

The Arc of NY Quarterly 2021 Plans

Q3 2021 (August 4, 2021)

Planned Initiatives for Q3

Advocacy

Initiatives	Who Lead	Remarks
Evaluate and Recommend to BOG any changes to Advocacy structure	David	
Work on 1 or 2 white papers in the next 12 months to drive where funding is being assigned.	Marco / Robin	Serving children aging out, serving behaviorally challenged individuals, lack of crisis services regionally etc.
Conducting focus groups on partnering with external stakeholders	State office	Using a facilitator once the topic has been determined, possibly hire this person.
Complete the Tool Kits	Laura/Judy Sue/Self Advocates	

Diversity, Equity, and Inclusion

Initiatives	Who Lead	Remarks
Complete and distribute the DEI Survey	DEI Steering Committee/ Kate Geurin	The intended audience for the survey is all chapter and state office staff, Board members and Board of Governor representatives
Engage a DEI Consultant	Steering Committee/ Leadership Engagement Committee	Incorporate the demographic data and survey findings, shared insight and knowledge on DEI best practices in the assessment process and to develop recommendations for initial

		strategies and training throughout the Arc NY.
Update the Arc NY on the current status and future benefits of DEI and cultural competence	Steering Committee	At the Annual Convention in October the Steering Committee will conduct a panel discussion to share EDI progress updates with staff and Board Members of the Arc NY and to obtain feedback and comments from audience members.

Financial Stability / Best Practices

Initiatives	Who Lead	Remarks
Identify IT platform and consultant options; then develop an RFP.	Ken Dales	
Each sub-committee will have developed a draft of best practices, metrics, or toolkit.	All Team Leads	
Identify Accounting Software options and develop an RFP.	Cyndi/Carol	
Continued exploration of common chart of accounts and standardized reporting. Identify timeline for Chapter engagement.	All	

Governance & Change Management

Initiatives	Who Lead	Remarks
Finalize plan for engagement.		
Begin to socialize future state recommendations with influencers and process feedback		Host workshops: EDA in September and October BOG meeting
Drive integration across Strategic Initiatives to ensure alignment and synchronize activities as needed considering experience of groups with which the teams are engaging		

Identify approvals required for future recommendations and submit for feedback		
Update Governance model, RACI, etc. to take into account role of Self-Advocates		
Begin to develop approach to organize, plan and conduct BOG meetings to improve engagement		
Begin to develop Training/Coaching requirements		

Staffing

Initiatives	Who Lead	Remarks
Data, Best Practices and Advocacy subgroups to coordinate on developing and launching a survey to understand the profile of the DSP	Shared	
Continue to develop best practices and coordinately lunch and learns as deemed valuable.	Best Practices	
Coordinate with Budget & Finance and EDA to determine funding allocation for DSP Marketing Initiative. Coordinate DSP Marketing Launch with DSP Branding Workgroup and Overit.	Cyndi & Jennifer	
Continue to work with OPWDD to reform the survey process to help obtain relief from over-enforcement of regulations	Regulatory	

Supports & Services

Initiatives	Who Lead	Remarks
Distribute surveys, analyze results and develop simple report to Chapters.		
Schedule and hold focus groups in September to gather additional detail for both priority 1 and 3 initiatives		
Create a platform for Chapter staff involved/interested in Self-Directed and Fiscal		Workgroup is exploring the use of Microsoft Teams to accomplish this deliverable.

Intermediary services to communicate, share resources and network.		
Create a routine meeting for Chapter staff involved/interested in Self-Directed and Fiscal Intermediary services to communicate, share resources and network.		

Q2 2021 (May 6, 2021)

Initiatives

(all % complete data shown below was reported at the August 4 Quarterly Planning Meeting)

Advocacy

1. Solidify the Advocacy Framework **(85%)**
 - a. Family Advocacy and Self-Advocate Group Toolkits
 - i. Identify stakeholders and target audience
 - Assessment of legislative/advocacy lead contact in each chapter
 - Engage stakeholder input for eventual rollout
 - ii. Conceptualize and draft toolkits
 - b. Messaging
 - i. Compose general overview of intent and goals
 - ii. Draft organizational charts and other diagrams
 - iii. Draft General instructions for Chapters
 - iv. Draft roles/responsibilities/decision making
 - c. Research and present options for outside
 - d. Research best practices from other statewide and/or national groups in forming large volunteer apparatus
2. Produce a Definitive Advocacy Plan **(65%)**
 - a. Review of Issues and Positions/Advocacy Priorities
 - i. Issues and Positions: engage the I&P Workgroup and together conduct a thorough review of I&Ps, bringing suggestions and recommendations for wider comment by mid to late August.
 - ii. Advocacy Priorities: engage the Governmental Affairs Workgroup (GAWG) and together conduct a thorough review of advocacy priorities,
 - iii. Bring suggestions and recommendations for wider comment by mid to late August.

