

EASTER SEALS TRISTATE

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[STRATEGIC PLAN 2016]

A Plan for the Transformation of Disability Services

Executive Summary

ESTS Disability Services is well positioned to transform services to operations that are community integrated. The Mission, Vision, Values, and Beliefs of the organization is such that innovation and transformation are a natural alignment and the talents of leadership, management, and all the staff will work to create the next frontier of services to people with disabilities in Ohio and the country. ESTS has generated a vast amount of opportunity for people with disabilities and the work and accomplishment of individuals served, and the staff supporting them, should be recognized and celebrated. It should also be celebrated that ESTS is aggressively pursuing new models and pushing to integrate services to people with disabilities. The primary areas of focus in the plan are marketing of services, workforce development, and operational processes and efficiencies. ESTS services have many benefits that are created for individuals served, business partners, and the community at large. Designing and deploying action plans within the three areas described will capitalize on the current strengths of the organization, but also build capacity to serve people more effectively and manage for long term sustainability.

The workforce is the most important piece of community based services. The requirements of support staff in the community versus a work center atmosphere are vastly different. Therefore, communication, training, and systems to celebrate success are primary recommendations within the plan. Leadership must keep all employees informed of the direction, offer opportunity for feedback, and work to pull the transformation through the organization. Training is pivotal as operating in the community is akin to going on stage to perform. Employees will operate with minimal support and must be able to successfully problem solve issues as they arise. Additionally, there is a great deal of unplanned events that take place while supporting an individual or group of individuals in the community and there is not an immediate opportunity to have the tools of a facility based model in place. Therefore, training is recommended that can assist with working the improvisational muscles necessary to adapt in real time.

ESTS has an established reputation in the community, but the overall messaging from the organization can be inconsistent at times. This is a result of having a tremendous number of programs and employees working throughout the organization, all of whom need to communicate information with a given stakeholder group. The design and deployment of a consistent messaging platform for Disability Services is an important recommendation as a result. The business development process is in need of centralization and recommendations for a systemic process to establish business partners are included.

Finally, the operations of Disability Services must be refined to allow for an increase in effectiveness and efficiency. The reimbursement rates offered for the services are robust enough to operate the Disability Services department in a sustainable manner. The primary focus of the operational recommendations attempt to address the objective of fiscal performance, while maintaining the high quality, individualized service that the organization is recognized for. Additionally, it is important that results are measures and compared consistently between service lines and locations. The consistent application of key objectives will build greater consistency within the services and offer internal benchmarking opportunity.

There are five broad recommended goals, with key performance indicators offered for consideration that align with the strategic goals of ESTS. The primary purpose of this plan is to successfully transform services to the community, while maintaining the cultural import of the individuals served and the achievement that ESTS helps create for each individual. Therefore, while the location of services may change, the Mission and heart of the organization will not. The heart of the organization will remain and the achievements of individuals served will be a direct reflection of the success of the staff and organization as a whole.

Mission/Vision/Values

The Mission of the ESTS is to empower people with disabilities to live, learn, work, and play in our communities.

The Vision of the company is a community where everyone experiences the pride of accomplishment and the security of belonging. In addition, all staff of EST assisted in creating the values and beliefs for the company.

Values

Courage: We are not afraid to take a risk or make a stand.

Tenacity: We are relentless in our pursuit of better.

Growth: We challenge ourselves and others to continually learn and innovate.

Diversity: Our greatest strength is our differences.

Beliefs

People First: We respect people as individuals with talents and dreams.

High Expectations: We believe that everyone has the potential to achieve and deserves to experience the thrill of success.

Forward Focus: We create today's opportunity by moving beyond yesterday's problem.

The mission, vision, values, and beliefs of ESTS are ideally positioned to reinforce the culture and action steps that will impact the transformation to community based services. Aligning the organization around the principles expressed will create the atmosphere for the organization changes that will need to take place in order to achieve community based services.

Elevator Pitch

ESTS is transforming our Disability Services to a model rooted in community employment and integration for all individuals served. We believe that actively engaging with the communities where individuals served live, learn, work, and play will create an environment of individual courage, growth, and achievement. The individuals we serve in Disability Services have achieved at a high level in the

models that we have implemented, but our forward focus mandates that we support the talents and dreams of people served in their respective communities.

SWOT

<p>Strengths</p> <ul style="list-style-type: none"> • ES National Brand and affiliate network • Experience of leadership team, which is ready for change • Reputation and relations with community • Experienced with Community Based Services • Experience • Good at building partnerships • Highly Compassionate and Dedicated Staff • Adult Day Services is close • High Number of People Served • Track Record of Innovation • Large multidimensional organization • Individuals served are highly satisfied • Understand core competencies • Adherence to compliance requirements • Salesforce • Diversity • WIOA Experience • Individual Approach 	<p>Weaknesses</p> <ul style="list-style-type: none"> • Lack of Key Performance Indicators • Many staff only have provided service in facility based settings • Tracking results • Facilities – physical space • Aging transportation fleet that may not be the right fleet • Workforce not technologically sophisticated • Sales & Marketing • Recruiting younger generation to employment with ESTS • Financial sustainability • Inefficient operations • Training • Decision Time and Slow Execution • Financial Literacy of Key Staff • Infrastructure is Facility Based
<p>Opportunities</p> <ul style="list-style-type: none"> • Employment First • Lead disability transformation • Partnerships, combinations, mergers • Leverage Exponent & Salesforce • Ticket to Work • Brand Renaissance • Volunteer Engagement • Build Support throughout Industry • Economy/Employment Marketing is Strong 	<p>Threats</p> <ul style="list-style-type: none"> • Unknown/Declining reimbursement rates • 14c eliminated by DOL • Changing role of county boards • HCBS and definition of integration • For Profit Competition • AR Time • Bottlenecks in Funding Sources

Strengths

The experience and community reputation of the organization, leadership, and management is a critical strength for ESTS. Clearly it offers the opportunity to leverage the network for support to create employment opportunities for individuals served.

The dedication and compassion of the staff is demonstrated each day in the services provided and tapping into that motivation will be critical in challenging staff to bring the same effort and mindset to services that are predominantly rendered in the community.

Overall, the strengths of the organization are positioned well to accomplish the transformation of Disability Services. Though much work needs to be done, there is a solid foundation of strengths that can be capitalized on. ESTS has a firm understanding of what it is good at and those services themselves are the strength. Whether creating employment opportunities, building individualized support plans, or assisting people in Adult Day Services, the core of what is needed for successful community based service is present.

Weaknesses

There are many services offered through the Disability Services department. The outcomes as they relate to fiscal sustainability are a weakness that must be addressed. While some service lines are more fiscally sound than others, Disability Services as a whole is not self-sustaining. There are inefficiencies in staffing patterns that account for this, as well as a lack of clearly organized processes within specific service lines, like those that currently support competitive employment.

The workforce may further complicate fiscal sustainability due to the rigidity of operations. There is not currently a great deal of flexibility within the workforce and the ability to meet multiple needs, in multiple settings, by a single staff person will be imperative in the transformation to community based services. Additionally, there is a large need to have the ability to mobilize a part time work force during times of high need. For instance, if five of six clients were in need of job coaching at the same time, it would be difficult to meet that need given the current staffing patterns. Finally, the staff has provided services for many years under the current models. The transition to community based settings causes this to be a weakness as employees have not traditionally worked in a decentralized fashion, have not been managed in that environment, may not be capable of using mobile technologies, and may not understand the expectations of community based services.

