



## **INNOVATIVE BUSINESS PLAN 2019-2022 – PHASE 1**

### **Executive Summary**

RT Industries (RT) was established in 1974 by the Miami County Board of Developmental Disabilities (Riverside) as a sheltered workshop for people with developmental disabilities (DD) to not only make money but to prepare for competitive employment. At this time, RT served only people with DD in Miami County. This service grew to Community Employment, Adult Day Services, Transportation and ODOT sites over the years.

In 2014 the Center of Medicaid (CMS) issued a set of rules that applied to sheltered workshops like RT in Ohio. This rule stated that the same group cannot coordinate services and provide a waiver service for the individual as it creates a conflict of interest. RT was given until 2024 to privatize.

RT started the privatization process in 2015 and finally privatized on January 1, 2018. During this time, the non-profit suffered a significant loss of employees in leadership roles who transitioned to Riverside in order to maintain benefits and wages causing RT to not only redo the Table of Organization but to bring in new employees. All positions were filled by September 2016 with the CEO retiring the day before privatization.

RT privatized and began its journey with a young executive and leadership team January 1, 2018. We found that RT required extra attention regarding the Department of Developmental Disabilities (DODD) requirements with HR files, service delivery documentation and training as well as the model of services. 2018 became the #BetheShift movement to transform our services and get in line with rules and regulations.

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Today, RT provides services to people with disabilities in Auglaize, Shelby, Darke, Miami, Champaign and Montgomery counties through two major funding sources, Opportunities for Ohioans with Disabilities (OOD) and DODD now that we are separated from the local County Board. Our day services reach a 25-mile radius around RT's building. Services offered include but are not limited to Adult Day Service, Vocational Habilitation, Group Employment Support, Career Planning, Individual Employment Support, Non-Medical Transportation, Homemaker Personal Care and OOD.

RT went through a tremendous amount of change in 2018 to align with requirements but this allowed us to also provide better quality services to people with DD. During this midst of change, RT went through a CARF certification review (April 2018) and DODD compliance review (July 2018). CARF and DODD were impressed with the transformation and we received minimal recommendations or citations allowing us to pass both reviews. RT's biggest transition was the separation of being paid to produce a good from our Vocational Habilitation (VH) services. Federal regulations show that VH is not about paying a person to work but should be time limited and preparing a person to gain meaningful employment. What our Coordinators found was that majority of our individuals had no interest in competitive employment but had been receiving VH for years. This started the transition of services and Production Solutions was created. This department employees a total of 13 people (11 Production Specialists, QA Lead, and Truck Driver) where Medicaid services are not billed.

Due to the wide scope of services we provide, RT is faced with several challenges.

- Family and County Board employee understanding of DODD rule requirements and service delivery needing to be community based & preparing for competitive employment. The old model of a sheltered workshop was safe from society and the potential of failing. Shifting towards Community Based Services.
- Retention & employment.
- Community perception of people with disabilities and RT.
- Competitors of services – provider of choice.
- Cost of living vs archaic billing funds.

We employ seventy-seven (77) full-time employees and seventy (70) part-time employees throughout our various departments of RT. Our goal is to continue providing excellent quality services per state and federal requirements. RT has the potential to grow service areas and support more people.

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## **Expanding Community-Based Services:**

- Staff Development/Training/Communication
  - Mentoring Program
    - Meet with Mentors minimum of quarterly
    - Insure DODD rule compliance
    - Educate. Educate. Educate.
    - Review documents at least annually
  - New Hire Orientation
    - Insure DODD rule compliance
    - Face to face & hands on
    - Review documents at least annually
  - Training
    - Find an electronic backup training system to utilize as needed for trainings
    - Schedule trainings monthly
    - Utilize DD specific trainings in the field
  - Communication
    - Update employees on DODD rule changes
    - Keep educated on policies, procedures and any other pertinent information
    - Customize one-page documents and/or pamphlets for marketing
- Expanding Revenue/Profit Centers
  - What types of other profit centers exist?
    - 501(c)(4) or 501(c)(6) – separate Board solely used for building \$\$ through fundraising and donations
    - Buying a franchise
    - Grants/Fundraisers/Donations
  - Production Solutions
    - Growth of contracts
      - New businesses
      - Current Partnerships
    - Transition employees from RT to partnerships – help businesses find employees through RT
  - Janitorial Contracts/ODOT Contracts
  - Transportation Contracts
  - GES Contracts

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## **Who are RT's Customers?**

