

# PHASE-Industries (P-I)

## TTCW Transformation – Strategic Plan

Plan Date:

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Name of Organization

PHASE-Industries

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## Section 1: Leadership, Focus, and Values

### Mission, Vision, Values

The Organization underwent an intensive process, including multiple stakeholder input sessions and feedback strategies, to review and modernize the Mission, Values, and Vision statements in Q4-2022 & Q1-2023.

These statements were evaluated through the lens of market trends, funding & regulatory shifts, alignment with current-day thinking on organizational purpose and, most importantly, the stated desires & expectations of individuals served. Below are the Q1-2023 Board approved Mission, Vision & Value statements for PHASE-Industries.

**Mission:** PHASE-Industries empowers Program Participants to live, work and thrive through the discovery and development of their individual abilities.

**Vision:** PHASE-Industries is the trusted partner in community supports, where compassion, expertise, and opportunity merge to create a world of discovery and success.

### **Values:**

- ***Program Participant First*** – Considering openly how all processes, actions and decisions will affect program participants. Every decision must benefit program participants.
- ***Service for Social Good*** – Actively promoting societal improvement through full inclusion & participation of individuals with disabilities in their communities, occupational pursuits and life choices.
- ***Excellence*** – Cultivating in every Team Member the person-centered values, technical proficiencies, best practices, and accountability required to improve the lives of persons served.
- ***Ethical Integrity*** - Acting at all times with only the highest of ethical integrity and scruples.
- ***Large Minded***– Choosing an empowered state, seeing possibilities, creating solutions.
- ***Empowerment*** – Committing in action to individual and team development, recognizing competence, and reinforcing excellence.
- ***Innovation*** – Committing to new ideas and creative solutions.
- ***Fun at Work*** – Promoting an enjoyable and fun workplace in the course of serving others.

## Transformation Goals

Underlying the development of specific organizational goals, and as part of the process of modernizing Mission, Vision & Values, the Organization examined its purpose and continued relevance, seeking to answer the question of why we exist, and why endeavor into transformation.

Inherent in the Mission, Vision & Values is the deeply held belief that every human being has gifts & potential waiting to be unlocked & discovered—that the world, and humanity, flourishes only when each person’s gifts are revealed, cultivated & celebrated. Further, in partnership, everything PHASE-Industries does should be designed to help individuals unlock, discover and develop their potential to fully participate in the world around them, including freely & equitably accessing competitive integrated employment. PHASE-Industries

will seek to accomplish this through fully-inclusive, person-first, person-centered, best-practice and expert supports.

With the question of why the Organization exists answered, the last foundational component answered was, “why transform?” The answers revealed themselves through the process described above, and include:

*...Because program participants have asked for more job opportunities, at better rates of pay, and in the community year-after-year on satisfaction surveys;*

*Because nothing and no one remains static;*

*Because new and better methods of helping individuals pursue and attain satisfying employment exist, yet remain mostly untapped;*

*Because we have witnessed the immense satisfaction of program participants when they work and are competitively paid;*

*Because occupational choice and satisfaction are vital to living one’s best life;*

*Because everyone has right to fully explore the world...the vocations...the opportunities...the risks around them, free from restraint; for, without full exploration, true informed consent does not exist;*

*Because we are in a better state when we are learning;*

*Because we can better help those we support access the deep well of potential they possess.*

For these reasons, we have chosen to transform our thinking, learning, expectations and organizational rhythms, in order to deliver a better, more potent product to individuals served.

