

**September 28, 2018: Adapting to the Environment: How one organization maximized opportunity.**

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Good afternoon. Thank you for joining today's webinar... "Adapting to the Environment. How one organization maximized opportunity." I'm Erica Lindquist, Senior Director at the National Association of States United for Aging and Disabilities (NASUAD) This webinar is presented through the Business Acumen Center, a part of the Business Acumen for Disability Organizations grant managed by NASUAD and made possible by the Administration on Community Living. Shortly after today's session, you will be able to find the PowerPoint and recording of this webinar (along with the archives of all of the Disability Network Business Acumen webinars) at [hcbsbusinessacumen.org/webinars](http://hcbsbusinessacumen.org/webinars). There will be time for Q&A at the end of the presentation. Please enter your questions in the Q&A box in the lower right hand corner of your screen.

Today's speaker is Dina Casalaspro. Dina will tell us about Community Options, program the Daily Plan It and describe the research that lead their organization to develop this creative and self-sustaining business model with a hybrid payer structure, where customer purchased services and office rentals support the cost of operations. Community Options was one of our winners of the Stories from the Field contest. As a reminder, this contest obtained stories that highlighted strategy that was used to improve the financial positions of facilities CEOs, stories that are relevant and replicable, stories that demonstrate a positive impact on people served, stories that demonstrate administration and or delivery and finally, stories that improve the delivery and accessibility. They were also highly successful business practices that were working with managed care, health systems, city Council, counties, municipalities, other universities or any organization to help improve the operations or financial performance of their business. As I mentioned, there's the Daily Plan It program in particular with one of these successful business practices. With that, I'll hand today's webinar over to Dena.

Hello everyone. Thank you. With our history and mission. Community options has been around since 1989. Community options have 50 locations across 11 states. We are over 3500 individuals with disabilities. Three of our states are New York, New Jersey, and Pennsylvania. We have 508 homes nationwide. Employment services and transition services is in New Jersey, Pennsylvania, South Carolina, and Tennessee. The social enterprises we have in New Jersey consists of the Daily Plan It's. There's [Indiscernible] and what the Daily Plan It represents I will explain to you it has a business model and a supported employment model that work together to create a function for the individual to be able to grow and learn while the getting paid. We also have are two other businesses which is the flower shop located in Edison and a secondary site that's opening in Princeton in early 2019.

We create flowers for weddings, funerals, parties, we get the orders, we fulfill them, the individuals with disabilities help complete the flower arrangements and deliver them and set them up for weddings and any other special event. Presence of mind is our Hallmark store. It has lots of gifts for all different times the year, events in a person's life, were also on Amazon where you can go on and purchase

the item of your choice and we would mail it to you. The Daily Plan It right now is serving throughout New Jersey 40 adults with developmental disabilities that are receiving minimum wage or better for working. There are 70 businesses across New Jersey that utilize our offices. Whether their physical renters or of virtual office package. These businesses hold one of our offices within the building that are individuals in the Daily Plan It take care of. The first Daily Plan It was established in 1997 in Princeton. Since the creation of this Daily Plan It there been three additional that have been created. Because the success found in this model. This model is very difficult to continue to replicate unless we have the initial funding to create or purchase a building so were able to create a Daily Plan It. The funding has to come from someone or something or fund raising So that were able to put down as a down payment so we can then have ventures come in and rent the office space and continue to have the programs that run out of this business as well.

