



Creative Support for People
with Developmental Disabilities

ANNUAL PLAN FY 2020-2021

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Developed May/June 2020

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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 2019-2020

CASE MANAGEMENT AND ADMINISTRATION

1. Thus far in fiscal year 2019 through 2020, the following number of individuals have been enrolled in HCBS services:
 - CES: 9 new enrollments/ total 84
 - DD: 2 new enrollments/ total 197
 - SLS: 11 new enrollments/ total 162
 - CHRP: 2 new enrollments/ total 2
2. Thus far in fiscal year 2019 through 2020, the following number of individuals have been referred to and enrolled in the Early Intervention program:
 - Total referred (including inappropriate referral – over age 3 or out of Weld County): 718
 - Referrals (not including inappropriate referrals): 673
 - Children actively receiving services: 512
3. Continued efforts in transitioning to a Person Centered Organization
 - Trained 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;
 - Hold regular PCT events to provide opportunities for employees to learn and practice PCT skills and tools;
 - Maintained one certified PCT trainer;
 - Continued revision of employee performance evaluation tools and job descriptions to incorporate PC language and categories to evaluate employee's use of PC skills and tools;
 - Continued use of person centered practices into the RFP process by using One-Page Descriptions;
 - Continued a pilot project to introduce a new person centered Service Plan that has received positive responses from the people we support and their teams; and
 - Use of the "PCO Pipeline" a document used to provide updates to stakeholders.
4. Successfully participated in the CCB Performance Audit by the Office of State Auditors and made changes required as a result of the recommendations.
5. Completed and implemented a Fund Development and Communications Strategic Plan.
6. Reviewed, revised or created multiple procedures related to the following services/programs:
 - Family Support Services Program
 - Eligibility Determination
 - Intake
 - Monitoring Services
 - Utilization
 - Critical Incident Reporting
 - Mistreatment, Abuse, Neglect and Exploitation
 - Incident Reporting
 - Program Services Procedures to meet the requirements of the HCBS Final Settings Rule
 - Facility Safety
7. Case Management is continually moving toward remote working, which has increased productivity and has helped address our problem with needing more staff but not having enough office space.
8. Actively participated in multiple meetings regarding "Conflict-free Case Management"
9. Two new local business community members joined the Board of Directors in the past year.
10. Maintained viable working relationships with Regional Accountable Entity (REA) care manager entities through increased communication and collaborative practices.

11. Participation in all four groups of United Way's new model of allocating funds called "Collective Impact" throughout the year, which equates to about four meetings/month.
12. Successfully conducted Envision's 6th Annual 5K In My Shoes
13. Successfully conducted Envision's H'Art of Envision Art Show.
14. Created new relationships with local businesses in support of special events, and to sponsor an "Employee Appreciation" BBQ in August
15. Hosted our 2nd Annual Rose Reception: an event to thank and recognize our partners, donors and sponsors.
16. Presented to 12 diverse community networking, service, or grant-making organizations about Envision and its important role in Weld County
17. Almost doubled previous Colorado Gives Day donation totals
18. Qualified, applied for and received a PPP Loan to help us retain all employees, even as service deliver and billing has decreased
19. Purchased tablets for all employees to be able to work remote during COVID
20. Purchased Zoom licenses for people to be able to conduct virtual meetings
21. Completed a COVID-19 Response and Communication plan for employees, people/families supported, vendors and stakeholders

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. With COVID and the Envision offices currently closed to the public, the NRBH Therapist is not coming to the office and is meeting with people remotely. 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, last 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 recently 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. Due to COVID-19, the Office of Early Childhood for the State of Colorado has changed eligibility requirements for EI effective 7/1/2020. They have changed the eligibility from a 25% delay to a 32% delay in one developmental area, which will disqualify some children that would currently be eligible. Additionally, currently, children who are found eligible would stay in the program and receive services until they age out at age 3. Also, effective 7/1/2020, be terminated from the program prior to their third birthday. With these two changes we expect

to be serving far fewer children at any one time during the year however, we still anticipate an increase in referrals.

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. In the past year, Colorado has become an Employment First State with an emphasis on competitive, integrated employment for all people. With COVID-19, and so many businesses unable to be open, we have not been able to secure new employment for people, and unfortunately, several people we had placed in community jobs have been laid off.