- b. Resolve where other strategic planning groups have crossover and integrate accordingly
 - c. Review and report on GAWG mission and duties. Explore how it aligns within the overarching advocacy framework and plan, and what is needed to meet the needs of short and long term advocacy
 - d. Produce a general yearly calendar of advocacy activities for state and federal “to dos”
 - e. Develop a general framework and plan forward with the Arc NY communications team for future media initiatives.
 - f. Research what data is collected through current communications, social media, and what might be possibly and useful.
- 3. Partner to Government and External Stakeholders (10%)**
- a. White papers and annual report
 - i. Conduct one focus group to discuss the notion, idea, intent, regularity, and gather future topics for consideration.
 - ii. Research and report examples of respected thought leading organizations with a similar footprint and intent
 - iii. Plan a focus group for engaging outside organizations not directly affiliated with I/DD
 - Inform the criteria for what organizations we align with outside of the I/DD sphere
 - Provide suggestions and report

Governance

- Make recommendation for standard core value/issues and positions/advocacy priority comprehensive review intervals
- Present a draft of known potential changes to bylaws and/or Chapter manual based on research and changes with decision making.

Diversity, Equity and Inclusion

- 1. Develop a comprehensive survey – DEI Assessment. (90%)**
This initiative will develop a comprehensive survey/equity assessment to be administered across all Chapters and the State office to obtain key demographic information from Boards, staff, persons supported and the surrounding community. In addition, DEI best practices will be obtained from each Chapter. While diversity demographics are essential, the survey will also include questions that address inclusion and equity. Inclusion ensures that everybody feels welcomed, appreciated and involved in the workplace. Equity ensures that the right support is granted for advancement, so inclusion can be nurtured for success. The outcome of the three is, ideally, a sense of belonging. A detailed analysis of the data will assist in the creation of targeted, specific goals and success metrics for the corporation.
- 2. Create DEI Strategies at all levels of the Arc NY.**

Using professional DEI consultation, this initiative seeks to engage Board leadership, Chapter and State office staff in discussions centered on the creation of a DEI framework for the entire organization. A series of tasks to accomplish this goal include but are not limited to:

- a. Engagement of a professional DEI consultant to facilitate discussion and mapping of the process.
- b. Obtain input and create ownership/commitment from the Board of Governors
- c. Create a common understanding and definition of DEI and the associated principles for the entire organization
Develop mission, vision and position statements, along with other clarifying principles to
- d. Expand receptivity to the ideals and goals of the DEI strategic plan
- e. Develop corporate wide training modules to educate the BOG, Chapter and State office staff on key principles of diversity, equity and inclusion
- f. Develop a train-the-trainer certification to ensure the ongoing delivery of high quality DEI education and support, in addition to ongoing cultural competence

Financial; Fiscal Sustainability Best Practices

1. Identify operational programs (Tami Walters & Carol Lutz) **(100%)**
 - a. Determine a list of operational programs both that are subject to regional rates and those with agency specific rates. Define who is considered rural and who is metropolitan. Program categories below may have several program subsets.
 - Employment Services
 - Residential Services
 - Day Habilitation Services
 - Educational Services
 - Clinics
 - Self-Direction
 - Site Based Pre-Vocational

Will prioritize the specific program review order by program size and overall financial/programmatic impact on the organization. **(Fiscal Sustainability Best Practices Committee)**

2. Identify Subcommittees for each of the program categories or set of such programs. **(100%)**
 - a. Employment – **Todd Hansen Lead**
 - b. Residential – **Dan Richardson Lead**
 - c. Day Services – **Howie Ganter Lead**
 - d. Educational – **Cyndi Borozny Lead**

- e. Clinics – **Perry Courto Lead**
 - f. Self-Direction - **TBD**
 - g. Site Based Pre-Vocational -**TBD**
3. Complete kickoff meeting of each Subcommittee & begin identifying chapters with best practices. **(Each Subcommittee) (50%)**
 4. Research IT platforms for information sharing. **(Ken Dales) (50%)**
 5. Collaboration with the Supports and Services Workgroup on the promoting best practices, program innovation and creation of a Chapter IT platform. **(100%)**