The reason the Daily Plan It was created is because there is limited opportunities for individuals with disabilities at this time. In 1997 there are many individuals that had disabilities and were unemployed. We looked at a model that would help us have these individuals grow in skills of work and be able to get paid at the same time so they would build their resume and have something that showed they had worked and these were the different skills they did. At the Daily Plan It they do many things from cleaning to creative services where they are helping with printing as well as any type of mailings or large events. We just had our national conference for community options and our individuals did all the booklets as well as the lanyards that everyone more. They also help out the tenants by doing a pretty or mail it. They clean their office, they take care of any concierge service that our tenants need as well. As you can see with the slide people with developmental disabilities that were employed in the community and the percent of individuals that were not employed and the percent that were. If you look at it and think how many individuals we serve and how many more there are in the community that still need jobs this is why we are able to replicate the Daily Plan It in three additional areas in New Jersey and continue to try and open up. There's such a large need still in 2018. Again if you look at the hourly wage on this slide it shows we are getting a little bit better with competitive wages but there's still a large room for growth. In 2018 there should be something were seeing more of an upward increase. We have over the course of the last few months.

There's been some change but there's still a long way to go. We are still looking at the percent of individuals in a facility based job. There things were especially looking to get away with. We have the Daily Plan It we want these individuals to be self-employed there's independently employed, working for an employer that pays them the wages for the job they have completed versus working in a facility where it would be considered some form of crew labor. We want them to get to a point where they're able to go out into the community and sustain their own job and be successful at it. Our residential programs we are serving individuals that need a job and with the increasing number of residents moving into our home community options need to create employment for these individuals as well. As we are getting more

referrals for community members as well as individuals that are moving into the homes as we created new homes we knew we had to continue to look for a model that supports both areas of the services we provide. The statistics report that less than 18% of people with disabilities were employed. More than three times that of nondisabled citizens. Again, we are looking at just over a little a year ago.

The number of individuals that had a disability were still much higher. Being in the field working with individuals that have disabilities I feel as though they are eager to work, they work very hard, they are as on time as possible. They want to be there. To see this rate still be so high shows that we as a community need to continue to give a look at why these individuals are not in self sustaining jobs. As the workforce moves it diminishes a number of possible opportunities for those individuals with disabilities. A lot of our individuals rely on the support that a social interactive work environment can provide. Unfortunately a lot of offices are doing things more remotely and people are working more from home and able to do their job it takes away from some of the work that were able to do out in the community for different offices or law firms. Again, the Bureau of Labor Statistics estimates that of the days they worked 38% of people in management, business, and other professional occupations did some or all of the work from home. Working remotely has been a growing trend. As more businesses and industries recognized the benefits engagement we are going to continue to see a change in how many office space clerical jobs an individual will be able to get in the future. Again, another reason why the Daily Plan It is such a huge success and why we need to continue to multiply and create something like the Daily Plan It throughout other state's. Our Daily Plan It businesses have a solution to two workforce challenges. There staffed by employees with disabilities creating opportunities for not only gainful employment but networking and future career options outside the Daily Plan It and their equipped with facilities and service set up. This type of arrangement to me is so cohesive and well put together because the office that we rent out to attorneys and psychologists as well as realtors, they need a service of someone that can help them with reception work, with answering phones for them, mailing, printing, cleaning their office. They never have to worry about anything except walking into the office and doing what they need to do. Everything else is taken care of for them. The rent helps sustain up paying the individual to complete the job. The individuals that are coming not only benefit from being able to get paid but there are also learning work skills, vocational skills, on top of them taking care of the business end of it we are teaching them computer skills, teaching them social skills, teaching them how to work together as a team. The skills their learning they can then take out into the field and be able to fill out a job application and talk to somebody and sit down for a job interview and be successful they come well-dressed to work every day. They know that when they're taking care of -- even going to the bathroom they check to make sure nobody's in there and ensure there are the only ones in there. It teaches them a lot of skills that when they go out into the workforce to obtain another job or secondary job some of the individuals work on their Daily Plan It their successful because they're getting the foundation that they need. As I was saying it aligns with our mission. It's a steppingstone into to supported employment.

The individuals that come to the Daily Plan It each day learn more skills than what they will need when they go out to the community because it gives them a diverse idea of what they can do. Whether by working in some kind of clerical field, some kind of cleaning field, they can even go out and do things with computers. Some have gone out worked in stores. Somehow gone out and worked with animals. The skills they're looking for, money management, we train them throughout the day in different vocational skill building as well as helping them learn how to properly engage with individuals, how to properly answer phones, take note, make copies. A lot of these individuals come to the Daily Plan It with not having any skills at all from what they learned potentially in high school in a classroom pacesetting.