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. 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 had begun partnering with the ARC of Weld County and the UNC GOAL program to implement Project SEARCH for students in Weld County, but with COVID-19 these efforts have been put on hold.

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 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

COVID-19: Just a couple of months into this pandemic, it is really too soon to know or understand what long-term impact this will have on services for people with IDD. Currently, our building is closed to the public, we are not providing any services for Day Program, Transportation or Supported Employment. Our Case Managers are working 100% remotely, without any in-person visits or monitoring. The only services that are being provided in-person are through the residential programs. It's been a challenge to keep those programs staffed at the level needed, especially since the people they are supporting are now home 24/7 with no Day Program or work to attend. We have been unable to bill for the services that are not being provided, and are losing about \$110,000 of revenue/month. Fortunately, the PPP loan has helped us with the expenses that we continue to have.

Person Centered Thinking/Person Centered Organization Envision began its seventh year as a Person Centered Organization (PCO) and we are 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 no longer offer the PCT class to people supported, and are exploring other ways of helping teach people how to facilitate their own meetings, and advocate for what they want. We lost two of our three certified PCT trainers, and the one PCT Trainer we have certified 10 employees and six new Coaches. We also combined our Employee Engagement Committee with our PCO Coaches since they both had similar goals of employee morale, recognition and appreciation.

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 and background checks 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 over 90 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. With COVID-19, these issues and concerns have just been compounded.

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.

Children's Habilitative Residential Program (CHRP) Waiver Program: This program transitioned from Weld County Department of Human Services to Envision on 7/1/2019. In the first 11 months of the program, we completed assessments and began serving six children. There are very few agencies approved to provide CHRP services making it exceedingly difficult to enroll and begin services for children/families who desperately need support. There are not any approved child placement agencies in the county that would be able to help with an out of home placement if needed. We anticipate to double the number of children/families being served in this program in the next year.

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 two to three 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. As mentioned before, with the change of eligibility to 32% delay from a 25% delay, and kids leaving the program as they catch up to their peers, we anticipate to see an overall decrease in the number of kids/families served, but expect to see an increase in the number of referrals.

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. With COVID-19, we purchased additional tablets, and certificates for employees to conduct virtual meetings through different platforms. One big challenge is that not every employee has a cell phone, and with most people not working in the office, getting calls/messages transferred to employees has been extremely difficult. We will be pursuing different phone options, faxing/copying/printing, electronic signatures, and content management systems (document storage) in the next year.

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. COVID-19 has opened our eyes to the reality that many employees may be able to work mostly remote for longer-term than just during the pandemic. We will be assessing the needs of people/families supported, Envision, and employees regarding physical building space.

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 that is administered with a different, local organization. Housing prices have increased state-wide, and the federal funds allocated to the state are not sufficient to maintain or grow the housing program. There is not a lot of housing inventory for either purchasing or renting. Fortunately, new development of houses, condominiums and apartments continues.

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 was submitted 7/1/18. We have also been provided draft documents of what the requirements for a case manager and case management agency will be. In March of 2020, the State (HCPF) decided that they did not like the options that were provided in HB17-1343 and they do not want an entity to have the option of providing both Case Management and Direct Services, even if it is not to the same person. There was one meeting in which that scenario was presented and then because of COVID-19, and the need to focus on that, there has not been any additional information on CFCM.

OBTAINING INPUT FOR PLANNING AND PLAN DEVELOPMENT

- COVID-19 will significantly change the means by which we would normally seek feedback and input from constituents; activities/events that used to be in person will now be cancelled or conducted virtually
- During Envision’s monthly Board of Director’s meeting, guests are able to provide feedback or input during public comments section; as of 5/2020 these are occurring through Zoom
- 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; in-person meetings have been cancelled and some virtual presentations will be occurring
- Envision participated in a Resource Fair with the City of Greeley in August, 2019 and received over 100 responses through the electronic survey
- A link to an online survey will be conducted in the fall
- Envision will be hosting our third donor recognition event scheduled in August, 2020. At this time, we will solicit feedback with a donor experience survey; this will most likely be a virtual event
- Offer outlets on all of our social media pages, news feed and website.
- Participation in multiple community events during the year – at this point; many of the activities we would normally participate in have been cancelled. We will continue to participate in events that are held virtually

