



Creative Support for People  
with Developmental Disabilities

# **ANNUAL PLAN FY 2018-2019**

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Developed May/June 2018

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## **MISSION STATEMENT**

The mission of Envision, Creative Support for People with Developmental Disabilities is to enhance the quality of life for people with intellectual and developmental disabilities in Weld County.

Developed February 2004  
Revised August 6, 2015

## **OPERATING OBJECTIVES**

Envision will:

Collaborate with individuals, families, friends and community partners to coordinate quality, individualized person centered services in a manner that provides choices and effective use of resources.

Provide advocacy and support to assist people with intellectual and developmental disabilities to live the lives they choose.

Encourage the provision of person-centered, self-directed services that promote inclusion, dignity, pride, self-worth and independence that create a sense of belonging and responsibility in the community.

Developed February 2004  
Revised August 6, 2015

## **VISION STATEMENT**

Empowering people to live, love, work and play their way.

Developed May 7, 2009  
Revised August 6, 2015  
Revised July 13, 2017

## ACCOMPLISHMENTS FOR FISCAL YEAR 2017-2018

### CASE MANAGEMENT AND ADMINISTRATION

1. Thus far in fiscal year 2017 through 2018, the following number of individuals have been enrolled in HCBS services:
  - CES: 12 enrolled, 7 pending, and 4 scheduled for assessment.
  - DD: 7 enrolled (4 emergencies, 3 transfers)
  - SLS: 13 enrolled and 7 pending.
2. Continued efforts in transitioning to a Person Centered Organization
  - Trained ten additional staff members as PCT coaches to assist employees with using person centered practices in everyday life.
  - Trained all new employees and host home providers with a two-day Person Centered Thinking training
  - People supported have access to case managers' one page person centered descriptions and can use these as a way of selecting their case manager.
  - PCO Leaders group recruited a person that is supported by Envision to serve as a member of the team. This group works to provide oversight to Person Centered activities within the organization and track progress at state and local levels.
  - Actively promoted and participated in efforts to provide no-cost person centered training throughout the statewide IDD community
  - Initiated a free course for people supported, "Planning with Me: Nothing About Me, Without Me", to learn person centered language, purpose, create their own one-page descriptions and empower people to advocate for themselves.
  - Change the name of the PCT course for people supported from "Workshop for People Supported" to "Planning with Me, Nothing About Me without Me" after a person supported said he "didn't want to go to a workshop" which he associated to a sheltered workshop.
  - Conduct monthly Lunch & Learn sessions to provide opportunities for employees to learn and practice PCT skills and tools Two of these Lunch & Learns included testimonials and panel discussions from graduates of the "Planning with Me" course.
  - Maintained three certified PCT trainers.
  - Supported certification of an employee to be a PCT Family Trainer.
  - Revised employee performance evaluation tools to incorporate PC language and categories to evaluate employee's use of PC skills and tools
  - Created one-page descriptions for Board of Directors, Human Rights Committee (HRC) and Family Support Council (FSC) membership. Doing so has resulted in the recruitment of four new board members, one new HRC and FSC member.
  - Implemented person centered practices into the RFP process by using One-Page Descriptions.
  - Using person centered practices and techniques, the Children and Adult Case Management departments re-organized their management structure in order to increase efficiency and reduce turnover. The plan included the creation of new job descriptions, manuals, the addition of Coordinator level supervisory roles, and adjustments to part-time positions.
  - Initiated a pilot project to introduce a new person centered Service Plan that has received positive responses from the people we support and their teams. It will be expanded to all areas within the next couple months.
  - Piloted laptops/tablets for case managers and docking stations to eliminate the need for desktop computers, hopefully to increase productivity and efficiencies in providing case management services while working directly with people/families.

3. The Early Intervention program fully transitioned billing from the Community Contract Management System (CCMS) to the newly created Early Intervention Colorado Database system, Salesforce (UNICORN).
4. Established viable working relationships with Regional Care Collaborative Organization's (RCCO) care manager entities through increased communication and collaborative practices.
5. Received two grants totaling \$10,750 that will be used to revitalize Envision's Lending Library for children and adults through the purchase of educational, adaptive, sensory and other therapeutic tools or equipment. The Lending Library will be accessed by staff and providers to allow individuals or caregivers to borrow the equipment on a trial basis before purchasing item through insurance or out-of-pocket. The goal is to ensure equipment is effective before purchasing and reduce the occurrence of unnecessary expenses.
6. Successfully conducted Envision's 4<sup>th</sup> Annual 5K In My
  - o 5K In My Shoes increased sponsorship by 12% from 2016, increased proceeds by 2.6%, and maintained the number of participants as prior years. Demographics showed that our marketing reach is expanding across Weld County and surrounding areas like Loveland, Longmont and LaSalle. 69.82% of respondents reported their first time participating in the race. Also, 16.55% reported 5K In My Shoes being the only race they choose to participate in each year.