The lack of key performance indicators is a weakness that is being addressed. Disability Services needs to develop key factors specific to the department, individual service lines, and at the individual level. Individuals served have personal goals, but aside from the standards set by regulatory bodies, Disability Services does not currently have these goals.

Opportunities

The largest, and most exciting, opportunity for ESTS Disability Services is to become a national leader and model for transforming services to a community based model. There are few organizations that have successfully transformed services and fewer still at the scale that ESTS will be accomplishing. Once complete, the leaders, managers, and staff members will be a premier example by which other organizations can model their own efforts after.

There are other opportunities present that can be capitalized in an effort to achieve the goals of Disability Services. First, Ticket to Work is a funding system that can create unrestricted reimbursements for assisting individuals served in achieving their personal employment and earning goals. The Ticket to Work program is, as briefly summarized in the appendix, a funding stream that can create a greater per individual served revenue total than vocational rehabilitation. Secondly, ESTS has mobile technology platforms that can be leveraged to create streamlined, decentralized services that are delivered within a variety of community settings. Finally, the political power from both federal and state efforts may provide opportunities for funding of models that could be used to demonstrate successful service innovation.

Innovation and change is necessary given the threats that are present in the industry. The provision of service to people with disabilities is currently going through tremendous change. The quest to evolve service to community based employment and experience at the greatest level possible is required; to continue to do work, regardless of how great that work is, in traditional models is simply not a reasonable consideration.

Cultural Cornerstone

The strategies, goals, and tactics recommended within this plan will seek to create a sustainable, community based service for individuals served by ESTS. The process of achieving the plan will require a tremendous amount of change management. Given that, Kotter's 8 keys to successfully managing change are important to consider in transformation. The factors are listed below, each will be critical to creating and maintaining the change in services.

- Create Sense of Urgency
- Build Coalitions
- Create a Vision for Change
- Communicate that Vision
- Remove Obstacles
- Create Short-Term Wins
- Build on Change
- Anchor the Changes in Organizational Culture

There will be a great deal of change, but that change will focus primarily on where services are delivered and how they are effectively managed. The core culture of ESTS will not need to change in order for transformation to be successfully achieved. The core competencies of the organization are creating employment, building individual services, and delivering high quality services to people with disabilities. The stories of achievement, and the symbolism that those stories create, is paramount when discussing Disability Services within ESTS. The symbolic, storytelling culture of the organization will serve as the motivating drive of building community based services and is clearly the cornerstone to anchor the change to Disability Services.

The process of reinforcing that symbolism will require alternative communication methods to be developed and Disability Services must be view as a high priority by those that are required to produce the services for individuals served. The success of people served is the reflection of success by employees that are assisting in the achievement. Those stories must be highlighted consistently and throughout all of Disability Services. Finally, the leadership team must reinforce the success in as many ways as possible. Potential solutions might be to have stories shared in a specific location of the office each day or week, perhaps at the beginning of each staff meeting, no matter the level, a story can be shared, or a Facebook account can be created that can detail the success of individuals served on a regular basis. No matter the format, the stories are what is important to the employees of ESTS and certainly provide the motivation to strive for community based services.

Goals

The recommended goals are broad and aggressive. There are five recommended goals that will have many tactical objectives that much be achieved in order for the success. The goals are aggressive to establish the urgency to activate all employees towards achievement of those goals.

1. Disability Services will successfully transform its service, having 100% of people served working in and/or actively engaging with their communities by December 31, 2019.
2. Disability Services will divest from the buildings where the work centers are located by December 31, 2019.
3. Disability Services will build and implement a detailed Sales and Marketing plan, creating aligned materials and messaging in an effort to partner with business and promote the success of individuals, and consistently communicate with individuals served and other stakeholders, by December 31, 2019.
4. Disability Services will build a flexible, decentralized workforce, which will be right sized and effectively supporting individuals served, in the community, by December 31, 2019.
5. Disability Services will independently support operations and revenues will match or outpace expenses by December 31, 2019.

Clearly, there is a large amount of work that will need to be completed in order to achieve the recommended goals. However, Easter Seals Tristate is positioned well to achieve all of the targets. The transformation will create many stories of success and allow all employees to remain attached to the mission, vision, values, and beliefs of ESTS. The remaining of the plan is to provide recommendations for the removal of obstacles, creating wins, building on the change, and communicate the vision of transformation to individuals served, employees, business partners, and all other stakeholders.

Key Performance Indicators

Disability Services has three primary service lines that are delineated by the outcome that is being achieved within each. The programs will be labeled as Community Employment, Community Employment Training, and Adult Day Services (ADS). Community Employment and ADS is each self explanatory, but Community Employment Training is really an umbrella title for five units of Disability Services. The IDEAL, HUB, Work and Grow (YMCA), enclaves, and the work centers all serve as training

and/or information gathering programs with the goal of preparing a person for community employment. Therefore, Key Performance Indicators (KPIs) are recommended as follows and should be established across the organization as a whole and within each service line in each location. The reason to measure at each service line level is to allow for management of the process within each of the service lines and create internal benchmarking opportunities. The internal benchmarks will create competition amongst the units and serve as an additional motivation for employee performance.

Individuals Served

- Individuals served will rate services at the top box level in X% of responses.
- Disability Services will maintain the underemployment rate of individuals served at or below 20%. (Under employment is a measure that compares the individual goals for hours worked against what they are actually working; earnings can also be used to compare the goal versus the actual)
- Individuals seeking independent community employment will earn an opportunity within 90 days of job search initiation.
- Annually, Disability Services will recruit 50 individuals to service, that have not received services from ESTS in the past.
- Each individual served in ADS will average 5 community outings per month.
- Individuals served in ADS will attempt X number of new activities each year.
- 80% of Individuals served will grow through a minimum of 1 step on their employment path each year.

Human Resources

- Employee engagement will be X% as measured annually. (Gallup Q12 is a tool that has been developed to measure employee engagement. Use will allow for a detailed understanding of the workforce as well as benchmarking opportunity)
- Turnover of High Performing employees will be less than 5%.
- Staff will rate their satisfaction with management at the top box level more than 50% of the time.
- Revenue per FTE will increase 5% annually, each year of the strategic plan.
- Each employee providing direct support to individuals served will receive 10 hours of training per year that is not required by statute.

Sales/Marketing

- Sales will produce 15 individual job placements, targeting 5 in each work center each month.
- ESTS will release 100 stories, highlighting success of individuals served and partnerships with the business community, aggregated through all communication channels during calendar year 2017.
- X new users will interact with the website per month
- Yield rate of cold calls to the creation of meetings will be X%
- Yield rate of meetings to the creation of interviews for individuals served will be X%.

- Yield rate of interviews to job offers to individuals served will be X%
- X% of businesses that hire an individual supported by ESTS will hire another individual supported by ESTS within 12 months.

