

Leadership: Steering Your Agency Toward Transformation

Jeannine Pavlak & Rachel Pollock
EFSLMP National Subject Matter
Experts

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The Leadership Role

SPEARHEADING THE PROCESS

Leadership: the process you will be spearheading (continued)

- Information/Education
- Internal discussions with management/staff/boards
- Clarifying philosophy and values
- Working with Boards
- Development of a vision of what services could look like
- Development of service models to get there
- Working with people served and families
- Working with funders and other community partners

Leadership: The Process you will be spearheading

- Developing the Workforce
- Strategic planning, including agency analysis, forecasting, budget modeling, transformation goal setting
- Charting the Path
- Measuring Performance
- Moving into full implementation
- Expanding into new venues
- Advocating

SETTING THE TONE FOR CHANGE

CREATING A LEARNING ORGANIZATION

Setting the Tone for Change – Encouraging Learning and Creativity

- Conferences and Trainings
 - ANCOR
 - TASH
 - APSE
 - Toronto Inclusion Institute
- Learning Journeys
- Finding a Mentor Agency
- Local Community of Practice with other agencies
- Internal Processes to share creative ideas
- Celebrating initial successes



Tools that can promote creativity and thoughtful exchanges

- Focus Groups
- Small Group Meetings – Ongoing team work is essential
- World Café– See www.theworldcafe.com
- Theory U –Framework and Method for Change See www.presencing.com

Starting the Process

IMPORTANT INITIAL STEPS

Starting the Process

Creating a transformation team

Reviewing and Developing Your Mission and Vision

Working and Engaging with your Board

Reaching out to Stakeholders – Individuals and Families

Creating a Transformation Team

- Engage all levels of the organization
- Possibility of including families and individuals
- Continuous role during the change process
- Key to strategic planning process
- Create Action Steps to ensure follow up and follow through
(Remember how busy your staff is)



Mission and Vision

DO THEY SPEAK TO INTEGRATED EMPLOYMENT
AND COMMUNITY BASED SERVICES?

Creating the Vision

Vision aligns people in activities that cut across the organization.

Helps set priorities and facilitates goal setting.

Basically states, “this is who we are, this is what we do, and this is where we are going.”

Does your organization have a vision focused on competitive, integrated employment?



Does the vision move from

SHELTERED WORK

INTEGRATED WORK



Seeing the Vision

- A leader seeing a vision alone will not transform an organization.

- Must identify others who see the vision:

Family members

Staff

Donors

Board Members

Business and Community Members

Consultants

Reality of the Vision

If the vision and mission are not clear, programs will be disjointed and competing leading to poor decision making.



Mission

Is your current mission inclusive of all programs for the organization you are transforming? Does it tell people what good the organization is doing and for whom? Is it grounded in your values? Is it a statement you can get excited about?

Does it include a focus on competitive, integrated employment?

Defining the Mission: So...What is Quality of Life?

Choice of relationships

- **(Friends, co-workers, family- not paid assigned staff)**

Choice of activities

- **(Informed choices from a variety of experiences)**

Dreams for the Future

- **(There is a reason for tomorrow)**

What do we believe ?₁

People learn best when they are with their
own kind

or

People learn best from an array of
relationships

What do we believe ?₂

The best way to learn is in a simulated
environment

or

The best way to learn is in the real
environment

What do we believe ?₃

The best choices are made from limited experiences

or

The best choices are made from a wealth of experiences

What do we believe ?₄

Life without expectations is an ideal world

or

Success begins with high expectations

Moving from

“Caring for” “Protecting” “Training”

to a life with the same expectations as people without
disabilities

To an “Employment Agency”

through Provider Transformation

New Core Values

We believe every person should:

- have on-going experiences, information and expectations from which to make choices,
- have the expectation for a career, make meaningful contributions and have dreams for the future,
- be included, respected and valued, live and participate in the community of his or her choice, and
- have a variety of relationships of their choice

Old Mission

Operating a center
for children
with mental retardation to achieve their
greatest potential
(Using a building to someday fix people)

New Mission:

Advancing Community Support and Opportunities for People with Disabilities

**(building the community to support people
to have a life like yours and mine)**

What is your organization's name? Does it reflect your vision and mission?



Our Name

did not reflect what we were doing

St. John's Child Development Center

A New Name

St. John's Child Development Center

to

St. John's Community Services

Challenges in Changing a Name that has a History in the Community.

Identity Confusion

Donor Ties

A part of another

If can't change name, come up with a DBA or tag line

Board Engagement

Board Engagement

An engaged Board helps to get families and the community behind your efforts through:

Strategic Planning - Values, mission, name, policies, etc.

Advancing the mission - Spokesperson & advocate

Relationship building - Connecting agency to community

Fiduciary responsibility - No Margin/No mission- New Funding Streams

Supervise - CEO in fulfilling the mission & setting benchmarks

Celebrate - Agency's success

Board Engagement

Engage allies on the Board on your interest in revisiting the organization's mission and strategic plan to focus on the goal of transformation to individualized community based service delivery

Learn any specific concerns regarding implementing transformation efforts

Look to identify additional leaders in the community you may want to recruit as potential future Board members.

Assessment

Conduct a written assessment of Board to determine-

Their knowledge level of existing policies, funding streams, and legal requirements that are igniting this push towards individualized community services;

Their comfort level with staff decentralization, funding diversification, decreasing facility based operations and services that lead to integrated employment and community participation;

Their commitment level to helping the organization make this transition.

Are you ready?

