



Road Map

DODD INNOVATIVE BUSINESS STRATEGIES GRANT

Ashley Brocious, CEO | June 13, 2019

Strategic Plan

– Approaches utilized for strategic planning

RT privatized on January 1, 2018 with a new Management Team at the helm as the previous CEO retired 12/31/17. Immediately, we began evaluating our business and service structure specifically regarding:

- Our existence/Who are we? → Mission & Core Values and Strategic Planning
- Vocational Habilitation within a sheltered Production Facility setting
- Adult Day Services needing to focus on meaningful activities and community inclusion
- Transportation stigma with buses and logos
- All services job titles and Table of Organizational structure
- DODD Rule regarding service delivery, hiring and training requirements
- Business Department allocation of funds & understand revenue streams

We started chipping away at each task based on importance as we knew our processes were not aligned with rule requirements and we were behind other local day services. Teams were developed to work on these projects at a Supervisor and Management level. As plans were starting to develop, communication opened to all other employees, Board of Trustees, County Boards, individuals, families, guardians and providers regarding the *WHY* we needed to make these necessary changes.

During this time, we chose to hire Christy Shell, Zeal Coaching to help guide RT through the Mission, Core Values and Strategic Planning. The culture of our business was to allow all employees input regarding our Mission & Core Values. Due to this, the Mission & Core Values took us longer than expected but was well worth the wait to finalize. The final roll out did not occur until March 2019 causing us to be behind on our Strategic Plan. During this process of looking at our “big picture” and the future of RT, we applied for the DODD Innovative Business Strategies Grant. We felt that this grant would help us finalize our Strategic Plan.

The Strategic Planning meetings consisted of all Supervisors, Directors and CEO. We also included the opinions of our partners which included Trustees, parents, guardians, SSA's, individuals receiving services, and business partnerships. While still meeting with Zeal Coaching, we started our meetings with our SME, Vic Gable as well. Whereas Zeal Coaching was getting us to think about the direction of the future, Vic was helping us hone in on current needs to get to the future. Our SME had us complete a SWOT Analysis for all departments and service delivery.

Supervisors, Directors, and CEO met to review the SWOT Analysis and determined that there were three major components we wanted to focus on.

- Expanding Community-Based Services
- Staff Development/Training/Communication
- Expanding Revenue/Profit Centers

Once we had the three major areas decided, we were able to take the information from our SME and Zeal Coaching to create a final Strategic Plan for RT. Supervisors and the Director of each department discussed specific goals for their departments and put together the steps to get there with timelines.

- Final Strategic Plan: separate document
- End of grant period update on initial strategic plan implementation

Goals and steps agreed upon in the Strategic Plan will be reviewed and discussed at departmental meetings at least monthly which includes the supervisor(s) and Director of the department.

RT's CEO will schedule quarterly meetings with the representative of the department and/or Directors to review the Strategic Plan progression. The department representative will be decided by each department's Supervisor(s) and Director.

These meetings will allow us to continually review and monitor progress towards achieving our goals.

Business Practice

- Approaches utilized to improve business practices

It is funny how timing works sometimes. As a privatized provider effective 1/1/18, with a new CEO who also started on 1/1/18, I will never forget reading the Memo Monday from DODD on 2/7/18 regarding the addition to the Employment First Division of DODD – Community Life Engagement Project Managers. I instantly reached out to Stacy Collins and asked to meet the Manager for our region as we were prepared to receive feedback and guidance regarding our services. We knew that establishing change after forty-four years of being a Production Facility first, was going to create waves for the people we served, families and the community.

We utilized the same practices when preparing for our Strategic Plan as we did for improving business practices. With a new Management Team at the helm, we took a hard look at the areas that needed improvement, growth and/or implement policies/procedures. We quickly realized that RT would need to be able to run business as usual while developing our organization from the ground up. Items listed below have only been the start of areas our team felt needed vast improvement or change.

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RT prioritized and attacked each area with various groups of employees in 2018. We started with DODD rule review, attending Transformation Summit events and reaching out to Keith Banner. Groups were then led by Directors or the CEO to discuss and create steps for preparation of change. Several items were implemented prior to the creation of a Strategic Plan however due to the importance of getting changes made quickly.

RT hired Zeal Coaching as a source to get supervisors, directors and CEO thinking about the future of RT and our Strategic Plan. Christy from Zeal Coaching utilized The Grove's visual documents to talk about our vision of the future, bold steps to reach the vision, challenges and supports. She guided us towards the vision and our bold steps to get there. Here are the six (6) major areas we felt were of upmost importance:

- Financial Plan
- Internal Relationships
- Setting Standard for Quality of Services
- PR Plan → External Partnerships & Market Awareness
- Identifying Department Needs
- Business Growth

Needless to say, RT employees have been busy getting us where we need to be with services while keeping our doors open. We finally felt after putting processes in place to insure compliance, we were ready to move forward with implementing a Strategic Plan.

- Success of implementation of each approach

Self-reflection and knowing what we need to do to improve our business practices has not been the concern at RT. The difficulty has been running business as usual while developing the organization from the ground up. When RT privatized 1/1/18, with a new Management Team, we realized there would be a tremendous amount of work that would need to be done to keep our doors open. The number of meetings, trainings and educational needs ramped up causing employees to prioritize job duties differently due to the importance of change.

