

## **Welcome & Introductions**

**Intention:** We wanted to provide an opportunity for employment services providers from across the state to come together to share their experiences and ask their questions and develop a network. Not everyone is working on 'transformation' but are dealing with and adapting to change and/or building and strengthening their community based programs—so we are going to use the term 'transformation' broadly today and throughout our time together. We would like to continue offering opportunities for providers to come together to talk about topics related to transformation and community based program development and will utilize ODEP's E1st Provider Transformation Manual and their developed set of Criteria for Performance Excellence in Employment First Provider Transformation which includes seven key elements: Leadership; Strategic Planning; Customer Focus; Workforce Focus; Operations Focus; Results; and Ongoing Measurement, Analysis, and Knowledge to shape the series' topics and focus our work each time we come together. The manual will guide our work and we have shared it with the larger group and made it available along with additional materials and resources on the IACP website.

36 individuals in attendance, representing 23 providers.

**Providers Represented:** VODEC, WESCO, Genesis Development, Easter Seals, Village Northwest, Christian Opportunity Center, Progress Industries, Skyline Center, The Homestead, CICS MHDS, Opportunity Village, To The Rescue, Mainstream Living, Nishna Productions, Ida Services, Concerned Inc., **Panel Members:** Candeo, Crossroads of Western Iowa, Exceptional Opportunities, NIVC, Hope Haven Rock Valley, CASS Incorporated, New Hope

### **Panel Member Introductions:**

Glenda Farrier with CASS Incorporated-Sheltered workshop and SE since 1989. We are moving more and more towards community based services. We no longer do day hab and still offer pre-voc though limited. We have sold our building. Offer residential supports as well.

Jen Daniel with New Hope Carroll- we offer pre-voc, SE, and residential including ICF and day services along with supported community living.

Kari Teitjen with Candeo- SE services and focus on customized employment.

Scott Witte with Hope Haven/My Choice Employment -Mental health and recovery services in Iowa and we also do the full array of community living services and serve kids. Employment services—still offer facility based employment and day habilitation, along with SE services.

Sherry Becker with NIVC-we only do employment and have been transforming for years and years and still trying to figure out funding. We have transition services for high school students who are at risk and/or who have disabilities. We offer skills training and are still getting folks in and out through pre-voc and onto SE.

Rodney Davis & Jean Menning with Exceptional Opportunities—3 years ago we took a leap of faith to change and place folks in the community making matches. Currently working with schools too to get students into SE vs the facility where they used to come into. We offer SCL in community settings and day hab without walls and closed our schools and closed several offices to consolidate to one office in Algona.

Clint Sargent with Crossroads of Western Iowa –all along the westside of the state and it all started with work and typically in a sheltered setting

Ashlea Lantz with Griffin-Hammis -working with providers all over the country on supported and customized employment. We are learning families are terrified and the message they hear from you can feed into how they are feeling and how they perceive the changes and transition from facility-based to community individualized jobs. As there is a shift in expectation and services and service delivery models, staff capacity to deliver and help individuals be successful will be critical. We need to provide adequate training and support all staff to know how to do it and do this on-going.

### **Setting the Tone for Change—**

**People Supported** are included & actively involved in the process

**Values/Vision/Mission**-work with stakeholders to determine who you are as an agency, where you are going, & how you will get there.

**Outreach** to stakeholders in a planned & consistent manner to inform, educate, & receive feedback.

**Communication & culture**-provide info & direction agency is going & why. Creating a culture of optimism, determination, inclusiveness, & teamwork. Celebrate successes through recognition & reward.

**Planning** & engaging all stakeholders in the process of setting the course for the future.

**Partnering** w/ staff, families, board, employers, funders etc. in all aspects.

**Marketing & branding** that reflects the agency's new identity.

**Mentoring** new leaders within the agency, providing them opportunities to lead & receive mentorship throughout the process.

**Leader Self-Reflection**- Do you fully embrace & support your agency's transformation? How can you best invest your efforts, energy & creativity?

### **From the beginning of the transformation process...**

- ✓ Communicate clear expectations regarding agency direction & changing staff roles.
- ✓ Provide on-going professional development so staff are well informed, trained, & supported, & therefore able to bring forth or implement the agency's new vision.
- ✓ Encourage open & honest conversations about fears, concerns, & hopes.
- ✓ Understand there will be supporters & resisters. Do your best to bring everyone along through information, training & support. If not, amicable separation may have to occur.