Financial

- Disability Services will match revenue with expenses, each month, throughout calendar year 2019.
- Fundraising efforts for Disability Services will increase X% annually, until December 31, 2019.
- Disability Services will successfully receive reimbursement of \$100,000 from Ticket to Work for calendar year 2019.
- Employees within Community Employment will be 80% productive on a monthly basis.
- Fundraising expenses will be \$.25 or less for every \$1.00 received annually.
- Revenue per FTE in the Community Employment Department will increase X% per year.

* KPI with X variables will need to have benchmarks established in order to specify the goal more soundly.

The recommended performance indicators may not be an exhaustive list. However, the KPI describe above allow for a detailed understand of performance and all represent an objective that aligns with and progresses towards one or more of the strategic goals. It would be beneficial to design a measure that tracks the staffing versus individuals served ratio and allows for a clear understanding of how the ratios are being balanced. The primary variable cost in the provision of services is staff, maintaining an appropriate balance, as determined per budgets, is critical to scaling adequately and sustaining Disability Services. Further discussion of this point is offered in the Sustainability Considerations at the end of the plan.

Individuals Served

The people receiving services from ESTS are satisfied with those services, generally happy with the employment options that are available to them, and comfortable in the routine that they have established. The motivation for seeking, obtaining, and keeping a community based job clearly varies from person to person, but there are barriers that must be overcome in the marketplace in order to create community based services. Individuals served are concerned about safety and may be risk averse; on top of being so satisfied with the services that they receive. All of these factors must be addressed and tactics need to be developed that will motivate people to take the perceived risk of community employment.

The initial recommendation is to assess the individuals currently served in work centers for skills, interest, and motivation to work in the community. Segmenting the individuals served will assist in completing three things; first, it creates the opportunity to generate early wins with the people that are ready and motivated to transition out of the work centers. Second, through promotion and celebration of the success had by those that achieve supported employment, a natural motivation will develop amongst individuals served. Third, it will allow for specific programs and goals to be developed for each segment of those served to better equip and prepare them to achieve at the greatest level of

independence each person is able to. Overall, the individuals served are enthusiastic about community employment. The small scale focus groups that were held proved that individuals served are interested in attempting community employment. As mentioned, their concerns revolve around safety and whether they will be treated well by their boss, but overall the level of interest is quite high.

The work to encourage and support individuals served in pursuing the goal of competitive, community based employment is a grassroots approach. Each person will have a unique set of needs and barriers that will need to be overcome and that can only be accomplished through individualized planning. However, this is one of the core strengths of ESTS, therefore this effort should be easily constructed within the programmatic goals that are already being individually built. The messaging to individuals should be encouraging and incentives for effort can assist in having people try something new. It is difficult to take individual risk. The economic drivers such as increased earnings may not be enough motivation to take that risk. A person may be motivated by an array of items, something as simple as lunch with Rich Davis, or another preferred colleague, may be the key to encouraging the supported risks that must be taken to successfully transform services.

There will be a segment of the market that is generally not prepared for nor interested in employment. The individuals in Adult Day Services (ADS) may be able to work in the community at some point, if they are or become interested, but the primary focus of the program should be to more fully integrate the services in the community. There are two recommendations that may assist in achieving the recommended goals for ADS. The programs would benefit in having a vehicle(s) designated at the location of service, during service times. Currently, easy access to transportation is not an option at all locations and this greatly inhibits the ability to easily access and, more importantly, integrate with the community.

The second recommendation is to move the ADS program away from the work centers as soon as possible. The work centers are not located in areas of the community that allow for easy access into the community. During many months of the year, the ability to walk to destinations within the community is inhibited by weather, but for the services in Rossplain and Symmes, there is really no place to walk to. In addition to a strict location problem, the space is so large that people have too much room and the motivation to separate individuals served into smaller groups and access the community in those small groups is not as high as it could be. Locating space that is centered in a way to allow for easy community access and have enough room for everyone, but not so much that there is a motivation to get out would greatly enhance the program. The Harrison location is a good representation of what ADS should look like. The location is attempting to integrate services without in service transportation, but once that is addressed will set the standard by which the other programs should be judged.

Industry/Funding Analysis

There are many influences that are impacting the industry of service to people with disabilities. Amongst the influential policy is Employment First, Home and Community Based Service policy, Olmstead, and WIOA. Each represents a similar push in that all, in one form or another, are implementing policy that will encourage, or in some cases require that services are integrated in the

community. Additionally, the ability to pay people below minimum wage is in jeopardy, and will be eliminated for those 24 or under on July 22, 2016. The elimination of commensurate wage is a massive change for ESTS and though the timing of elimination is not currently known, it is prudent to effort towards cannibalizing services that pay individuals served less than minimum wage. This effort may not require an elimination of all service models currently offered, as individual employment and enclaves either create or can be created to meet the impending standards, but the need to transform services away from work center based employment is clearly an effort that must be undertaken as a result of this risk.

The effort of transformation is comprehensive and complicated. The funding models that are in place for ESTS Disability Services may be viewed as inadequate in attempts to build community services that are sustainable. However, the reimbursement through the waiver for day services, the outcome payments from vocational rehabilitation, and the opportunity of Ticket to Work all offer monies that can be capitalized on to build sustainable, effective services. The funding available for follow along services in Supported Employment is quite low and perhaps an important funding correction that could be lobbied for as critical to transformation.

The other area that may be an opportunity for legislative change is the rate of reimbursement for transportation services. The current reimbursement rates incentivize and encourage transportation of people with disabilities. Transportation is a major barrier for community employment and is undoubtedly an important priority for the development and transformation of facility based services, but the services and outcomes generated by those services should be the first priority of services to people with disabilities. An argument to recalibrate the waivers slightly and repurpose the budget for transportation into the budget of creating and supporting community employment options is strong and perhaps there is lobbying possibility for ESTS in this regard.

For Disability Services specifically, Ticket to Work is a critical need for a more rapid and potentially successful transformation. It is strongly recommended that ESTS either become or reactivate their status as an Employment Network (EN) for Ticket to Work. The general payment summary can be found in the appendix, but it is important to note that if a person has social security, assigns their ticket to ESTS and specific milestones are met, the reimburse received is actually greater than Vocational Rehabilitation. Additionally, it is potentially a robust funding source that can be leveraged to support other models in Disability Services as Ticket to Work reimbursement is not restricted in any way.

Competition

There are several providers in Hamilton County that provide day services to people with disabilities. The total number of competitors is increased with regards to supported employment services. Generally speaking the choices for individuals with disabilities to select as a service provider are fairly robust. However, ESTS has a respected reputation, a broader and deeper reach than competitors, and a specific expertise in developing employment for people with disabilities. The expertise with employment and the innovative approaches that ESTS Disability Services has demonstrated though the years is a critical factor that differentiates the organization from competitors.

The core competency of employment creation is in need of promotion and results need to be generated, specifically in relationship to Vocational Rehabilitation and the preference of that referral source to partner with competitors for job placement. This area of recruiting new individuals to service is one where competitors currently hold the advantage. The primary reason for this appears to be the lack of job placement and, perhaps, individual preferences within vocational rehabilitation. The reorganization of placement services should assist in rebuilding the relationship and therefore the number of referrals from Vocational Rehabilitation.

Marketing Plan

The marketing of Disability Services is critical in creating business partners and employment opportunities at the volume necessary to rapidly graduate individuals served into community employment where they are earnings minimum wage or more. Disability Services needs to develop a consistent message and position with potential employers of individuals served, maintain positive referral relationships, and reestablish positive referral numbers from Vocational Rehabilitation. In addition, marketing and communication plans need to be developed to communicate with individuals served, employees of ESTS, and stakeholders of the organization.

