IL-NET T&TA Center

Workplan Development for Centers for Independent Living

Presented by Forrest Hamrick and Tyler Morris

July 16, 2024

Live captioning by Ai-Media

MARY-KATE WELLS:
Hello everyone, welcome to today's webinar. We will give it a few seconds to let folks join. Alright... I will start with some housekeeping items. I first want to welcome everyone today to our IL-NET webinar. Workplan Development for Centers for Independent Living. My name is Mary-Kate Wells, and I use the pronounced she/her, and I in the program director at NCIL the National Council on Independent Living. NCIL partners with the IL-NET training and technical assistance team to support the coronation of these webinars, and today I will be helping to facilitate behind-the-scenes.

Next slide please, to slide three. Today's presentation is brought to you by the Administration for Community Living at the US Department for Health and Human Services in conjunction with the IL-NET, which is operated by ILRU in collaboration with NCIL, APRIL and University of Montana.

Slide number four...

The logos of all the collaborators are on the screen now. Next slide... So the IL-NET team training and technical assistance Center provides training and technical assistance to Centers for Independent Living, statewide Independent living councils and designated state entities.

Before we jump into today's webinar, a few notes for excess ability for the webinar. Captions are available on this webinar, click show subtitles and using menu to turn them on. We also have captioning running on an external link, that link will be put in the chat, where you can change the font, size and color to your preference.

ASL interpreters are also present today and should always be visible as we are presenting and gallery view. Please let us know in the chat if you are not able to see the interpreters. The ASL interpreters are also available in a separate viewing screen if you go to the bottom of your zoom bar, press interpretation and select ASL if that is your preferred way of viewing the interpreters.

We have Spanish interpreters today, which you can also use that button at the bottom of your screen to select which language you would like to hear the presentation on. We have public chat turned off, but you are still able to chat with panelists. We ask that you reserve the chat for requests on technical support. But not to use the chat for questions for panelists.

But there is a number of ways that you can ask questions and engage with us today. If you are on Zoom, you can type your question in the Q&A tab at the bottom of your screen and submit questions from there. You are also welcome to email me any questions at mary-kate@ncil.org and we will also put that in the chat.

And just as a kind of note and reminder for folks, zoom is having ongoing updates that have affected some of the accessibility features on zoom. And created some challenges for some folks. So we are recommending that people join from the laptop or desktop, or be having the option of using the ASL channel to view on a mobile device.

Alright, next slide... The goal of today's webinar are to identify elements of strong work plan, how work plans can be used at Centers for Independent Living, and how work plans can be used for internal evaluation.

Next slide... And before handing it off to our two wonderful presenters today, just a reminder, at the end of the webinar we will be sharing an evaluation link. We appreciate any and all feedback, so if you have a minute to complete that evaluation, we would greatly appreciate it!

Next slide... With that, I have the pleasure of introducing our first speaker, Forrest Hamrick from ABLE South Carolina. And I will hand it off to Forrest.

FORREST HAMRICK:
Wonderful, thank you so much! We will go ahead and go on to the next slide. But I am really happy to be here today. And to talk a little bit about work plans. So starting off, my name is Forrest Hamrick, I am the vice president and chief quality Officer at ABLE South Carolina. And I use he/him pronouns. Just as a visual description, I am a white male in my late 30s, with brown hair, receding, and gold glasses and a blue collar shirt.

A little bit about me before we dive in, because one of the things that I absolutely love about IL is this is a movement led by people with disabilities. And I myself am a person with a disability that is in IL doing this work. So I have been at ABLE South Carolina for the past nine years, almost 9 1/2 years. And I have been able to work in all different aspects of the work here. I started as an independent living specialist. I worked in employment, pre-education transition services, quality assurance.

And I got to see really all of the aspects of that direct service, and even some of the advocacy work that we are fortunate enough to do as Centers for Independent Living. For those of you that do not know about ABLE South Carolina, of course we are in South Carolina, and we are the state's oldest and largest center for independent living here. We are celebrating our 30th anniversary this year! And we serve about half the state of South Carolina.

One of the reasons I mentioned that is because... To give you a little background about where I am coming from and where ABLE is coming from when we start talking about work plans. Because we are a fairly large CIL, covering both rural and urban areas. So depending on what you are doing, where your CIL is, which are staff sizes, when we are talking about work plans, they are going to be completely different. And we will get into a little bit of why that is today.

So for the first part of today's discussion, what I am going to be covering is really forming things. The first one is just what a work plan is. You have probably heard bits and pieces of this view have done your PPR every year or gotten feedback. I want to talk about what it is, I want to discuss why we even have them, why it is a best practice, while we are required to. And then we're going to talk through the different parts of the work plan. What they have, what they need to have. Finally I will go over how to create one, and then I will hand it off to Tyler to really tell you how to use these in your CIL and all the great things they can do for that.

So let's kick things right off and let's go to the next slide! So let's start with what a work plan is. And this is the definition I am using, and you will hear me repeated a lot. But it is your action plan. For how you are going to serve your community for the next year. We have so many different plans and planning documents we use as CILs. A lot of them are required, our strategic plan, having a State Plan for Independent Living. But your work is pretty limited in that it is what your community... How you are going to serve your community and that next year.

So it is a really good plan to be a foundation for a lot of things. Most of you will really be thinking about this and working on work plan as you complete your PPR, your Program Performance Report every year. And part of that is because the PPR looks backwards, looks at what you have accomplished during this past year, and the work plan is really your chance on that big federal report, that all of the CILs have to fill out, to talk about what your goal is moving forward. How you are really going to serve your community, how the CIL is going to adapt to the changes that are there.

So those are the basic parts of a work plan, it is an action plan, but I also want to mention that it is different from the other plans that we have in place. So you are going to have, as a center for independent living, a strategic plan, like a three year plan, that is really going to cover what you want your CIL to grow into, where your strategic goals are. It could be focused on buildings, staffing levels, growing all different programs. So you could have that is your strategic plan, you will use that.