### **Program Services Accomplishments**

- Maximized staff time during quarterly meetings to include additional training on Mandatory Reporting, Workplace Safety, and Personal Needs
- Revised interview questions for two positions
- Revised job descriptions for three positions throughout the year including changing the Program Services Technician position to be full time adding in job duties to support the medical functions of the department
- Developed a Program Services Technician training manual incorporating a lot of person centered practices
- Updated training manuals for Work Crew Member, Residential Program Manager position and Program Services Technician to be person centered and accommodate new changes necessary to each position
- Updated all of our application materials on how to become a Host Home Provider with Envision to align with our current practices including our person centered practices
- Requested the Envision website be updated to add a How to Become a Host Home Provider link which is now active with all of the current materials available online
- Expanded our residential services by contracting with seven more Host Home Providers allowing for more choice in residential placements as well as providing new residential services to four people
- Realigned our Residential department structure to gain more efficiencies
- Hired a fourth Residential Program Manager to help meet the demands of the Residential Program
- Developed an efficient method to submit Medicaid Redeterminations to help people maintain their benefits
- Received continued funding through the United Way to provide a Drop Off respite program to children and adults
- Secured a wheelchair accessible apartment for a person we support who expressed a desire to move
- Updated many forms to be Person Centered and reflect current practices:
  - o The person supported Rights flyer to be inclusive of all human rights

- Residential file review forms
- Residential home visit forms
- Residential and Day Program annual summary forms
- Day Program assessment
- SLS and COMP Termination Notices
- Medication Administration Procedure
- Developed and revised a new Medication Administration Course to be an approved training entity for the QMAP (Qualified Medication Administration Personnel) certification
- Committed to getting our direct care professionals trained in Person Centered Thinking so had a partial two-day closure of our day program to get everyone trained
- Committed to our ongoing hiring efforts and now we have secured a Now Hiring Sign to better advertise direct care openings
- Networked with the Evans Recreation Center and the highplains library district on activity development with a specific focus on community inclusion for the people we support
- Helped four individuals secure employment in community jobs
- Completed necessary provider transition plans for our day program setting to be in compliance with the final settings rule
- Added one additional agency shopper with the Weld Food Bank to help spread out shopping among our Host Home Providers
- Re-evaluated the intent behind HUD vouchers and helped people relinquish HUD vouchers to go to people in the county who are in need to help with securing affordable housing since they do not have comprehensive services

**NEEDS DETERMINATION OF ELIGIBLE PERSONS IN WELD COUNTY**  
**AND PLAN TO ADDRESS THE IDENTIFIED NEEDS**

**1. Increase in State-determined rates for people currently enrolled in and receiving services:** Envision is dependent upon the State Legislature, the Department of Health Care Policy and Financing/Office of Community Living/Division for Intellectual and Developmental Disabilities (HCPF/OCL/DIDD), and the Department of Human Services/Office of Early Childhood/Early Intervention Colorado (DHS/OEC/EICO) for adequate and equitable funding to provide services to people who have been determined to have intellectual and developmental disabilities/delays who are eligible for and are receiving services in Weld County. It is unrealistic to believe that in the foreseeable future Envision will have the ability to attain a long-term, ongoing source of local revenue that would be sufficient or adequate to positively impact our ability to provide long-term, ongoing services to more people in Weld County than are allowed through our current contracts with the State of Colorado. We have no local short or long term solution on our horizon to address the need for increased funding.

**2. Different Models of Service/Providers of Services:** We know that Colorado is in the process of Medicaid Waiver Redesign for the IDD system and from the information released to date by HCPF; we believe that the redesign has potential to positively impact people receiving services. There is also potential that people identified with very high needs may find they are unable to access funds great enough to meet those needs because there will not be an unlimited amount of funds available. While we continue to wait patiently for the redesigned waiver to become reality, we continue to experience difficulties with the waivers currently in existence in meeting people's needs. Not everyone requires the ongoing support of the SLS or DD waiver programs. Some individuals may need only occasional assistance to connect with services within the community, in a time of crisis or to help with more challenging tasks such as housing or benefits application, but do not need routine ongoing assistance. The availability of funding to meet these types of sporadic needs would provide the occasional and time-limited assistance needed by some people, thereby freeing up waiver services for other people with greater and ongoing needs. For individuals requiring less support than customarily provided in the SLS or DD waiver programs, Envision currently has an Intake case manager who assists individuals as needed during intake, connecting them to other existing community services, referring them to the Family Support Program, if qualified, and providing guidance and assistance when a crisis occurs. For those adults who do not qualify for Medicaid waiver services, we provide access to State Funded SLS. Envision continues to seek new providers, encouraging new and existing providers to expand their ability to provide services or consider providing different types of services. We will continue working with community groups to further develop "natural" support systems for individuals. Envision has an ongoing partnership with the local mental health center, North Range Behavioral Health (NRBH), to have a full time NRBH therapist with IDD experience located at Envision and available to provide therapy to individuals with IDD and to provide consultation with staff. We believe this arrangement is helping to build relationships and understandings that lead to better services overall for individuals with co-occurring IDD and mental illness (MI). An ongoing unmet need in Weld County is for resources or service models to address the needs of individuals with criminal behaviors, to help contain and provide re-training to change criminal behavior. Although this is not a large population, when there is a referral