**Transformation Goals** – The overriding Transformation Goals identified here are built out in greater detail throughout the remainder of this Plan with corresponding objectives, strategies and action plans. As a result of the work of this transformation plan:

- Individuals will fully explore their own pathways to inclusive & competitive employment possibilities...to learning...to meaningful activities and relationships through supports that are flexible, community-inclusive and expert.
- PHASE-Industries will discontinue any and all supports that result in the payment of subminimum wages.
- PHASE-Industries will end its use and status as a holder of a U.S. Department of Labor Commensurate Wage Certificate.
- PHASE-Industries will strengthen and promote its supports & services that result in competitive integrated employment.
- PHASE-Industries will elevate & improve its non-employment-based supports to be community-integrated, person-driven, and inclusive of standard elements within the service model (e.g. core discovery process, enhanced informed consent practices, integrated relational learning modules, more effective use of technology in achieving outcomes, etc.).
- PHASE-Industries will enhance potency & effectiveness of supports at the point-of-service through revised performance expectations, elevated qualifications, overhauled training & certifications in best-practice technologies, and outcome-based performance measurements.

PHASE-Industries will convene multiple Teams and subgroups to accomplish the work of its Strategic Transformation and the TTCW Plan. These include:

- Cross-organizational Project Team, comprised of the CEO, Director of Operations (fiscal representative), COO, Human Resources Director, Director of Employment & Development, Designated Coordinator, Executive Assistant, Employment Consultant (point-of-service position) and Direct Support Professional (point-of-service position). The Project Team acts as the accountable party in the design, development, implementation, performance measurement & monitoring, and reporting of the Strategic Transformation/TTCW Plan.
- Service Coordination Team, comprised of CEO, COO, Director of Employment & Development, and Executive Assistant. This Team is accountable for layering in field and service-specific expertise and evaluation into the mechanics of the TTCW Plan & implementation. This Team reports relevant information, decisions and recommendations to the Project Team.
- Senior Leadership Team is responsible for the wholistic review of TTCW Plan, implementation, outcomes performance, and analysis & action around business operation implications. This is the Organizations standing leadership team (exclusive of the TTCW Plan), and is comprised of the CEO, COO, CFO, Human Resources Director, Director of Employment & Development, and Director of Operations.
- Board of Directors is responsible for providing, discussing, and determining how stakeholder inputs & market conditions intersect with the Organization’s Mission/Vision/Values, and adjust accordingly. Further, the Board is the accountable party for overall fiduciary oversight, monitoring the impact of services/programs, and final approval of the Organization’s Strategic (Transformation) Plan.
- TTCW Project Subgroups – several subgroups are identified, some of which are existing teams (e.g., Program Leadership & QA Team). These subgroups are intended to provide meaningful input into the development of the TTCW Plan, its activities, and the cascading/communication strategies relevant to the Plan. One or more of these subgroups will be utilized, at various times, to act as the operational “task force” for various components in the Plan’s objectives, action steps, or where more technical expertise/consultation is required. Initial subgroups include: Program Leadership & QA, Technology & Finance, Talent Management/HR, and Piece-Rated Program Conversion.

**Is the transformation goal shared by each of the following stakeholder groups?**

The TTCW Transformation Goal is part of the Organization’s larger Strategic Plan. Although the TTCW Plan addresses the TTCW Grant-specific goal of eliminating use/payment of subminimum wages, the TTCW Plan represents an inherent, consequential and essential part of the Organization’s multi-year Strategic Plan. As such, the two will ultimately be merged to act as one-in-the-same. This is important because the initial step in approaching organizational strategic planning is understanding purpose and its intersection with stakeholders. The TTCW Plan development requires the same, and associated steps are outlined in this document. The goals, strategies and action steps outlined here are designed to ensure stakeholders are supportive of, and supported by, transformation goals. As of this writing, all identified stakeholders have been invited to engage in these structured engagement opportunities, and buy-in and alignment are rated as high.