You are also going to have your State Plan for Independent Living, your SPIL, that is statewide. So even if you are just serving one or two counties, you are serving 1/10 of your state or whatever, you are going to be feeding into whatever your entire state goal is for your independent living plan. And I will not go any further into any of those because I know at NCIL there will be some sessions on definitely the SPIL and probably strategic plan and I do not want to step on any of that.

But I do mention that to say that you are already doing so many different parts of the work plan, because the work plan is informed by all of these different things that you are collecting and doing every single year. So it is going to be formed by that strategic plan you have, informed by that SPIL, you are going to get input from your community about what is going on and how we can fix it. And then you are even going to look at your PPR and figure out where the gaps are, what are you doing really well? What are you not doing well?

So... We are going to start to move on, but I want you to take away that it is this action plan, there will be lots of different parts that come into it, but you are not pulling in brand-new stuff that you have never seen before. The work plan is going to be right along the same lines of what you have been doing so far.

Let's go to the next slide... We have our work plans, and this is what we are going to be creating, I will give you the outline of how to do it. And it is also important to talk about why we even have work plans. Shouldn't our strategic plan or our SPIL be enough? One of the things that I really want to say about why we even have this is because it is ingrained in IL philosophy. Every single work plan is going to be adapted to the specific CIL that makes it. Because you are adapting to the needs of your community, to the needs of the individuals that come into contact with your CIL.

Not one size is going to fit all for this. One amazing thing I love about CILs as we are community-based, right? The community that we serve here at ABLE, we have half of the state, is going to be wildly different than even some of our sister CILs in South Carolina. The population they are going to be serving, that could be demographics, whether they are rural or urban, are going to have different needs than our center. And each of your centers are going to have vastly different needs about where you are at and what you are doing.

And that is kind of at the center of aisle philosophy. It is going to be individually based, it is going to be adopting and growing to what is the need of the individual and the community. As I talked through this information about work plans, I want you to think about how you can adapt it to the size and scope of your own CIL.

If you are serving a county, what is the impact you want to have in that county? If you are serving almost the entire state because of where you are at, how are you going to start thinking about the impact that you're going to make there?

And I do have this note on the slide that talks about work plans being best practice, and there is so much studies and research and all of that just about if you write on a plan, if you think through plan, you are much more likely to succeed and make progress towards it. And a lot of different reasons for that, right? A lot of times it is now we have a benchmark that we can be moving towards. We have actually thought about the consequences of what we are doing. And that is what we are going to bring in to what we're talking about today with the work plan. Let's going to the next light... This is still continuing the IL philosophy and stuff I already mentioned, that these work plans and one of the reasons we have them is they can be centered on your community. On the individuals that you serve. It won't be something that comes down directly from ACL or directly from any other large body that says, "hit these checkmarks. Do this. To have a successful work plan. Those quote this will be what is successful for you, your community, and the individuals you serve. So be creative with it and make it adapt to your community.

Let's go on to the next slide. I also like to talk about this because even though it is very much into, you know, our philosophy to have individualized plans anything through how we will serve our community, it is also a requirement of our funding. So part of the Rehabilitation Act, Title VII section 725, talks about the things we need to have as we plan. To do our work as a Center for Independent Living.

And it specifically mentions work plans. And that they are not your Strategic Plan they are not your SPIL but they are informed by it. So it could be one of those key documents that you are using to make sure that you are serving your community, serving who you want to serve with this. Next slide.

There we go. So, I have here just on the screen some quick summarizing of that requirement. So, CILs will establish clear priorities through annual and three-year program and financial planning objectives for the center. So this is from the act. This includes overall goals or mission for the center, a work plan for achieving those goals or missions, specific objectives, service priorities, and types of services that will be provided and a -- description that will demonstrate how the proposed activities of the sale are consistent with the most recent three years SPIL under Section 704.

So three parts. The goals and mission that we will establish today but also establishing the priorities for our three-year strategic plan and our three year SPIL

Let's go to the next -- slide. We have a working definition of water SPIL is. The action plan for the year. If it is a working philosophy and a requirement, now let's talk about how we will create a plan and that is really the bulk of what we are talking about here.

The first thing I want to mention is these are unique. It is going to be unique to your center because it is going to respond to the needs of your community and service area. You are the ones that are going to drive the scope of it. Your size and the capacity of your sale -- CIL is going to determine what you are able to do with this which is great because you are not trying to fit in another centers plan to make it work for your community. That will not work. That is the reason we are community-based.

Let's go to the next slide. So, we know it will be unique. We know it is going to be specific to your CIL. So I wanted to give you some steps to create that workplan. And one of the things that I want to keep on pointing out is you already have almost all of these documents. You are probably already thinking a lot about what you will do during the next year. Making a Work Plan -- making 2023 Work Plan should feel very comfortable. It shouldn't be anything you're scared about. It is something you are already doing as you plan your work as a CIL. But before you start developing what your work will be, I have a few things listed on the screen I will read through that will be really useful for you to have and reference.

The first thing is your CIL Strategic Plan. You know, that is your real plan for the next three years as you develop as a CIL. You're also going to have whatever your current SPIL is. Those are also typically three years but I know we also just had an extension and submitted our next one as we go to a new system, so whatever your current SPIL is, you will make sure to have that information.

When you are developing your work plan, you are doing this hand-in-hand typically as you complete your PPR every year. So, make sure that you have that complete, you know what your core services are, you know what your gaps in services are. You can look back at that past year and think about how you can improve.

Finally, community needs assessment. This can be complete different for every single center. I know in South Carolina, what we do for our â€“ our SILCs does a needs assessment every three years, a statewide through a survey so we get a lot of information from that but just as important is the feedback you get from the communities you serve.

So if you are starting to hear more about difficulty with affordable housing and it is coming up much more often than you thought, that is a community needs assessment right there. You can start to identify areas of need in your community.

