

Pathway for the Future: Downsize Farm

Ohio Department of Developmental Disabilities
Building Innovative Service Models Contract
Deliverable 3: Pathway



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Factors that Helped **Downsize Farm** Move Forward

1

- New Leadership
- Covid-19
- Energy to think differently
- Staff's input welcome
- Open Communication
- Consensus built
- DODD support

2

- **Assessment** from an outside party helped highlight areas that need to be changed or strengthen.
- Executive Director had been thinking about the areas identified.
- The assessment strengthened her thinking.

3

- The Governing Directors and the Executive Director, based on the assessment, determine what areas needed **immediate focus** to build and strengthen the foundation and what areas needed focus after the foundation was strengthened.

4

- Creation of a **Business Plan** that will lay the foundation for Downsize Farm's (DF's) first **Strategic Plan**. The plan will set the direction for the agency's future.

5

- Once the Strategic Plan is created in Fall of 2021, the Executive Director with support of the Governing Directors will create a **3-year Strategic Implementation Plan** with benchmarks that align with a business plan that will be monitored and data collected on.

Background

- Downsize Farm (DF) is an established organization in rural Ohio, trying for many years meet its client base by providing a wide array of services—sometimes to the point of making it difficult to fiscally manage.
- DF valued providing services—the sustainability component was secondary. The fiscal infrastructure was not strong.

Background (continued)

- ➔ The Organization's founder retired last Fall.
- ➔ The new Executive Director (ED) is committed to retaining the foundation of DF and its values, while strengthening the infrastructure and expanding innovation so they are prepared for the future.
- ➔ The new ED intentionally used her management team to build consensus for future direction and changes.

Sought Out Her Leadership Team For Feedback

- Every recommendation made to DF from the Assessment was reviewed by the leadership for both buy-in and the impact.
- DF staff is small, committed and flexible which made discussing and considering new approaches nonthreatening.
- DF is committed to integrating both low and high technology into all aspects of their services.

The Future

- COVID-19 hit the organization hard both in the number of individuals served and its revenue, but it also gave them time to think strategically on DF's focus for the future.
- The Executive Director broke the steps towards innovation down into immediate actions, intermediate action and long term.

Immediate Action Steps

- Immediate action steps are the elements that are essential to:
 - ↑ Build up the business part of the organization and create a strong foundation.
 - ↑ Place the organization on solid fiscal ground for the future.
 - ↑ Allow the organization to expand its footprint in the community.
- These actions are the focus of the next year.

Moving Forward Strategically

- The first step for DF was to expand their foundation by the Executive Director (ED) moving the organization forward strategically.
 - ↑ Implementing solid businesses practices
 - ↑ Fiscal accountability and understanding across Departments and the Governing Directors.

Solid Fiscal Systems

- DF implemented systems that resulted in sound fiscal practices.
- Each Governing Director monitored their program's budget reporting any issues to the ED.
- The ED worked with its accountant to have separate budgets for each program.
- Payroll costs are assigned to the program where the staff works.
- In cases where a staff is divided between two programs the cost will be shared proportionately.

Solid Fiscal Systems (continued)

- All programs' financial status will be reviewed regularly, at least on a quarterly basis at the Governor Program Directors meeting, starting on June 30, 2021.
- For any new or expanded services there will be a cost analysis conducted prior to implementation, starting in July 2021.
- KPIs for enrollments and attendance in all departments will be established by June 2021 and then monitored monthly by each Governing Director.

Expanding Revenue Base

- DF is setting up a team to explore different funding options beyond Developmental Disabilities.
- The team will present their analysis and recommendations to the ED by November 2021.
- The ED and the Advisory Board (AB) will determine what will be implemented and when.

Expanding the Use of DF Website

- DF will use their website to create community involvement.
- Create new videos and content that creates community interest and involvement.
- At least once a quarter DF will have a community partner post a blog on DF's website.

Establishing an Advisory Board To Increase Community Support

- In preparation for creating an AB the ED has cultivated contacts who are excited about serving on the AB to help DF move into the future.
- The ED will create a document that delineates the AB role and expectation of membership by May 2021.
- The first AB meeting will be held by June 2021 and quarterly thereafter.
- In the first AB meeting the business plan will be reviewed for feedback.

Strategic Plan & Business Plan

- DF knows the business and the strategic plans to be in alignment which will strengthen the agency and provide a clear understanding for stakeholders and staff on the path DF is taking.
- DF will survey stakeholders and conduct at least one focus group to obtain input for the Strategic Plan.
- Based on the input from stakeholders, families and staff, ED, and AB will create a Strategic Plan that is in alignment with the Business Plan.
- DF intends to post both plans on their website for transparency by November 2021.