Bringing in Zeal Coaching was a must for us regarding the mission, core values and the start of strategic planning. Her experience and focus kept us on track. We do not feel that we would have been able to put together a mission or our core values that would have compared to what we have today.

I am proud of the employees at RT as they have run through, what has felt like, brick walls to establish the changes that have needed to occur in such a short amount of time. Employees have embraced our new service model practice and understand that this is just stepping stone to where we want to be. Everything we have said we would look at or would implement, has happened or is in process. The component that we were missing was the actual Strategic Plan.

Collaboration and Partnership

- *Detail the partnerships required for strategic planning and plan implementation*
- ✓ Local County Boards (Miami, Auglaize, Shelby, Darke, Champaign, & Montgomery)
 - Open communication regarding services and what we offer
 - Give tours of facility and/or share success stories
 - Focused on the person receiving services, person-centered
 - Helping each other, examples – getting people services in a crisis or assisting with concerns as they arise.
 - Work together to solve problems and create solutions
 - Feedback regarding services
- ✓ Opportunities for Ohioans with Disabilities (OOD)
 - Quarterly meetings with counselors
 - Open communication regarding employment and supports needed to maintain employment

- Frequent discussion regarding needs of services
- Feedback regarding services
- ✓ Local Business Partnerships – Employment Services, Transportation, Production Solutions and Group Employment
 - Employment Opportunities - Community
 - Transportation contracts
 - Enclaves
 - Volunteer Opportunities
 - Outsourcing work from businesses
- ✓ Ohio Department of Developmental Disabilities
 - Consistent with DODD rule requirements
 - Utilizing resources from DODD to guide RT when the need arises
 - Compliance Reviews
- ✓ CARF
 - Compliance Reviews
 - Consistent with CARF regulations
 - Assists with good business strategies
- ✓ Parents/Guardians/Natural Supports
 - Open communication about RT services and what we offer
 - Show that safety is our number one core value
 - Share how things are going at RT with services (if authorized – person does not have a guardian)
 - Provide Person-Centered services
 - Offer solutions to any concerns from the parent/guardian/natural support
- ✓ Community
 - Share our successes
 - Explore possibilities with partnerships

- Offer understanding of what we do

- Outline the strengths and limitations to partnerships

Local County Boards (Miami, Auglaize, Shelby, Darke, Champaign, & Montgomery)

Strengths

- ✓ Can work together to help people achieve personal success by developing skills to confidently work, interact and thrive in the community
- ✓ Consistent service delivery by RT
- ✓ Teamwork to build solutions for service needs
- ✓ RT understanding of DODD requirements

Limitations

- ✓ Provider of choice – people leaving our services or not being aware of our services
- ✓ ISP and processes vary county to county
- ✓ Intake process is in-depth at RT, can be difficult for SSA to get someone in quickly
- ✓ Relationship development with County Boards

Opportunities for Ohioans with Disabilities (OOD)

Strengths

- ✓ Good partnership with current OOD counselors.
- ✓ We work quickly to get people in a job that is a good match.
- ✓ We communicate consistently with OOD.
- ✓ Very knowledgeable about OOD rules and regulations.
- ✓ Willingness to work with all cases.
- ✓ Out of the box thinking.

Limitations

- ✓ Need to build partnership with new OOD counselors.

- ✓ Need more employer partnerships in other surrounding counties.
- ✓ Need more OOD cases in other surrounding counties.
- ✓ Being a smaller provider hurts us in the amount of people we can take or how fast we can get services to people.

Local Business Partnerships – Employment Services, Transportation, Production Solutions and Group Employment

Strengths

- ✓ Businesses are happy with the services we provide for them
- ✓ We have seen growth due to word of mouth from customers
- ✓ Creates more services to offer people with RT
- ✓ Revenue stream

Limitations

- ✓ Businesses think we are owned/operated by the local County Board
- ✓ Lack of understanding of what we do or who we are
- ✓ Believe our services should be inexpensive – look at us like a charity

Ohio Department of Developmental Disabilities

Strengths

- ✓ Willingness to listen to provider requests/opinions
- ✓ Focus has changed from “I got you” to helping providers align with rule
- ✓ More training opportunities

Limitations

- ✓ Limitations in services being requested due to funding – we have had to use other revenue streams to help with providing support for ADS and VH services
- ✓ Difficulty locating updates or changes to rule at times

CARF

Strengths

- ✓ Ability to reach out to our contact person regarding questions with quick response

- ✓ Assists as an additional support for business management
- ✓ Provides support as needed

Limitations

- ✓ CARF requirements sometimes overlap DODD requirements causing our agency to add more responsibility to the task(s)
- ✓ Can be difficult to comprehend requirements

Parents/Guardians/Natural Supports

Strengths

- ✓ Values services
- ✓ People are safe
- ✓ Social interactions – relationships with employees and community
- ✓ Expanded services that are being offered
- ✓ Communication – quick responses to concerns and/or questions

Limitations

- ✓ Believe we are owned/operated by the local County Board
- ✓ Does not understand services RT providers vs another provider
- ✓ Understanding of Transformation, Sheltered Workshop and paying people to work

Community

Strengths

- ✓ Networking to increase understanding of RT
- ✓ Networking to build business partnerships
- ✓ Values our services
- ✓ Knows we provide services to people with developmental disabilities

Limitations

- ✓ Perception of RT services
- ✓ Believe we are owned/operated by the local County Board

Fiscal Analysis

- *Fiscal analysis of costs associated with the changing of business models: separate document*