So you are going to have these four documents. Let's go to the next slide. You are going to walk through really these four steps. One, you will look at common themes. You will find some between all four of these documents. I know we have, as a CIL, and that could be things like looking at transitioning to community. Are you seeing a theme in your SPIL that we need to address housing at affordable housing? Are you also seeing that from needs assessment and the services you are made maybe. You are providing a lot of transition to housing. Your community? Or maybe you are providing a lot of transition to community. New paired outlook for those themes. You will find them. You'll find them across all four documents because this is the work that sills are doing.

That is the first thing. The second thing is think about your community. What changes do you want to see in the next year? This could be directly in response to some of these themes. It could also be directly in response to what is happening in the community.

Another example I will give you from South Carolina. Our legislator runs into your cycles. So when we are deciding what changes we want to see maybe as advocacy goes or by informing the community and informing legislators about what is important to our community, we think of it into year cycles versus every single year or every three years. But I also know it is completely different in other states. Some have year-round at legislators, some meet every other year. So think about what your community needs and what change can be made.

And then step three, what areas of your PPR need improvement? This is going to come up as you go through your PPR and that could be areas that you are not serving. So if you are serving 10 counties but to have them you are only serving one or two people in that county, you know, that will be something the ACL will want to address and that is a perfect area for when you start making an action plan about how you can reach your entire community.

Which is really important, too. We want to serve the entire community! Same thing when we think about the PPR. The thinking about demographics. Are you serving, you know, 80 or 85% of people with just physical dis-abilities? What is your percentage of people with psychiatric or cognitive disabilities or blindness or anything like that? Are you missing parts of our community? That we need to address in our work plan?

Then finally, is it feasible for your center? You may come away with this for like 25 things you want to do in the next year. That is not feasible (Laughs) Foremost CILs. We have about 60 or 70 staff here at Able SC. That would not be feasible for us. Some will have 150 and some will have five. Think about what is feasible for you. And what will make the most impact. It is perfectly OK for your work plan to have one or two key things you are really focusing on to change and work on in the next year versus 20 things that you may be able to complete but are they really making an impact?

So think through all four of those and that is why I use those key resources and documents for. Let's go to the next slide. So, we have kind of our list of here are our impactors. Here are the things we want to make sure we address in our work plan.

Well, I wanted to share a tool, it was released about a year ago. Probably last September. But it is the outcome measurement toolkit for CILs. And I know the language to the PDF will be shared either in the chat or at the end of this PowerPoint. But this was a great tool created by LR are you, our TC Rule, and it is a step-by-step guide. Each chapter will walk you through each part of how to create outcomes and measure the outcomes for your CIL.

There are a lot of worksheets. A lot of guides. It is very easy to use and they are going to give you specific examples for CILs. So you're not going to be trying to make a random nonprofit example work for you. So, we don't have time to go through that. If we went through that, it would be two or three trainings. It is a very big tool. But I do want to let you know that is an option and also talk through some of the key parts of that toolkit that you can start using now.

Let's go to the next slide. So, from the toolkit, I'll use some of their verbiage like outcomes, outputs, activities. They have even more. But I'll give you just a very simple Work Plan structure and as I've mentioned before, this will be specific to you. Don't feel like you have to use this structure but I'm just giving you a structure that if you need a place to start, here are three items you can have, you can structure them, and have a successful plan and make it evolve to fit what you need.

With that, our work plan structure is going to have three things. It will have outcomes. Those are what you want to change. So all of these will be tied to a question because that is how I think things through. So, what do you want to change? Then we have outputs which is how much work and what work are you doing to make that change?

Then finally, the activities. What actions or action verbs are you going to take to make that change and how will you do the work? So we are going to focus on these three things. And we are going to break each one down. So, don't be overwhelmed by new words. Hopefully you've already seen a good amount of these as you work through different plans with your Strategic Plan or SPIL. But we will break each of these down as a very civil way of structuring this.

Let's go to the next slide. So, me and I think one of the best things to do is always start with your outcomes, right? You need to be knowing where you will go to reach that location. So when I am thinking of outcomes, I want to think of a few things that I want to change in the community. So, an outcome is the change that you want in the community. I have two examples here.

One, the outcome could be consumers will demonstrate improved independent living skills at home. AB that is the outcome you want in your community because you are really going to focus on transition to the community. And those IL skills are going to be important.

Another example I have is maybe one of your outcomes is state government buildings will be more accessible to people with this ability. Alright? -- Disabilities. These are outcomes and changes we want to see made in the community.

You will find these outcomes I looking at those key resources and documents and finding those themes that we talked about. Whatever your list was, whether it was two things or 15 things, you're going to find out what are those main outcomes, the changes you want to see in your community?

Let's go to the next slide.

Once you have your outcomes, you need to think about what your outputs are going to be and this is the work you are going to do to make that change or make that outcome happen in the community. I like to think of outputs as numbers. These are things we can count. How many of this will be due? How long are you going to do something?

The reason we count these is because we cannot always control what the outcome is, right? We can't necessarily control that government buildings are more accessible. As a CIL, we don't necessarily have that power. We can't come in there and find or do anything like that.

But we can control the steps we are taking to make that change and we can record the steps we are taking. So how much work we are doing to achieve this goal. An example could be counting how many consumers learned IL skills for the home. Count the number of hours we spent teaching IL skills at home. Maybe it is 10 hours per person. Same thing when we are talking about making government buildings more accessible. Maybe we set a number four state buildings that we assess for physical accessibility. We can count that number, we can say we did 15 buildings. And we are hoping that that is leading to better outcomes. That we can take that information, make the changes, and that we will see that outcome. But we always cannot control the outcome, so we will just measure what our outputs are.

I hate how similar they are, they both start with the word out, so I get tongue-tied just talking about them. So always feel free to slow down when you have to start thinking through this. I do all the time. Then let's go to the next slide on this... A little bit more closely on outputs. Outputs can be your measuring stick or your statistic as well.

When we think about outcomes it can be 85% showed an increased knowledge of blank... Independent living skills. We served more people in this community. So look closely at your PPR, I think that is a great spot to start thinking about where you may have gaps in services that may actually be stopping you from achieving those outcomes.