ESTS is exceptional at creating employment opportunities for people in specific segments of Disability Services, but there is a need to develop a systematic, integrated marketing approach. The initial step in development is to determine the message that communicates the purpose and goals of Disability Services across multiple channels. Individuals in service, referral and funding sources, business partners, and the community, are each that needs to be communicated with. ESTS is designing and implementing the new frontier of services to people with disabilities in Ohio.

The idea of creating a new frontier is a good description of what ESTS is endeavoring towards. The next frontier is frightening and exciting, a positive message about the risks that are involved in the pursuit is important. Furthermore, crafting the message that highlights the success and identifies the risks gives great meaning and power to the import of the work. An identified opportunity from the SWOT analysis is to be recognized as a leader in Ohio, and the county, in transforming services to people with disabilities. Therefore, positioning the marketing message as an adventure that requires partnering, teamwork, and planning in order to achieve success is important. Therefore, a recommended message is, "ESTS is on a transformational journey and is intent on building the next frontier of service to people with disabilities. ESTS brings individuals with disabilities, business partners, and the community together, to create the joy and satisfaction of career achievement". This message aligns with ESTS as each of the values and beliefs is an important factor in discovery.

Disability Services is working with people in three broad categories: Adult Day Services, community career preparation, and Community Employment. Materials for each need to be designed describing the benefits of each to the marketplace targeted for these services. The Key performance indicators previously described are attempting to align the measurable results with the benefits that each of the models produce and can certainly be promoted in a dashboard format as a piece of the marketing of Disability Services.

Adult Day Services

- ESTS provides individuals in ADS with the opportunity to discover new experiences, active participation in their neighborhoods, and the sense of belonging to the larger community in which people live, learn, and play.
- The process of discovery to completed through experimentation and personalization. Individuals in this program find their individual success with the support and guidance of our dedicated staff members.
- Our staff are dedicated to individuals served, assisting them in their pursuit of the highest level of independence possible.

Career Preparation (HUB, Enclaves, Work and Grow (YMCA), Building Ability)

- ESTS provides individuals in Career Preparation with the support and encouragement to develop the skills to meet the high expectations that they have for individual success.
- ESTS partners with local businesses to create an atmosphere where individuals served find the confidence to achieve independent employment.
- These services are where individuals served discover their career goals and begin their pursuit of Community Employment

Community Employment

- ESTS assist individuals in becoming valuable staff members of local businesses, serving as the consultant in each person's journey toward independent employment.
- ESTS helps individuals served learn their respective craft and assists in each person becoming part of the team at their place of employment.
- This is where individuals served feel the sense of achievement, as they are accomplishing their individual goals and discovering the next frontier of their working lives.

The marketing to business partners is pivotal to the success of the strategic plan. ESTS has developed many business partners and have an established brand within the business community. The focus of any new strategy that is developed should be to increase penetration into the business community and focus the message to one that is promoting individuals served as highly valuable employees and also that the services offered by ESTS can alleviate any concern that a potential business partner may have when making their hiring decision.

The initial recommendation for business development is to centralize the effort in two ways. First, the Salesforce data base should be developed in order to provide information to all employees charged with developing and maintaining business partners. The centralized system is already in place and is being used for client data management, but can be further utilized to create the informational center of business development. The other recommendation is to build a centralized team for sales. The Business Development Manager can serve as the point person for the effort, with the sales team working in conjunction with the manager. The Job Developers that are currently working to create community employment can continue to work directly with individuals served in the process of the

overall job search, but should be working with established business partners and serve as the expert in supporting the individuals in their respective employment.

The initial contact with any business will be made by the development team, following a process like that described in the appendix of the plan. It is a simple sales flow that allows for job creation and follow up with business leads that are categorized as positive. The development team is charged with selling the features and benefits of ESTS and individuals served to potential employers, with the ability to match specific people with employment opportunities as they are meeting with new businesses. The development team can then communicate with the staff that is providing the individual services. Once the business lead is qualified and applications can be submitted for consideration, it will be the role of the job developers to handle the process with the individual served having them apply, assisting with interview preparation, and aiding with considerations when an offer is made. Once the job is offered and accepted, the staff with the job developer title will become the primary business contact and serve as the liaison between the individual served and their employer.

ESTS: The Features and Benefits offered to Business Partners

Features	Benefits
Specialized Resource that can Assist with Diversity Initiatives	Reduction in Training and Turnover Costs
Access to Unique Skill Sets	Social Benefit and Business Leadership that Hiring People with Disabilities Offers
Professional Staff that Help Through the Entire Employment Process	Confidence that ESTS has Everything Handles
Customers of Business Partners Value Companies that Hire People with Disabilities	Increase in Revenue and Brand Enhancement

Core Message to Businesses:

ESTS partners with employers to find, train, and develop highly skilled employees that take pride in their work. Employers can be confident that our professional staff has everything handled.

ESTS assists people with a variety of barriers to employment. Employers partnering with ESTS have access to a highly diversified candidate pool and reap both the tangible and intangible benefits of employing people with disabilities.

As the liaison, the job developer will serve as the job coach and follow along person for the individual(s) working with a specific business partner. This will offer the opportunity for continued development with that specific business partner, perhaps developing more opportunity for individuals within that business. For an example, if a specific retail outlet is employing an individual, the job developer can work to create more opportunities within that business for other people who are interested in working in retail, or create assessment opportunities for evaluation services.

The communication with business partners is a grassroots effort and similar to the messaging that has been used to create the opportunities that ESTS has created to date. The nature of contacting business is not in need of changes, but as mentioned, needs to be centralized and more consistent. Furthermore, there are tangible benefits that can be sold to businesses as to why it is beneficial to hire individuals served. Included in the real benefit to business is a potential reduction in turnover and training costs, tax benefits, and research indicates that productivity of all employees are improved by creating the diversity that hiring an individual with a disability represents. Furthermore, the customers of any business have always appreciated, and in some cases, made buying decisions based on people working at the business. There are many examples of this type of benefit, so the public relations and sales meetings can both reference these situations and build the brand of employing individuals with disabilities.

There needs to be an understanding of what the impact of marketing efforts are beyond simple job hires or new individuals added to services. There should be a cornerstone of Disability Services communication developed. It will allow for all communication outlets to refer people to a centralized location where all communications can be aggregated and outcomes can be posted. The recommendation is to use the website as the central landing for communication. The reason for that is that website traffic can be analyzed with Google Analytics or similar program as a piece in the determination of whether or not the marketing efforts are driving towards the intended results.

The final recommendation is that Disability Services must be differentiated effectively from all the other employment support programs offered by ESTS. Disability Services is large and the transformation of service too high of a priority to allow for messaging about employment for people with disabilities to get lost amongst all the other departments. There are opportunities to leverage efficiencies due to all the employment services offered, the marketing of employment of people with disabilities should not be one of them. The advocacy and import of targeting employment for people with disabilities is too important.

