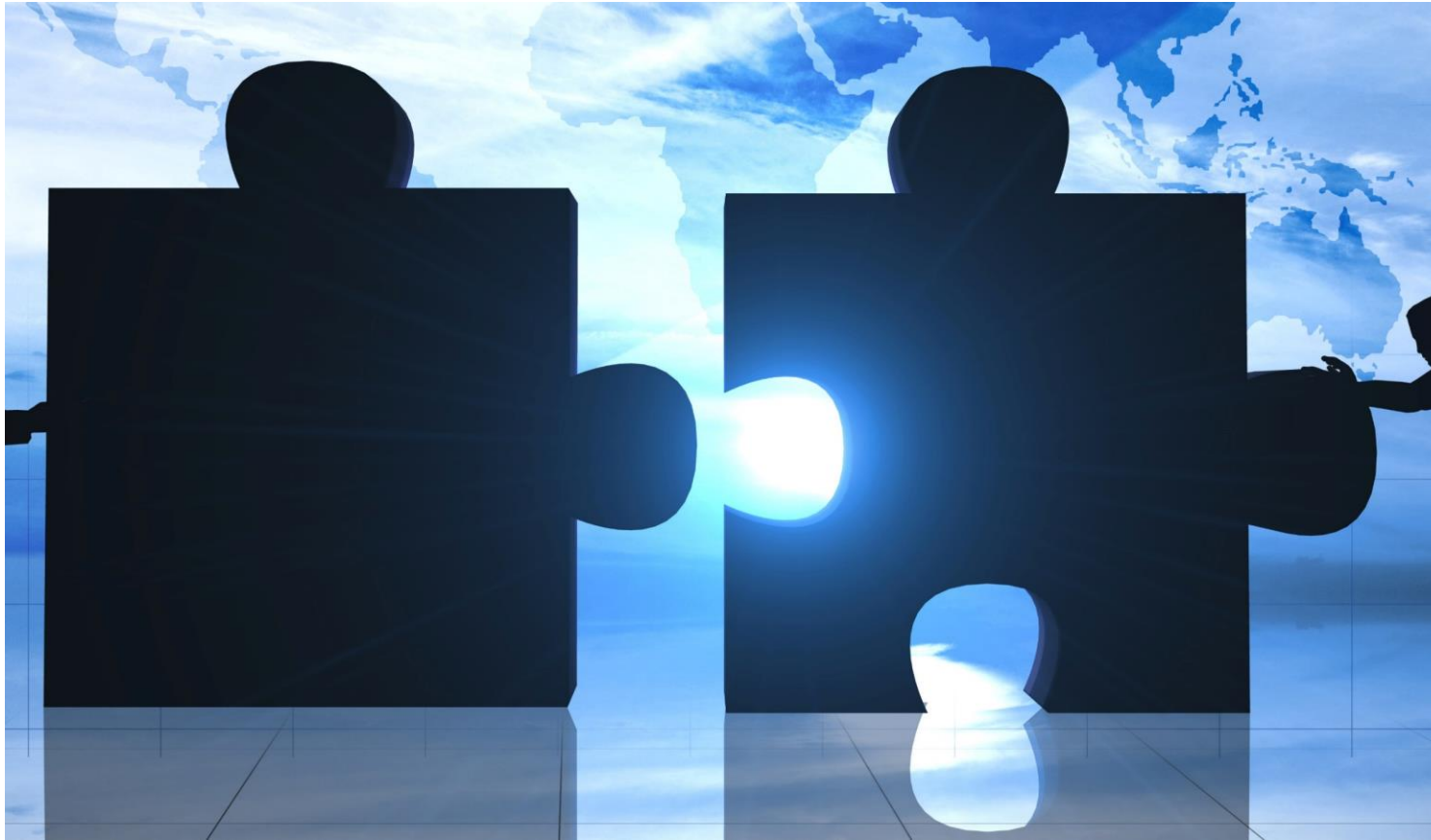


Getting Started: Think Big, Start Small, Scale Quickly!