for services for an individual with criminal issues, it is a struggle to locate appropriate services. Currently there are no program approved service agencies (PASAs) in Weld County that are providing this model of service. It is difficult to build understanding with the greater community regarding the limitations of IDD services and the need for cooperative services with probation, mental health/substance abuse, and human (social) services, as well as with the judicial system. In general we experience difficulty in finding providers who are willing and able to provide discreetly and specifically requested individualized services for people, and who have the knowledge and talent to truly connect people to their community to establish natural supports so paid assistance can be diminished. To try to address these concerns, this year we developed a plan with HCPF, CDHS – Office of Behavioral Health and the Weld County Courts that enables the people receiving services to attain community based restoration through behavioral services. This enables non-convicted people with IDD a financially feasible way to complete court ordered restoration with a qualified professional who has experience working with people who have IDD. Residential, out of home placements, are predominately provided through the host home model which often is not the most optimal or viable solution for individuals. We often hear providers say they attribute their lack of ability to meet individual needs/requests or to provide other models of service to inadequate reimbursement rates, an issue we have minimal ability to impact.

**3. More local providers for Early Intervention (EI):** A significant increase in referrals to the EI program in Weld County has resulted in more children being found eligible. Because of this growth, a greater number of providers of EI services are needed to provide families with choices of who provides their services. Along with that, Envision is working to ensure there are providers willing and able to bill multiple funding sources, specifically Medicaid and private insurances. We take advantage of every opportunity available to us to do frequent outreach in the community to communicate the need for more providers to serve families in Weld County. We discuss these needs at local events and community gatherings attended in our county and plan to continue those efforts. The EI Case Management provider liaison conducts orientation sessions at Envision six times per year for providers who contract with our EI program. The sessions are specific to both Envision’s EI program and to the state and federal rules and regulations. At this time there is no formal “training” or orientation provided by EI Colorado to ensure EI providers are well informed in the delivery of services, including understanding EI philosophy versus clinical services, the funding hierarchy, the billing system, or the data system. Envision’s EI department staff provides support and information in this area. During the orientation, EI providers are given a thorough overview of the EI model and service delivery expectations and are informed of Envision’s procedures and requirements. Prior to orientation, the EI coordinators spend a great deal of time coordinating with providers, scheduling time and space for meetings and ensuring appropriate provider documents are submitted to Envision and uploaded into the data system. They prepare packets for the providers to use during the orientation that include the presentation power point, relevant state requirements and regulations, EI forms and Envision contract requirements. They also include a survey for each participant so they can offer feedback on the orientation and offer comments and suggestions for improvement in the future. Attendance at the sessions ranges from 5 to 20 providers and we often have providers attend from other locations in the State outside of our specifically assigned area of Weld County.

**4. Employment for People Supported:** Employment for people with intellectual and developmental disabilities (IDD) continues to be a focus of attention in Weld County. We continue to struggle to find

viable opportunities for individual community employment for people with IDD. Many of the jobs that are available in our community require specific skills and certifications to perform. Further, with minimum wage increasing more businesses are looking more closely at efficiencies and reducing the number of employees they have rather than hiring. People supported who seek assistance to obtain a job and acquire the skills must be referred to the Division of Vocational Rehabilitation (DVR) for assistance. Fortunately, Envision has a very good working relationship with DVR in Weld County and the DVR staff assigned to work with us are very responsive and knowledgeable. DVR no longer has a waiting list for people to receive their assistance with employment and we are hopeful that will positively impact people with IDD. Some additional providers have begun to add employment to their list of services available and we do find that overall, employment for people with IDD has increased in Weld County. The State Employment Leadership Network (SELN) trainings that are offered through HCPF have been a good resource for employment providers. Additionally Envision has memberships with several local Chamber of Commerce organizations and staff participate in events that promote employment for people supported and to network with the business community.

**5. Services for Transition-Age Adults:** The increase in SLS resources has been very helpful in offering and providing services to many of the transition-age adults. Case Managers continue to serve on local school transition teams encouraging the development of employment while the student is completing school. We have been offering informational meetings at a variety of host sites (primarily schools) throughout Weld County. The information we have been providing includes eligibility requirements, the determination process, HCBS waivers and community resources. During March, we also participated in a panel discussion on Transitioning Kids that was hosted by the University of Northern Colorado. Case managers will continue to assist families and individuals to connect to other resources they may qualify for in the community that may be more beneficial for them than IDD waivers, including referring them to HCBS-EBD waiver services, Home Care Allowance, Home Health Services, EPSDT and other options. A gap or lack of information for people transitioning into adulthood and their families exists in knowing how to navigate benefits (social security, Medicaid, etc.) and frequently causes delays in enrollment processes. Case managers often spend many hours of non-billable time helping with these processes. The Social Security Administration office in Weld County operates on limited hours and no longer has the time available to provide detailed assistance to individuals who may require assistance. Additionally, the local Department of Human Services has changed some of their processes which have led to inconsistencies with their turn-around time certifying Medicaid eligibility. More recently, we began partnering with the ARC of Weld County and the UNC GOAL program to implement Project SEARCH for students in Weld County.