Now they are out in the world with individuals they don't know. They have to meet peers, they have to become a part of something and work together as a team. The research information we found is that the current individuals were serving are in need of a model that can assist them to learn employment skills and build their resume. La the individuals in our day program have never done anything in regards to supported employment or have even thought about going into the workforce and obtaining a job. We begin the process with teaching them the skills they need and from there we are able to move them into our Daily Plan It where they will start and begin to learn skills they need. Many individuals come to our Daily Plan It.

The training we provide is just some examples. There's much more than just this. One Of the biggest most important areas that we see the need for is the actual face-to-face communication skills a lot of that happens here at the Daily Plan It. Just the one location we have 26 tenants that rent out the individual office. There alone the individuals working have to interact with all these tenants on a daily basis. Whether they mean some form assistance or were giving them a task to do they have to be able to bring that task back as a team or independently and go back to the tenant and say here's the final product. These are some quotes.

This is one of our tenants that's an attorney. I find this quote to be great like a lot of our tenants do they would rather rent from somewhere where they know they're rent is going to a cause and helping someone. Also they have a beautiful office space where they're able to conduct their business and they have a great location. Anything you can think of that you are I would need a someone that's renting space and complete our business. Community options looked into our mission and what we need to do in order to have New Jersey being employment first state as we would like all of our states to be.

We looked at what would be sustainable and would provide job training and the success rate we are looking for with the individuals that are coming to the program. Part of the Daily Plan It business model is that the program runs with in the businesses I have dated. Each location has a different number of tenants with in them. Some have more some have less. Enter one location in North Jersey

almost the entire second floor is rented out by home healthcare service. As we know they're very busy. Our phones at that location ring all the time and there's always visitors, there's always packages being dropped off and or someone at the reception area that has to get the packages or the mailman. There someone at that location at answering phones all the time and transferring them and taking messages and

ensuring visitors coming in don't go past the reception without them being checked in. It's a very busy location. The individuals that work there and take care of that location spend a lot of their time engaging with outside individuals. Where revenue sources come from to pay our individuals and take care of any mortgage or anything we have is the referrals come from the New Jersey division of developmental disabilities more recently through Medicaid which is the change from the division of developmental disabilities moving forward in Jersey with fee-for-service. Those referrals come to us for the individuals that are going to come through our program to learn the skills and these revenue sources allow us to pay we obtain business models, we have local donors, and then of course the physical and virtual office tenants continue to help us pay the rent -- the mortgage, or any other bills that come along with the actual building. There's tenants onto the floors and one of our programs is on the floor. In order for us to pay these individuals we have to ensure all the office spaces are always rented out. Each of the four Daily Plan It programs we have there are no vacancies at this current time to take any new referrals because they are also full. Like I said, it's a very exciting model for many individuals but also for the tenants as well. It's something they feel will not only benefit themselves but the community by being part of a model as such. A lot of the businesses get to know the individuals and get to know where their strengths are as well some of the individuals might be better at doing one activity versus another.

It's really nice to see you in your there because the tenants know who to go to for certain things specific to where their abilities are and specific to where they need additional assistance. The tenants will sit with the individual and it's nice to see because the staff that work with the individual say I don't have to worry about Johnny completing the task. They take pride in being tenants and ensuring the it individuals within our Daily Plan It are successful. As I mentioned, the success rate shows in that we do not have any office space rented out in any four of our locations. All four of our locations are filled to capacity. I see this is a great model because I don't ever have to go looking for someone help fill these spots for individuals the Daily Plan It is a steppingstone. Our individuals as well as the staff worked with the -- each other to get to point to self sustain a job out in the community. We like to see they get the skills they need at the Daily Plan It and then move on to support and employment. We have one success story of a young lady that's a one of our locations in Princeton that's been with us since 2004 any year after being at the Daily Plan It she obtained her first job. In 2018 she has three jobs. She still wants to continue to attend the Daily Plan It. She works three jobs and attend the Daily Plan It twice a week. She does not want to leave that setting she has but it's also a fourth job for her. She has for part-time jobs since 2004 were she started with us not having any work experience or knowledge and we worked with her and got her prepared. Now she works in an office setting in a retail setting and with animals. Two of her jobs are both in retail. One thing she always does is she is our greeter, our receptionist, she answers the phone, she takes people to where they need to go, she's one of the biggest cheerleaders. Anytime you see someone new she will tell them all about the things she learned and she says the reason she continues to come is because she finds more jobs