### Panel Questions:

1. **Talk about how ensuring your stakeholders were knowledgeable about the movement towards integrated competitive employment & community integrated services was important to your efforts?**
2. **What role did a 'strong & consistent' message play in effectively communicating your agency's commitment to your vision for the future?**
3. **What is the value in communicating clear expectations regarding agency direction & changes in staff roles from the beginning & throughout the process for team members?**

**NIVC**-Involved as many people as possible. We started with an expert/consultant to start talking and interviewed 148 people, of which were our all stakeholders.

- ✓ Incorporated into our strategic planning and keep a pulse on what people are thinking
- ✓ What should NIVC keeping doing, stop doing and start doing

I had to really talk to our staff who was held up-our business(es) are changing and you can be a part of it

**Crossroads of Western Iowa**—had some technical support and came a little later in the game and had some leadership change. We started and kept coming to meetings and listening and learning what other agencies are doing and taking from each. CEO on down embraced the E1st message, everyone believed it, it has a domino effect. We have taken advantage of TA when we can and listening and learning.

**Hope Haven**- We were doing community employment back in 1979, however, in the last 10 years our focus has shifted. Before that we were serving a wide variety of individuals with varying degrees of disabilities and these were the folks getting jobs in the community. In 2008, we got an establishment grant from VR to establish and offer SE in 3-4 counties and outside of our home county. We learned a lot through this process and doing job development in tiny towns in NW Iowa and that ended up being a 4-year project and helped 34 people get employment, though we weren't placing folks with MSD.

In 2010, we applied for a MIG grant monies and got our first taste of customized employment. Then in February 2012, we joined and began participating in E1st/ICIE pilot project giving us more experience with customized employment. FB gave us the revenue to go out and develop employment and/or do SE. Joined efforts to redesign Medicaid service descriptions and restructuring the rates and we created My Choice Employment that focused on integrated competitive employment. Hiring the right person was key to that program and hadn't previously worked in a FB setting. Today we have 30-35 staff placing people in NW Iowa. We also included in our strategic plan and the movement of people. Closed ICF/ID about a year ago. Kept folks involved all along the way.

**Candeo**-Just starting to implement customized employment with one person working a caseload and utilizing the strategies and this approach works for folks with higher impact and success for MSD. Identifying a person on each caseload and had success but also very time intensive so we figured we must have one staff committed to the caseload. Job developers weren't being as productive, and we have lost. How to do we implement the new funding structures and re-organize our program(s) and effectively serving and financially viable? Working on implementing career exploration in groups of 4 and one a quarter. Figured out we are top heavy in the administration side so working to move folks

through discovery and/or career exploration and then move on to job developers. Sharing this message in our admissions process—what services we provide and what that looks like. We were making changes quick and didn't really include a whole lot of stakeholders so we would like to include them more.

**NIVC**-When the consultants go home you still have to have the structure and a sense of urgency—rule changes, WIOA, settings –either internal or external –take that momentum and run with it, embrace it

**Hope Haven**-Networking with other agencies and listening and learning from them and when we opened My Choice and we sent our staff to Candeo to mentor our new manager. Wanted her to talk to an agency who hadn't done any FB and used APSE community employment training series as well. Tried to immerse ourselves in E1st philosophy and strategies.

**Exceptional Opportunities**- EO is 47 years old and our FB was 45 years old and we had great contract work with Fortune 500 companies. Several truck loads out a week. Trying to convince our employees and their families and community to stop this work they thought I was out of it. Learned the most from IACP networking and other providers and what other states were doing.

How we told our stakeholders-we had a one board member who had been on all 47 years and a daughter receiving our services and other members with longevity. Every month talking about all the legislation and laws and bring stuff from IACP and DHS talking about expectations and what the state and federal funders are going to expect and fund. And then our region said they would no longer fund it, that was really a tipping point. Constantly talking to the board and educating them. Constantly talking to staff and we had longevity in staff too (45-40-30 years) it was a hard sale. Some of them didn't make it but I told them that nobody needed to leave or to lose their job it just needed to change or look a little different. Our vocational director ended up leaving as he could not support changing something that he had worked to build for 30 years, along with health changes. Rodney stepped in right at the right time. Some retired or left, but the majority took the leap and changes along with. Our day hab staff also felt she couldn't make the change after 30 years. I encouraged and reframe for her that folks are making a change too and they needed her and how it might feel for them and if she were not there to offer support.

Lots of rumors going around town, are we closing? We are not closing –we are changing or transforming.

