way that will make sense to all stakeholders and partners. Work is underway in preparing for our rebranding roll out. The key to success will be communication and alignment with all our stakeholders.

Re-branding activities were necessary before much work could start on a communications and marketing plan. This includes redesigning our website, social media, and marketing materials to reflect our new image, messages and words. We have begun creating key documents, service walk throughs, visuals and other information to assist individuals and families in understanding not what Medicaid services we offer, but in plain and simple terms, how we can support them to achieve their goals.

Too often we talk about not fitting people into a program. But the field as a whole is still trying to do just that. CA Group wants to support individuals to: 1) determine their goal (outcome), 2) determine what skills they need to develop to meet that goal, and 3) explain how we can support them to develop those skills. Then, and only then, should we say what type of service that would be (voc/hab, ADS, etc.) Those served just want to develop skills to meet their goal and understand any time limits.

Too often, as a provider, we are told what service the person wants, and we have to try to fit the person there. As a provider, we should be told about their goals and skills they need to work on to meet those goals, and then we should determine how to best support them and what Medicaid service it would fall under. We have attempted several times to try to pull this information out of individuals/families and SSA's so we can determine the best tour and discussion when we meet new people interested in our services. Typically, what happens though is we are told they want ADS, or they want voc/hab, etc. In a sense, they are being put into a program before we know their goals. This conversation must change to efficiently get people the right supports so they can achieve their goals quickly. This is a large part of our communication plan with individuals/families, County Boards, schools and other partners.

We have also drafted roles for an Associate/Parent Advisory Committee and a Business partnership Committee so success can be shared directly from the source, individual to individual, parent to parent, business to business. We have identified people for these groups, and some have already agreed to be on a Committee. Informational sessions will be held monthly for individuals, families and all partners, such as schools, County Boards of DD, and OOD counselors to discuss our services, how to best describe them, and what different services entail. We will lead discussions around the new B.E.S.T. service and its implications, opportunities gained from inclusion, the benefits of career planning and how we will guide individuals through their course to success.

These discussions will begin after more information is released on the B.E.S.T. service. It is important for us to know what is expected for an individual to be granted extensions for this service. Our fear is that if there is no concrete requirement to be granted an extension, all stakeholders will continue to show that any movement along the path to employment, whether committed to getting a job in the community or not, to be able to get the extension. For example, will participating in the DODD career planning service be a requirement to get an extension? If so, partners will begin to see the value and necessity of this service instead of referring

individuals to OOD to receive this service. Providers will be able to truly work with individuals on the appropriate skills needed for what they want to do in the community. Often, time and resources are used in voc/hab that do not help individuals move efficiently along the path to employment. Individuals think they want a job, for example, so services are devoted primarily to that. Though other services are used to explore, it is still in small groups, with the inability to do true individual discovery.

A staff recruitment, retention and development plan were created and what was to be fully implemented with our new budget year, took a change of course. To prioritize staff recruitment and retention, wages were redesigned to ensure employees make a livable wage. The Board invested in employees and based new wages off our outlined financial and strategic plans and what we have developed for tiered wages/efficiency/staff development and advancement. Employee efficiency will be tied into staff development and wages.

Interviews, job descriptions, development, performance reviews, wages and incentives will be aligned with our new mission and the core competencies we have identified as valuable. This work is underway, and, in the process, we have gained employee excitement and momentum for new business practices evidenced in the tier wages/job descriptions.

New outreach methods have been established and some have been implemented with success, however, most will wait until we have re-branded. This will lessen confusion in the community. Training and development are being better aligned so all employees get tangible, usable ideas to use the second they complete training. Some employees have been excited to share what they tried differently after training and success they have seen. I do envision a virtual communication board to continue this peer to peer excitement and learning when more employees are facility free.

A financial sustainability plan will be completed by October with timelines for expansion of service populations and other programs for further diversification to decrease Medicaid reliance. New funding streams are being explored. Customized employment will be expanded. OOD services are currently being evaluated for expansion. We have been evaluating providing pre employment transition (Pre-ETS) and involvement in Project Search over the last several months so this has been added to our timelines for a more concrete start date. Pre-ETS will not be provided through an RFP this fall so we plan to begin that service then. We have been thrilled with Project Search discussions around the state to become more consistent as that has been our biggest barrier to getting it off the ground.

Fundraising efforts have been underway, and several new key fundraisers have been identified. These are being developed and employees and associates alike have shown excitement to be involved. Fundraising will be a priority to continue to decrease reliance on Medicaid.

