

Jay Nolan Community Services
Strategic Plan 2014-2019
Summary of Activities, Progress and Challenges for 2014

Strategic Initiative 1): Strengthen the **organizational infrastructure** by operating more efficiently and cost effectively and by creating a stronger fund raising capacity.

Objectives for this strategic initiative:

1-A: Create and implement a plan for using technology more effectively within the organization, i.e., assuring all departments are using Soneto reliably, upgrading accounting systems, and maximizing the overall use of technology.

Report for 2014:

- Developed and implemented a contract with a consultant to analyze our technology needs.
- Engaged services of Abe Kim to assist us with implementing technology needs including installing and utilizing Soneto, upgrading our software and hardware including phone system, wiring, cell phones, alarm system, scanner, etc. Completed: Soneto installed and in use, wiring, getting new copier, new phone system in L.A., new internet service. Challenges: resolving phone issues in Antelope Valley and San Jose offices.
- All department receiving training and assistance to implement Soneto as our data base for services. All departments currently using Soneto and figuring out how it can be used for various tasks within each department.
- Issues in progress: revising cell phone policy and procedures, upgrading accounting department software, utilizing Soneto effectively and consistently across agency, resolving phone issues in AV and San Jose, looking at other hardware (laptops) to address work done in the field.

1-B: Create and implement a plan for addressing changes in labor laws that will impact both our payroll costs and our methods of service delivery.

Report for 2014:

- We had a very challenging year with a host of changes in laws both Federal and State that impact our services and our budgets (changes in minimum wage, overtime rules, Affordable Care Act, IHSS issues.) We are taking a very conservative approach to all changes in laws and rules in order to protect ourselves legally. We are trying to keep staff, individuals and families informed as these multiple changes are happening. Juggling so many changes has meant that administrators are spending many hours dealing with these issues on top of day to day program needs. We are looking at how Soneto can assist us with tracking some of these issues.
- Increases in minimum wage mandates:
 - Programs identified what changes would need to happen to comply with the increased minimum wage and submitted to the respective regional centers. Roommates were impacted the most. New roommate agreements were developed.
 - Regional centers are responsible for granting additional funding to cover this change.
 - Some payments and back payments have been received. Some are more complicated and haven't been resolved.
 - The process will need to be repeated when second increase occurs in 2015 up to \$10/hour.
 - Waiting to see if there will be a minimum wage increase established by the City of Los Angeles.
- Changes in overtime requirements (eliminating the Wage Order that exempted companion services from the requirements for paying overtime.)
 - Federal rules were scheduled to change January 1, 2015, to eliminate the waiver for overtime for people providing companion services. Eliminating the waiver means any hours worked over 40 would have to be paid at time and a half or double time including roommate hours.

- The rule was stayed at the last minute by the courts. Ruling to be made January 15, 2015, whether to go forward with the rule or alter it. We made changes based on the anticipation that the new rule would take effect. We had to adjust schedules and staff assignments to limit the number of hours of overtime since DDS/Regional Centers were not compensating for the full cost of implementing the new rule. If the rule is overturned, then we will adjust our policies accordingly.
- Waiting to hear if sleep hours will be included in the count of total hours per week.
- We are taking the stance that we are co-employers for IHSS since we assist people in managing their IHSS services. This means that IHSS hours count in the total number of hours worked per week and whether a staff should be paid overtime. IHSS is not clear that they think we are co-employers. It will be very hard to track all the hours that staff work for IHSS since they may work outside of JNCS for IHSS. Supported living services has hired an IHSS coordinator since the issues are so complex.
- We need to separate payment for IHSS from regional center paid services. The changes can result in the loss of benefits to staff as hours are sorted between JNCS and IHSS wages.
- We have many staff that work in multiple departments doing a lot of hours. These assignments have had to be changed since JNCS cannot afford to pay overtime for so many hours. Some staff are very upset that they have had their hours cut or changed in order to comply with the Federal and State laws. The changes have resulted in hiring more staff and having shorter shifts for people which in some cases makes services more institutional.
- Good news is that it looks likely that the state will restore the reduction in IHSS hours for individuals.
- →→→ **Last Minute Update!!** As of today--January 14, 2015, a federal judge has ordered the rule change *vacated*, which means we do not have to worry for now about changing our overtime practices.