and she thinks it's because she learn more things every time she comes to the Daily Plan It.

Here's my information. If anyone wants to reach out after the webinar. One thing

I've to see is the model of the Daily Plan It works for us in New Jersey and we would love to emulate it in other states. The funding is the biggest hurdle with purchasing of the building one of the things I've noticed that you can take away from this is that when you have a business model that gives support to different community members as well as individuals with disabilities and the model works cohesively with everyone the individuals are successful and the business continues to grow were the individuals want to come and the tenants don't want to leave. The rent spaces easily filled it shows it successful and it's been successful since 1997. We opened up our

fourth Daily Plan It about two years ago and prior to opening its doors it was also successful. Right away we had no offices to rent prior to opening and all the individuals waiting for the doors come into the program. It's successful still to date.

We will start the Q&A in just a bit . To your last point, some of what really stood out when we received the submission for the stories in the field contest was exactly that point about using two problems to solve each other. I know when I read through your materials we talked very specifically about the number of people that need community employment. We can look for opportunities such as this. New opportunities, new ways of working, new ways of supporting.

If you look at information and data, where do you begin?

We started looking at where there was a need. The need we start our foundation as the need for individuals. Ensure there's a success rate for us. What were trying to do with the individual wasn't gonna work. Once we saw that there is a huge need to find jobs we know were always can have a tenant. Realtors we just a small space to conduct their business where they have an email address, phone,

-- I'm sorry a mail address, phone, and everything can be done, visitors can come to a location versus a home. Also they have a receptionist that takes care of all the work. Once we realize this can work hand-in-hand in the individuals work with

in the Daily Plan It were so successful outside of their and finding jobs and being able to move on to true support we knew that growing the Daily Plan It and finding additional sites and finding resources for revenue to do so was can be successful. At this point there's still a need for individuals that have disabilities that are being employed in the community. There's still a need for tenants to rent space and have all the resources they do that we provide for them at their location. >>

Are there certain dynamics you look for to help identify the right location for when you're looking to expand, I know certain locations are the right place to put that building. >> I think the location we tried to see where there's a need. A lot of times in Princeton we know that rent there is much more expensive. We know the renters will come because the space is at a reasonable rate. It's in a very busy business district where again, the rent is deleted -- needed. There's individuals outcomes was referrals. Mainly it has to do with the donor. Where were

looking at that location that's willing to have a business model of this nature be set up in their community and know there are a part of it. I know that holds true for one of our location's. It depends on where the funding is coming from, where the need is, and where we know will find the most renters.

Would they help identify the potential need areas?

We are part of the Chamber of Commerce in different counties. Through them we get to meet a lot of individuals, a lot of business owners, and members of different areas that we use for different resources. I don't think I'm in any of the four that we've set up. I don't think anything change from the member of commerce that it can say that it's vital to us now to be a member because it keeps us up to date with the most information we need as well as new businesses, local businesses, it continues to market our brand, it markets what we do, it helps us grow our mission. Being a part of it today is important to us. >>

The services being authorized are for the individuals. Some of them are vocational skill building, some of them were even working on behavioral skill building. It would be having individuals that may get more upset when there's too many people around them or it's too loud. Were working on those skills as well as ensuring that it won't get in the way of them being able to perform their job. The other services we are providing for them are person centered. Everything we do at the Daily Plan It is person centered. They're going to,'s with a plan and in that plan we put in any services they are looking for and the staff in sure that they provide the best support to these individuals as possible.