Additional Source of Local Input

Local input from the community is obtained on an ongoing basis through active attendance and participation (for this upcoming year, virtually) 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 RE1J, 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/North Front Range Metro Planning Organization
- 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

Annual Goals and Objectives 2020-2021

Board Objective for Current Fiscal Year

Continue to work towards our mission/vision for the people/families we support by taking action on the following goals:

Goal 1: Support fundraising, community outreach and engagement efforts to facilitate the functions of Envision and improve its financial stability

We will do this by:

- Partnering with Envision leadership to review/refine strategic planning specific to fundraising
- Increasing funding through:
 - Securing more household enrollments in the King Soopers Community Rewards Program
 - Securing individual donations/networking gifts
 - Supporting online fundraising campaigns
 - Developing a legacy gift program with expert advice
- Investigating additional methods of fundraising/creative sourcing
 - Virtual 5K In My Shoes
 - Virtual art shows/auctions
- Increasing our engagement with Envision social media – assisting with marketing content/interviews/video clips/community connections/informative content
- Participating in community events and planned agency activities
- Leveraging personal and professional networks to solicit participation and donations

Goal 2: Provide fiscal oversight as it relates to overall agency financial health

We will do this by:

- Evaluating the efficiency and effectiveness of Envision’s fiscal activities
 - Exploring opportunities for a new space/building
 - Developing creative strategies/technologies and infrastructure to continue supporting remote working
 - Pursuing additional community relationships and collaborations to leverage existing community resources
- Reviewing annual budget and monthly financial statements in a timely manner
- Overseeing and evaluating services/programs to determine the fiscal viability of each service area, while also understanding that rates/reimbursement may change in the future
- Taking action when payments from State entities are delayed
- Actively participating in monthly board meetings in which finances are discussed

Goal 3: 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:

- Actively engaging in legislative opportunities to influence decisions
- Supporting Envision leadership through change management and strategic planning
- 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
- Working with the Executive Director in determining and designing the future role of the organization including leadership roles

EXECUTIVE DIRECTOR

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

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 and changes of Envision's Business Continuity Plan regarding CFCM/CM Re-design
3. Identify and engage with entities with whom Envision could collaborate to assure continuity of care for people receiving services

Goal 2: Support departments and employees to efficiently, timely and accurately complete their work to improve the quality of services and maximize reimbursement potential.

Objectives:

1. Regularly and routinely participate in department director one-on-one meetings and department team meetings to discuss work quality, and revenue/expenses
2. Conduct a survey with all employees to determine "what's working/what's not" regarding remote/virtual working, and in-person work
3. Review outcome of the employee survey and work with Management Team to help provide needed resources to better support employees in the work they do

Finance and Administration Department Goals

Goal 1: Ensure that all critical processes can be easily understood and reasonably performed in the event an employee is ill or needs to be away from the office for an extended period of time and to promote remote working.

Objectives:

- Current written processes – Ensure all desk manuals and written processes are updated and current so all employees would be able to perform any job tasks if needed.
- Remote working - Set up all finance team with tablets so they can work from home if needed.
- Cross-training – Train employees and Finance and Administration Director on all job duties so they are able to fill in as needed.
- Electronic files - Establish a Content Management System. Within this system we will store documents, process workflows, and prepare fillable documents. This will also allow employees to access files and sign requests, if working remote.

HR/Training Goals

Goal 1: To focus on implementing an electronic benefit enrollment system with Shirazi Benefits to be utilized on or before open enrollment season in the fall of 2020.

Goal 2: To review and revise/update HR/Training policies and procedures.

Goal 3: To prepare and plan for COVID-19 potential surge in fall/winter, and ensure compliance with employment/employee rule changes due to COVID-19.