1-C: Create a plan for increasing our ongoing capacity for fund raising by utilizing professional consultation services to assist us to develop and implement strategies.

Report for 2014:

- We need to assess whether our current fund raising efforts are the best ones to be doing and what other types of fund development may be better for us.
- Several resources were explored to provide consultation for the agency around fund raising.
- Some resources looked good but were not local and we felt may not work as well as a local resource.
- We hired a consultant, Sharon Collins, to assist us with strategizing about fund raising activities. She is helping us develop grants and to look at new ways to bring in money.
- We are looking specifically at grants right now for communication supports.
- We are working with Wells Fargo which is our new bank to look at grant possibilities.
- Ongoing issues: assessing whether our current fund raising events are worth the effort, determining new types of fund development, finding supports for better fund development.

1-D: Develop and implement an effective system for creating an agency annual report and for developing the organization's budget each year.

Report for 2014:

- We are in the process of designing a format for an agency annual report. We are looking at which reports Soneto can generate for the report such as reports on demographics of the people we serve.
- We want to report to include an overview of the services we provided in the past year, a look at finances, achievements and celebrations for the year as well as challenges we faced.
- We will include information about the Strategic Plan in the annual report.
- The Finance Department is working on improving the budget planning process for the year. A new format for budgeting was rolled out in January 2015.
- A new budget will be developed using the new format.

Strategic Initiative 2): Improve the **organizational culture** of our agency by renewing our commitment to a shared vision, strong partnerships with each other, responsive accountability, and support for our staff to be valued and professional.

Objectives for this strategic initiative:

2-A: Utilize an extensive PATH futures planning process for all aspects of our agency to renew our commitment to a shared vision and mission.

Report for 2014:

- All three departments (Supported Living, Day/Employment Services, and Family Services) conducted a PATH planning process with outside PATH consultants.
- The PATH plans showed the history of services in that department and will show where the departments hope to take their services in the future.
- Each department will use their PATH plan to help them keep their services on track with our mission and values.
- We want to return to using the PATH planning process to guide services for all individuals served by JNCS.
- Ongoing issues: developing expertise within JNCS to conduct effective PATH plans for individuals, finishing up the department PATH planning process with the consultants (in February 2015), developing an Administrative PATH plan to guide operational issues for the agency, and keeping the PATH plans at the heart of what we do.

2-B: Explore and create new strategies for how we work together across departments and between staff and the Board of Directors utilizing a shared commitment to the agency's PATH and the Strategic Plan.

Report for 2014:

- This objective was designed to keep us from thinking and working only in the confines of our individual departments.

- The design of the Strategic Plan implementation has led us to work together since goals are assigned across departments. We have enjoyed knowing more about the issues and strategies of different departments and how we can work together to solve problems and improve services.
- The changes in labor laws have brought us together to work as a team across departments since they affect all of us.
- The Self-Advocacy Group has provided an opportunity to work across departments to support self-advocacy within the agency.
- Ongoing issues: finding ways to include the Board members in the activities of the Strategic Plan implementation, sustaining efforts to work collaboratively across departments.

2-C: Strengthen the Board of Directors by expanding the numbers and diversity of the people who serve on it including providing support for valued roles for people with disabilities on the Board.

Report for 2014:

- We need to recruit some new members for our Board of Directors. We are happy to report that Ann Snowhook will be able to continue to serve.
- We have approached some individuals but none has accepted yet.
- We are recruiting a board member from the individuals we support so their voice is heard. We are working with the Self-Advocacy Group in this process. When a person we serve is appointed to the Board, we will make sure that person has the support needed to be a valued and fully engaged member of the Board.
- We are looking at the community to find people willing to be on the Board including Wells Fargo, our new bank.

2-D: Create and effectively implement a system of accountability that makes the Strategic Plan and the PATH our daily road map for how we operate as an agency including specific lines of responsibility and methods of accountability.