If efforts are needed to align goals across all stakeholder groups, include the objective(s) and action steps to meet the objective(s).
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Objective(s)	Action Steps (including quarter)
<p>1. The broad base of PHASE-Industries stakeholders shall have meaningful input into the Organization’s intention to transition to competitive wages and accordingly align its foundational statements &amp; operations.</p>	<ol style="list-style-type: none"> <li>1. Q4-2022 &amp; Q1-2023: Engage internal and external stakeholders in discussion and interactive feedback regarding the intent to transition to competitive wages, inform the Organization on alignment/misalignment of transition intentions &amp; existing Mission/Values/Vision/Purpose.</li> <li>2. Q1-2023: Use information gathered from multiple feedback platforms (e.g., meetings, community sessions, surveys, email, phone calls, one-to-one visits, etc.) to evaluate stakeholder desire/expectations and, if/as applicable, modernize the Organizations foundational statements (Mission/Vision/Values).</li> <li>3. Q1-2023 &amp; On-Going: The Project Team shall develop a multi-platform &amp; continuous communication strategy to both inform and engage stakeholders of the Organization’s intentions, changes, progress and <i>continuous quality improvement</i> strategies.</li> <li>4. Q2-2023: Conduct an all-staff, all-day in-service experiential training focused on: transformation goals in daily practice, definitions (e.g., CIE, CLE, etc.), live CIE lived experience testimonials, change management &amp; habit building, DSP career ladder &amp; CE Certification opportunities, and best-practice technologies.</li> </ol>

**How will your organization align your agency culture with your updated goals and new ways of thinking?**

The shift in organizational culture to align with transformation goals requires meaningful engagement across the organization, clarity in communicating the transformation goals and how they translate to day-to-day activities/behaviors, repetition of consistent messaging in multiple formats & environments, and reinforcement of aligned activities/behaviors paired with real-time correction of misaligned activities/behaviors.

If changes are needed to your organization’s culture, include the objective(s) and action steps to meet the objective(s).

<b>Objective(s)</b>	<b>Action Steps (including quarter)</b>
<ol style="list-style-type: none"> <li>1. Introduce workforce to transformation intention, and engage in design &amp; implementation of steps to accomplish goals.</li> <li>2. Reinforce organizational behavior when transformation objectives and goals are successfully accomplished—publicly celebrate successes.</li> </ol>	<ol style="list-style-type: none"> <li>1. Q2-Q4 2022, Q1-2023: Introduce intent to transform to workforce via newsletter articles (written), small group local meetings (written &amp; verbal) and interactive engagement sessions (written, verbal &amp; interactive).  Q4-2022 &amp; on-going: select transformation project team &amp; cross-organizational working teams to build action steps around transformation goals. Maintain engagement of these teams throughout grant timeline (through 3/31/2024). Use input from each of these teams to inform communication messages to stakeholders during each “cycle” of the project. A key strategy here is to intentionally structure decision-making &amp; service-rebuilding at the point closest to services (i.e., pairing authority to design the steps needed to transform with the responsibility to carry them out &amp; manage outcomes).</li> <li>2. Q2-2023 &amp; on-going: Project Team to work with local teams to create a method of recognizing successes &amp; accomplishments directly related to transformation goals, with a focus on swift &amp; public recognition.</li> </ol>

## Section 2: Infrastructure, Operations and Finance

### Operations

Examine your organization’s current physical infrastructure and assets. **What is your organization’s plan to address needed changes to infrastructure during your transition?** Are there buildings, vehicles, etc. that will need to be sold or repurposed? Will your organization need other infrastructure that it currently does not have?

P-I has four DHS 245D-licensed sites and one thrift store. These are located in the communities of Mora, Cambridge, Sandstone and Beroun/Pine City. P-I owns 43 passenger vehicles, including sedans, minivans, 12-15 passenger full-sized vans, fully accessible buses, along with multiple box trucks, trailers, forklifts, and a skid steer. P-I maintains two comprehensive, multi-user woodworking & furniture-building operation (Cambridge & Beroun).

