

NEW AVENUES FOR INDEPENDENCE
Road Map
Building Innovative Service Strategies Grant
July 2019

Strategic Plan

New Avenues completed an extensive Strategic Planning process in December of 2018. Over 40 people participated in the process, including Board members, senior staff, family members and other stakeholders who are experts in the fields of I/DD, finance and other specialized areas. The 2018-2020 Strategic Plan defines the organization's future model of service provision as client centered, specific to people with intellectual and developmental disabilities, and taking place in small settings over a longer period of time. It outlines the transformation of day and employment service from facility-based services to the new model of community-based service provision.

To determine how to meet the goals outlined in their strategic plan, NATI applied for a *Building Innovative Services* grant from Ohio's Department of Developmental Disabilities. The grant provided technical assistance for developing an implementation/action plan for service transformation. In conversations with Sara Murphy (the assigned SME), NATI's team decided to use a Value Stream Mapping process to assess the agency's current processes and resources and develop a roadmap for making change.

The attached Transition Plan outlines the goals and strategies agreed upon during the transformation team's work sessions. Updates on initial implementation are included in the plan document.

Business Practice

As the service transformation team used Value Stream Mapping to assess NATI's current service processes, we looked at employment services, facility-based day services and the new "facility-free" day services pilot in Lake County. The team outlined the agency's current processes for Referral, Intake/Assessment, Service Planning, Service Provision and Billing. The team used the mapping process to identify "bright spots", available resources, inefficient processes and challenges.

Using Lean principles, NATI's team discussed current practices and desired service outcomes. The group then created a Future State Map that envisioned an individualized, consumer-focused service model that centered on integrated settings and incorporated best practices. The Future State Map helped the team identify available resources and brainstorm ways to address service gaps and significant challenges.

Key areas for business practice improvement included:

- Streamlined and standardized processes and procedures across services and locations
- Connection to community resources closer to individuals' homes to better utilize public transportation options
- More efficient and centralized billing procedures
- Increased employment services staffing

These improvements are still in the initial phase of implementation and we have not yet been able to evaluate the success of each. We anticipate that these changes will lead to more efficient and effective use of financial and human resources.

Collaboration and Partnership

A collaborative approach including Board members, senior staff, family members and other stakeholders has been used throughout strategic planning and plan implementation. During the grant period, members of the transformation team also worked with community leaders to evaluate partnership opportunities that could benefit individuals with disabilities and the neighborhood surrounding NATI's main campus. In June, NATI hosted a Common Ground community conversation in partnership with The Cleveland Foundation to discuss ways that neighborhood residents (including those supported by NATI) could create more opportunities for social connection together. In July, members of the transformation team met with our local Councilman, members of the local Community Development Corporation and the Commissioner of Parks and Recreation to discuss plans for offering community events and activities at the main campus.

One of the major challenges our workgroup identified during the assessment and planning process was the need to discover and develop many more new opportunities for individuals to meaningfully participate in their communities. While we are currently connected to several excellent resources such as senior centers, volunteer sites and community groups/clubs, we are still struggling to find opportunities that are the right match for each person we serve. To address this challenge, the team created a new staff position of Navigator to assist with community development. Additionally, Community Inclusion staff will receive training and ongoing support to help develop the skills and confidence to identify and cultivate potential new connections.

Fiscal Analysis

The budget projections below account for the service changes outlined in our Transition Plan, as well as a full transition to community based services over the next three years. Cost savings were evaluated along with new revenue. These were weighed against new/increased expenses and anticipated losses of revenue. All other revenues and expenses not included in the projections were assumed to remain at current levels for the purpose of this analysis.

The fiscal analysis shows that grant funding will be critical to the success of our transition from facility-based to fully community-based services. Once we have completed the transition in 2022, we anticipate that service revenue will be approximately equal to expenses.

	2019	2020	2021	2022
New Revenue				
New waiver enrollments	\$10,560	\$70,400	\$140,800	\$140,800
New ICF enrollments	\$6,144	\$55,296	\$55,296	\$55,296
OOD services for currently enrolled clients	\$4,378	\$24,540	\$50,254	\$50,254
Grant funding - secured	\$44,000	\$0	\$0	\$0
Grant funding - pending	\$30,000	\$0	\$0	\$0
Subtotal	\$95,082	\$150,236	\$246,350	\$246,350
Lost Revenue				
ICF Disenrollments	\$17,850	\$109,428	\$109,428	\$109,428
NMT	\$18,390	\$24,520	\$24,520	\$24,520
Subtotal	\$36,240	\$133,948	\$133,948	\$133,948
Eliminated Expenses				
Madison Building & Utilities	\$19,200	\$38,400	\$38,400	\$38,400
Parma Building & Utilities	\$0	\$0	\$24,660	\$32,880
Cleveland Building & Utilities	\$0	\$0	\$19,790	\$79,150
Transportation - Agency	\$29,002	\$29,002	\$42,720	\$42,720
Subtotal	\$48,202	\$67,402	\$125,570	\$193,150
New Expenses				
Navigator/Asst. Director Salary & Benefits	\$15,070	\$45,200	\$46,200	\$46,200
Technology (tablets, smartphones)	\$5,150	\$7,575	\$15,150	\$15,150
Staff Training & Development	\$6,000	\$12,000	\$12,000	\$12,000
Wages & Benefits for new CIS staff	\$0	\$32,450	\$108,120	\$108,120
Transportation - Public/Community	\$6,800	\$58,700	\$111,150	\$121,350
Subtotal	\$33,020	\$155,925	\$292,620	\$302,820
Surplus/Deficit	\$74,024	-\$72,235	-\$54,648	\$2,732