If you don't have the core values embedded into your vision/mission and your Board & Leadership embracing them in action and deed, then you are not ready for true systems transformation.

Small Group Exercise

Discuss some steps you have or are considering taking to create a culture of change in your organization?

What is your vision for your organization that incorporates employment and community inclusion?

Does your staff and board share this vision? What have you done to engage them in this vision or what steps might you take to instill that vision among your staff and board?

Small Group Exercise

What objections or level of support do you anticipate getting from your board?

Share what you have done to prepare or what you plan on doing to prepare for objections?

Implementing the vision

MAKING IT HAPPEN!

Implementing the vision

Strategic Planning

Advocating with funders

Piloting and Bringing to Scale

Staying the Course

Strategic planning

THINKING IT THROUGH

Why a strategic plan for transformation

Keeps the transformation effort front and center

Blueprint as a background to evaluate changes in program and funding environment

Encourages step by step process through continuous action plan

Components of the strategic plan

Incorporates mission and vision

Recommended best practices and service models

Define outcomes, goals and timelines (including piloting programs)

Funding and plans for funding diversification

Resource reallocation

Plans for data collection

Plans for measurement, analysis and quality review of outcomes

Components of the transformation strategic plan (2)

Recommendations needed regarding operations and management structure

Recommendations needed in workforce – job descriptions, staffing, wages, recruitment

Possibilities for sharing resources (personnel, etc.)

Components of the strategic plan (3)

Needs for advocacy

Communications and outreach plan for stakeholders

Sharing the strategic plan with constituencies

Marketing plan; branding or re-branding; website overhaul

Digging deeper into the strategic planning process

Gathering and analyzing information and performance

The importance of a self-assessment process

- Base your planning on data and research
- What do you already know about what has worked and hasn't worked
- What can you learn from others about what has worked
- Do not plan in a vacuum – e.g. realistic understanding of staffing needs
- Self assessment will also highlight what you already have accomplished or what you can launch off from
- Where are we in relationship to where we want to be?

Digger deeper into the strategic planning process

Creating a workable model

Is the model aligned with our mission, vision and values

Understand the opportunities, conditions and risks

Determine what your service model(s) will be

Create a financial model – the plan must be sustainable

If the model doesn't work, re-evaluate your service model and potential funding.

Project forward including expansion from pilot to full scale

Determine where you may need to reallocate resources to accomplish goals

Digging Deeper into the Strategic Planning Process (3)

Ongoing communication and re-evaluation of the plan

Plan needs to have flexibility to respond to changes but maintain a long-term commitment to transformation goals.

Keep your change team in place and engaged to evaluate and re-evaluate progress and needed changes on a regular basis

Importance of honest communication about transformation work

Piloting new ideas

Start small with people who have an interest but don't skew your results by creaming

Start with committed and organized staff

Determine what you are trying to achieve in your pilot and measure your performance

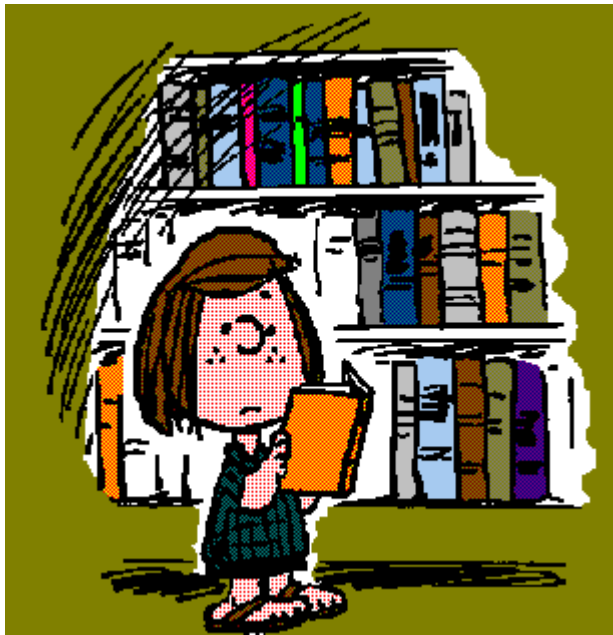
Make adjustments based on data based information

Advocating with funders

MAKING THE CASE

Preparation for advocacy

RESEARCH AND PLANNING



Do your research....

Understand how you are helping funders reach their transformation goals and other goals

Demonstrate why you are positioned to help reach these goals

Prepare documentation of costs and why you need what you are requesting

Understand how the regulations can work for your plan

What other localities or states are doing that are models

Develop your strategy

What are your most compelling arguments?

Is it better to go in alone or with other providers?

Who is the right person to approach?

What other providers might you collaborate with?

Staying the Course



Organizational Culture

Must evaluate how the existing organization's culture might positively or negatively influence the change that needs to take place.

Work to adjust culture, as needed, so it supports change.



Leadership

The key leaders have to change the culture as they are the ones that motivate and support behaviors.

Evaluate who is on the leadership team, what are they doing, who is making key decisions;

Evaluate the processes and systems in place that affect how people work together.

Small Group Questions?

What has been or do you think will be a major focus of your strategic planning for transformation?

As you are thinking about implementation, what have you identified as your main concerns?

How will you plan for these?

If there are areas where you anticipate the need to advocate with funding agencies to develop a workable plan, what ground work will you do to prepare for these discussions?

Contact Information

Jeannine Pavlak

Executive Director, NEBA WORKS

Jeannine.pavlak@nebaworks.com

Rachel Pollock

Senior Program Advisor, Job Path Inc.

rpollock@jobpathnyc.org