Development and analysis of pilots, scaling up, initial financial planning and resource reallocation as well as bench marking to meet new priorities



Genni Sasnett and Tom Wilds, SMEs
Connecticut Employment First Conference
May 12, 2019

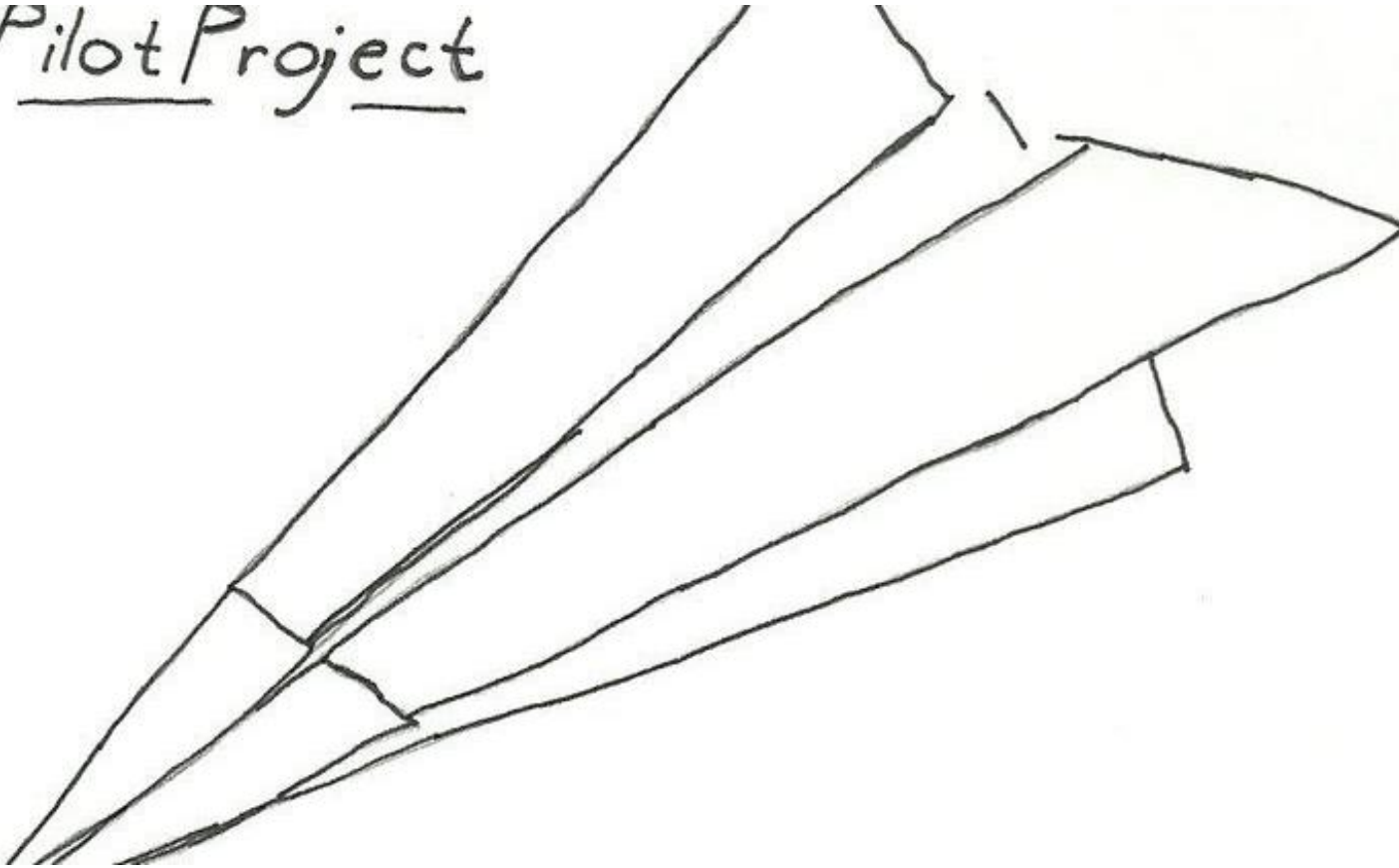


Think Big, Start Small, Scale Quickly

Implementing Your Plan:

- **Piloting**
- **Capacity building**
- **Scaling**
- **Financial Planning**

Pilot Project



Piloting

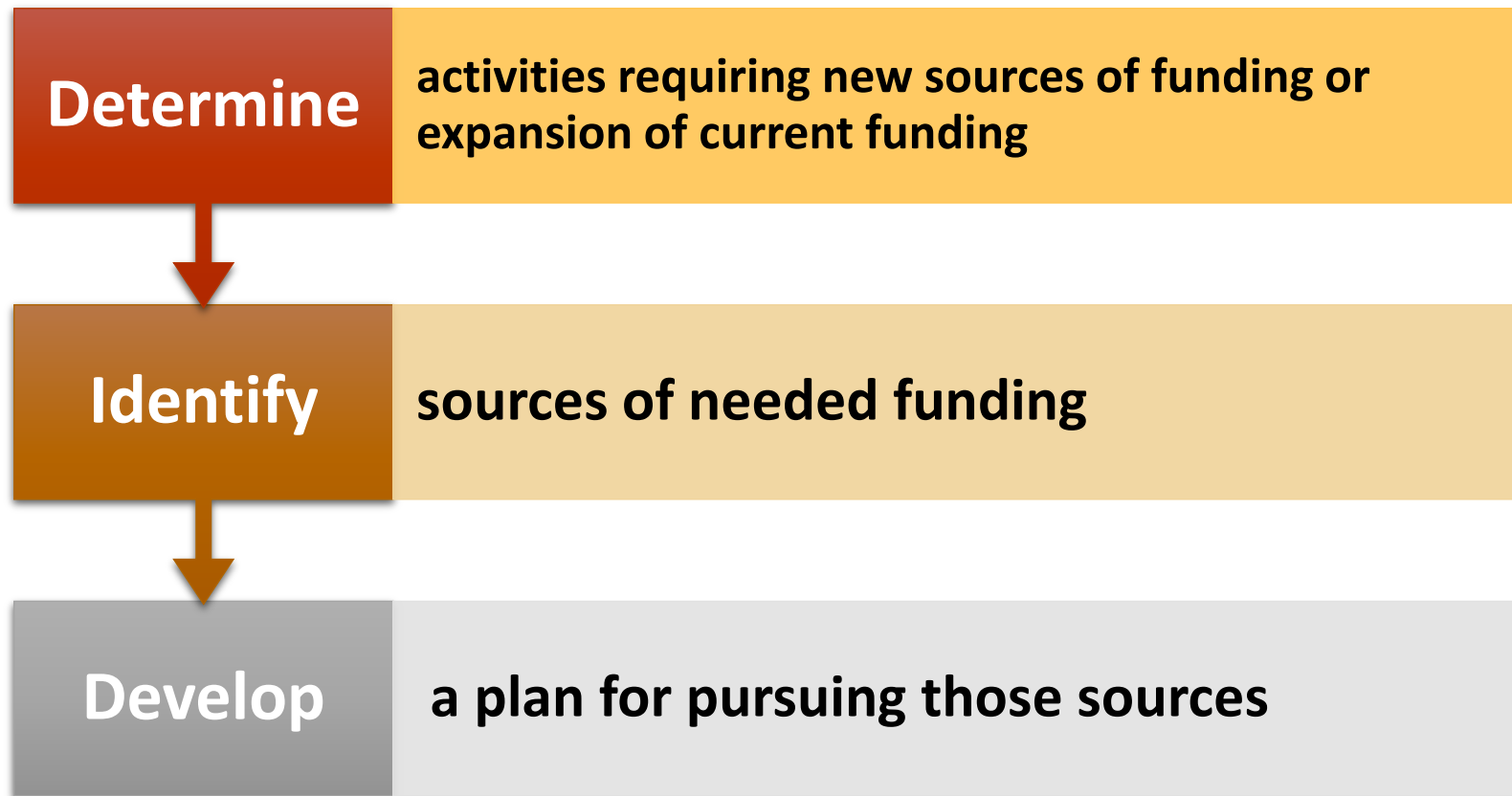
Start small w/ interested people but maintain diverse population in the pilot