Report for 2014:

- We have maintained our commitments to be accountable for the Strategic Plan. Goal Coordinators assure that their groups meet regularly to work on their objectives. We meet together as a team quarterly to share progress and challenges. We select several groups to present to the Board of Directors each quarter.
- We shared our Strategic Plan and PATH plans with the individuals who conducted our certification for CARF (a national organization that certifies agencies providing employment services.) They were impressed with our Strategic Planning process. We received a three year certification this time with very few deficiencies or areas of improvement indicated.
- We have continued to use outside assistance to assure that we are being accountable with our values and mission. Beth Gallagher returned to assess changes we made that were suggested to improve various aspects of our services. We still have work to do to address the issues identified but the review did show slow but steady progress in the right direction.
- The Training Department has taken the suggestions that came from Beth to create new trainings around the issues addressed.

2-E: Create and implement a plan for assuring our staff are valued and professional by providing a living wage, career paths for advancement, opportunities for having a voice and valued roles in the operation of the agency, and recognition for their accomplishments.

Report for 2014:

- We provided a number of professional development opportunities for employees.
- We provided an annual bonus to all staff (third year in a row.)
- Nine employees received a bonus for referring a new employee.

- We provided tuition reimbursement to some employees to continue their education. We are working with a local university to consider offering reduced tuition for our staff.
- As a part of the Strategic Planning process, the consultant, Mary Schuh conducted employee surveys and interviews to understand their perspective on the functioning of the agency. An employee survey will be completed this quarter as well to assure that people have an opportunity for their voice to be heard.
- We are planning an agency picnic in 2015.
- The staff and Board were instructed in Cultural Competency and Diversity considerations.
- A video is being developed that will highlight some direct support staff that have made a difference in individuals' lives. The video will also show what different jobs entail so people who are considering employment will know what to expect.
- San Jose awards "Above and Beyond" recognition when staff show exemplary efforts in their jobs. They also have an annual gathering. These efforts have helped morale in the program.
- Challenges: Some staff are upset about the changes in hours and schedules necessitated by the changes in labor laws. We are trying to help them understand that the changes are not coming from JNCS but rather by forces we have no control over.

2-F: Create and implement a plan for expanding our presence in the community and strengthening our connections to businesses, community organizations, and others.

Report for 2014:

- We are working to find new vehicles for helping the community to understand who we are and what we do so that we can create community partnerships to assist us with our mission and vision including the following:
 - Creating a social media plan, updating and upgrading our use of our website, establishing a dynamic and diverse training calendar to draw in outside people, organized email/ mailing lists to reach out to the right people for the right event, planned community group involvement, fund raising, connecting with local businesses to create mutually beneficial relationships.

- We hired a part time person through the State Council grant to focus on creating and loading media content.
- Training Department is developing new and useful trainings on Cultural Diversity, Family Mandt, CPR/First Aid that bring in people from the community.
- Employment Department has joined five Chambers of Commerce and attending meetings to develop business relationships there.
- Staff have been attending community fairs to do outreach for recruiting staff and presenting our services.

Strategic Initiative 3): Actively sustain **our mission, vision, and values** through more consistent and cohesive methods of planning and delivering services that flow from our values and provide a framework for the individuals we support to have a stronger voice in their lives and greater life opportunities.

Objectives for this strategic initiative:

3-A: Effectively and consistently use a values based method of planning and delivering supports for individuals across the agency (using PATH and circles of support.)

Report for 2014:

- We are developing expertise within our agency on providing high quality person centered planning. We will continue to increase our capacity to do this vital function. We are identifying staff that can be trained to be master planners.
- We are working across departments to look at our current assessment and planning processes. We are evaluating which ones best support our mission and values. We will be looking at some standardized processes that assure that each individual we support has access to good quality person centered planning.
- We will utilize the Five Accomplishments and the Quality Assurance Tool to guide our efforts to create an effective planning process.
- We will incorporate the specific planning objectives included in other sections of the Strategic Plan (i.e., employment, communication, and end of life planning.)

- We will create a Community Activities Work Group to create a community resource guide.
- Ongoing issues: how can Soneto help us with this project, what other training resources can we use for this including sending people to PATH training at Tierra del Sol, where can we secure funding for additional training in planning skills.

3-B: Assure that all individuals we support have effective means of communication and opportunities to have a voice and control in the delivery of their supports and in their lives.