Some good examples are, if we are talking about transition to the community, which I talk about a lot because it is such a difficult course service, because it depends so much on the structures that exist so much in your state, community, and a lot of times, we do not have direct control on that outcome. If there are no affordable, accessible housing, it is very difficult to have good outcomes for that.

But maybe we can go and look at our PPR and make sure we are not stopping ourselves, just because of who we are serving. Good examples of that, if we are thinking about transition to the community, what age group of people are we working with? Are we only doing transition to the community for people that are over 55? While there is a lot of people that are... That need the version from institutes that are younger than 55, we should be doing transition to community services probably transition in high school, but definitely an 18-30 as well, how are people going to move out from living in a family unit two on their own? What happens if the family unit changes? That could be things that we are looking at, gaps, that could actually impact what our outcomes are. So always think about what the gaps are that you have with your PPR.

Let's go to the next slide... We have our outcomes, what we want to change, we have our output, what we are measuring. And then we have our activity... This is what your CIL is doing, your staff is doing, to accomplish and get those numbers. And we can do multiple activities, and you probably will be doing multiple activities. Activities use action words such as serve, assess, teach, conduct. To give you a few examples here, independent living, for teaching independent living skills for example, an independent living specialist will teach IL skills in the home of the consumer. That is your action. You may have other activities in there, it could be things like information referral specialist will distribute information about home safety and emergency kits. You will hold trainings about emergency safety, because that can always be such a big skill for helping people transition into the home. Can they protect themselves? Can they stay safe in their home?

Another example, if we are going back to our assessing government buildings, the assistant director will conduct assessments of government buildings. We are saying that these are the actions that the assistant director will do. And that is going to lead to our output. It is going to be however many they decide to do, which is hopefully going to make a change in our outcomes.

And let's go to the next slide... So I'm going to go over these examples in just a second and wrap up my part of the presentation, but I do want to say... The ones I'm going to be giving you are very simplistic, because they are supposed to be workplan outcomes. Again, make this fit your center, make this fits the activities that you need to do. You can have multiple outputs lead to an outcome, you can have multiple activities lead to an output. You can make these very big, very small, depending what you need.

So here's an example I have of that outcome that we talked about of that ABLE South Carolina consumers will demonstrate improved IL skills at home. So we said... This is an example, we do not have this on a work plan, but an example could be, we have identified we need better IL skills at home, that is stopping people from living independently. We have identified that, and that is what we want our outcome to be.

Our first output will be that ABLE South Carolina will attend five outreach events in the community. The reason we would choose that one is because we need to be actually serving consumers for the skill, and maybe people do not know that we teach it. We need to be serving more people, making sure people know about everything that a center does. That is our first output. And we have an activity. With the output you will see there isn't a number there-- is a number there. Five outputs. In an activity of one you see will who will do the work for that output, the coordinator will attend outreach events, and show information about working with and ILS for building skills at home.

We can see that clear line of the activity to output to outcome. Let's go to the next page...

Great! Again, this is the same outcome, right? We are trying to have consumers demonstrate improved IL skills, but we have a second output. And that is 100 consumers will work on IL skills at home. So pretty much what we are saying is if we work with enough consumers, 100 consumers, we are going to see improved IL skills at home. And then our activity for that is that ILS, independent living specialists will travel to meet consumers in their home to practice and teach IL skills will stop we have exactly what they will be doing, and I always think, we are community based, if we are teaching anything that is IL skills at home, if we can do it in the home, that is the best place for us to do it, unless it is just not possible. So we have it written in there as well.

Let's go to the next slide... And then we have our third output, so we have the same outcome, that they are going to demonstrate these IL skills. Our third output is another measuring statistic, 85% of consumers will report an increase in skills after working with the ILS. So we are going to do some kind of survey, a lot of you will already have some kind of satisfaction survey, so maybe we at this. Because again, we want... If there is 100 people we serve, we want 85 of them to increase their skill. And we want that to lead to the outcome of more people showing improved IL skills at home.

In the activity, they will include a satisfaction question in surveys after working with the consumer. We can go into more detail in the future but whether that needs to be after certain amount of time, so you can build that in, whether it is just when the case is closed, if it is just yearly, and get a sense of what each thing looks like.

So that is a very basic overview about the CIL work plans. Again, you can make these work for your CIL, and I will start turning it over to Tyler who can talk about how we can use these plans, whatever you create, for making your center stronger! And some of the barriers that come along with it. I will turn it over to you, Tyler...

TYLER MORRIS:
Thank you, Forrest, I appreciate that. It is great to be with all of you this afternoon. My name is Tyler Morris, I am the executive director for the CIL here in Jacksonville, Florida. I have been with our CIL for about 17 years, about seven of which I have been privileged to lead as Executive Director. For any SILC centers on the call, I have also been able to serve, and I am honored by serving the network of centers representatives on the Florida Independent living Council.

A little bit about our agency, or our CIL, we have a five-county Hageman area. So when you are looking at Florida, it is the top right-hand corner, that is very close to Georgia. So we have a team of a little over 20 staff members, a little bit different than our friends there in ABLE South Carolina. But we are doing similar work as well.

Today, I wanted to talk to you a little bit about the barriers that you might experience with work plans, talking a little bit about some of the ways that you can be successful, and also some of the resources that are available.

Before I begin, I would like to give a quick visual description. I am a white male in my late 30s, with a beard, and brown hair, wearing a Black polo. I am sitting in my office at the CIL. Joining you from our offices. Next slide please...

The first thing that I would like to talk about with you are some of the common barriers that you might experience with CIL work plans. Some of these might even be transferable to your larger and bigger plans. The first is a lack of alignment and clarity. When your objectives and your work plan are either unclear or ambiguous, it can hinder your planning process, and without that understanding of where the organization wants to go, it is challenging to develop that plan. To get there.

One of the things that I think is critical for us at Centers for Independent Living is making sure that we are aligned to the independent living philosophy, but we are not experiencing mission drift. And if we are not clear on what our outputs and outcomes are, we might find ourselves chasing something that might get us a little bit further away from the independent living philosophy or mission drift.