Governance Initiatives; Governance & Change Management

1. Engage consultant and review progress to date; obtain feedback on next appropriate steps **(100%)**
 - a. Survey of BOG prepared
 - b. Planned to send June 15 after feedback from regional VPs, but awaiting feedback from consultant on both content and timing of this survey
2. Develop timeline and action plan for change management initiative **(100%)**
3. Define and finalize regional role **(100%)**
 - a. Survey of Regional VPs completed; feedback reviewed with that stakeholder group
4. Begin to strategize engagement of influencers identified by stakeholder group and develop a plan for engagement (for change management mostly) **(100%)**

Staffing; Attract and retain staff

1. Reprioritize strategic goals to address immediate workforce crisis and pay equity issues. **(100%)**
 - a. Create strategic subgroups to identify solutions and address issues in the following areas:
 - i. Data Collection- Doug/Josh/Angela
 - ii. Operations/Best Practices Sharing- Jennifer/Angela/Deb M./Karen K
 - iii. Advocacy- Kate/Philip/Kirk
 - iv. Regulatory Relief- Ellen G/John Kemmer
 - v. Financial Opportunities- Cyndi/Don M
 - b. Subgroups to identify additional members (if any) and set up reoccurring meetings
 - c. Subgroups to identify immediate priorities and actions they will take
2. DSP Marketing Vendor Selection **(100%)**
 1. Coordinated directly with DSP branding workgroup and the EDA 5. Initiative
3. Make federal connections with ANCOR and Arc US **(100%)**
4. Seek eFMAP founding for unfunded mandated benefits **(90%)**
5. Professionalize the Direct Support Professional **(50%)**

6. Obtain input on regulatory reform as it pertains to workforce issues, consolidate issues into main themes **(100%)**

Workforce Crisis

In order to address the workforce shortages/pay equity issues we have identified several areas where we feel we can make immediate recommendations to help us manage this situation more effectively. Specifically:

- Data Collection (Doug/Josh/Angela)
 - Oversee and ensure submission of NYDA data survey
 - Further review of Arc data from NYDA data
 - Identify any other data needs and determine how to best get them...from other groups
- Operations/Best Practice Sharing (Angela/Jennifer/Karen)
 - Pull in best practices and innovative approaches from COO/HR/Residential Arc groups
 - Plan to share on Wednesday calls and lead discussion
 - Are there other formats for sharing information with Chapters?
 - Identify items that may require additional discussion and a format – Lunch and Learns, etc.
- Advocacy (Kate/Philip/Kirk Lewis)
 - Who do we need to advocate with – identify all levels and points of contact
 - What is the message? What recommendations? What options?
 - How best to do this – NYDA or Arc
- Regulatory Relief (Ellen G./John Kemmer)
 - What regulations need to be relaxed?
 - Who should we be meeting with at OPWDD?
- Financial Opportunities (Cyndi/Don Mullin)
 - What are Chapters doing now to address salary and staffing crisis?
 - What is working?
 - How do we best share with the organization?

Each subgroup will be asked to get organized, select resources needed and begin to identify immediate opportunities to address this staffing challenge. I ask that you identify the goal and then the steps and actions needed to move it forward.

Other tasks within the staffing initiative will continue – DSP branding and marketing, career ladders, etc. – but are obviously mid-range or longer term goals.

We will dedicate time each Wednesday morning at the EDA/Arc meeting to address, have discussion and share. This week we will share this strategy in verbal report.

Supports and Services

1. Engage NYS OPWDD as part of the 507-planning process and FMAP priority process by presenting opportunities for development and funding of retirement options that are less regulated and afford a leisure time activity. (John Kemmer) **(100%)**
2. Identify innovative residential and day service program models via the following activities. **(60%)**:
 - a. Survey Arc New York Chapters to identify innovative programming and approaches (Tracey and Kellie)
 - b. Gain perspective from NYS OPWDD (John Kemmer)
 - c. Examine alternate models outside NYS (Full Team)
 - d. Consult with ANCOR and The Alliance for innovative programming and models
 - e. Collect feedback from individuals supported and families via survey and potentially focus group (Betsy and Amy)
 - f. Examine other systems of care - OMH, OOA, hospitals, elder care, long term care (Betsy)
3. Develop a blueprint to assist Chapters in implementing self-determination programs via the following activities:
 - a. Develop a survey designed to capture the Chapter experience with self-determination programs (Lynn & Lori) **(100%)**
 - b. Distribute survey to Chapters (State Office) **(75%)**
 - c. Create a forum for meeting with Chapters identified as having experience with self-determination programs (Lori & Lynn) **(25%)**
 - d. Aggregate results (Full Team)