

# GOODWILL COLUMBUS

## ROADMAP

INNOVATIVE BUSINESS STRATEGIES PROJECT GRANT  
2019



## **Introduction**

This document outlines work done to this point, as well as provides a path forward for the Goodwill of Columbus WCS program to transform to a person-centered model. The path forward has been created as a “living document” with the intent of updating it regularly as implementation moves forward.

## **Work Done**

Through the grant period, we focused on two primary steps along this path. First, we worked to assess the current conditions of the WCS program. Second, we created a strategic plan that allowed us to think broadly about this change and begin to narrow the focus to the most ideal strategies. Additional details on each step are below.

### **Assessment of Current Conditions**

An external consultant, CQL, conducted a two-day onsite assessment with Goodwill of Columbus management staff, self-advocates, and direct support staff. During this time, many departments and positions within Goodwill were represented, as well as individuals supported by the organization. The assessment consisted of policy reviews, topical discussions, focus groups, and a staff training survey. During this assessment, current practices were compared to best practice, and discussions of how to move towards fully integrated community employment were facilitated. A copy of the assessment schedule is included as an addendum to this document

This information was compiled by CQL into a summary document, keeping the information anonymous along with recommendations for the transformation. That document was reviewed by WCS decision makers and an advisory council to understand better where things stand today. We learned that overall, people are ready for this change. They primarily want to know, more specifically, what it means in their day-to-day. The full assessment was provided to DODD as the first deliverable.

### **Strategic Plan**

CQL, Goodwill of Columbus leadership, and another external consultant worked together to compile a strategic plan. CQL brought industry expertise, the other consultant brought business expertise, and the Goodwill of Columbus staff collaborated internally to involve multiple departments in the conversation.

The Goodwill Innovative Business Services Stakeholder Committee met to review each portion of the grant deliverables and receive feedback concerning the content and concept of the transition of the program. The committee consisted of representatives from the following programs/agencies Dublin City Schools Transition Coordination, Franklin County Board of DD Service Coordination, Next Step Business Consulting, Syntero Mental Health Agency, Goodwill Workforce Development, Goodwill Marketing & Development, Goodwill Executive Leadership, Goodwill WCS Management Team and Individual we serve and their guardian. The committee will continue to meet as the program transitions.

The final Strategic Plan document included multiple sections:

- The vision of the transformation
- A list of the team, and an Executive Summary
- Background and Introduction
- Market/Competition Research
- Programmatic Changes
- Transition to Medicaid
- Assessments (how to measure success for the people we serve)
- Resources and Collaborations
- Communication Plan (internal and external)
- Staffing Plan
- Ongoing Assessment and Key Performance Indicators (how to measure success for the programming)
- Financial Forecasting
- Future Concepts
- Project Monitoring
- Change Management Process
- Success Statement

Writing each of these sections involved collaboration and partnership within the organization, bringing in other departments (marketing/communications, fiscal, HR, etc.) to identify strong strategies to move this transformation forward. While we understand that the plan will also likely be “living,” the “final” version was submitted to DODD as the second deliverable.

### **Road Map for Progress**

As the start of this process for WCS started with the grant timeline, much of the implementation is still left to be done. What follows is a road map that aligns with the timeline found in Appendix A.

The pieces of the timeline are pulled from the Business Plan, which was created in many ways in response to the assessment of the current condition. Each of these documents works together to provide a holistic view of the upcoming WCS transformation. We have also included as Appendix B the Action Plans document that goes into even more detail for each transition strategy.

### **Phase One: Planning and Initiation; August-November 2019**

During this phase, we will continue to iterate concepts identified by the business planning process. Specifically, we will identify multiple Job Placement models for review, research best practices, and conduct additional workshops with Goodwill of Columbus staff. This approach will ensure that our solution is based on a solid foundation of knowledge and understanding from those who live our values every day.

One important piece of work that will be done during this process is to begin to more accurately identify the individuals we will serve under this new model. While the characteristics of these individuals may align exactly with who we currently serve, we recognize that to fill gaps in the existing market and provide true value add we may need to shift focus in some way.

During this phase, additional internal partnerships will also be strengthened. Specifically with the workforce development department to better understand their Business Advisory Committee's role and how lessons learned can be used to build external partnerships for WCS, but also with the marketing, fundraising, and job development departments as well.

*Phase Two: Project Definition and Planning; August-October 2019*

This work includes several key components to the transition; namely, the communication plan for both internal and external messaging around the transition and the beginning of the budget, assessment, and staffing models.

A desire to adequately communicate our value add to external partners will drive the external communication plan. Internally, communicating to align the heads, hearts, and hands of our staff will ensure buy in and ideal results.

The budget will be built using internal tools created by the finance team. Several departments have gone through comparable transformations, and we will flatten our learning curve by starting where they left off. Specifically, we will utilize:

- a gap analysis for WCS showing the reduced revenue when shifting to a Medicaid funded model (if all else remained the same)
- a model for another department that is in the process of shifting to Medicaid funding, and
- a model for a department that has already transitioned to Medicaid

The financial model will require a solid understanding of our staffing needs. As such, we will utilize best practices from the research compiled in Phase One, as well as an understanding of our goals as outlined in the Business Plan, to create an updated staffing model for WCS.

We are also having each of those models reviewed by an external consultant (CQL) who will bring industry expertise and best practice knowledge to the financial modeling process.

*Phase Three: Launch of Execution; September 2019 - June 2020 (and beyond)*

This phase sees plan implementation, starting with the communication plan in September 2019. That is closely followed by benefits counseling and design of paths towards employment for the people served by WCS. Aligned with these efforts will be the creation of policies and procedures, followed by internal staff training. Specific categories of training will include:

- Discovery and Assessments

- New Programming Model
- Handbook and P&P
- Data Management
- Others as needed - we will continue to assess staff readiness as we move forward

As these pieces fall into place, transitions for PODs and CBDG areas will occur and will continue until all groups have shifted to the new model.

*Phase Four: Project Performance & Control; November 2019 - January 2020*

At this point, we will have made enough progress to determine appropriate measures of success for the program as a whole. We will identify Key Performance Indicators (KPIs) and the appropriate data management systems to confirm when we reach those benchmarks adequately.

*Phase Five: Project Continues/2nd Shift Execution/Transition to Medicaid; October 2019 - June 2020 (and beyond)*

In this phase, we focus heavily on the transition to Medicaid. Identifying needs surrounding billing, creating and implementing a timeline around this transition will take us through the end of 2020 and will build on work done in the other four phases.

**Conclusion and Next Steps**

Goodwill of Columbus has used this process to jumpstart a transition process. We are ready to expand on the three deliverables through a wrap up (and next steps) process, then move forward with implementation by the end of the year 2020.