Report for 2014:

- We are working to assure that people served by the agency have support to communicate effectively.
- We engaged the services of communication trainers from an outside organization WAPDH. They are providing training classes every six weeks or so to teach people how to communicate more effectively with the assistance of technology. These classes are open to any served by JNCS. We are targeting especially people who received iPads through the Communication Grant we had last year. These trainers are helping us identify appropriate software and hardware to use for communication.
- Staff are acquiring resources and training to increase our capacity to address communication issues, including Lisa attending an assistive technology class, meeting with Martha Leary to strategize communication supports, looking at grant opportunities for communication projects.
- We are working with the person centered planning group to assure that that all individuals are assessed to determine what support they need to communicate effectively.
- We engaged the services of Martha Leary to consult with us on communication issues with individuals as well as communication support issues.
- Ongoing issues: how do we assure that staff are using the strategies identified for individuals consistently and effectively, how do we get the resources to acquire more technology for people to use to communication, how do we support people to take care of the

communication devices they receive, how do we use technology to help people communicate out in the community at jobs or community activities.

3-C: Assure that the adults and young adults we support have opportunities to earn income in meaningful jobs or small business ownership.

Report for 2014:

- We are working to reorganize our employment department to incorporate the learning and techniques we have acquired through the State Council grant on customized employment which ends in March 2015. We will have a Customized Employment service which should be very useful to assist people to gain employment when traditional employment support is not enough. This is a service which may bring us more requests for services especially from the schools.
- We are working on expanding our employment services to other areas such as the Antelope Valley. We are doing it thoughtfully and carefully so that we can sustain any commitments we make in this area. We have received approval from DOR to provide services in this area when we are ready.
- We are working with Lanterman Regional Center to expand the use of ACE services for customized employment opportunities.
- We have used the State Council grant to serve a number of individuals who are in the 17-30 age range using customized employment techniques to help individuals to create a path to meaningful employment.
- We attained a three year certification with CARF which allows us to continue providing supported employment services through the Department of Rehabilitation.
- Rebecca was appointed to the CalTASH Board of Directors for a three year term to represent employment services for JNCS.
- Over 10 staff attended the national APSE conference in Long Beach. One of the participants in the State Council grant presented at the conference.

3-D: Assure that individuals' PATH planning includes consideration of aging and end of life issues, both for themselves and their family members.

Report for 2014:

- We are working with the work group on person centered planning to develop a format for including end of life planning for individuals we support.
- End of life planning is both for the individual and for planning what will happen when their parents are no longer able to be in their lives.
- We are offering a training on Special Needs Trusts.

Strategic Initiative 4):* Expand our services by developing **new service options and additional revenue sources.*

Objectives for this strategic initiative:

4-A: Explore and create a model for providing services in a self-directed service delivery system.

Report for 2014:

- A number of staff attended the Self-Determination Conference. We gathered information on how the state's self-determination system is proposed to operate.
- We are working to determine what roles JNCS can play in a self-directed service delivery system. We are looking at providing service broker services and person centered planning services. These are naturals for us because we have done them for many years. We are working with Gavin to determine what kinds of pricing makes sense since these services will be funded differently from our current services.
- We are working on ways we can also play a role in keeping families and individuals informed about how self-directed services work so that individuals will be able to use them effectively.
- The state has submitted a self-directed services waiver to the Centers for Medicaid and Medicare. When it is approved, then self-determination will be available throughout the

state to a limited number of people for the first three years. After that it will be available to everyone.

4-B: Expand our current services into a broader geographic area particularly in the northern part of our Los Angeles service area.

Report for 2014:

- The Antelope Valley JNCS office has moved to a better location. We are receiving referrals for services in that area including LINK, SLS and Adaptive Skills.
- We are working on providing employment services in the AV. We are also looking at providing assistance to people who are transitioning out of high school.
- We are looking at ways we can offer private pay services in addition to regional center funded services.
- We are working with work group 3-C to determine thoughtful ways to expand services and maintain our commitment to quality and our values.
- We are working with the regional center office in the Antelope Valley to determine service needs in that area and how JNCS can meet those needs.

4-C: Explore and create a report on the feasibility of new ways to provide services that will enlarge and diversify our revenue base, (i.e., providing services to different populations and age groups, contracting with school systems, offering fee for service private pay options for things we do well such as person centered planning and service delivery, exploring services covered by insurance, and others.)

Report for 2014:

- As was said previously, we are pursuing how JNCS can play a role in a self-directed services system providing service brokering services and person centered planning services.
- We will continue to consider private pay services that we might be able to offer and other possible funding sources such as school systems.