Staff with “early adopter” staff – they will pull others along

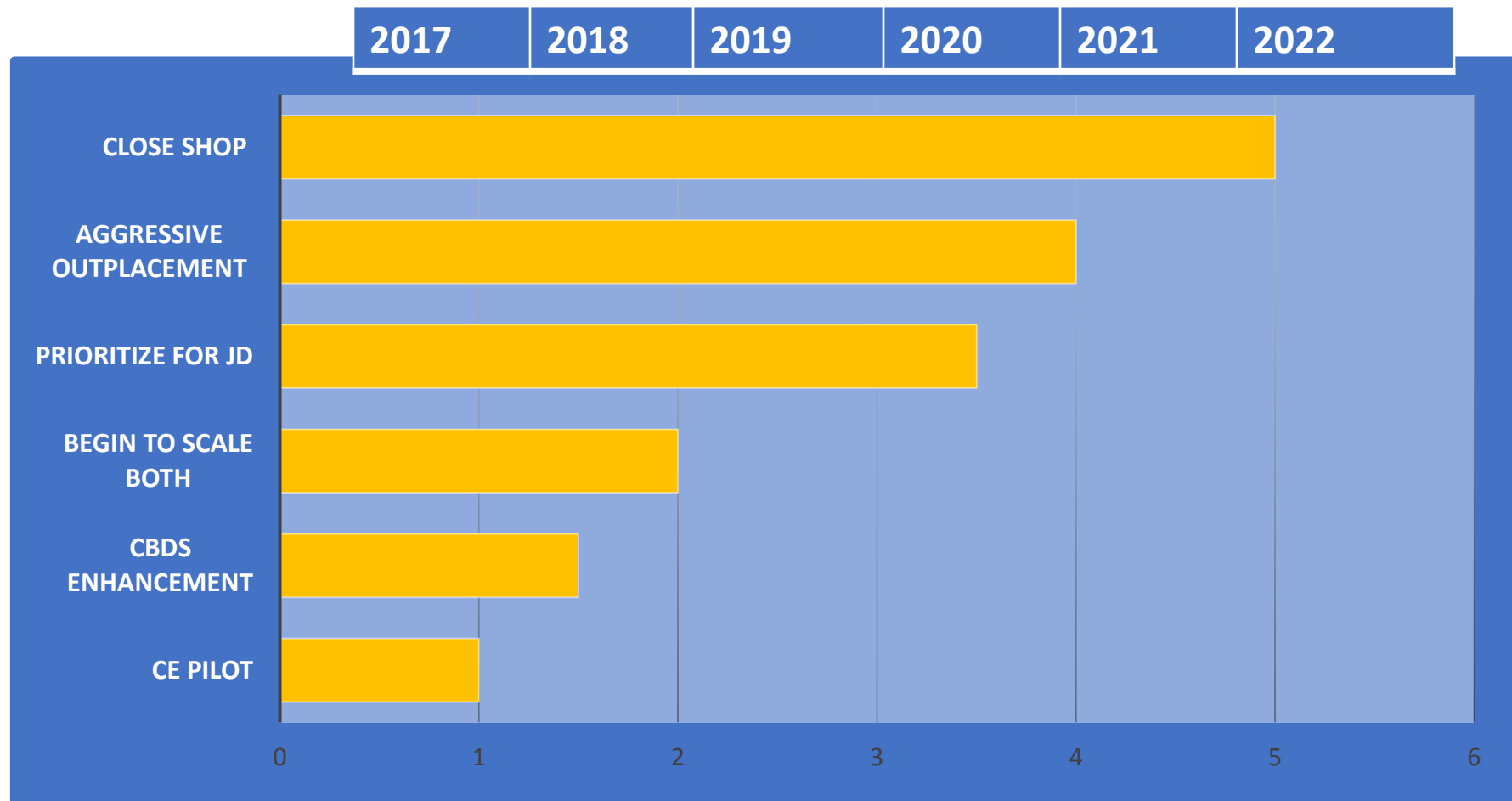
Determine what you are trying to achieve - measure your performance