- Persons receiving services
- Guardians/Families
- County Board SSAs
- Business Partnerships – Employment Services & Production Solutions
- Opportunities for Ohioans with Disabilities

## **Current Drivers of the Business, how do our customers access us?**

- WestCon – provider requests
- SSA Recommendation
- Word of mouth
- Presentations at local business meetings (Chamber, Councils, etc)
- Cold calls
- OOD Referrals

## **Possible Diversification ideas**

### ***Overall RT Industries***

- Seamless transitions between departments for services
- Growth in services
- Openly communicate with all stakeholders about RT's services and why the transformation is good for people

<b>Item to Develop</b>	<b>Who is responsible?</b>	<b>When will this happen?</b>	<b>Expected outcome</b>
Marketing and Public Relations *Transformation *Service Delivery *Business Partnerships	CEO, Directors, & Supervisors	Ongoing	*Community engagement *Growth in revenue

### **Steps**

1. Cleanup website to reflect services.
2. Create content guidelines for social media.
3. Public speak at events about RT.
4. Open House 1x per year.

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5. Get articles in the local media about things we are doing.
6. Build newsletter to speak about all services.
7. Create pamphlets/flyers packet to hand out after tours.
8. Attend local fairs & Chamber events → Job Fairs, Provider Fairs, etc.
9. Keep families/guardians, County Board Reps, OOD Counselors, Providers and the community updated on RT services

Potential Financial Needs

1. Consultant for website
2. Employee time to attend events/costs associated with events
3. Marketing material costs

Build/Create revenue outside of Medicaid Funding	CEO, Directors, & Supervisors	Ongoing	*Growth in revenue to give back to services and employees
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Steps

1. Education and understanding of the difference in a 501(c)(4) & 501(C)(6) - do we want to create one for fundraising/donations?
2. Purchase a franchise – speak with local city officials to see what is needed in the area.
3. Growth in Production Solutions, Janitorial Contracts, ODOT sites, etc.
4. Fundraising/Grants/Donations

Potential Financial Needs

1. If franchise is purchased, \$\$ for startup.
2. Employee time
3. Marketing material

Supervisor/Employee Training & Growth	CEO, Directors & Supervisors	Ongoing	*Retention of employees *Ability to move up *Creates good customer service & service delivery *Meet compliance
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Steps

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1. Utilize training material from local sources – DODD, OOD, OPRA, Disability Rights Ohio, PPN, etc.
2. Create an addendum to the New Hire Training Packet for all supervisor positions.
3. Review & attend external trainings such as – Edison, Pryor, etc.
4. Supervisor discussion with employees on recent rule changes and building service delivery.

Potential Financial Needs

1. Costs for external trainings/bringing in a Speaker
2. Employee time to create training material
3. Employee time to complete training
4. Costs to create training material

**Adult Day Service (ADS)**

- Services without walls or hubs → pilot small groups of both to see which is the better service for people attending RT.
- More community connections/partnerships to utilize for service delivery.
- Engagement opportunities (calendars) based on person-centered services.

Item to Develop	Who is responsible?	When will this happen?	Expected outcome
Pilot group of 1-10 for hub	Mary, Stefanie, Cheryl & Kathy	2021	Services are removed from sheltered/segregated environment

Steps

1. Survey families for interest level.
2. Training and expectations of staff buy in. Assess staff strengths and weaknesses for fit and interest.
3. Family/SSA buy in – start conversations with guardians/families. Talk about benefits and listen to concerns.
4. Pick 1-2 groups to be part of the pilot based on interests and location.
5. Find location – calls, visits and if there is something we can do for them to utilize space for free. Location would need to fit our needs such as accessibility.

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6. Start calendar development.
7. Work with Transportation Department on routes – insure CES has met requirements for NMT. Map out routes.
8. Schedule the pilot “Go Live” date on the calendar.
9. Reassess service model → Are staff secure and supported? Any Transportation issues? Follow up with individuals receiving services and families/guardians.

Potential Financial Needs

1. DOT Physicals for CES employees
2. Changing Tables for hubs/necessary supplies
3. Smaller vehicles for use
4. Training

Pilot group of 1-10 walls free	Mary, Stefanie, Cheryl & Kathy	2021	Services are removed from sheltered/segregated environment
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Steps

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3. Smaller vehicles for use
4. Training

Continue to educate/train CES employees on person-centered services	Ashley B., Mary, Stefanie, Cheryl & Kathy	*Meaningful Day Training – Three Part Started 5/1/19 Finish by 6/30/19 *Ongoing	Services are person-driven, and people are getting something out of the service provided
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Steps

1. Continue educating CES staff on person-centered services, activities and calendars as training material comes out from various sectors of our field.
2. Have open dialog with CES staff about opportunities and share examples.