Staff retention, financial sustainability and full integration, along with other areas of our strategic plan, all tie in to the need to looking at service delivery completely different. We are evaluating facility free services and getting back to the basics to provide all services differently. In the process natural efficiencies have been found. Currently, we have drivers for transportation routes and different employees to provide day services. We have known this set up will need to

change to move toward facility free. We feared staff retention would be difficult because everyone thought their jobs would be more difficult. What we found instead was an opportunity to increase staff efficiency, decrease co-dependency of employees and services, simplify our operations and offer opportunities to employees for staff development and growth.

Employees of day services have begun providing NMT so that a natural progression can be made toward facility free services. In our ADS, for example, over half of the NMT is provided by the day service employees instead of a “driver”. This will lead smoothly into facility free services without having drivers suddenly lose hours. As drivers retire or community employment routes expand, we introduce the day service employees into the routes. This makes employees more efficient (billable) and they will receive a better wage because of it. Discussion around facility free services have allowed employees to see the ease of working with only a few individuals, eliminating co-dependency of services and co-workers which ultimately makes for a better paying, lower stress job. This streamlines processes and further eliminates employees needing to know so much about so many people and processes by keeping their focus on fewer people, creating better and more efficient services and happier employees.

It further lessens administrative expenses by lessening total training time for fewer employees. This creates more understanding of the whole person, rather than pieces. Individuals will be working with less employees, creating better relationships with more discovery. It’s a win-win for everyone. We are excited to move this opportunity along and continue to set other services up the same way. For facility free, Supervisors have drafted, based on interests and goals, groups of 4 individuals and an employee. They are beginning to talk to individuals and families about trying this new service model. There are a few people interested and we will work toward making this happen for them. We are in the process of determining if more employees will need to be hired first, to ensure quality services for the others.

At this time, we are told by some partners and families that individuals do not want a facility free service. They want to complete paid jobs in voc-hab, they want to maybe be part of an integrated enclave someday, or they just don’t want change. Some families have told us they will go elsewhere to do paid work at a voc/hab site if all we are going to do is “run around in the community”. Our communications plan addresses what being in the community is about, what the goals are, how natural experiences increase informed decisions and decrease the time it takes to learn new skills and debunk myths. Further, all partners must be in agreement and support the expectation that BEST (voc/hab) services are provided only to those that have a goal to be employed in the community. Without all partners and providers consistently expecting this and delivering the message clearly, many individuals and families will continue to go to providers to seek the same old service.

Many partners and providers have the vision for facility free, non-paid work to prepare individuals for integrated employment, however, many individuals and families are not seeking it as reported by different County Board employees. We will focus on new service models for those who want it but will continue to support and meet people where they are until current service options aren’t available. We have plans to implement and provide facility free services, for example, on a large scale, however, we cannot yet advocate to provide only facility free, as there is little market for it.

By combining some processes for staff efficiency and the move toward more facility free/community based services, we have been able to draft quality assessment and annual employment progress reports combined with data to streamline these processes, lessen administrative overhead and gain better information from employees to advance individuals on their path to employment to increase referrals for career planning and integrated employment. Again, this ties into retaining staff by offering more opportunities and decreasing the amount of training and responsibilities required.

CA Group has been advocating for career planning since its inception with increased advocacy over this grant period, however, as noted above, few have received it. CA Group has increased referrals for career planning; however, we have seen little movement. Instead, we are seeing individuals be referred by the County Board to OOD to receive this service. Sometimes, we feel the individual is not ready for OOD. OOD counselors and providers have been having discussions with DODD representatives on the need to provide more training on this service so all partners are on the same page. Career planning services can be so valuable to individuals to ensure they are advancing to their chosen career given informed choices to extend their length of success and happiness in an integrated job. It does not seem this service or the path to employment is understood completely or valued by all team members.

Data retrieval has been streamlined and analyzed for better collection and formatting to be able to use it more flexibly. We are beginning to “toy around” with best collection methods for additional data retrieval and decisions can be based on concrete successes and failures. This further ties in to our draft quality assessment and annual employment progress reports discussed previously.

We will begin tracking how long it takes for someone to get from voc/hab (or BEST), group employment or career planning to being ready for integrated employment and how long they retain integrated employment. We would like to retrieve and analyze data on the success rate of career planning and the length of time it leads to integrated employment and how long that employment is retained in comparison to someone who does not use career planning to show the benefits of the service.