The objectives & action steps below relate primary to P-I’s Prevocational Services and, to some extent, Day Support Services. It should be noted that P-I intends to maintain, but reconfigure, Prevocational Supports using current Community Hub/Licensed Sites. While the Prevocational Service Model is modernized and changed, use of these locations, along with P-I provided work, is necessary to honor a reasonable pace of change & stability (persons served), fast-track relinquishment of P-I’s 14c certificate without jeopardizing wage earnings of persons currently served, and allow adequate time to effectively implement transformed models of support, one person at a time.

If changes need to be made to your organization’s infrastructure, include the objective(s) and action steps to meet the objective(s).	
Objective(s)	Action Steps (including quarter)
<ol style="list-style-type: none"> <li>1. P-I will continue to replace full-sized vehicles with smaller sedans and minivans, while maintaining access to fully accessible buses in each quadrant of its operating regions.</li> <li>2. Redefine &amp; repurpose P-I owned program spaces (i.e., buildings and programs). Infrastructure shall be examined and repurposed (or released), as needed, to support the strategic intentions of the organization, including prioritizing CIE as the preferred employment outcome, but maintaining P-I owned spaces into the 2-5 year range (as all Plan activities are fully implemented).</li> </ol>	<ol style="list-style-type: none"> <li>1. Q1-2023: 2023 Annual budget &amp; vehicle replacement plan approval, with \$200k budgeted for replacement vehicles. Plan, and subsequent year budget, to be modified in Q4 of each year.</li> <li>2. Q2 2023-Q1 2024: TTCW Project Team &amp; the Program Leadership Subgroup shall redesign &amp; implement new Prevocational Support Tracks to align with Strategic Intent (prioritizing CIE as preferred employment outcome &amp; incorporating CLE Community of Practice principles). Project designees shall monitor &amp; report</li> </ol>

<p>Improve the DSS Model of Support to promote &amp; increase full community inclusion, in enhanced person-centered &amp; directed approach (infusing best practice technology – CLE training &amp; implementation- at point-of-service).</p>	<p>qualitative performance metrics upon approval &amp; initiation of new Tracks (Q3-Q4 2023).</p> <p>Q3/Q4 2023 – Designate DSS Redesign Taskforce to design &amp; present to TTCW Project Team a DSS Improvement Plan, which will seek to increase quantity &amp; quality of supports, &amp; experiences in the community (“in-community” versus “of-community”, improve the informed consent process, strengthen natural supports in the community, enhance meaningful exposures &amp; experiences in fully inclusive settings, and result in transferrable (outside the scope of services) and personally meaningful life activities for the person served.</p> <p>Q2 2023 – Add CLE orientation training to new hire training curriculum, using MTI CoP training materials.</p>
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**Describe your organization’s plan to phase out use of the 14c certificate.** Include the organization’s plan for building capacity to support people in engaging with, planning for, finding, and succeeding in competitive, integrated employment.

<p>Include the objective(s) and action steps to meet the objective(s) to phase out use of the 14c certificate.</p>	
<p><b>Objective(s)</b></p>	<p><b>Action Steps (including quarter)</b></p>
<ol style="list-style-type: none"> <li>1. Establish, gain approval, and cascade Policy with target dates to end use of 14c with new entrants; establish &amp; cascade target date to fully eliminate use of 14c.</li> <li>2. Redefine purpose of work contracts, and realign the contract &amp; use of accordingly.</li> <li>3. Integrate lessons &amp; successes from other organizations that have transformed to discontinue 14c &amp; prioritize CIE.</li> </ol>	<ol style="list-style-type: none"> <li>1. Q1 2023: Draft &amp; secure Board approval on Policy on ending the payment of subminimum wages to new admissions. Upon approval, include target dates in stakeholder communications, as part of the larger transformation message.</li> </ol> <p>Q1 2023: Set target date (7/31/2023) to end status as a Commensurate Wage Certificate holder with U.S. DOL, and fully discontinue payment of subminimum wages accordingly.</p>