Potential Financial Needs

1. \$\$ for Training
2. Cost of hours spent in training vs job duties

***Vocation Habilitation/Group Employment Support/Career Discovery (VH/GES/CD)***

- Additional GES contracts & volunteer opportunities that offer a variety of work experiences.
- Bridging the services to IES/OOD
- Build Career Discovery Service

Item to Develop	Who is responsible?	When will this happen?	Expected outcome
Reach out to various local businesses for GES contracts & volunteer opportunities	MaryJo	Ongoing	Allow people the opportunity to try different types of work experiences for employment

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1. Develop Production & Career Discovery Coordinator's (P&CDC) skill level in public speaking, sales, customer service, and marketing.
2. Find a way to develop relationships with local businesses/leaders → speaking engagements.
3. Find an effective way to promote GES.
4. Improve website to provide easily accessible information for potential/current customers.
5. Growth of number of persons receiving services in 25-mile radius.
6. Touring SSA's and educating.
7. Monthly email blasts to SSA's (marketing tool regarding how people are doing and what they are doing in this service) – have Kathy Voris help create a standard format
8. Goal setting for all Career Discovery Specialists → contact 2 non-profits for volunteer opportunities.
9. Develop a business card with marketing on back for employees to hand out.

Potential Financial Needs

1. \$\$ for Training/research
2. Cost of hours spent in training vs job duties
3. Consultant for Website
4. Marketing material

Reach out to various local businesses to grow Production Solutions contracts.	MaryJo	*Ongoing	*Increase in business awareness of RT/Production Solutions *Insure job stability for employees *Increase revenue
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Steps

1. Develop Production & Career Discovery Coordinator's (P&CDC) skill level in public speaking, sales, customer service, and marketing.
2. Find a way to develop relationships with local businesses/leaders → speaking engagements.
3. Find an effective way to promote Production Solutions.

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4. Improve website to provide easily accessible information for potential/current customers.
5. Develop and implement marketing materials specific to Production Solutions.

Potential Financial Needs

1. \$\$ for Training/research
2. Cost of hours spent in training vs job duties
3. Consultant for Website
4. Marketing material

P&CDC & EC will work together to blend services and send people from VH/GES services to IES/OOD – may use Career Planning to bridge the gap as well.	MaryJo, Kathy, Jennifer, and Michelle D.	September 2019	People in VH/GES would transition to competitive integrated employment
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Steps

1. Use janitorial cleaning contracts as a stepping stone for competitive integrated employment.
2. Pulling a Coach for assistance with Production Solutions jobs to streamline process.
3. Sharing information with each other to improve VH/GES/Production Solutions.
4. More referrals from our Production Solutions/VH/GES to IES/OOD.
5. Build relationship to help move people from Production Solutions/VH/GES to IES/OOD.
6. Create an inhouse referral form.

Potential Financial Needs

1. Employee time.
2. Additional Trainings due to transitioning people through contracts.

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3. May see losses in revenue when someone transitions from VH/GES to IES/OOD.

Start and grow Career Discovery	MaryJo & Kathy	July 2019	*Another route for preparing for competitive integrated employment *Additional Revenue Source
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**Steps**

1. Develop Staff Plan – June 17, 2019
  - i. Pilot with one employee → Train the Trainer
  - ii. External Sources
  - iii. Additional Hours for Staff
2. Develop plan for logistics of implementation
  - i. Roll out to persons served, pilot program
  - ii. Staffing needs & staffing availability (including evenings and weekends)
  - iii. Do we need more staff?

**Potential Financial Needs**

1. Additional costs up front for service – may cause overtime pay.
2. Time spent on training employees.
3. Advertising for additional staff.

***Individual Employment Support & Opportunities for Ohioans with Disabilities (IES/OOD)***

- Growth outside of Miami County
- Creating an environment where it is not a stigma to receive RT services.
- Relocate Employment Services

Item to Develop	Who is responsible?	When will this happen?	Expected outcome
Contact local County Boards and OOD to share	Jennifer & Michelle D.	*Ongoing *July 2020	*Growth in business/revenue

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services we provide, give tour and do introductions			
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Steps

1. Attend SSA Department Meeting
2. One on one conversations with OOD/County Boards
3. More education to the County and OOD that we do more than DD base services.
4. Keep good relationships with OOD/County Boards
5. Tour job sites with other departments.
6. Get into local High Schools.