Talked with families at planning meetings which occur every 6 months, sent letters and post card and did family meetings on Sundays. Offered lots of opportunities to chat and ask questions.

Individuals—lots of discussions and a presentation about change and simultaneously getting folks jobs in the community and slowly bringing folks out. Last day was June 30<sup>th</sup> and did a celebration of all the work they had accomplished and a farewell and on to the next thing. Just met yesterday to talk about our culture and how it was taking a toll on us—emphasize the good stuff and minimize the stuff we are not happy with anymore. My name is still kind of mud in Burt but I just keep telling and reminding them that our people are happy.

**New Hope**—I have been at New Hope for 23 years –big push on the regulation and legislation—received support from Ashlea as a SME through the ODEP project. Be a residential provider that supports

vocational –not the other way around. At the height, we were serving 75 in our facility, but today we are down to 15. We have moved everyone into enclaves paying minimum wage or above –just have to keep pushing staff and the team and staying consistent with my expectations and focusing on what I can do to support my staff. Continuing to support to support them will be critical to our success.

**Exceptional Opportunities**--You have to stick to your guns –had so many staff bucking us—this is what we are doing so get on the bus or get out of the way.

**Ashlea**—it will be helpful and important to have a success story so that when you are talking with and connecting with families because the Facility is consistent and safe—they need a story a vision –doing parent nights so they can hear from other families and parents. This is what it looks like and that child was ok and there is another parent. Start with one person, with one family at a time. Focus on one person and one family who is asking for something different-start there because they can become your biggest cheerleaders later. It's not just a single service change, it's a whole agency change—it changes or impacts all the other services.

**Crossroads of Western Iowa**—Success stories have been big for us—clients sharing with clients and other families and employers talking with other employers.

**CASS Incorporated**- In our organization because we have done SE for so long we have always talked about it in planning. As we started to go down the transformation road, and it does transform everything and started to get more push back as they didn't expect that for themselves. They say people hear 7% so we have to communicate and over communicate. This is just a part of our evolution. We try to be perfectly transparent...everyone who wants to work should work. Some who don't want to work should work. I am not necessarily someone who believes that everyone can work (maybe don't want to) —community life engagement is what we have really embraced. We see the house/home as the spoke of the wheel.

2014 I started talking with our board and every time we meet we have this conversation and education. They didn't always believe or been on board—we haven't always agreed but we keep moving forward. Everything is safe and can be shared. But when we leave we are all united and showing a united front and shared message. You must start cascading that message. We had parents who were concerned but they understood and we worked out some compromises. Larger community asking questions and concerns and spreading rumors so all staff had to have an elevator speech.

**New Hope & CASS Incorporated**-- Its our obligation to provide experiences—some of those in the FB haven't had those experiences—how do we know unless we try?

**Hope Haven**-Going back to the first pilot project—took time with some of these individuals—feel like we failed one who recently passed away but as Sherry said-it's about the services and supports we offered—those saying no can be gently guided and exposed to experiences.

**Exceptional Opportunities**- Gently guiding staff and talking about results –didn't stretch them too far initially until they were onboard and enthusiastic –coaches coming out of sheltered employment.

**NIVC**-Give everyone a chance to see themselves in the new vision or direction –start each board meeting with a mission moment (using about 10 minutes of the meeting).

**Exceptional Opportunities**-Folks wanting to get off work to join day hab as they are having such a great time. **Ashlea** -that's great because that is life, how many of us would rather be shopping right now or etc. than working!?

**Crossroads of Western Iowa**-Day hab or community support isn't just 9-5 we have to be flexible and go outside the box –so a turning point for us has been bringing community living along with our vocational services so that they are recognizing and supporting employment for folks. We have to be flexible –so community living is supporting employment or being flexible to vs employment having to be flexible to community living.

**NIVC**-How do you become involved and a good citizen?

**Question:** The 24 month cap on pre-voc, how do you keep it going with contracts and alive until the settings rules go into effect?

**CASS Incorporated**- We have went supporting 150 to 30 individuals–renting our building until the settings date but we hope there is something as more than half of our clientle come from across the state for structure, particularly those with MI. We went to a 2 hour workday to pay minimum wage and 2 hours of classroom time. What did happen to us is because we don't have the draw of the workshop and that has been a detriment to us. We are financially healthy though we have lost about 25%. We have been letting contracts go and only have one.