Workforce

The primary consideration in regards to the employees is that they each have been providing exceptional services, in many cases for a long time, and know and understand individuals served better than most. The organizational knowledge amongst employees is both a benefit and potential barrier. Individuals served will need support and guidance as they attempt to earn community based employment opportunities. The employees of ESTS, with all the personal knowledge are well positioned to provide support to individuals served. However, there are some barriers that must be overcome and the recommended strategies for the workforce are focused on overcoming those barriers.

Change is a difficult thing for employees, it is made more so when they are experienced and successful. Therefore, the transformation plan will need to be communicated to all employees of Disability Services by the leadership team. All of leadership needs to be of one accord and involved in the process of building momentum amongst Disability Services. By having all of leadership engaged in the process of transforming Disability Services, it will create a more urgent environment, sustain momentum, and offer

more problem solvers to address issues as necessary. Communication throughout the process of transformation will also be necessary. The development of weekly news about the process, the results achieved, and success stories that individuals served are creating. External public relationship is clearly important, but there will need to be an internal marketing and public relations effort to ensure that employees are up to date and still have the attachment to the stories of success as much as possible. In addition to a weekly newsletter, the staff of Disability Services should be privy to and given the opportunity to discuss the KPI for the department.

The culture of work and success that has been sustained within Disability Services is to be commended and celebrated. The employees that have worked to establish the processes and systems that have created all the success are being asked to start over, as the current models of service will gradually erode away. In addition, the policy changes and mandates from the federal and state government make it feel as though the services that are being provided are wrong, despite the stories of success and satisfaction levels of individuals served. The celebration of all that is and has been achieved is important.

The workforce construction is too rigid as currently constituted. Full time employees make up the bulk of the labor force, and there is difficulty in meeting the needs of individuals served who are working evenings and weekends. The need to build a more flexible labor force is necessary to meet the increasingly variable hours that individuals served will be working. By adding part time employees, a larger amount of human resource can be dedicated at time of need. For example, if five people are all starting work on the same day and all need intensive job coaching, it will be beneficial to have capacity to cover this type of situation, but not be overstaffing for day to day operations. The other area that appears as rigid is the service that is provided by each person is narrowly defined. The process in Community Employment has a number of transitions in staff providing the service and staff responsibilities are very specific. The recommendation is to develop a cross functional employee group. The process to do that may be as simple as breaking the process as the skills necessary to complete Job Coaching are not different from that of providing Follow Along services. Employee's expertise should be defined as providing services to people with disabilities, not providing Follow Along services to people with disabilities.

Training needs for building a decentralized workforce have to start with technology education. There has already been an investment in mobile platforms and the data management platforms that are in place for both the billing and client program management, are more than adequate for a mobile workforce. The employees have to be trained to use the equipment. In addition, there has to be recognition that providing services to individuals in the community can be more challenging than providing service in the work centers. There are many more variables in the community that can be influential and employees are operating on an island in many cases. The employee becomes much more responsible for solving problems in real time and dealing with situations that they may not have experience with. For instances, Direct Support Staff will be working closely with managers and supervisors of businesses where individuals served are working and must be able to problem solve and communicate effectively with all community members as well.

It is difficult to find and provide training specifically designed for supporting individuals in the community. However, improvisation training and the ideas that are discussed within the training are valuable to community services. The flexibility and ingenuity that are important for success in improvisation are also necessary to support people with disabilities in the community. Additionally, the opportunity to role play scenarios that may happen in the community must be a piece of training, both at new hire and continually throughout a staff member's tenure. Finally, it is recommended that high performing employees that have been providing services in the community be a part of the training process for new hires or for staff members supporting people in the community for the first time. The mentorship relationship that partnering those with training needs can create value in the process of training. The staff providing the training has dealt with real issues in the community, the person receiving training can shadow the trainer and get a tangible look at the work, and finally it creates a relationship that the new staff can lean on for debriefing and questions as they arise.

Many employees of ESTS have been providing services to individuals for many years. There is a pride in the work that is being performed and the results that have been achieved as a result of that work. It is important to recognize the achievements to date, but as described in the marketing plan, staff members must be able to celebrate and discover the success of individuals served throughout the organization. The stories of success are the symbols that the culture of ESTS is identified as by the employees of the organization. As wins are achieved, internal promotion of success must be promoted in order to anchor the change to community employment to the historical culture of ESTS.

The final recommendation is to develop plans that are designed to recruit and retain the next generation of employee. Whether an internship program can be developed, or partnerships with the local universities are or can be established, a plan must be in place to build the workforce that will step in as succession occurs.

Operations Plan

The systems that are creating value in Community Employment are currently not prepared to meet the goals associated with the transformation. The processes used to find jobs are successful in some ways, but the job coaching piece are not structured for the flexibility and capacity necessary for success. Recommendations for operations in this department focus on developing a sales team that can create leads, working in conjunction with professionals that are dedicated to working with the individuals served throughout the process of finding, learning, and keeping a job.

Job development is quite different from providing services to people with disabilities. There are staff members that can successfully engage in both aspects, but it is more likely that the strengths of employees will land in one expertise or another. Therefore, it is recommended that the department is analyzed to determine which, if any, of the current job developers can expand their reach and find jobs for all the individuals served that are looking for community jobs. The number of people dedicated to business and employment development is somewhat dependent on the number of individuals that are currently searching for work. However, because the employees will not have the responsibilities associated with paperwork and managing individual needs, they can handle a large number of people, if

not an infinite number, if the communication between the two sides of job development is effective. Therefore, it is imperative that processes are developed that allow clear communication of individual job goals and what jobs are available in the community.

The business development process itself needs to have systematic aspects of it as the messaging and setting of expectations with the employers is critical to long term success. Inflating the expectation of business partners will effectively set individuals served up for a difficult battle, as the abilities of individuals served must meet the expectations of the business. Additionally, a sales cycle, that all can engage with through Salesforce, needs to be developed. A process for business development is depicted in the appendix of the plan, but can be designed in a number of ways. Regardless of the process design, there needs to be outcomes to measure both at the end of the process, but also throughout the process to determine performance. Those measures are recommended in the Key Performance Indicators of the plan.

The employees that are responsible to prepare individuals served for community employment need to collaborate with the work centers and individuals that are operating in the Community Employment Training business lines. The transition between the two programs is dramatic in a number of ways and individuals served need to be known within each of those service lines. Therefore, the staff identified as experts at assisting individuals in all the aspects of community employment must be present in the programs that are preparing people for that opportunity.

The preparation of people is important and working with Vocational Rehabilitation and other funding lines is imperative in order to create the volume of people looking for community work that will allow the economies of scale to be built. The referral process to funding streams must be created to build volume and, according to discussions with representatives from OOD, if referrals are made that have all the barriers removed and people are truly ready for community employment, they will work to streamline the process of referral and establish service authorization. In an effort to help individuals prepare the Employment First Coordinator and Vocational Rehabilitation Counselors should be included on the work floor or have an opportunity to interact with the individual served in the environment they are working in. This allows for counselors to better understand who the person is, provide feedback regarding an individual's readiness, and offer suggestions for programming if the person still has areas that need improvement. Additionally, partnering in this nature will build the relationship with Vocational Rehabilitation and build the referral opportunities from their caseloads as well.