**6. Community Resources:** Public transportation within the Greeley-Evans area does exist through Greeley-Evans Transit (GET). While still not ideal for later night hours and weekends, the change in the hours and locations of services has been a positive improvement. The cities of Greeley and Evans have continued to grow in every direction and while GET has grown also, they have not expanded adequately to meet all of that growth. Public transportation in Weld County outside of the Greeley-Evans area is virtually non-existent. Envision participates in local and regional transportation groups that meet regularly to discuss county-wide transportation needs but, while there has been a lot of talk, little progress has been made. Key Envision staff will continue to participate on local and regional transportation groups and will encourage people supported, their family members, and staff from other Weld County provider agencies

to participate. Housing is extremely difficult to find in Weld County, especially rental properties. When wheelchair accessibility is also required it is nearly impossible. When housing is available, the rent is very high and usually unaffordable for people or is at an amount that would disqualify them from their housing resource. Envision continues to partner with local real estate agents and landlords to identify appropriate and affordable housing for people. Medical Medicaid providers willing to take new patients are scarce in our community. This is true of primary care physicians, dental and vision providers. We work closely with the local Regional Care Collaborative Organization as well as the North Colorado Health Alliance to attempt to address this issue.

**7. Guardianship/Representative:** Older adults with IDD often no longer have family members in their lives and as their health fails through aging or capacity diminishes, their need for a guardian increases. Some individuals have been declared incompetent through legal process and have had a guardian appointed but when the guardian passed away or experienced diminished capacity themselves, there has been no one to take their place. Public volunteer guardians do not exist in Weld County and the County itself does not provide guardianships except in extremely rare, typically abusive situations. We have occasionally been successful in having people who previously worked with the individual in some capacity step up to take guardianships but that is rare. When there is need for medical decisions to be made, teams often have had to scramble to find someone to be willing to be appointed as a Medical Proxy decision maker. To date, we have not experienced concerns with the relatively new legislation that allows medical doctors to make treatment decisions for people with diminished capacity. Individuals enrolled in SLS who have no family involvement experience the same concerns but have an added concern with lack of resources or options for individuals or agencies to serve as their Representative Payee, to assure that their Supplemental Security Income is spent as intended and needed to support them to meet housing, food, clothing and other needs as well as for recreation.

## **LOCAL ISSUES IMPACTING OR EXPECTING TO IMPACT WELD COUNTY**

**Person Centered Thinking/Person Centered Organization** Envision began its fifth year as a Person Centered Organization (PCO) and are now fully self-directed. We experience ongoing barriers in regularly and routinely connecting with staff to support our cultural change and their efforts to naturally incorporate person centered practices into the completion of their everyday tasks and job responsibilities. We are focusing our momentum on instilling person centered practices into all phases of our operation as we deliver services and conduct our everyday business, and to model person centered practices in all of our internal and external interactions with other IDD providers and with community partners. We changed the name of the course and have refined the curriculum for people supported and have expanded the group to families and people supported outside of our direct services. We have had 16 graduates of the program in the last year. Our three certified PCT trainers certified nine more employees as PCO Coaches. The PCO Leaders Committee was happy to accept membership from a person supported who graduated from Planning with Me.

**Workforce** Envision struggles with employee turnover as do many non-profit organizations. A variety of reasons contribute to that, including pay rates, a diminished benefits package, and high demand job responsibilities. We have stringent training requirements for our employees, high performance expectations and a high volume of work. We often find that our well-trained employees are attractive to other organizations who offer better pay and benefits and perhaps a lower volume of work and performance expectations. We believe another contributing factor is the constant change in how employees are expected to perform their job duties due to frequent changes in rules, regulations and requirements that must be met to remain in compliance with our contractual obligations with the State of Colorado. In order to meet those obligations we are dependent upon employees to assume additional responsibilities because there is seldom additional funding provided to enable us to employ additional people to take on those responsibilities. We often find it necessary to piece together assignments in order to complete them and sometimes the assignment has no direct correlation to the employee's actual job. It gets assigned to them because they happen to have the talent needed to accomplish it quickly or they "raised their hand" indicating they were willing to help. Frequent staff turnover is a drain on resources as recruiting, hiring and training is costly and it is a non-motivator to remaining employees, having a significant impact on overall morale of our workforce. We restructured some roles in case management to have one CM responsible for all FSSP families, regardless of age, and able to have one CM responsible for Intake and have a caseload of people on State SLS. Finally, the increase in minimum wage and our inability to increase wages for DSPs to above minimum wage has a negative impact on morale. We did bump up DSPs in January with the minimum wage increase but did not for any other positions; which is already causing a problem with "compression" of wages.