Make adjustments based on data based information

Analyze Information from Pilot



Develop a Timeline for Transformation



JD = job
development;
CBDS =
community-
based day;
services
CE =
customized
employment

Build Capacity for Community Integrated Employment

- Adequate staffing ratios & availability of staff
 - Excellent job development capability
 - Cloud-based electronic data based systems
- Communications devices and systems
 - Policies and Procedures for community
 - Revamped staff development and training strategies

Forecasting
*predicting future
costs and resource
requirements*





Determine How to Fund

- **Determine the cost of services you will provide (pilots)**
- **Review research on possible funding streams**
- **Identify funding streams to pursue**
- **Begin outreach to potential funders**

Budgetary Projections

- You will go back and forth between planning operationally and reconciling budgetarily
- Best to develop projected budgets for the duration of your strategic or transformation plan (3 yr. plan = 3 yr. budgets)
- You may have a shortfall initially, however, projections made after programmatic and structural changes should begin to show positive financial outcomes



Scaling Up



Determine structure, policies and procedures, required resources

Multi-year plans for expansion with specific timelines – BUT stay opportunistic

Try another way – a la Mark Gold – go around barriers

Keep everyone informed and involved

Alter or adapt approaches but keep within parameters of beliefs

Begin to formalize procedures across the board

Focus on quality and individual outcomes for people

Managing the Transition to New Billing and Budgeting Processes

Historically many agencies were paid a daily rate for services or people served attended a single program all day. Accustomed to counting on somewhat predictable income

New approach differs – individuals have more individualized supports provided in smaller service units – 15 minutes units in some cases or by outcomes (milestones)


Stresses the capacity of agencies until they become adept

Transitioning from Production Income to Other Sources

Make a careful analysis of production finances - do you have a profit currently?

An orange rectangular box with rounded corners. A light orange arrow points downwards from its bottom center towards the next box.

Remove all support provided to operations by Medicaid funding - how does this impact your profit?

A grey rectangular box with rounded corners. A light grey arrow points downwards from its bottom center towards the next box.

Calculate with all workers making minimum wage - how does this impact your profit?

A green rectangular box with rounded corners.

How is the Retained Revenue (Profit) Used?

- **Providing services not otherwise funded** – explore funding options not considered before to pay for services
- **Growth and expansion** – consider decentralization of services; reduced start-up costs for community- based services
- **Reserves** – may draw on reserves until financial stability is achieved