Once the jobs are developed and individuals begin work, the job coaching provided must be professionally implemented and communicated with team members in order to mitigate the risk of poor performance and the high performing staff should be assigned to start any new business partnerships. In addition, there has to be capacity to provide job coaching regardless of the time that individuals are working or how many are starting on a given day. Developing that flexibility may entail building a part-time or temporary workforce that can be scheduled and balanced according to need. In addition to the flexibility that can be created with a part time labor pool, it also assist in adding staff capacity in alignment with what the needs are in relationship to individuals served. As an example, if a staff person's caseload is determined to be 30 individuals, there is a need for staff capacity, which is less than

full time, all the way to 30 more people being added to the caseload. A part time person will allow for the balance of staffing need, with individual needs, and maintain the fiscal integrity of the unit.

The employees providing both job coaching and follow along services are also the lead communicator with the business partner and will set the stage for more individuals to be hired in a given setting. Therefore, the employees must be developed to provide professional services, but also engage with business partners in a meaningful way. One consideration is to determine the qualifications necessary to provide professional, consultative services to both individuals served and established business partners. The first criteria is the ability to provide exceptional services to people, but the person must be able to represent the person, themselves, and ESTS with a confidence that the business feels that everything is handled and can trust the staff person to figure out what is needed if issues should arise.

Finally, the staff members working in Community Employment have to have the ability to operate in a decentralized, mobile manner. Key to this is the ability to operate and work with technological platforms that will allow for real time reporting and billing while in the field with individuals served. The ability to produce results and record those results, without ever having to be in the office is critical and should be a mandated requirement of all staff in the department.

The Community Employment Training segments of Disability Services are actively engaging people and are meeting the goal of community involvement. However, two specific strategic recommendations are detailed below. The purpose of these recommendations is in conjunction with other efforts that are detailed above. The individuals served that are identified and ready or near ready for community employment need to be engaged with the job developers within the Community Employment department as quickly as possible. The best way to learn about working in an independent, community based setting, is to work in that setting, under those circumstances. Therefore, the faster individuals served can graduate from the work center and starting learning the skills identified in the IDEAL program, the better. Services like the HUB, Enclaves, or other models are an excellent stepping stones, but should not be considering the end goal for many individuals. Transition is sometimes a difficult thing for individuals served, so perhaps it is more effective to transition once, or quickly, to community employment. The second recommendation is to limit the time that individuals served can operate within a given program as the transition from the work center to community employment takes place. Several individuals have worked on enclaves or the YMCA for many years. Perhaps this situation is ideal for a given person, but generally speaking, individuals should be encouraged to complete the next step to community employment.

In addition, the enclaves are an exceptional model to prepare individuals for work, an expansion in both the number and variety of enclaves is a recommendation to get more individuals actively engaged in community employment. Furthermore, it is recommended that Group Supported Employment (Group SE) settings be pursued for individuals to work in the community. The basic concept of Group SE is to locate employment settings for individuals served and support multiple persons with a single staff member throughout the day. This style of service and support is already being implemented in the Project Search sites and may be a critical model in the transformation of the work centers. Group SE does not need to mirror Project Search in terms of the classroom work, or job rotations. The

comparison is apt in the sense that you are supporting multiple people, performing multiple different jobs with a single staff person, thereby creating the scale to sustain services. The jobs simply have to be close together, not necessarily in the same business. For instance, if 7 people earn employment at a mall, in a multitude of stores, it would allow one job coach or follow along person to provide the support necessary for success and do so in an efficient manner.

The final recommendation is to ensure that individuals served, and employees as well, have an opportunity to congregate for social and recreational activities. All the feedback from individuals served indicated that friends and social inclusion is a tremendous benefit of ESTS services. Therefore, while the transition to community employment will change the social interactions, there should be a mechanism, whether in conjunction with where ADS is offered, HUBs are operating, or another avenue, that the social piece can be a part of everyone's week.

Adult Day Services (ADS) is designed to actively engage individuals served with their communities through social and recreational opportunity. The primary recommendation for this service line is to increase the transportation available throughout the day for individuals within the program. For example, the location on Harrison is very close to meeting integration goals and is dedicated to doing so as frequently as possible. However, there is a need to provide transportation to individuals served in ADS and it is imperative that transport options need to be made available. The advantage that Harrison has as compared to ADS programs at Symmes and Rossplain is the location is such that there are community options to walk to and engage with. Symmes and Rossplain are located in more industrial neighbors and the walking distance to the community is simply too great. Therefore, it is recommended that new space for ADS is located for the programs at Symmes and Rossplain. Transportation availability can solve many of the barriers to community integration for individuals served in ADS. However, being able to walk to community activities vastly improves the capacity to get out and actively engage in the community. Therefore, it is recommended that space is explored to relocate ADS services. Additionally, the expectations outcomes generated by ADS should be standardized across the service locations. The primary reason for this is that consistency across service models is critical, but it also offers an opportunity for internal benchmarking. The natural competition that this creates will improve ADS as a whole.

Sustainability Considerations

The operations are consistently creating results, but the efficiency of those results can be improved. The import of this improvement, specifically as it relates to creating jobs and supporting individuals served in community employment, is critical to overall success as individuals currently working in the work centers will be transitioning to community employment. Additionally, the training models that are built to prepare and expose individuals for community endeavors are numerous, but may be repetitive. The individuals served in these models have transitioned to community employment or have made a step towards that goal, but a larger percentage of individuals need to graduate from models such as HUB, YMCA, and Enclaves to community employment.

The Community Employment division currently presents as inefficient and without the capacity to effectively serve individuals that earn employment outside the traditional business hours of ESTS. Additionally, the development of productivity measures for employees within this department is critical. Utilization of staff time is necessary to produce results for individuals, but also in maintaining fiscal sustainability. The employees working in this department are working on job development, job coaching, follow along, and vocational assessments. The equation to understand utilization and productivity is straightforward:

Hours in (Job Development + Job Coaching + Follow along + Assessment)/Total Hours Worked

Job Development is slightly difficult as outcome payments is how Vocational Rehabilitation reimburses that service. However, an understanding on the number of hours necessary to successfully create a job for an individual is another process measure that may be important to understand and make decisions. The other three services in the equation are simple as they are reimbursed in some unit of time. Job Developers will be supported by a sales force, but will continue to work directly with the individuals seeking employment, ensuring that everyone is prepared and working towards earning their job. There may be value in creating volume based services for individuals served. A job club, or a similar model, is an excellent way to provide support to multiple individuals with fewer staff. Clearly, there is an opportunity to build volume based service tactics that will create efficiencies within the job creation process.

The Community Employment unit needs to be analyzed to determine the precise number of staff necessary to effectively provide the services. The unit may have the correct number of employees, if the pipeline of individuals being served can be expanded. Work centers have a number of people building towards Community Employment. The IDEAL program is designed as a step towards community employment and employees from Community Employment should begin interacting with individuals from all the service models that are targeted as a stepping stone as quickly as possible, though how to effectively support the transition is complex.

One operational barrier may be funding for individuals moving from work centers to community employment. There is a risk in developing a bottleneck with referrals to Vocational Rehabilitation and an understanding of the speed with which Vocational Rehabilitation is able to issue authorizations of service for targeted individuals must be determined. However, there is the alternate funding available through the Ticket to Work program and utilization of this funding stream, along with the traditional model of referring to Vocational Rehabilitation, will help to create a larger volume of individuals that can be referred into the job placement pipeline. The increased volume of individuals seeking jobs will vastly improve the overall productivity of the employees within Community Employment and allow for a wider sales approach and any job lead that is developed has a greater likelihood of meeting the needs of one or more individuals who are currently looking for work.