Potential Financial Needs

1. Employee time.
2. Marketing material.
3. Advertising.

*Discuss all RT services and mission with people when they are onboarding *Share what other departments are doing throughout time at RT **Break the stigma!	Jennifer, Michelle D. & Employment Specialists	*Ongoing *January 2020	*One strong agency *Potential for willingness to receive other RT services *Understanding all services
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Steps

1. Community Employment involved in discussions and service changes.
2. More social media exposure.
3. Be involved in building tours - communication.
4. Handouts for all services.
5. Pass out the newsletter in department.

Potential Financial Needs

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1. Employee time.
2. Development of marketing material.

Find location or locations for the Employment Services Department – could include VH/GES (could be a place to rent or place that is willing to let us share their space)	Jennifer, Michelle D., MaryJo & Kathy	2021	*Employment Services not located at a sheltered/serrated setting
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Steps

1. Office space available at companies we have partnerships with.
2. Fundraiser to offset cost of location.
3. Mobile units?
4. Build relationship with local realtors for locations.
5. Making sure landlords understand we are a non-profit.

Potential Financial Needs

1. \$\$ for rent, internet, etc.
2. Vehicle located at site for use.

➤ **Transportation**

- Bus Proposal – return leased buses to the MCBDD
- Open services to non-typical hours → transportation crisis
- Build Community Contracts

Item to Develop	Who is responsible?	When will this happen?	Expected outcome
Create Bus Proposal document to present to CEO – removal of buses	Sharrie, Ashley A. & Kathy	Start July 1, 2019	*No school-like appearance *Smaller groups *Financial savings

Steps

1. Clean up the existing proposal.
2. Email to CEO by May 31<sup>st</sup>.

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3. Meet to present no later than June 7<sup>th</sup>.

Potential Financial Needs

1. May need additional vehicles for smaller routes.
2. Employee time.

Pilot extending hours of operation (weekend & evenings)	Sharrie, Ashley A. & Kathy	Up and running by July 1, 2019	*Assist people with transportation to and from employment *Additional revenue
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Steps

1. Improve system to insure people are receiving the services requested consistently (i.e. no one is missed, etc). THIS STEP IS VITAL TO ALL OTHER PARTS OF THIS PLAN.
2. Meeting set up for June 5th with David, Sharrie, Kathy, Ashley A and a member of the Emp Serv. Dept. to review current process and brainstorm how to improve tracking and accountability. (Until we can obtain software)
3. Develop marketing email/materials for SSA's to share options. (by July 1)
4. Could we utilize other staff (vs only VOA/VON) to do hours? Should we broaden our times? Market to what the need is. (Discussion)

Potential Financial Needs

1. May see overtime costs for employees who are already full-time.
2. Additional training for employees.
3. Employee time.

Marketing materials/plan to reach community contracts	Sharrie, Ashley A. & Kathy	June 7, 2019	*Increase community awareness *Increase revenue
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Steps

1. Develop marketing materials specifically for community organizations that may be interested in using our fleet. (By June 7)

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2. Develop a list of possible non-profits or others that may be interested and schedule times to meet to share information about us. (By July 1)

Potential Financial Needs

1. Marketing material.
2. Advertising.
3. Employee time spent reaching out.

Obtain and implement routing software	Sharrie, Ashley A. & Kathy	January 1, 2020	*Increased efficiency *Increased capacity/range = \$\$
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Steps

1. Research options for software.
  - i. Email OPRA listserve?
  - ii. Sharrie will reach out to local agencies to find out what they use. (by June 5th)
  - iii. Determine which software to use.
2. Write grant proposal for software OR
3. Use DODD grant to purchase software.
4. Train staff on software.
5. Implement fully by January 1, 2020.

Potential Financial Needs

1. Costs for software
2. Employee time to research and write grant.
3. Employee time for training.

**Assumptions:**

- Open communication with SSA's, persons receiving services, families/guardians and the local community about changes to our service model.
- Continue to stay align with rules and regulations.
- Develop additional partnerships with businesses that help us accomplish our business plan and mission.

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- Diversify our customer/sales base to insure sustainability of our business.
- Continue to educate employees regarding the DD field.

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