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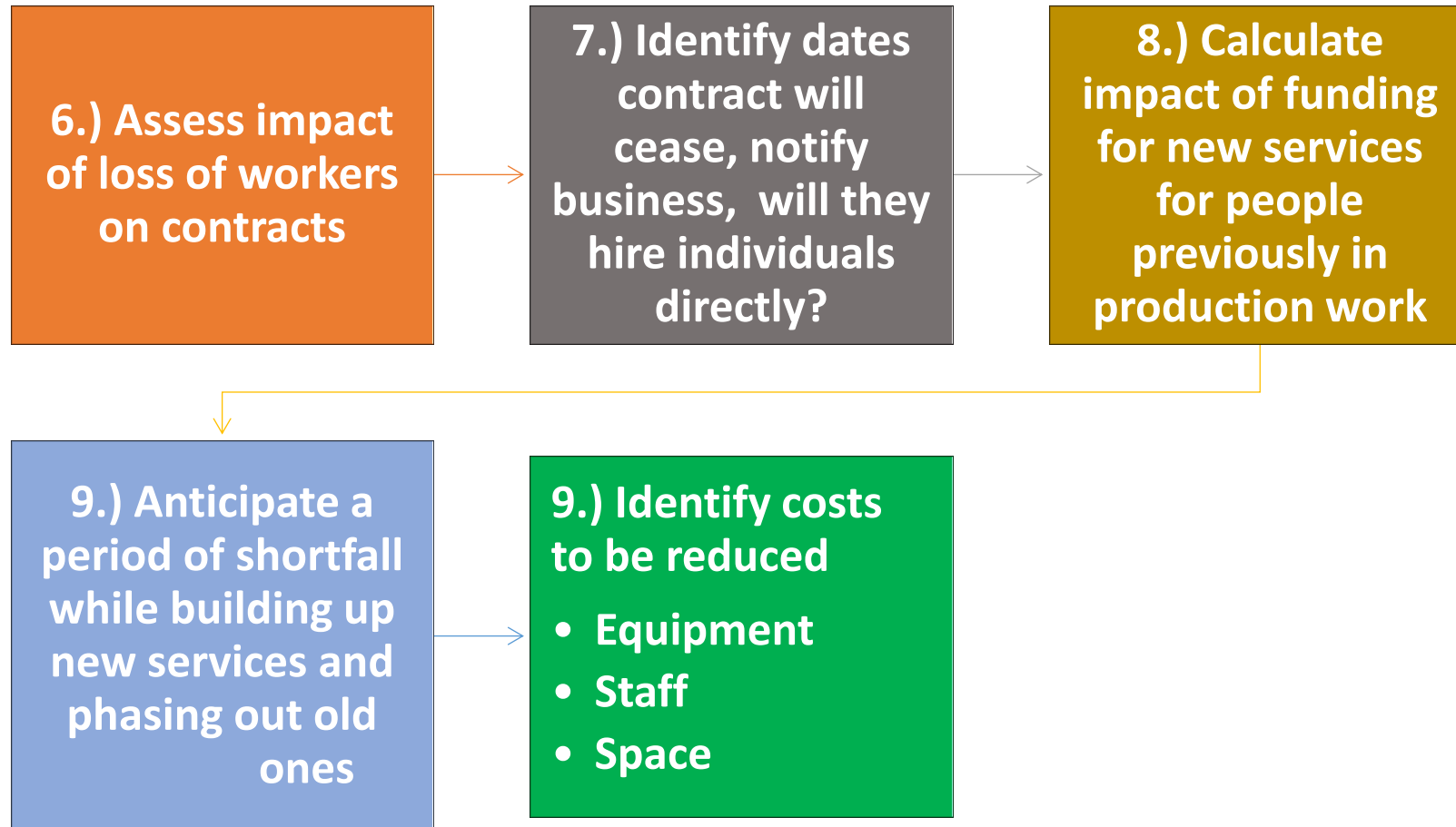
Focus on Capability and Capacity for New Services & Revenue Streams

- **Employment – Successful transitions to community employment can only be facilitated by qualified, capable job development and employment staff. This personnel MUST be in place.**
- **Wrap-around supports - Many people will not start by working FT. They may require additional non-work supports. You can provide a needed service AND tap a new revenue stream.**
- **Being prepared to provide these services quickly and efficiently will allow you to scale up quickly and gain new revenue sooner.**

Transition from Facility-Based to Community-Based Services



Transition from Facility-Based to Community-Based Services₂





Use caution before locking in long term financial commitments

- **Purchases of property or facilities**
- **Long-term leases without kick-out clauses**
- **Vehicles & Equipment - think “leasing”**

Think decentralized services

Think electronics for efficiency

Think Financial Agility!

Decentralized Services & Technology

Decentralized Services



- Plan for fewer people coming to central locations (facilities)
- Consider impact of less travel, less need for large facilities and associated costs
- People served closer to home, better connection to natural supports

Technology



- Initial investment required
- Staff untethered from facility – can do work anywhere, fewer offices
- Efficiencies achieved



Consider Case Mix

Do you have a diverse group of individuals on your case loads?

- Analyze the support levels of the people you currently support
- Analyze the support levels of the referrals you are receiving – what do they tell you?

