



Building Innovative Service Models

## **Downsize Farm: Pathway Report**

Ohio Department of Developmental Disabilities

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## Introduction

Downsize Farm (DF) received the Building Innovative Service Models grant at the perfect time. The organizations' founder and Executive Director (ED) had just retired; new leadership charted a path forward for DF that expanded possibilities. DF had always been a creative organization that believed in a holistic approach to services. The Building Innovative Service model grant provides the opportunity to create a rubric for sustainable business practices while respecting the organization's culture.

DF's new ED's showed the ability to turn some of COVID 19's negative aspects into opportunity. The impact of limited enrollment alongside many community venues shutting down gave the organization time. They used this time to think strategically on future potential opportunities. Supplementary funding from the Ohio Department of Developmental Disabilities (DODD) to assist organizations during the pandemic allowed the organization to continue providing services. However, the ED knew the organization needed to strengthen its fiscal protocols after the pandemic to move forward. Leadership made a conscious decision to use this time to cultivate open communications about possible changes to strengthen the organization while building consensus.

Having a team to assist in the assessment and planning strengthened DF's ability to make changes. The ED felt the state representative assigned to DF, Kyle Corbin, helped the team to a greater understanding of the state's requirements and processes. Having an outside party assisting allowed DF to focus on areas they wanted to expand or change for sustainability and innovation. This assessment laid the foundation for the business plan. Areas highlighted in the assessment were the same areas the ED had been considering ripe for change. Based on the assessment, leadership focused on determining what areas needed immediate attention to build and strengthen their foundation and what areas needed to be concentrated on after their foundation was strengthened.

## Creation of a Business Plan

Creating a Business Plan with concrete steps allowed DF to control their processes and future rather than feeling that they were going through the motions to please the state. DF analyzed what they would accomplish in a given time frame, and rejected areas considered too great of a stretch for the organization at the time (see chart below). The plan provided the structure for the change DF wanted to create. The Director Governor's leadership team was all given the

opportunity to review every step in the business plan, discuss it with their staff and provide feedback both on the content and the timeline. The Business Plan built consensus and laid the foundation for the organization's first strategic plan that will set a long-term direction for the future. The strategic plan will be developed with the Governing Directors and with the newly formed Advisory Board of community partners established in May of 2021. Due to the newness of both the Advisory Board and Governing Directors, the strategic planning will start in the fall of 2021.

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
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## Strategic Plan & Business Plan

It is important to DF that their Business Plan aligned with the agency's first Strategic Plan. DF is excited to be creating a strategic plan that will involve the newly formed advisory board. The strategic plan is both a vision and a shared foundation for the future. It will be the pathway for the organization's progress and a tool to evaluate their efforts. The leadership is committed to the strategic plan being in alignment with the business plan because it will strengthen the agency. In tandem the plans provide understanding to stakeholders and staff by offering the rationale, choices, and the structure for future directions. In the past DF ran as a family-owned business: meeting the needs of clients, but the expectations for organizations have changed rapidly. This may cause DF to make some hard choices in the future concerning services and funding: a strategic plan and business plan will guide those choices.

Prior to the creation of the strategic plan DF will survey stakeholders and conduct at least one focus group to obtain input for the strategic plan from families and participants, community partnerships, funders and staff. Based on the input the ED and AB will create a strategic plan that is in alignment with the business plan, both the Business and Strategic plans will be posted on their website when completed in November of 2021.

## Implementing Solid Businesses Practices

DF implemented fiscal practices that allowed individuals responsible for programs to have their own budget rather than a combined budget. In the past, budgets had not been individually separated by programs; some Governing Directors did not know the fiscal aspects of their programs; creating challenges regarding decisions on service cost effectiveness. DF remedied this in the spring of 2021 by implementing systems to remedy the situation. The ED worked with its accountant to create separate budgets for each program. Payroll costs are now assigned to the program where staff works; in cases where a staff is divided between two programs the cost is now shared proportionately. Each Governing Director now monitors their program's budget, with any issues reported to the ED. Currently, all expenses and revenue are tracked and reviewed monthly, this allows DF to figure out what goals should be set using the financial data to determine sustainability and how to maintain forward progress. Policies are being considered on how to ensure that when a new or expanded service is being considered, a cost analysis will be conducted.

During the pandemic enrollment and attendance dropped significantly leading to an alarming decrease in revenue. The decrease in revenue led to the introduction of Key Performance Indicators (KPI) as a governing metric in all departments. Some are still being established but once that occurs, they will be monitored monthly by each Governing Director to ensure that programs are and remain cost effective. Beyond current programming and putting solid policies in place DF realizes there is a need to purposely and carefully consider how to expand revenue beyond one

funding source. To this end 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.

## Stronger Connection with the Community

DF is well established and has strong community connections. It has never looked at the alignment between their services and the community's needs. Striving for alignment with the community would strengthen the organization support and perhaps revenue base. It would also help them determine the most effective marketing plan.

To learn how the community views DF the program team will create a survey for their current employers and/or community venues/partnerships. The survey will focus on what the community values about DF and what DF could do to expand on said values. A variety of respondents will be contacted for follow-up interviews due to how they answer the surveyed believes it is important to establish themselves as a resource both to the community and to individuals with developmental disabilities. Reaching out to the community to discovery their perspective will assist DF both in establishing new partnerships with the community and becoming a resource for them. The team will evaluate and analyze all the data. They will determine what services can expand to meet employers' and community needs and how they should revisit their marketing. Their findings and ideas will be presented to the ED and Advisory Board by January 2022.