Does that answer your question?

I think that does. Like you said, that unique mix of being able to have some of the cost of the delivery of the service be authorized through Medicaid helps keep our costs down which makes it much more competitive. I think having that unique mix is really important in this business model.

Another question that came in from the audience was what's the average retention rate of individuals? >> Placed in the Daily Plan It or outside in the workforce?

I assume it means placed outside.

To date anyone we place in a job that still with us there hasn't been any turnover. Some individuals, once they're placed in a job they don't want our service to continue or we provide follow up services because they don't want the outside community to know they have a job coach or support. What happens is they continue independent of our support which is great. We see that as a success. The individual still attending and have a job outside the Daily Plan It so far everyone is still employed and still attending.

Please continue to submit your Q&A. And take a minute to share little bit of the information and resources available through the business center. A lot of the community options especially in the first starting

in able to move forward is they can plea environmental scan of their area and that shows the different data where they identify the need for individuals that want and need employment services for the change in the environment and the way businesses work. One strategy that we strongly encourage when they're looking at the businesses is to begin an environmental scan. Understand what is happening around you and how your organization fits within that.

Reviewing it for those impacted developing strategies those that would be impacted.

Implementing the strategy you need to monitor it to make sure it's effective and you're getting the outcome you desire. When you look at an environmental scan for organizations for community-based that serve with disabilities there some key areas that

are work has found to be important. Looking at federal state, you're looking at rules and regulations. Looking at the competitors in your environment not others their other vocational sites that clients may choose from to make sure the services they are offering have value. Looking at who really helps you move your work forward.

Sometimes looking at technology and system requirements and capabilities. If you're working with the health plan you may want to require certain ways in which to share information that you have the ability to do that. Look at the general economy. Look at the demographics of the areas and in some cases, that might be changes

in businesses that bring in a younger population or an older population in our area. Look at the aging of caregivers. Finally, not last by any means are the potential payer. In this case community options looked at the Medicaid system. It looked at outside funders and payers that support the operations in businesses and institutions and so forth that's help the startup funding. Within module one there's a document toolkit. You see a template. This is a simple way to document the information as you collect it. All the same areas that I just identified. Look at change. How did it used to work? What's happening now? And what you see coming in the future. What you need to plan for? You use this information as you dive into a spot analysis. Look at your internal capabilities relation to what's happening within your environment. All this information can be found online.

It's available -- I think we have the wrong URL there. It should be at a see base at a see base@admin.org and search under the toolkit. You will be able to find step one prepare that walk-through. With that, I will open up the last 10 minutes here on environmental scans were for Dena and the work they've been doing at community options. >>

Why were looking at additional questions if we can restate our discussion about the services people receive at the Daily Plan It. When you work with Medicaid specifically what services is Medicaid authorizing for the people being served?

Medicaid is authorizing services that are within the person's plan. Whether it be supported on appointment, behavioral, vocational, day habilitation, transportation, Medicaid is authorizing any services the person is coming to us with that there in need of. We are able to provide them for the individual because we are an approved vendor for them. One of things I didn't mention is one of the training tools we do through the Daily Plan It is travel training. It's huge for individuals. Channel -- travel training helps them learn to take public transportation

and use the right schedule to get to work on time, come home after work is done, or if they need to walk or if they have other means of transportation there to get to and from work with we train them on that. We also make sure were ever their job is going to be that it's not too far where there's no transportation that can get them there. One of the great things is we can provide transportation for them or they come on their own and take public transportation in whatever form that is for them. That's a pretty cool tool as well. They are learning travel safety and stranger safety. >> I think this is a follow-up question. How are build patient services being filled for the services provided at the Daily Plan It.