**Capacity of Service Provision for Adults – Lack of Response from PASAs** Although the number changes sometimes without notification, Envision currently has 86 identified Program Approved Service Agencies authorized to provide a variety of services to adults and children in Weld County through the CES, SLS and DD waivers and state SLS services. At the direction and choice of people receiving services, Envision case management assists them in seeking qualified providers to deliver the services they have selected to receive through RFP processes. Those processes can be complicated given the number of qualified providers authorized in Weld County. However, what we are often faced with is a

lack of response to the individuals' requests or responses to the requests that do not correspond to the actual services requested. The responses do not provide adequate information specific to the individual but instead are generic in nature, not taking into consideration person centered principles to address the needs and desires of the individual. This does not provide options to individuals nor does it provide the information necessary for informed choice making. People are expected to fit into what agencies currently have available, instead of receiving individualized services that meet their unique needs and wishes. We frequently hear from PASAs that reimbursement rates for people are not adequate to provide the services they request and, secondarily they say they are unable to provide services in Weld County until they have sufficient numbers of people to make it cost effective for them to do so. Another concern is again related to minimum wage increases. This has made it even more difficult for PASAs to find competitive, integrated work for people supported as many companies simply cannot afford to hire people with those increased expenses.

**Children's Extensive Supports (CES) Waiver and Supported Living Services Waiver (SLS) Growth and Enrollment** With the growth of the CES and SLS programs due to wait list elimination, workloads have increased requiring an increase in the number of case managers needed. Responding to referrals, completing intake and enrollment and on boarding services for a new enrollee is very time consuming. It is a complicated and overwhelming process that can easily get delayed or diverted for people and families unless case managers consistently support them to navigate the many tasks. Often receiving documents from or getting tasks completed by entities other than case management are less than timely and require constant checking and reminders, all of which contributes to the significant amount of time required for enrollments. We did complete some restructuring specifically around FSSP and Intake Case Management to help address the growing number of referrals and enrollments that are occurring.

**Early Intervention (EI) Growth and Requirements** The EI program continues to grow at a steady pace. Referral sources have increased as more outreach is made within our community. In some cases, referral sources tend to over refer and we often find case managers bogged down completing required referral tasks for numerous inappropriate referrals. With growth comes demand for additional services and service providers. Finding providers willing and able to bill Medicaid and private insurances is a barrier to effective use of the EI funding hierarchy. We will also need to consider the effect the GO4IT process will have on providers. Finding a Most Likely Provider to attend a Family Assessment/IFSP meetings is going to be difficult since most current providers do not have the 2 to 3 hour time slots available to attend these meetings. We reached out to home healthcare agencies hoping we would gain more providers but that has not been reality. EI Colorado has begun developing trainings that include telehealth as a method of service delivery which may allow families the opportunity to receive service at a time more convenient for them. Telehealth would also allow providers to support more families throughout the day by eliminating drive/transportation time.

**Technology:** The only constant with technology is change. Currently Envision's technology needs far outweigh our financial ability to obtain them. However, we have recently had the ability to purchase tablets and smart phones to assist case managers' working in the field at individual and family homes or other locations as needed. Although we made the leap to purchase this technology, we have great concern regarding our ability to financially maintain and upgrade the technology as needed. We look forward to greater efficiency through the use of technology. We continue to maintain an enormous volume of paper

documents which could be created and stored electronically if funds were available, thereby impacting both efficiencies and environmental considerations.

**Facility or Other Work Locations:** We have experienced significant growth in Children's Services, both Early Intervention and Children's Extensive Supports services and in adult Supported Living Services. Envision has added additional staff in case management to accommodate that growth and, with those additions, our building space is at maximum capacity. A portion of our workspace configuration does not allow for the level of privacy we would like to have to assure confidentiality and the ability for everyone to work efficiently. Leasing additional space is not a financial option for Envision at this point in time.

**Affordable Accessible Housing:** Housing in our Weld County community is at a premium. It is difficult to find affordable housing for people supported whether for families or for individuals. Coupled with that, finding accessible housing is virtually impossible. Many of the people supported benefit from the Section 8 voucher program but many are waiting for vouchers. The waiting list for Section 8 vouchers is currently frozen and the waiting list for income based properties/rentals is 2 to 3 years. Some rental agencies/companies will not accept section 8 housing vouchers, further limiting housing choices for people with limited incomes. This year we chose to no longer administer the Section 8 voucher program. We worked with the State and another local entity to move the vouchers we had been administering to another organization. Everybody whom we were the HUD Administrator for was able to keep their Section 8 voucher. It had become too difficult to hire and maintain an employee to coordinate those services, which is what led to the decision to ask another organization to manage them. Housing prices have increased statewide and the federal funds allocated to the state are not sufficient to maintain or grow the housing program.