**NIVC**-We are using other workers or resource to meet the contract needs and moving one contract off-site. Recently hired 4 people through AARP and working with probation officers and offenders with non-violent crimes. We had staff doing lots of hours just to keep contracts and that was not work. 26 are still being paid a sub-minimum wage. AARP pays the wage for 3-4 years. It also diversifies our workplace and though it may not meet the settings but it is a different workplace.

**Engaging the Board—**

- Engage & educate from the start
- Develop & utilize personal relationships to garner support & align vision
- Staff/Board Retreats
- Education sessions routinely incorporated into board meetings
- Invite to attend training sessions
- Governmental (funder) information sessions
- Observations at other agencies
- Inviting board member(s) to spend time with individuals receiving services

**Panel Questions:**

1. How did your team gain the board of directors' support for the agency's transformation?
2. What strategies did you utilize?
3. If your board was always supportive, what aspects of their support were most crucial to your efforts?

**Exceptional Opportunities** -Educating every month and also every time there was an article in the newspaper or another provider doing the same things we were doing I would share and forward on to them to say we are not the only ones. Board member had a family who was also experiencing the same thing. Board member with a daughter who receives services and another with a son who is (higher expectations) for the younger. Generational differences that we have to respect and not be judgmental of, don't have to make bad or demonize. We also had to be flexible in our planning and talk about it more like a forecast, and be able to amend that plan and formulate a budget.

**CASS Incorporated**-Get someone on the board like doctors who have experience and exposure to managed care was helpful. Honoring the history and folks who have formed our agency and programs and it was about taking care of and protecting. Did real time strategic planning.

**Hope Haven**- Keeping them informed and up to date on the national and state levels –every time the full board gets together there is a presentation on things HH are doing. Individual board members come along at different rates –some still in denial or wondering if it is going to happen.

**New Hope**-Board engaged and we did strategic planning with them when they hadn't before, which was huge.

**NIVC**-I am a big believer in planning—if we don't know where we are going we won't end up in the right place. We really use it and refer to it.

Comment: Skyline in Clinton and engaging the board of directors-recently got them on board and our employment supervisor was resistant. She has since moved on and the board recently got on-board and made the decision that we will be transforming. This is exciting but we will need support.

### **Internal Review or Self-Assessment-**

#### Important Components of Internal Review or Self-Assessment

- ✓ Budget & financial reports
- ✓ Marketing & communication materials
- ✓ Agency values, vision, & mission
- ✓ Organizational charts
- ✓ Strategic or business plans
- ✓ Services & funding sources
- ✓ Customer Focus
- ✓ Workforce development
- ✓ Facilities & assets
- ✓ Data & benchmarking
- ✓ Quality Assurance

Self-Assessment—when we talk about a shift or a change in employment services, you have to look at the whole picture and whole agency and pieces and parts.

**Panel Questions:**

**Why is it important to analyze your agency's status (review of present operations & culture) as a primary step in the transformation process? What process did you utilize (formal & informal)?**

**Gap Analysis**

**Internal & External Review**

**Congruency of current Mission, Vision, & Values statements**

**Did you utilize a 'transformation team' & who would you recommend as members?**

**Hope Haven-** We had two different SMEs come in and look at us and assess. Nancy had not transformed an agency like ours but rather took over. Then last year we had Genni Sassnet and completed a formal assessment process and the feedback she gave us was what was helpful and areas we needed to do better in or things we weren't doing at all that we needed to do. Had our managers complete them without us, created more ownership—and then they became our transformation team—our managers of employment and day services.

**NIVC-**Managers have influence and they are interacting with direct services staff. Our team members expect our leadership team to be transparent and want to know everything and what is happening. Not just me communicating but coming from all leadership and we have visual reminders like the board with logos.

**Crossroads of Western Iowa-** We tend to operate in silos (residential, employment) but the settings for example and how it will affect all the different departments and members of the agency and it will impact them all and how they can work together support individuals and move us forward.

**Ashlea-** Utah provider—trained residential team leads and sent them through ACRE training and they help the person lead the job search. You should be tracking data too and numbers so you know what is happening and how many folks are working this month and how many do we want next month. Then after that we can take it to the next level.

**CASS Incorporated-** We are small enough that all of our department heads come together and talk and break into small groups and talk about impact and making plans for the next steps.

**Exceptional Opportunities -**Genni did assessment with us but she really helped us by getting us thinking and asking questions that made us think and ask questions. Our staff said we needed more communication though I thought we had been communicating so much all the time. You must look at the generations you are serving and how they prefer to communicate. Like incorporating social media. It was the outside perspective and being able to process

Thank you everyone for joining us!