Ticket to Work is a mechanism to increase the volume of individuals with active funding as anyone who is receiving social security benefits is likely eligible to assign their respective ticket to ESTS. Therefore, the individuals served should be analyzed for ticket eligibility and efforts should be made to have those

tickets assigned to ESTS. The individuals served may not be interested in completely transitioning off of social security benefits, but if they are eligible for Phase 1 reimbursement, each placement that is made, where all four milestones are reached will create a revenue stream of \$5,592 in as little as nine months following job hire. Furthermore, if the person quickly learns the job and is in minimal need of support, there are no criteria of support that must be met. For instance, all support can be offered via technological communication or through simple phone conversations. This vastly changes the fiscal models as many persons can be supported by a single employee without the lost time of travel or other unproductive tasks.

The need to balance production and quality is important in Community Employment and it carries over to both Adult Day Services and community preparation segments of Disability Services. There is no single solution to balance the equation of fiscal sustainability and quality services. There are many factors that each organization needs to determine. Clearly reimbursement rates, staff wages, and overhead fixed costs are the broad categories that impact fiscal sustainability. On the quality side, the staffing ratios and resources to create opportunities for individual services are of primary import. The first recommendation for strategy deployment is to determine what the goal for revenue over expense is for Disability Services, not including Community Employment. The goal for this plan is to create a model that can sustain itself by breaking even in the services provided, perhaps a slight margin is a goal that may be considered, but given the fiscal performance of the past 6 months, the recommendation is to set the goal at matching revenue with the expense of service provision.

There are two ways in which the negative margin may be reduced. The first is that the hours that staff members are working simply outpace the hours that individuals are being served. Simply put, total service hours that are being reimbursed are five hours per day. By serving clients longer or scheduling staff members for 7-8 hours per day, given the amount of time that is reimbursed, margins are reduced or eliminated, thereby impacting sustainability. Therefore, it is recommended the both staff hours and individual hours served are examined to determine whether these issues are impacting operational budgets. In addition, transportation services should be examined in a similar way.

Conclusion

Easter Seals Tristate is a dynamic organization that is staging to become a leader in services to people with disabilities. The work and planning that will be required to complete the task at hand is not able to be fully captured in a single plan. There are too many changes, unexpected barriers, and different opportunities that will arise during the process. However, ESTS is an agile organization and will adapt effectively to all the different needs of people served, their stakeholders, and employees as they evolve through plan implementation. This plan that is designed attempts to address the priority needs in transformation and by addressing the marketing, workforce, and operational processes, ESTS will build on the successes and developed strengths that the plan outlines. It is both an intimidating and exciting opportunity that is in front of organization, but the outcome of providing fully integrated employment and other supports to people with disabilities will be achieved.

Appendix:

The information below highlights comments and thoughts from individuals served, parents, and other stakeholders. These questions were posed to people in individual conversations and small group discussions. This is anecdotal information, as a low number of people related to total numbers served in Disability Services were a part of the conversation.

- How long have you been working with Easter Seals Tristate?

The range of time working with ESTS spanned 1 – 27 years, with an approximate average at 8 years of affiliation with ESTS.

- What are the strengths of Easter Seals Tristate?

The staff was mentioned by all the parents that were a part of the discussion. The dedication, compassion, and communication were all heralded as outstanding.

Individuals served stated that work was strong and really enjoyed ESTS for that, but also for social reasons, specifically, seeing friends and parties. They have fun at ESTS.

Communication was also highlighted by Support Coordinators as a strong point. They appreciated the focus on work and thought that ESTS staff creates strong programs to help individuals grow.

- What are the areas that could be improved?

There was a general consensus that the “drama” associated with break, lunch, or non work time can be improved. All three groups mentioned this, with the individuals served being a loud and resounding voice to this issue. In conjunction, each group mentioned some inconsistency in work availability, as when work is unavailable the troublesome drama increases significantly.

Support Coordinators commented that more person centered assessment work might be an opportunity for improvement. They commented that providers simply use the same assessment sites, regardless of the wishes of the person served. There is a reported opportunity to build a person centered assessment program.

Some individuals served thought a dress code would be of some benefit.

- What is one thing that should not change at Easter Seals Tristate?

The approach to how individuals are served. “I feel that their staff does a remarkable job making sure that each person is treated individually and really help that person grow.”

- What are your initial thoughts about community employment?

Great idea, I think it is wonderful.

I love seeing people working out in the community

It is fantastic, but it is not for everyone.

- What aspects of community employment are exciting or intriguing?

Sense of self worth, learn new things, and make more money.

- What aspects of community employment feel risky, if any?

“Will the boss treat me fairly?”

“I am terrified. My daughter is not ready for the community.”

“I hope my daughter stays in the work center, it is a safe place for her to go.”

“Why can’t the community come to the work center?”

Individuals served are concerned about safety, parents and support coordinators have the same concern, but phrase it more as being “ready” or “prepared” for community employment.

Transportation was addressed as a concern, but more in terms of timing.

Will it get people to and from on time?

Getting off the bus and walking alone at night may be a risky situation.

Want individuals served to be treated as fairly at community work site as they are at ESTS.

- When considering those areas that are risky for you, what steps can be taken to mitigate your concerns?

People generally thought that strong job coaching and assisting in developing key relationships at the job with co-workers would greatly reduce the feeling of risk.

- Is the community and businesses in the community ready for this?

Parents thought maybe, professionals thought yes or already prepared.

Parents wanted to hear the success stories: “It is great to see and gives me confidence it can be done.”

OOD Focus Group Summary

The purpose of the discussion with OOD was to determine the perception of ESTS in the eyes of Vocational Rehabilitation Counselors, but also understand the best course of action to build referrals to their department. Furthermore, there was discussion about how to best partner with OOD and use their services in to assist with transformation.

The discussion did illuminate several things. The reputation of ESTS at OOD is not in a strong position at this time. The reasons for this include a lack of job placement outcomes, poor reporting and communication with counselors, and a general distrust that job coaching will be completed with any effectiveness. All the people that were in the discussion, which totaled 9 counselors, commented that they are willing to work with ESTS if items can be improved. However, they felt frustrated, as they have communicated these issues on multiple occasions and have seen no improvement. Simply put, “they will believe it when they see it”.