**Conflict Free Case Management (CFCM):** HB17-1343 passed by state legislators during the 2017 session that will give clear direction to the Department of Health Care Policy and Financing (HCPF) on implementation of conflict free case management in Colorado as it relates to the federal final settings rule. At this stage there are still many unanswered questions regarding definitions, roles, possible rural/geographic area exemptions, and timelines. HCPF provided us with instructions and a workbook to complete our Business Continuity Plan (BCP) which is due 7/1/18. We have also been provided draft documents of what the requirements for a case manager and case management agency will be. One thing that is concerning is that if we want to continue to be a case management agency we must be willing and able to provide case management for all the waiver programs, which I think would be extremely difficult. We have also not been given information on what reimbursement for case management will look like; the other waivers do not bill TCM. It would be nice to have complete information before a decision for BCP is due. It is clearly evident that the overall structure of the community system for IDD services will see enormous changes over the coming years. Our staff and Board of Directors attempt to stay optimistic and to look at this requirement as an opportunity to expand and collaborate.

## OBTAINING INPUT FOR PLANNING AND PLAN DEVELOPMENT

- During Envision’s monthly Board of Director’s meeting, guests are able to provide feedback or input during public comments section.
- Envision’s Person Centered Organization Leaders and Coaches groups developed several subcommittees including a community outreach group that is currently targeting local schools to solicit input and develop the transition process for youth and young adults.
- Envision’s Board of Directors has a Fund Development and Communication Subcommittee developed a Speakers Bureau and contacted over 60 community and service organizations in Weld County to educate about services offered, person centeredness, and the IDD community, as well as to seek feedback and comments from the community.
- Adult Case Management conducted an annual survey in 2017. Feedback was solicited and is being analyzed for process improvement and quality assurance.
- Envision has created a Resource Fair event that is scheduled for May 1<sup>st</sup>, 2018. The event is intended to steer away from the traditional “Provider Fairs” but instead offer hands-on assistance and deliverables at the time of the event to the attendees, i.e. completing an intake, offering a therapy, scheduling tours, etc.
- Envision is having our first donor recognition event scheduled on July 26<sup>th</sup>, 2018. At this time, we will solicit feedback with a donor experience survey.
- Offer outlets on all of our social media pages, news feed and website.
- Participation in multiple community events during the year
  - IDD Awareness Day at the Capitol with Alliance Colorado
  - 8<sup>th</sup> Grade Career Festival
  - Johnstown Children’s Festival
  - Northern Colorado Children’s Festival
  - Evans Heritage Day
  - Greeley Stampede
  - Greeley Arts Picnic
  - Weld Project Connect
  - UNC CommUNITY Fest
  - Superhero Run

### **Additional Source of Local Input**

Local input from the community is obtained on an ongoing basis through active attendance and participation in community activities, community/state/national professional organizations, inter-agency meetings, intra-agency meetings, community forums, community organizations, community public events, State legislative activities and through formal and informal discussions with key local and state individuals. Below is a list of entities and sources that provide input:

- People supported and family members/guardians
- Private Therapists
- Host Home Providers
- Envision Staff
- North Range Behavioral Health
- Weld County Adult Protection
- Weld County Department of Human Services
- Private Community Providers
- Greeley/Evans School District 6
- School District REIJ, St. Vrain Valley

- School Districts RE-3J and RE-8
- Windsor School District RE-4
- Arc of Weld County
- People First of Weld County
- Centennial BOCES
- Weld County Government (County Commissioners)
- City and Town Councils/Boards of Weld County Communities
- Division for Vocational Rehabilitation
- Colorado Department of Human Services
- Colorado Department of Health Care Policy and Financing
- The Joint Budget Committee
- Local and State Legislators
- Community professionals
- Community businesses and employers
- Greeley Chamber of Commerce
- Carbon Valley Chamber of Commerce
- Johnstown-Milliken Chamber of Commerce
- Evans Chamber of Commerce
- United Way of Weld County
- Weld County Community Transition Team
- Weld County Mobility Council
- Alliance and Alliance Committees and Workgroups
- Weld Food Bank
- Weld County At-Risk Adult Law Enforcement Task Force
- Promises for Children-Weld County Early Childhood Council and Community Awareness Committee (LICC)
- Weld County Adult Protection Networking Committee
- St Vrain Valley Early Childhood Committee
- RCCO Region 2
- ADRC
- Area Agency on Aging/Single Entry Point
- Connections for Independent Living

## **Board of Directors' Goals and Objectives**

### **Fiscal Year 2018-2019**

#### **Goal 1:**

Support Envision in planning for impending regulatory changes expected in the intellectual and developmental disabilities system over the next three to five years and in developing primary leadership roles within the organization to meet those changes.