Fund Development and Communications

Goal 1: Optimize fund development and communications through the implementation of equipment and technology

OBJECTIVES:

- Increase donor base through more specific giving options with a focus on online giving through platforms like Give Lively and ColoradoGives.org profile
- Continue migrating donor history/data to Salesforce
- Implement a new, more user-friendly website using WordPress
- Revive the agency's e-newsletter using Constant Contact and continue building the contact list

Goal 2: Increase overall agency engagement from employees, volunteers, and the community

OBJECTIVES:

- Identify new grants, partnership opportunities & existing resources to compensate for the effects of COVID-19 on the agency budget
- Continue progress made on developing a stronger volunteer/intern program and create ways for people to support Envision remotely
- Solicit engagement from other community organizations, government entities, and the public by building a stronger social media/web presence supported by story/video collection

Goal 3: Assure quality and streamlined information is gathered and distributed that supports strategic conversation, decision-making and consistent communications internally and externally

OBJECTIVES:

- Develop a steady stream of content and calls to action for digital marketing/social media platforms to compensate for less in-person opportunities to promote Envision during the pandemic
- Work closely with Finance Director to create new ways to track and assess fund development activities more accurately
- Update the in-kind donor documentation process
- Update existing agency brochures and create print materials for programs/services that do not currently have this resource

CM Quality Assurance

Goal 1: Create and develop a strong Quality Assurance Team, assuring timely and quality completion of all:

- Intake and Determination tasks
- Warm hand-off to case management
- Investigations
- Family Support Services assessments and plans
- Review and feedback to case management monthly regarding 100.2 assessment, PARs and CIRs

To help accomplish, there will be:

- development of clear procedures for all tasks,
- hiring and cross-training four (4) individuals to complete all tasks
- consistent on ongoing training for staff
- administrative support with timely completion of routing referrals and reporting required data
- consistent tracking and timely submission of billable activities

Case Management

Goal 1: To improve the timeliness of case management delivery and increase revenue

Objectives:

#1: Effectively insure timeframes are met:

To include multiple areas of improvement: **1)** returning phone calls and emails within two business days and providing periodic updates on those emails and phone calls if not immediately resolved; **2)** scheduling all meetings within the month prior to the month the meeting is required (Quarterly Face-to-Face Monitoring visits, Annual Assessment visits, Service Plan visits); **3)** provide Case Management Technician notice of all scheduled visits upon scheduling; **4)** submitting PMIP requests in the third month prior to the end of the current plan period; **5)** completing annual 100.2 assessments (and targeting criteria assessments where applicable) in the third month prior to the end of the current plan period; **6)** verifying 100.2 assessments within ten business days of the date of the assessment meeting; **7)** finalizing 100.2 Assessments upon the date of the Service Plan visit; **8)** completing service plans within the second month prior to the end of the current plan period; **9)** verifying Service Plans within ten business days of the date of the Service Plan meeting; **10)** finalizing and submitting completed Service Plans for distribution 30 days prior to the end of the current plan period; **11)** verifying revisions to Service Plans within ten business days of the date of the requested change; **12)** finalizing revisions within five business days of verification; **13)** submitting revisions for distribution within two business days of the date of finalizing the revision; **14)** contacting individuals/families within two business days of the date of referral for initial assessment for waivers/programs we manage; **15)** scheduling initial assessments within ten business days of confirmation of a) active Medicaid and LTC or, b) submission of Medicaid and LTC applications to DHS; **16)** log noting all case management activity within five business days of

the date of the activity; 17) entering all CIRs by noon the day following notification of a critical incident; 18) responding to CIR follow-up requests within two business days of receiving the request

2: Increase TCM billable reporting

Early Intervention

Goal 1: Referral Implementation

- a) Explore use of referral team scheduling all EI Evaluations to open up time for SC's to focus on children and their case management expectations
- b) Have all employee's roles clear and defined
- c) Cross training of all positions

Goal 2: Remote Working

- a) 100% electronic and remote access to all docs, files, etc. and be able to have systems in place where working remotely is done all of the time
- b) Develop a process to monitor the quality of Service Coordinators working remote

Program Services

Goal 1: (Residential and Day Program Goal) 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
- Improve in our efforts of being person-centered with staff and providers

Goal 2: (Day Program Only) 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.
- Evaluate program efficiency and make level 1 changes as needed and suggest level 2 changes when necessary

Goal 3: (Residential Only) To have a collaborative effort to improve the health and nutritional needs of the people we support.

- Provide education on meal planning to the people we support and their staff/providers
- Develop new healthy recipes and share them, foster a community of sharing among staff and providers to share their recipes and meal planning tips
- Conduct “Blue-sky” sessions for how to communicate health and nutritional needs
- Engage staff and providers in training and education around special diets and dietary needs
- Communicate regularly to ensure staff and providers are trained and comfortable with keeping people healthy and safe

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.