It's during the time of vocational skill building. It's not during the time supported employment is happening. The individuals were work for a portion and then for another person -- portion they do skill building. Whether it's computer training, whether it's skill building training, whether were teaching them how to tie their shoes. Whatever's happening at that time is being billed for habilitation. When they're actually working in taking care the building and the tenants is one supported employment take place. At the time they're doing that I'm working they are not cleaning or taking care of the space they do vocational skill building. It's only the building itself that has the tenant.

How you recruit clientele. Where do you find the clients to the businesses and so forth. How do you find them, how do you find -- how they find you? Sometimes it's an ad put out.

Many times we have a waiting list of tenants.

One of the things we also do for the referrals for the individuals within the program as we reach out to the coronation agencies, we reach out to the vision and developmental disabilities and we say were taking referrals, whether it be via email, phone call, if we put out some for of constant contact on our website or in the newspaper we are constantly looking for a way to promote what were doing and promote awareness to the community. It's not looking for a new tenant or a referral but were looking for donors. This is a great model. For us to continue to emulate it we have to have the startup fund. When were actually going out there it's not just for the referral or tenant it's to continue to bring awareness to what were doing.

We have another question. I'll read it as it stated. How does a Daily Plan It

address the federal rule that you cannot pay individuals with disabilities more than half the minimum wage and bill for Medicaid at the same time? Are you building vocational build -- rehabilitation at the time?

Vocational rehabilitation for what?

I'm not familiar with this. It says there's a federal rule you cannot pay individuals with disabilities more than half of the federal minimum wage and bill for Medicaid at the same time. Asking if you're billing for vocational rehabilitation at that time?

We are billing day habilitation. During that time it's where both skills are being done. We are an approved vendor for day rehabilitation. Vocational is more supported employment. When we do our day rehab were not billing both at that time. They have falls under the parameter of one set of skills vocational supported employment where they're working.

What were training at that time is what were bill for. We can only bill and 15 minute units. Typically it's out for an hour and we move on to another skill it's the same thing as 15 minute units.

We don't go further than that for each type of skill because it becomes exhausting and we move on to the next step. When they're working, their billing built for supported employment. It's time the staff is demonstrating hand over hand working with them to get the skill completed. Does that answer the question? >> These are all questions submitted from the audience. Will have to see if we receive follow-up questions. It sound like you have [Indiscernible] that you provide to the capabilities to make sure you're billing the right parties and services for the right amount of time and everything else. I'm curious about when you started this program were the things you learned about how to manage things from administrative side that were different from other programs you offer?

With this we have different staffing we have a managing director that oversees the operations of data day. We were program manager that sits at the location and runs the actual program. We have a marketing purchase does. --. Person that make sure the building is running smoothly. We make sure the office spaces are rented out. We have created services team that works within a Daily Plan It that helps with any printing or prep. And then we have our direct support of Fishel that work one-on-one each day and give the support they need and once there done there's case notes that need to be created for the services provided. Then there's employment specialist that work with the individual during the time the receiving employment services. Again after their completed there has to be documentation in place in order for us to get paid. The program managers role to ensure all the staff are there that the individuals are safe that there following the curriculum that they're working and that there working

during that time that the program runs there are any incidents or pickups they need to take part in. We will

Will put your contact information up afterwards.

They're not being paid during the skill building sessions is that correct?

Correct. The can be paid during skill building. >> I don't know if you can answer this. Another clarifying question. Are you billing Medicaid at the same time paying individuals minimum wage and if so, for what service?

Supported employment.

This has been an exciting program that you presented. I personally was thrilled to see the connection between an organization that was fulfilling the mission, meeting individual needs, but also connecting

with the broader business community and creating options and opportunities for people to move be on the beginning workplace. I thank you for your submission and your time. For those of you on the line, if you have not viewed the webinar there's also an overview of the interview at the each BCS conference. Her information is on the screen now. Please feel free to reach out to her that will close today's webinar. Thank you for your presentation.

Thank you. [event concluded]