So making sure that there is that connection between your work plan and the organizational priorities, the values, that is imperative, to make sure that you are connected. Because if it is not, it can lead to plans that are maybe irrelevant, or unachievable.

So aligning that ensures that the strategic... Or that the plan resonates with stakeholders, and also addresses the current challenges and opportunities. The next is undefined metrics, and I think probably one of the best examples is a story that I will tell you really quickly, recently I was able to sit in an IEP meeting. They are as an advocate, and it gets to the point of looking at some of these goals for the upcoming school year, and it is something to the effect of "student will learn 20 additional words."

And then you ask the questions of the metrics... Who or what... How is that going to be captured? What are the current metrics? Where is the current baseline? So not being clear on those, or how you will measure those benchmarks and successes, will not be successful. Being very clear on what your objectives are is really an important thing to have. How you are going to measure those, and what those metrics have historically done.

You know, I have... With some of the information that we have, we know that funders are moving to a more return on investment for awards that they provide. And communicating metrics in plain language is very important. We have things that we look at on the day-to-day, we know number of services, goals achieved, goals set. Those are very common for us. But being very clear, like the example that Forrest gave earlier, 100 consumers work on their IL skills at home. Some of those things are more tangible for us as CILs to communicate. Two different stakeholders in our community.

The third point I will talk about his limited resources. You know, if you have a feeling of -- being overwhelmed getting the set up, maybe even for your Strategic Plan, you are not alone. Remember, do not tire yourself or your team or exhaust your resources. Your goal through this is to apply your skills and the resources where they can make the most impact. So when you are going into this, make sure you have enough resources and time being probably one of the most important, that you have the ability to dedicate that time and effort to that planning process.

This barrier can present as, you know, often times feeling rushed or maybe an incomplete plan. So, be mindful of your resources.

The fourth is resistance to change. Maybe you have already heard in the past, you know, we haven't done that in the past, or that didn't work for us. Those are, you know, some important things to listen to but if that is something that might have happened 20 years ago, you might have to ask the question, is this change that we are trying to make with our work plan and the activities we are trying to implement, will it work for this. With the staff and the resources and the partners we have in the community?

It might be just a resistance or fear from the unknown. Concerns about job security or maybe just that this is how we have always done it. But one of the things I like to encourage is, don't be risk-averse. There are some significant things that can happen by taking reasonable risks as a Center for Independent Living.

The next is short-term focus, which is if you are just looking down and not ahead, that can be very detrimental to implementing the work plan. Those it day-to-day operations can divert your attention from that longer-term plan. It is important, but no when it is best used.

You know, this barrier can maybe prevent organizations from investing adequate time and resources into planning for the future for sustainability and growth.

The last bullet on this slide is poor communication. If you are ineffective with the communication about this plan, you know, the objectives, outcomes, outputs, activities, it can lead to misunderstandings and a lack of buy-in from stakeholders. You know, one of the things I always quote, Brenna Brown says "clear is kind" And by providing a clear, transparent communication channel, you can build support and commitment to the plan.

Next slide, please. The next topic is complexity and over complication. Sometimes we might be guilty of that ourselves, he being one of them. I have to be mindful of, you don't have to add a million things to solve and answer that is already in front of you. So, making sure that you don't have an overly complex planning process or the documents, so it doesn't overwhelm the people that are trying to make the plan happen or, you know, executed and it will prevent from confusion. Or it will â€“ it may lead to confusion rather than clarity.

Remember that your plan should be accessible, it should be actionable, it should be focusing on those priorities that you have for that year. So you don't have to always create a new spreadsheet (Laughs) To find the answer for yourself.

The next is leadership challenges. Making sure that you have the support and engagement throughout the process will really prevent you from hindering progress. You will move a lot faster together and further together when you have buy-in from all different levels of leadership. And that will be crucial for you to drive that planning process forward. Making the collaboration and may be making decisions.

And environmental uncertainty a also be a common barrier. You might have been in the middle of a strategic plan or workplan when we all got this news that there was a virus that was sweeping across our nation. And we had to be very nimble and adaptable during that time.

So, you know, make sure that you are looking at rapidly changing factors. Maybe it is an economic shift. Aviators attack advancement or regulatory changes. Make sure that you are ahead of those and avoid any uncertainty or disruption to your progress and your plan.

And making sure that you adapt to that, those external conditions. Lastly, past failures. Looking at maybe how unsuccessful a past plan has been, it can lead to skepticism or reluctance to engage in future planning efforts and overcoming that is going to require, you know, learning from those past mistakes and demonstrating the value of the Strategic Planning through implementation and buy-in.

Next slide, please. Having those barriers and pitfalls aside, let's talk about some of the strategies for having a relevant and successful plan. And I think the first and foremost, and that is why it is in bold and underline, is reviewing your planning IL. There is a reason why we say "nothing about us without us."

When people with disabilities are the drivers of work plans, they are successful. As Forrest mentioned earlier, you know, work plans are a best practice. Weather is a SPIL, Strategic Plan, or your work plan, when the work is anchored in the foundation of independent living, you will be successful.

The next is aligning to Strategic Plan where possible. These are just two of some sources of input that you have that help shape those work plan. How does it align? Making sure that there is a connection there and knowing why there is that connection. Making sure that you are not being shortsighted like we talked about as a common barrier, but being aware that this feeds into a bigger picture and a bigger plan for you.

Being clear with objectives and monitoring key performance indicators which, you know, we sometimes say is KPIs. It is really important to define and track those KPIs. That connects to your work plan. And using these metrics to demonstrate progress objectively. Right?

Some of the questions that you might be considering when you are looking at these is, you know, are you achieving the desired outcomes? You know, do we need to adjust our strategy? Does the work -- work plan remain aligned with our overarching mission, our vision, our values, the independent living philosophy? Should we look at new initiatives or make adjustments that support this plan, or maybe it's we had our target? Now what?