<p>4. Create pathway to employment for each person utilizing Prevocational supports, who chooses employment as an outcome. All individuals wishing to work will: be supported using <i>Individualized Path to Employment</i> model of supports (field-tested best practices technologies &amp; models) to discover &amp; fully explore their occupational interests &amp; aptitudes.</p> <ul style="list-style-type: none"> <li>• Enhance Informed Choice facilitation as a standard part of services.</li> <li>• Develop time-limited employment readiness standardized curricula, with flexibility to be applied based on individual interests, strengths, focus areas, goals, etc.</li> <li>• Increase visits, meetings and interviews with community businesses by person’s served, as a standard &amp; recurring support activity within Prevocational Services.</li> </ul> <p>5. Successfully define &amp; build practitioner competencies in multiple models/strategies to assist participants to obtain and retain work.</p> <p>6. Successfully relinquish 14c Certificate by target date (7/31/2023) in compliance with DOL &amp; FLSA.</p>	<p>2. Q2 &amp; Q3 2023: a) Initiate formal map of new CIE <i>Individualized Path to Employment</i> supports for persons served (one person at a time), and each new enrollee. b) <i>Study</i>, align and selectively maintain, change or discontinue prevocational-related work contracts to: pay at least minimum wage, act as one piece of a newly-designed multi-focused activity to support development of market-ready, transferable qualifications &amp; competencies needed for CIE.</p> <p>3. Q1 2023 &amp; on-going: engage in formal &amp; informal mentorship opportunities with other organizations who have successfully undergone similar transformation initiatives to inform our plan, systems and operations. TTCW Project Team to coordinate with at least two other organizations (can be mix of formal &amp; informal relationship).</p> <p>4. Q2 2023 (initiate) &amp; on-going structured implementation: Strengthen &amp; infuse Informed Choice Facilitation training to all DC &amp; DM positions. Beginning Q3 2023 &amp; ongoing: apply this training to all point-of-service staff.</p> <p>5. Q4 2022: Add CE/Discovery service to Master VRS Contract.</p> <p>Q2 2023 &amp; Q3 2023: Design training &amp; competency testing plan for the support modalities of conventional job development (i.e., fitting job seeker to CIE) and self-employment, among others, similar to practitioner competencies required in CE Certification.</p> <p>6. (Q2 2023) HR &amp; Operations – research all 14c relinquishment implications within existing P-I HR policies/practices. HR Director shall modify Policy &amp;</p>
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	Practices to comply with DOL/FLSA after 14c elimination. Director of Operations to Communicate in writing intent to withdraw 14 c certificate to DOL W&H Division to ensure smooth process and transition.
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**Describe how your organization will update and implement policies and procedures to support the organization’s business transformation plan and transformation efforts.**

P-I shall use its existing process of policy development & approval to update relevant policies. Specifically, the TTCW Project Team shall draft a Policy & Procedure on discontinuing payment of subminimum wages to new entrants, for approval by CEO, along with the Board of Directors. Policy & Procedures, both new and updated, shall be cascaded to key stakeholders (persons served, workforce, guardians, providers, community partners, etc.) using a mixture of communication platforms (website, social media, print, email, etc.). It is the responsibility of the Senior Leadership Team to ensure & monitor implementation of these Policies, Procedures, and associated operating plans.

If changes are needed to policies and procedures, include the objective(s) and action steps to meet the objective(s).	
<b>Objective(s)</b>	<b>Action Steps (including quarter)</b>
1. P-I shall take the needed step of ending payment of subminimum wages to new entrants, in its goal of transitioning fully to competitive wages.	1. Q1-Q2 2023: P-I shall develop a policy to accept no new entrant to subminimum wage employment, including selecting the target implementation date (5/31/2023). This policy shall be presented to the Board of Directors for approval (Q1-2023), and upon so, communicated to PHASE-Industries stakeholders (as part of the strategic & on-going communications plan) (Q2-2023).