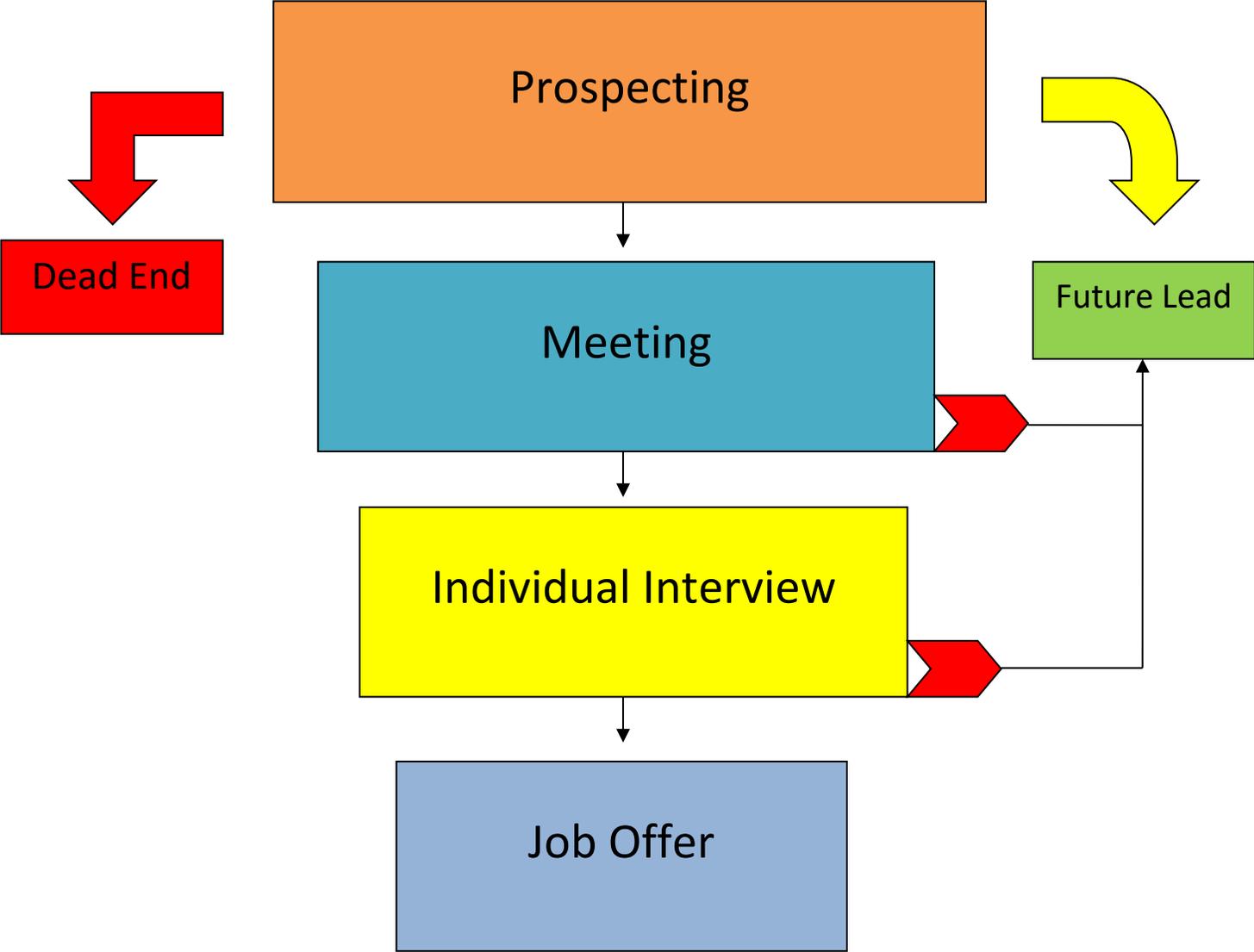
There was discussion about how services were better prior to the merger and several times they referred to the organization as JVS, rather than Easter Seals. While perhaps a simple error from multiple people, the fact that they are still referring to services coming from JVS is interesting. They have a limited concept of who is in charge of the department, feel any changes in management are not effectively communicated, and when pressed, could not produce a reason to refer a person to ESTS, beyond the person living very nearby.

A particular complaint was the transition of service from job placement to job coaching. One commenter described this process as “terrible” and the general sense is that individuals are not receiving the job coaching necessary, despite active authorizations to do so. An example was provide in which the person served had 400 units of job coaching authorized for a month, but only after receiving word from the person’s parents, was it determined that the job coach failed to provide one unit of service for the entire month. Additionally, counselors had particular complaints about communication from job coaches as they felt that the reporting was late, if completed at all, and that they were unable to communicate directly with the job coach, but always had to operate with the manager of the services.

The other discussion topic centered on transforming the work centers and how OOD can be a part of the process to ensure that individuals served are not hampered by the referral process. The group all indicated that they are willing to work together and made specific suggestions of referring first to the Employment First Counselor and including that person, as well as other counselors, with the individuals in the work center. The opinion was that the inclusion would offer an opportunity to discuss a specific person and the counselor may be able to help craft a plan to ensure the person is prepared for community work, if indeed there were still areas of needed improvement.

Finally, there was a discussion about what a ready referral looks like and what should be included in the information provided. OOD would like referrals that have an understanding of what community employment means from all interested parties supporting the person served. Therefore, the hope is that the group home, parents, and other parties are supportive of community work as well.

The flow chart below represents a simple sales process that can be utilized to create in-process measures and provide consistency amongst those employees charged with business development.



The graphic below details the payments that are possible through Ticket to Work. The benefit of the Ticket to Work is that it provides an additional funding stream for transformation. Additionally, if specific individuals are ineligible for Vocational Rehabilitation or the referral process to that funding model is delayed, Ticket to Work is an alternative path that may be able to unlock the process for a given individual.



2016 Payments at a Glance

OUTCOME PAYMENT METHOD

Payment Type	Beneficiary Earnings Required After Ticket Assignment	SSI Ticket-Holder (Title XVI)	SSDI Ticket-Holder (Title II)
Outcome	Earnings sufficient for "zero" cash benefits status	Up to 60 Payments of \$451/Month	Up to 36 payments of \$781/Month
Total of Outcome Payments Available		\$ 27,060	\$ 28,116

MILESTONE OUTCOME PAYMENT METHOD

Payment Type	Beneficiary Earnings	SSI Payment Amount (Title XVI)	SSDI Payment Amount (Title II)
Phase 1 Milestones**			
Milestone 1	\$810/mo. x 1 mo.	\$1,398	\$1,398
Milestone 2	\$810/mo. x 3 mos. w/in 6 mos.	\$1,398	\$1,398
Milestone 3	\$810/mo. x 6 mos. w/in 12 mos.	\$1,398	\$1,398
Milestone 4	\$810/mo. x 9 mos. w/in 18 mos.	\$1,398	\$1,398
Total Potential Phase 1 Milestones		\$5,592	\$5,592
Phase 2 Milestones	Gross Earnings > SGA (\$1,130/\$1,820)***	\$242/mo. for up to 18 mos. = \$4,356	\$419/mo. for up to 11 mos. = \$4,609
Total Potential Phase 1+2 Milestones		\$9,948	\$10,201
Outcome	Earnings > SGA (\$1,130/\$1,820)*** And federal cash benefit = \$0	\$242/mo. for up to 60 mos. = \$14,520	\$419/mo. for up to 36 mos. = \$15,084
Total Potential Milestone and Outcome Payments		\$ 24,468	\$ 25,285

*The payment rate in effect at the time the Milestone or Outcome is attained is the rate that will be paid for that particular month, regardless of when the payment request is submitted.

** Please contact the Payments Help Desk (at ENPaymentsHelpDesk@yourtickettowork.com) for explanations to exceptions.

*** The 2016 monthly SGA amounts are \$1,130 for non-blind and \$1,820 for blind individuals.

Website: www.yourtickettowork.com | Email: ENPaymentsHelpDesk@yourtickettowork.com | Call: 1.866.949.3687 (toll-free)