Ohio is an Employment First State and competitive integrated employment (CIE) will continue to be a key funding priority for the foreseeable future. DF wants to be sure their employer engagement efforts are both thoughtful and effective, not only to expand the number of individuals who obtain CIE but to increase their funding options. Employers in this climate are hungry for prescreen, solid workers which DF can offer. To achieve their goal the DF employment team is creating a plan on employer engagement. It will address:

- The process regarding current approaches in using networking, developing new partnerships, and marketing.
- How to connect with employers beyond hiring, exploring being a resource to employers around disability information; such as providing training on universal design or understanding reasonable accommodations.
- Establishing strong partnerships with employers with a cadre of businesses that provided informational interviews to DF jobseekers.
- The plan will also provide projections of the number of employers engaged each month to secure the desired number of competitive integrated placements annually both for funding and staffing bandwidth.
- Explore how expanding the use of technology could increase independence on the job site.

The employment plan is intended to be a living document that can be modified when conditions change and will be used as a blueprint for the employment team as they move forward with CIE. The program team will follow this model in creating a plan for community involvement and outreach in order to expand the community-based options DF's participants who are receiving prevocational or day habilitation services.

Basic Employment Skill Training (BEST) which is intended to replace the current Vocational Habilitation service has been delayed. But DF knows it is coming and they intend to use this year to prepare. They will research and gather data on current procedures in congruence with OTS reports, as well as create and test new prototypes that can be used with BEST implementation. One of these approaches is a modified version of the Discovery (an approach used in Customized Employment). This approach will be formalized and request funders review it to ensure the format and process is one that will be reimbursable.

DF created a system called PATH that focuses on assisting individuals to successfully move to CIE, it has created a matrix of what should be considered as individuals move forward. PATH uses data of the individual's progress, team reviews and individual interviews with the potential job seekers to track progress towards CIE. DF intends to work with Kyle Corbin to determine the best resources and systems in evaluating the progress of the program. As they move forward a date will be set in 2022 to establish the KPI for employment.

## Year Two

If DF is successful with its changes and modifications made in year one, they will start to tackle creating a self-employment service in year two. The ED has a strong interest in self-employment: starting the Spotted Cow coffee shop which is affiliated with DF and recently helped one participant write a business plan for a business that fixes small appliances. DF's business plan delineates what will be necessary to create a self-employment service covering the gamut of: staff training, policies, creating connections with the entrepreneur in the community, funding and available resources. An evaluation matrix will be created to ensure this direction is feasible. During the assessment phase of this grant the ED connected with the Director of the newly Rehabilitations Services Administration (RSA) funded National Technical Assistance Center on Self-Employment and will stay in contact with the TA Center as DF creates its Self-Employment Services.

There are two areas of their self-employment services that are intended to build a strong foundation for increasing the service in the future. First, a mentoring component will be established with local entrepreneurs and small businesses that are willing to mentors individuals who are interested in self-employment. The strategy will allow DF to tap into community knowledge while creating broad support for the individuals who become entrepreneurs. Second, self-employment is frequently viewed as the last resort with funders. DF will establish a small task

force to address now to make it a more feasible employment option for individuals with intellectual disabilities. DF's goal is to have three individuals obtain self-employment by December 2024.

## Year Three

Year three focuses on bringing innovation to DF's residential services. DF wants to structure residential services, so it expands community inclusion. It will examine hat tools used in CIE that could be converted for use residentially. For example, modifying the approaches used in Discovery to help individuals understand what they need from their residential setting to be happy in their living setting and involved in the community. Does the setting assist them in having a full life? This is a different way for DF to of think both about residential services and how to involve the individual in the process. DF is excited to explore how residential services can be reframed.

Changes in services will start with the creation of a Vision Statement for OSL. This vision will drive the new protocols on how families are chosen and what the matching process is to ensure the family will highlight the individual's interests and contributions so they can actively participate in the community and establish connections. DF will create a marketing plan with the end goal of having a diverse range of individuals with disabilities and families that are interested in the service. The new approach to the service will be featured on DF's website with information in a variety of formats including video clips, and blogs.

DF and Hometown Techs will explore a partnership to provide remote monitoring to HPC in Ohio. The first step will be researching the need with local providers, if there is a strong need and the cost analysis shows it would be fiscally sound then a business plan for the service would be created.

In June of 2024 DF will begin the planning process again. Beginning with creating a planning team that will review all the data over the last three years to determine what should be expanded, what needs to be assessed, what should be dropped and how the climate and funding trends have changed. This synopsis will be given to the ED and Advisory Board to lay the foundation for the new planning document.

## Conclusion

The Building Innovation Service Model Grant helped DF critically look at its services and determine how to move forward. It provided the foundation that DF needed. It was a wise choice for them to first secure their infrastructure. This allowed them to put systems in place to not only help the organization advance on a solid footing but to have a clear direction to follow. The creation of policies and protocols has allowed them to have the right systems in place to analyze how and where to stretch the organization. Having and following both the strategic and business plan gives the organization a mechanism to build support, expand their services, and potentially increase



revenue. DF's is now in the position to capitalize on future trends that align with their mission both in the field of disabilities and the community.