We will do this by:

- With Envision leadership relaying information to the Board of Directors (BOD) from statewide issues and communication, the BOD will consider the information provided and discuss options at monthly Executive Finance Committee and Board of Directors' meetings
- Oversight and evaluation of services/programs during the transition period to determine fiscal viability of each service area
- Working with the Executive Director in determining and designing the future role of the organization including leadership roles
- Actively developing a strategic plan with Envision leadership to include all aspects of Envision's programs, addressing needs of the people supported by Envision, as well as efficiencies of programs and processes

#### **Goal 2:**

Support fundraising, community outreach and engagement efforts to facilitate the functions and needs of Envision.

We will do this by:

- Partnering with Envision leadership to develop a strategic plan specific to fundraising for Envision's programs and staff
- Supporting and participating in planned activities/events
- Attending community events
- Leveraging personal and professional networks to solicit participation and donations

## **EXECUTIVE DIRECTOR GOALS AND OBJECTIVES**

### **FISCAL YEAR 2018-2019**

**Goal 1:** Assist the Board of Directors in planning for future direction of the organization regarding outcomes of Conflict Free Case Management (CFCM).

Objectives:

1. Actively participate in opportunities to influence impending changes in the statewide IDD system that will impact Envision
2. Actively participate in the development of Envision's Business Continuity Plan in regards to CFCM
  - Develop and implement a communication plan with all entities effected by CFCM including but not limited to people supported, families/guardians, PASAs and the community
  - Review/edit current and develop new procedures required for the Business Continuity Plan

3. Identify and engage with entities with whom Envision could collaborate to assure continuity of care for people receiving services

**Goal 2:** Advance person centered skills, tools and practices throughout the organization.

Objectives:

1. Regularly and routinely communicate PCO updates to all Envision employees, Board members and Host Home Providers
2. Implement an incentive program to encourage people to share success stories and vision victories

## **ADMINISTRATION DEPARTMENT GOALS**

### **FISCAL YEAR 2018-2019**

**DEPARTMENT LONG-TERM GOAL:** To support the overall organization by providing tools and resources that promote proficient performance of departments and employees within their respective roles and responsibilities.

**Finance Department Mission:** The mission of Envision’s Finance Department is to provide timely and accurate financial information using generally accepted accounting principles (GAAP).

**Finance Department Goal #1:** Examine, evaluate and update indirect expense allocation methodologies to insure equitable and accurate allocations are applied to all Envision departments and programs.

Objectives

- ∇ Examine and evaluate all indirect expense allocations – Staff involved: Finance and Administration Director and Accounting Specialist with feedback from department directors.
- ∇ Make necessary adjustments and coordinate allocation updates in accounting software with Accounting Technician. Staff involved: Finance and Administration Director, Accounting Specialist and Accounting Technician
- ∇ Accounting Specialist and Accounting Technician review all monthly allocations made in the general ledger for accuracy.

**Finance Department Goal #2:** Update and/or create financial written processes and forms to ensure that all employees receive consistent and accurate information about financial processes.

Objectives

- ∇ Document indirect cost allocation methodologies from Goal #1– Staff involved: Finance and Administration Director, Accounting Specialist and Accounting Technician

- ∇ Update and document billing processes and procedures – Staff involved: Finance and Administration Director, Accounting Specialist, Accounting Technician, EI Billing Technician and Medicaid/State Programs Billing Technician.
- ∇ Review, update and document the following Finance Department processes and forms
  - Mileage Reimbursement
  - Travel Reimbursement
  - Timesheets
  - Paid Time Off Request
  - Purchase Orders
- ∇ Update, document and implement annual budget process
  - Develop budget calendar
  - Develop Finance Department expectations of department directors
  - Develop department budget spreadsheets and instructions

**Human Resources Goal:** Improvement of staff Retention

Objectives:

- Investigate possible ways to improve employee retention by researching and collaborating with other departments on possible ways to retain current employees.
- Assess the viability/applicability of outcomes from the previous objective.
- Develop an implementation plan for any viable options and start implementation.

**Training Goal:** Develop a comprehensive approach to on-boarding, training and on-the-job training that gives employees the skills, knowledge of the individual or family, and person centered framework by which to optimally support people.

- Review current training curriculum and practices for effectiveness and efficiencies.
- Research training curriculum and various options of how training is delivered with consideration of different learning styles.
- Create and implement a comprehensive training plan based on the outcomes of the review and research conducted.

**Incident Report Management Goal:** Support case management by administering incident reports and the reporting process.

Objectives:

- Record incident reports in Envision database and enter critical incidents additionally in State of CO BUS Critical Incident Reporting System (CIRS).
- Route IRs to case manager, send reviewed/signed copies to relevant parties.
- Identify & report trends in incident occurrences.
- Conduct or oversee investigations into allegations of MANE.

**Safety Goal:** Promote practices that maintain a safe environment at Envision.

Objectives:

- Provide education and training to office staff and program participants.
- Coordinate safety inspections.
- Address incidents and potential hazards identified by staff, program participants or professional inspectors.