Being mindful to review those objectives, and monitoring those key performance indicators are really important and conducting regular review and updates. Making sure you have scheduled time to not just develop a work plan and then it sits there. You know, schedule consistent updates at intervals that make sense for your cell. Just like I work plan have to make sense for your cell, the review of it and updating it needs to make sense for intervals that are not going to exhaust your resources.

You know, here, the stakeholders, whether it is consumers, staff, board members, informs without overwhelming them. And you can do this in a lot of ways that we will talk about, a few, later on in the presentation.

Next slide, please.

Another strategy to keeping a relevant and successful CIL workplan is scanning the environment. Just like we talked about, a pitfall is really maybe somewhere a big change happens that you are not aware of. Making sure you have these inputs of information that might impact the ability for consumers to achieve their goals at home or whatever it may be, making sure that you are aware of those trends. Maybe it is opportunities. Maybe it is not just things that can threaten the success of a workplan, but also an opportunity that might help you achieve the outcome faster.

So make sure that you scan that environment is really important. Staying informed of any market shifts, you know, and detect changes that you have. Maybe there is a new system that is available through your data management software? You know, I said that we are in Florida and just, so, like, something we did not plan for our all of the hurricanes that have popped up. But that is also an environmental change we have to consider.

Our property insurance and our insurance skyrocketed their premiums. You know, just so you know, the past five years in Florida alone, the cost for that, for business insurance surged like 125% and, you know, the premiums last year were an increase of 27% which was almost what we saw here at our CIL. So that could impact significantly what you are planning on doing if some of your activities are tied to revenue.

So, the good news is that CILs are inherently programmed to scan the environment because we are a Disability Lead organization. You know, we have a team of over the majority that our people with disabilities that bring in things that they have either through serving consumers or their walks, we bring that to the table because we have that lived experience.

The next is engaging stakeholders and leveraging your networks. You know, seek feedback from your teams. Your consumers. Your partners. The stakeholders. And make sure that all of those team members, that they have an understanding of what the objectives are and the activities and that there is buy-in. And what their role is in this workplan. This is a living, breathing document and this is going to be a guide for us. So it is important that we all are very clear on it. So, like I said, do not let the plan collect dust. Maybe you hold a kickoff meeting or a training session for your team. With maybe the workplan's purpose, expected outcomes, though why, how it connects to IL, how it connects to community, what impact it would be to our consumers.

Next is being flexible and agile. Making sure you are learning and adapting from, you know, anything you are experiencing through the work plan process. Understanding that mistakes are part of learning and growing. I know we are often told this, but it's also important to remember it ourselves. You know, just making sure that you are building flex ability into your plan to accommodate any unforeseen changes or opportunities.

That will allow you to pivot and maybe reallocate resources for a new priority or challenge you might have. Fostering a culture of learning is important to be flexible and agile, so folks are empowered to find their own answers and solutions, by being guided by the work plan. And encourage that continuous improvement, by learning from both the successes and setbacks that you have from your plan.

The last bullet is using technology and data appropriately. And I really would like to stress that last (Laughs)... Just because it is there, does not mean you have to run a million reports. Keep it simple. But use it to its best and highest use. Like I said earlier, put the skills to good use where the matter most. The highest and best use, which is connecting and empowering our consumers. But leverage that technology. And the data tools for insights, or informing decision-making. Making sure that the formatting is consistent is very helpful. No one likes a report format that is changed in the middle of a time period. So making sure that that is consistent. And it speaks to the stakeholders that you are communicating about the progress of your work plan with.

Next slide please...

Maintain communication and transparency is another way to maintain a relevant and successful CIL work plan. That means maintaining open communication channels, sharing the progress, challenges faced, adjustments that need to be made. And above all, that communication is listen, listen, listen... Remember that what you are communicating, or how you are communicating the information is equally as important as what you are trying to communicate. So really fostering that transparency builds trust and engagement across the stakeholders that are involved in the work plan.

And last point for this bullet is just nowhere to find help. And do not be afraid to ask for. A commitment and balanced oversight is also necessary for a work plan, making sure there is buy-in at all levels for this. Remembering also that you have... That you need to either demonstrate the flexibility to respond to changes, but also to balance that oversight as well. You might be focused on work plan activities, understanding that Bill still need to be paid, lights need to stay on, this program still needs attention, so make sure that there is an equitable balance on the oversight of the program. Lastly, celebrate the achievements! And work to remove those barriers. Take time to enjoy the progress you have made in the work plan. Throughout the year, celebrate the successes and milestones that if you have reached, acknowledge the challenges that you have though. It is not all, you know... It is not all just celebration, you have to address also very transparently those setbacks, honestly, and how those strategies, what strategies you use to address them.

And remember, for those that are may be starting or looking at the work plan, we all started somewhere, and that mistakes are a natural part of achieving success. So remember to treat setbacks as learning opportunities. And refine your strategies, and be stronger moving forward.

Next slide please... Where do you get information to inform your work plan? We have those documents, but we also have a great network of people at our disposal to help support our work. We have first and foremost people with disabilities. Including CIL staff and board. Our peer to peer networks are very important to use. NCIL is coming up and I hope to see some of you there, and I will be presenting on how to create those peer-to-peer networks with a few of my peers on a panel. And it is a really great resource to have and to build, to support your work plan accomplishments, and your personal and professional growth.

You also have your state membership associations may be in your state? You will definitely have your SILC, these are also resources for you. IL-NET T&TA, there are things you can click on and learn from very easily on the database for strategic planning, being an example. Also your community partners. They might already have a strategic plan that they are working on, because of the need they have identified. So reach out to them, and make sure that you are saying... Maybe here in Jacksonville, there is a Community Health Needs Assessment, who were very involved in the process, of providing input, connecting consumers to provide input, and then also the formulation of what we have done with our city for that. And making progress with that.