Researching What the Community Values Are

- ➔ The Program Team* will conduct survey of their current employers and/or community venues/partnerships using SurveyMonkey.
- ➔ The survey will address what DF community values are compile suggestions on what should be expanded on or improved.

*Program team includes Employment Services, Pre-Voc and Day Hab

Researching What the Community Values Are (continued)

- The ED will review all survey responses. The Governing Directors will ensure surveys are sent by September 1, 2021.
- The Program Team will create a criteria matrix for which survey respondents will receive a follow-up interview by September 30, 2021.
- The Program Governing Directors will ensure the follow-up surveys are sent by October 2021.

Researching What the Community Values Are (continued)

- Based on the results of the survey and interviews the Program Team will evaluate what services they can afford to expand to meet employers' and community needs or to expand DF's image by January 2022.
- By April 2022, each team will develop KPI for new outreach.

Employment Team

- The Employment Team will create a plan for Employer Outreach which will include at minimum:
 - ↑ How networking will be used
 - ↑ What the employment trends are in the area
 - ↑ How employers will be engaged beyond hiring (i.e., informational interviews, tours)
 - ↑ An incentive program for clients and employers to create natural connections
 - ↑ how to track employer contacts to individual job seekers

Employment Team (continued)

- By April 2022, the Employer Outreach Plan will include projection of the number of employers that must be engaged each month to secure the desire number of competitive integrated placements annually.
- The Program Team will also create a plan for Community Outreach by April 1202.

Be Ready for Best

- Research and gather data on current procedures in congruence with OTS reports.
- Develop new prototypes by December 2021, ready for implementation.
- Formalize the employment discovery process, that funders will reimburse.

PATH

- A system of how individuals in PATH will move to Community Integrated Employment (CIE)
- Work with Kyle Corbin to determine the best resources and systems to evaluate the progress of the programs
- In 2022 based on the date DF will set KPIs for employment

Year 2 and Year 3

CREATION OF SELF-EMPLOYMENT SERVICE

Creation of Self-Employment Service

- Determine what elements need to be in place to have an effective self-employment process:
 - ↑ Staff training
 - ↑ Policies
 - ↑ Connections with the Entrepreneur Community
 - ↑ Funding
 - ↑ Resources

National Technical Assistance Center on Self-Employment

- DF's Executive Director will stay in touch with the Technical Assistance Center during the creation of their Self-Employment Program.

Self-Employment Services

- Create with Entrepreneurs and small businesses a **mentoring program** for individuals on the self-employment track.
- Establish a relationship with a **benefits planner** to create materials on self-employment and public benefits.

Self-Employment Services (continued)

- Create an orientation on the Self-Employment Services to be provided by DF
- Establish a small Task Force on advancing self-employment that includes Vocational Rehabilitation
- Have at least three individuals obtain self-employment by December 2024.

Year Three

The Focus is Residential

- DF believes an opportunity is being missed by not considering Residential Services to increase inclusion.
- Consider how to use the Discovery Process to help individuals understand what they need from their Residential Services which will help them be involved in their community.

Start with a Vision Statement

- A Vision Statement for OSL will be created by March 2024
- Vision Statement will drive protocols:
 - ↑ How families are selected
 - ↑ The process for matching participants to families to ensure the family will highlight the participant's best.

Design a Marketing Plan

The Marketing Plan will:

- Include Social Media
- Target different groups to insure diversity both in families and individuals with disabilities
- Highlight the services on DF's website including:
 - ↑ Blogs, Podcasts and video clips

New Service

- DF and Hometown Techs will explore a partnership to provide remote monitoring to HPC Services in Ohio.
- They will conduct a **Needs Analysis** of local providers for remote monitoring.
- A business plan will be created if there is a strong need.

Start The Process All Over Again

- Start the planning process with staff, stakeholders and AB in June 2024.
- Review data and progress from 2021 to 2024.
- Determine what areas should be built on for the future.
- Create a Planning Team in the Summer of 2024 that reports to the Executive Director.

Recap of DF's Pathway

Immediate – Infrastructure April 2021 – April 2022	Intermediate – Strengthen & Build April 2022 – April 2023	Year Long Term – Expansion Ohio Shared Living (OSL) and Plan for the Next Three Years, April 2023 – April 2024
Establish an Advisory Board	Continue to monitor the Strategic and Business plan	Expand OSL into a vibrant innovative service
Create a Strategic Plan	Determine what new services will be implemented in Years 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 a written protocol
Strengthen Employment Services. Explore how expanding the use of technology could increase independence	Continue and expand infrastructure systems from Year One and lay the foundation for Year Three expansions	Set date to ramp up and unveil the expanded services
Expand Marketing Strategies	Implement KPI in place and monitor for employment services	Start the planning process for 2025-2027