General plans are in the works for turning our voc hab center, Green Business Solutions, into a career academy so it is identified as a workforce preparedness solution, not as an end goal. Path to employment visuals will be created as well as walk throughs for those we serve so they can best identify where they are at on their path. Along with this, we will be looking at the financial implications of having a few positions available and hiring only some individuals without providing the voc hab (BEST) service at the same time. Further, we will be expanding group employment so real work experiences can be obtained while still integrated. It has always been CA Group’s goal to only provide group employment if it is integrated.

This will free up space and allow us to increase populations served, increase partnerships, diversify and increase movement along the path to employment. This plan will become more concrete as we get closer to knowing how voc/hab/BEST service rules are going to be revised and more specifically, what the requirements will be for individuals to be authorized for unlimited extensions. This will help us define how quickly we will take action for increased

facility free and employment services, what populations we may be able to additionally serve and how to best create curriculum for the academy.

The CEO has met with employees and individuals together in voc/hab services in Green Business Solutions to discuss the future of this service and how CA Group would like to implement it. At first, there was a lot of concern about having less paid work to do more community participation. However, once ideas were generated, it became clearer to individuals that their goal is not about paid work, but to gain meaningful employment in the community.

Further, receiving services in the community is not about just having fun (the traditional thought of “going out”), but to explore their employment interests, work on the skills that they determine are needed to meet their goal of employment and to make sure they know what that employment goal is. Though this has been discussed at annual meetings and by CA Group employees many times, initially they did not understand that to receive voc/hab, they must want to be employed in the community and must show they are progressing to meet that goal. It is imperative that all partners (DODD, County Boards, schools, providers, etc.) give the same expectations for this service. It seems we have these conversations, get individuals on board, then somewhere along the line, this message is lost, and we are back at the beginning. Again, it will take all partners to be clear and give the same message for this to work.

We will be very clear as to where the future of services is going (B.E.S.T.) and that we will start implementing more of those services now so that they are ready for the new service in 2020. We discussed time limits for this new service and how they could not just be in voc/hab forever. Many individuals started to talk about what their employment goal is and as we were able to explain how community-based services can prepare them for that, they seemed to buy in a little more readily.

The Program Specialist and Community Coaches continue to educate individuals about this service as they increase community-based voc/hab services. They are also preparing documents and guides to use as a “walk through” for what services are best for them. Many training sessions have been offered to employees to help them better communicate with individuals to first determine what their goal (outcome) is, what skills they need to be able to achieve that goal, and only then talk about what services we can and will offer them to build those skills.

CA Group also has voc hab services at another location, Community Connections. Since October 2018, they have been offering a more fully community-based model to develop skills and gain employment. Lessons learned here have been shared with Green Business Solutions. This too will continue to move forward with guides to help determine their true goal, skills needed to meet that goal, and us offering the services to build those skills.

Families have been involved in this thinking at Community Connections and overall, have been positive. There remains families and individuals who do not want these connections because they just want to work (voc/hab). All individuals and families will need to understand, and all partners will need to commit and have a consistent message to those we serve that voc/hab is not intended forever and that there will be limits. In addition to ongoing communications from

employees daily, CA Group's communication plan will address this with ongoing learning and enrichment opportunities for individuals, families, County Boards, schools, etc.

Further, the communication plan will be addressing with all partners what CA Group is willing to provide and how they will provide it. Many years ago, CA Group began to operate a county board run program so individuals could be involved in their communities. Community engagement is offered by CA Group in many other ways now. CA Group is evaluating these HPC services to determine what can be offered through other community engagement services and streamline what they are willing to offer. This HPC service is a small fraction of what CA Group provides and has a lot of overhead. Though many services are important, we may not be the best provider for it because we focus on other employment services.

It is important to note that CA Group provides community engagement services not only by going out into the community, but also by bringing the community in. We serve individuals with significant medical needs and though they receive some services in the community, we have shifted to bring more community engagement to them. This allows for more engagement in a person-centered plan that does not prioritize community-based services. We are working on bringing more community members in as part of our recruitment plan. We have seen success with this plan because friendships and natural supports have developed and moved beyond our service.

To avoid confusion, CA Group has chosen to not implement some of these new business models until we roll out our new brand on January 1, 2020. We are working behind the scenes to prepare so we are ready to move quickly. At that time, we will evaluate additional strengths and limitations of all partners by collecting surveys and other data to improve our communications and increase our relationships.