Solicit a wider range of clientele – some with fewer support requirements as well as those with greater needs

Develop “mixed” caseloads for employment specialists

Consider other populations and referral sources

Consider specialization among employment staff, while allowing for flexibility in how staff are deployed

BENEFITS

Some quicker placements possible - May be able to make placements sooner with people with fewer challenges to employment

Can balance financially - earning profit with some job seekers and experiencing loss with others

Employment staff experience success more frequently, highly motivating

Caution!!! - must have means to ensure equitable access to employment services for all

RISK



Resource Reallocation Moving on Two Tracks

Assessing the Difference in Current Resources and Future Resource Requirements



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Impact – Resources Stretched



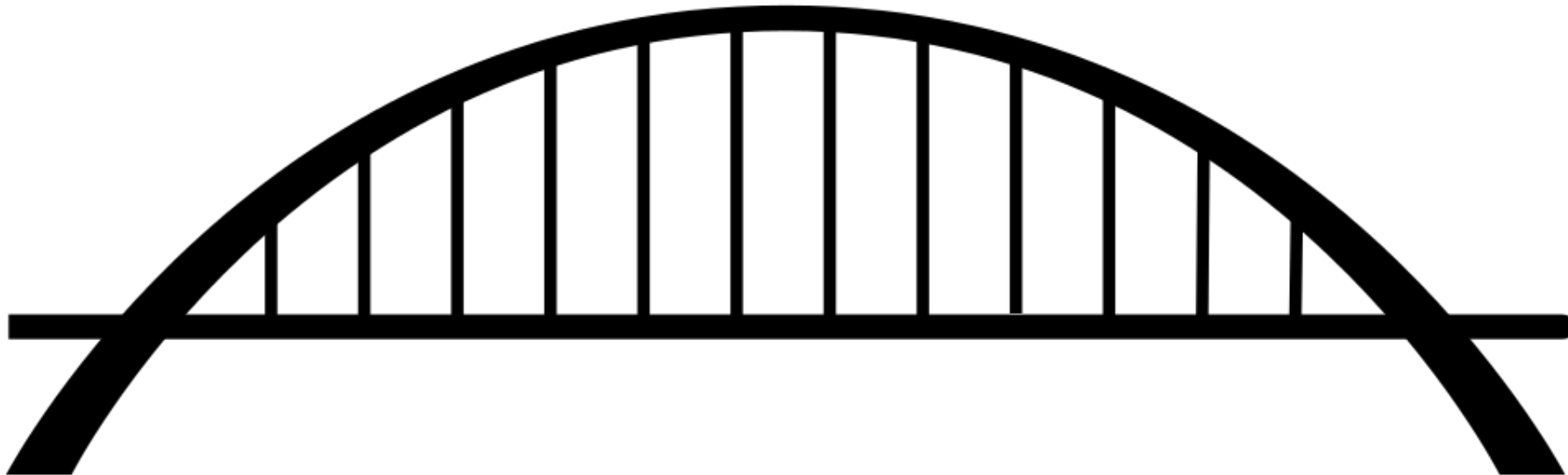
What Does All of This Mean?

Something's got to give!!!



Bridge Funding

Not likely to get from government
Private fundraising for targeted resources



Development

- Individual giving
- Planned Giving
- Events
- Grant proposals





Diversification

- **Research additional funding streams**
- **Assess core competencies and other populations to serve**
- **Evaluate partnerships, service in other geographical areas**



Measure Your Progress

- Identify what to measure and why
- Determine how you will measure
- Develop benchmarks for future performance



Discussion Group 1



Has your agency undertaken any pilot projects as a method of learning about the effectiveness of and resources requirements for new services?

If not, do you plan to?

What did you learn if you have already conducted a pilot or what will you hope to learn if you plan to conduct one?

Discussion Group 2



What resources are needed for community based employment and day service provision that may be different from facility based ones?

Has your agency begun to plan for those? What's the plan?

Group Discussion 3

Can you identify some possible
efficiencies your agency could implement
that provide opportunities for resources
reallocation to finance your

Transformation
...going **beyond** change



Group Discussion 4



What data do you need to keep in the field for billing? How is that transmitted?

What data is kept for measurement of acquisition of outcomes, both for Individuals and for the agency?

How is the data used for manage services provided?