Next slide please... Input, if you have an activity you have identified in your work plan, and you do not know how you will fund it, scanning the environment, looking at what the priorities are for some of the large organizations or businesses in your area that aligned to the strategic priority, that is a great way to connect what you are trying to do to resources that might be available. Legislators, I think, worth talking about, making sure that we have that connection is really important. As well as consultants. You do not have to do it alone. You can engage people to help provide you information and support.

Historical documents and data trends are really another way to inform that. And lastly, artificial intelligence. I don't think we are talking enough about it, honestly. Maybe an activity from this session is just putting in Chat GPT who are the top disability providers in my area. You can get so much information that is available to you, just to consider. Just consider it another input. So those are some resources and inputs that are also available to you.

Lastly, I would like to end with some practical applications that we and other CILs might have used to help with work plans. The first is creating a shared calendar. Everybody has a calendar that is created, and if you label it work plan and you shared across your teams, it might help monitor those benchmarks in progress. Or at least schedule time for reviewing those benchmarks and progress.

Using your PPR is a great way to create a training plan, if you're going to incorporate that as part of your work plan. Section 8 is not just for the executive director to fill out, you can share that with your staff. And also your board. To see what training priorities might be important for your team in the upcoming year.

And integrated into onboarding. When you have someone joining your team, it is really great to not only know what the strategic plan is, but what the priorities are for this year and also for how that fits into what their roles are, and where their responsibilities are.

Incorporating staff personal and professional goals are really important as well. Listening throughout the year is a great way. Sometimes I think we might get a little bit overwhelmed, just thinking about having to schedule these big listening sessions in town halls and the resources that are important to make that happen. But you can make some simple changes, like the highlights that our team submits to our board every month. Not just talk about highlights, but also barriers. And the common themes in our community. Your teams are really great resource to know what those barriers are for consumers, and also things that you could potentially address as a Centers for Independent Living. So incorporating that into a process of monthly reporting is a great way to get some feedback.

Next slide please...

Aligning performance evaluations â€“ how are you incorporating the success of your work plan into the review of your team? And also how are you incorporating goals, and that includes the executive director, in what that upcoming plan is for staff member? Remember to include that feedback of maybe some of those things that your team would like to get more training on, some of the skills training that might be needed to address health outcomes. There are a lot of good examples there.

We have recently shifted our performance evaluations from an anniversary to a calendar, to align closer to our fiscal. That might be something that you consider. Using slide desks-- decks at staff meetings, making sure you send them out in advance to make sure it is accessible. But if you want to focus on something, for a big win, or something that needs attention, drawing attention to that through appropriate visuals and descriptions is a good way to get buy-in from the team.

We have already talked about creating templates for consistent formats. No one wants five reports when it just needs to be one. So make sure you are creating templates that are not overkill, but get the job done. And one of the other things you can do is scan the environment with Google alerts. There is a lot of information to digest, especially recently, and so getting through that no ways to something that is going to benefit you, your team, your CIL, you can create a Google alert, with some keywords, maybe it is your CIL, your CIL name, maybe it is disability in the catchment area you are in. Maybe your outcome and activities that are tied to health outcomes. You can look for health affairs, so you can -- health fairs, you can check off those items from your work plan, so those are strategies you can use, and a practical way to get your work planned on.

-- Plan done.

Next slide please, which I think are questions and answers, thank you all so much!

MARY-KATE WELLS:
Thank you so much Tyler and Forrest, that was a lot of information, but very well organized, really clear, I am also a fan of Brene Brown, so I like that quote. We have time for plenty of discussion and question-and-answer, so please put your questions in the chat, or what barriers are you facing, but for right now, we have one question in the chat, and I think this was during Forrest's presentation, so of course if you want to answer this... But the question is: how many outcomes, outputs, activities should be in a work plan?

FORREST HAMRICK:
Sure, and of course anybody is welcome to jump in with this as well. Because this really is going to depend on your CIL, and a lot of what Tyler was talking about, what resources you have... Just to give you some guideposts to think through. I think number one, as far as outcomes go, go ahead and start small and build out. Think first about what is on your PPR, there are areas as far as outcomes that you need to improve year-over-year. Then you can start moving into things outside of our five core services. Maybe not directly touching on some of the consumer work that we do. That could be things you want to expand out, advocacy... And then what kind of legislator you want to do. Starting small can always be a good thing, and trying to adjust any issues that you are having with the five core services, and improving those is always a great place to start.

As far as outputs and activities, I will say that I think it's really useful to have at least two outputs for every outcome, and one of those outputs is just to the counting statistic of 100 trainings, five trainings, 50 new employees, whatever that be. On the other one being something you are measuring to show that what you are doing is actually working. So if you train 100 people, are you also doing any kind of survey to see if it was effective? Same thing if you are doing stuff in education, it would be things like... Are they improving their grades by five percentage points? Or whatever, set something to show that it is working.

And then activities is really... It is going to fit whatever the outputs are. Sometimes you will have multiple activities just to reach each output, but sometimes it'll just be one. MARY-KATE WELLS:
also, thank you. To folks, please add questions, challenges, barriers, or successes even that you have gone through with work plans. Since we don't have any more in the chat, I can ask a question to our presenters. One of the things Tyler, you mentioned, was about engaging staff within the CIL in the work plan process. I am just curious a little bit about what that could look like or if you could talk a bit more about that?

TYLER MORRIS:
Sure, you know, thinking about when we started our plan, we had a kickoff. Everybody was aware of it but there was a lot of stuff that was leading up to that and to establish that buy-in with your team, it's really important that you are listening to those issues that they are bringing. Sometimes we hear it over and over and over again and even if it is not you are picking up and saying, "we will solve this as a CIL", Having that transparent communication of, like, I understand it is an issue. We might not be the best organization to fix it because there is another organization already doing this, let's support their initiatives.

So listening to the team members going into this plan, a strategic plan or whatnot, is really important. Having those check ins. And if you are not may be directly managing a team but maybe you have more oversight and compliance and quality insurance, having these assistance channels where that input up is really important. So keeping them engaged, you know, we have our staff meetings that have, you know, our PowerPoint presentations that we talk about priorities we need to address, and that helps to make sure that that relevancy continues throughout the year.