**Fund Development and Communications Goal:** Promote Envision’s mission, vision, and successes throughout Weld County in an effort to build corporate partnerships, identify matching grant opportunities, and expand donor and volunteer engagement while increasing awareness and acceptance of intellectual and developmental disabilities within the community.

Objectives:

- Collaborate with the Board of Directors Fund Development and Communications Subcommittee to:
  - Launch a cultivation plan that includes targeted communications to strengthen relationships with past, current and new contacts.
  - Secure, tailor and launch a fundraising platform and consolidate the donor experience.
  - Design a catalogue of materials that share Success Stories and promote Envision’s mission and vision. Also, recall any expired, outdated, or unbranded materials from all departments.
  - Migrate remaining fundraising history to Salesforce NPSP and utilize this platform for all fundraising tracking going forward.
  - Migrate and update Constant Contact data to MailChimp to enhance e-mail marketing campaigns and integrate with Salesforce.
- Develop a process for gathering and entering contact data from people supported and their families from all departments into fundraising and communications databases.
- Present person centered information and Contact Us cards at every community outreach opportunity.
- Re-design volunteer engagement forms, opportunities, and processes.

### **Children’s Case Management Department Goals**

#### **Fiscal Year 2018-2019**

Goal 1: Improve training process for new and ongoing employees, contracted providers, and community partners.

Objectives:

- a) Develop training materials for employee’s that pertains to the state data systems, processes, and procedures.
- b) Develop and present awareness material of our programs to community partners.

Goal 2: Improve the quality of Case Management for all Children’s programs

Objectives:

- a) Develop internal process for CM to work remote, fully implementing by July 1, 2019.

- b) Analyze overall department structure in consideration of CFCM, pilot restructure to better accommodate growth.

## **Adult Case Management Department Goals and Objectives**

### **Fiscal year 2018-2019**

#### Goal 1:

Share information and support Envision in planning for impending regulatory changes expected in the intellectual and developmental disabilities system.

- Explore options and information and share with leadership to aide decision making.
- Develop and practice efficient processes to effectively support people receiving services.
- Provide oversight and guidance to promote ACM in being fiscally sound.

#### Goal 2:

Practice person centeredness in all aspects of adult case management.

- Model person centeredness while completing ACM duties.
  - Perform ACM duties without bias to people served, providers, vendors, and others in order to achieve positive outcomes.
- Provide people receiving services with information and opportunities to express their choices, preferences, and goals.
  - Utilize the person centered individual service plan.
- Approach challenges with person centered practices in a way that is positive and remains focused on the person supported.
- Offer guidance in person centered practices to all stakeholders.

#### Goal 3:

Maintain a dedicated ACM team.

- Build and maintain strong team morale.
  - Support ACMs in a person-centered manner.
- Support ACMs with guidance, insight and time management.
- Provide clear expectations of responsibilities and accountability.
  - Develop clear updated ACM procedures.
  - Provide quality tools and equipment to support efficient and effective case management.
- Provide comprehensive, consistent training to enable ACMs to be knowledgeable and prepared.
  - Provide ongoing training and resources to promote confidence and growth.
  - Develop a new, updated training manual.
- Review caseload size regularly to insure optimum support for people receiving services and case managers are able to perform their tasks adequately.
- Provide strategies and support to record accurate targeted case management.

## **CM Quality Assurance Coordinator Goals**

**Fiscal Year 2018-2019**

**Goal 1:** Provide specific CM processes trainings as needs indicate to assure quality case management processes and delivery in a person-centered manner.

## **Program Services Goals and Objectives**

**Fiscal Year 2018-2019**

**Goal 1: To fully-implement person-centered practices within the Program Services Department, with an emphasis on person-centered outcomes.**

- Focus our efforts of service delivery to include the person-centered tool of matching.
- Continue to develop and update one-page descriptions for the people we support and for the various programs we offer.
- Use the person-centered tools of what's working/what's not working, and the 4 + 1 questions, as our methods for problem resolution.
- Utilize the donut sort as our main method of providing coaching and supervision to help employees and the people we support improve in the understanding of their roles and responsibilities.

**Goal 2: To work towards achieving compliance with CFCM and the HCBS Final Settings rule.**

- Conduct "Blue sky" sessions for each service area to identify areas we are not currently in compliance.
- Develop action plans with timelines to adjust services to be in compliance.
- Attend webinars and other development opportunities to learn about how to come into compliance with both CFCM and the final settings rule.
- Conduct ongoing "blue sky" sessions to continually assess our compliance in each service area and develop creative solutions.

## **AVAILABILITY OF PLAN**

The Annual Plan for Envision, Creative Support for People with Developmental Disabilities, is available on the Envision website and at the reception area of the administrative office during business hours. The availability of the Plan will be made known through the agency website, agency newsletter, interagency meetings, service provider meetings, agency departmental meetings, agency Board meetings and during general discussions with system stakeholders.