But it is also something we are improving and learning from two. We don't have it all done or I would say perfect. Right? There is a lot of things that change, things you learn from, and that can be implemented in your next year, making adjustments to your current plan.

MARY-KATE WELLS:
thank you. Great, we have a question in the chat. The question is, how can you build up your staff in a strategic plan, both from a skill point and from my morality and dedication point? Do you want to take it, Tyler?

TYLER MORRIS:
Yes, that's a good question. I mentioned using section 8 of the PPR, sending it out as a general overview of topics. You can send that out and people can rake it -- rank it or you might be able to get staff to submit some of the things they would like to learn on. What we've just gotten back is presentations built -- presentation skills like a Toastmasters, Google cheats, some of these things. That is really critical to understand because you have someone that is communicating they would like to learn more on a topic so when you listen to that and you provide a training plan as part of accomplishing the bigger goal of improving the efficiency of serving consumers, that helps build that Morell and dedication by listening to your team and showing that.

Recognizing their parts in it. The success they have helped achieve. Also being comfortable to have the conversations with maybe opportunities for growth. Those are some good ways that you can build up the staff and the strategic plan because if you are just communicating down what needs to happen, that is not IL, I don't think. That's not our foundation anyway, you know?

So make sure that we have that buy-in. And remembering to maybe send a reminder of the Y on a couple of. By slowing things down to take time to explain the Y helps with that buy-in. If you are just giving a directive and saying, "this needs to be done." And sometimes you have to do that, but taking time to slow down and showing how that priority of looking at this one County to increase by 20 consumers fits into a bigger Strategic Plan of building footprints in outlying counties that feed into the SPIL of making sure that consumers living in rural communities have access. At all feeds together. But taking time to explain that helps with the buy-in.

I hope that answers the question.

MARY-KATE WELLS:
That is great and it kinds of leads into something that, I forgot to mention it, but those joining the Nickel Nanoparticles in Aquatic Environments & Health Effects conference next week -- nickel conference next week, it shows the Strategic Planning and how this all kind of comes together.

We have another question in the chat I think. OK. This is a bit long but, one of the main pieces of feedback that we have had from ACL is that our work plan is to similar to the previous years. Do you have any recommendations on how to square the circle, as, though we do adjust our specific metric goals, so many of the barriers are folks based don't really change. Examples, transportation, housing, or demographics or underserved populations.

I'd like to resist the urge to get too granular but I don't know how to really dial in without changing just to change and being a token.

I like this question. Go ahead, Forrest.

FORREST HAMRICK:
Yes, so, what I would say for this one, and I would love to hear from other people as well on similar things. It is to maybe get more granular on this. Because if you are saying, "this is my action plan for the next year", And you are not meeting those outcomes because there is stuff that, some of the transportation housing barriers, is there a more specific outcome, maybe, that is more achievable that may lead to that bigger outcome in the future?

Maybe that is, for transportation, it could be like do you have a partnership already with local transportation at the (Indiscernible)? If not, could you make a partnership? Did you start helping them with their disability services and being approved for dialogue ride transit? Just to open up that barrier. Same thing with housing. You know, what committees can you join? If that hasn't been specific?

I think going a little bit more specific and maybe even smaller scope so you can show those pick changes year by year would be good.

MARY-KATE WELLS:
Tyler, do you have any other thoughts on this or â€“ it's OK if not.

TYLER MORRIS:
I would agree with Forrest. We are learning also not bite off more than you can chew across work plans and having it really relevant. This even goes to the earlier question about buy-in. Do you want to try to accomplish 20 things? Semi-OK. Or do you really want to try to accomplish some really cool things, you know, two or three big picture things and show those wins and show that difference that has been made? So, you know, I agree with what Forrest said of biting off a reasonable amount for your CIL.

MARY-KATE WELLS:
Great. It looks like we probably have time for one more question but I do just wants to plug the evaluation in the chat. We do appreciate any of your feedback and if you could either click on the feedback or the link in the chat were completed when we end the webinar. But I see one more question in the chat.

What if the SPIL has so many activities that it is hard to make many activities in the CIL plan? Countless -- can â€“ Tyler?

TYLER MORRIS:
Yes, you know, thinking about this, alignment where possible is important and showing that -- how that connects to the SPIL is critical, right? But remember that CILs are community-based organizations, right? And while we agree for this estate plan to address, right, maybe it doesn't fit a specific demographic or geographical area in our catchment area, right? So maybe you address it somewhere differently, or maybe you condense it.

So I think the key word here is the alignment.

MARY-KATE WELLS:
Right, thank you. I see we have an attendee with their hands raised. Nay, did you have a question? I can unmute you. No? Oh, I think not. Alright. I'll give it a couple of seconds. Oh, I see another â€“ oh. Any last questions before we wrap up today?

This PowerPoint and recording will be available on the IR LU website. So the -- that you can go back to it. Same with the material. And we will also include the link to the outcome measure to look at as well. So, without any more questions, we will wrap up today.

Thank you so much Forrest and Tyler for joining us today. I think that was super informative and actually, if you go to the next slide, I think it is the contact info. Again, we would love your feedback stop if you want to complete the evaluation form, but with that, we will end today.

Thank you everyone for joining. And I see in the chat â€“ you can email me if you need a certificate of attendance. That was a question in the chat. I will put my email in the chat. Alright. And you, everyone!

(End of meeting)

Live captioning by AI-Media.

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|

|  |  |
| --- | --- |
| logo | **NCIL-IL-NET Webinar: Strategic Planning-(Ai-Live  (USC3NC0808A - Ai-Live Premium)** |
|  |

 |

|  |
| --- |
|  |
| Page of  | Downloaded on: 17 Jul 2024 8:07 AM |
| logo | **NCIL-IL-NET Webinar: Strategic Planning-(Ai-Live  (USC3NC0808A - Ai-Live Premium)** |
|  |

|  |
| --- |
|  |
| Page of  | Downloaded on: 17 Jul 2024 8:07 AM |

 |