If changes are needed to your organization’s use of technology, include the objective(s) and action steps to meet the objective(s).	
Objective(s)	Action Steps (including quarter)
1. Program and Finance utilize software that creates increased efficiencies.	<ol style="list-style-type: none"> <li>1. Research software platforms for VRS and Waivered program services. (Q4 2022 and Q1 2023)</li> <li>2. Program and Finance review and make recommendation. (Q2 2023)</li> <li>3. Demo for SLT for approval (Q2 2023)</li> <li>4. Create limited Pilot for implementation test &amp; train pilot personnel (Q3 2023)</li> </ol>
2. Each staff will be assigned a computer or tablet for quick and easy access throughout the day	<ol style="list-style-type: none"> <li>1. Identify available inventory (Q2 2023)</li> <li>2. Determine if more computers / tablets need to be purchased Q2 2023)</li> <li>3. Purchase equipment (Q3 2023)</li> <li>4. Develop standardized definition of CIE and train staff to record relevant performance outcome data to support management reporting, monitoring, and quality improvement. Q4-2023).</li> </ol>
4. All Program Participants have access to computers as a tool to aid in achieving their goals	<ol style="list-style-type: none"> <li>1. Q2-2023: Identify current inventory and access needs for each program</li> <li>2. Q3 2023-Q1 2024: Purchase, designate &amp; train on needed equipment.</li> <li>3. Q3 2023 &amp; on-going: Distribute equipment that will be tracked through annual IT inventory process</li> </ol>

**Describe your organization’s approach to transportation.** Include how you will ensure a variety of transportation options (including public options when and where available) enabling people to explore and participate in competitive, integrated employment and community life. Include any local partnerships, as well as strategies to develop and/or increase transportation independence among people receiving services. Describe how your transportation resources will be aligned to support an individualized competitive, integrated employment approach.

Transportation remains one of the primary barriers to employment placement stability in Region 7E, with only two public transit providers with limited hours/days, extremely limited Uber/Lyft-type services, and nearly non-existent employer-sponsored ride-sharing or facilitated transportation programs. P-I is highly engaged with the Region’s transportation commission (i.e., ECRDC-RTCC), tasked, in part, with expanding & coordinating transportation options (including fully accessible) in the region. The RTCC was tasked with developing a 5-year Local Human Service Transportation Plan (approved by

Mn-DOT 12/2022). This Plan includes all of the current resources around transportation in the Region, and seeks to significantly further expansion coordination efforts within existing and new partnerships. As P-I is both a member and Chair of the RTCC, the organization will ensure alignment of changing transportation needs from its own transformation with the focus of the RTCC.

Further, P-I has an existing fleet of over 40 vehicles, in multiple sizes and levels of accessibility. More will be added to the fleet in 2023, and the organization will continue to build its fleet of smaller vehicles to support individual/1-1 and small group supports. P-I will engage local transit providers and, ultimately, businesses in determining the on-going (and changing) demand for CIE transportation supports, as outlined in objectives/action steps below. There is a very real possibility that P-I may need to provide its own vehicles and multiple new individualized/small group trips for 2-4 years, until overall demand capacity at similar days/times/locations triggers new public transit routes/ride availability.

Include transportation-related objective(s) and action steps to meet the objective(s).	
Objective(s)	Action Steps (including quarter)
<ol style="list-style-type: none"> <li>1. P-I vehicle inventory management supports CIE &amp; other Strategic Goals.</li> <li>2. Organization supports accessible transportation expansion in the region, while managing and utilizing its own fleet of vehicles to support transformation goals while regional capacity develops (2-10 years).</li> </ol>	<ol style="list-style-type: none"> <li>1. Q4 2022: Establish vehicle replacement budget &amp; plan consistent with the assessed balance of accessibility with individualized supports in community, including the promotion of natural supports.  <i>Note: see Section above for additional vehicle use &amp; replacement strategies.</i></li> <li>2. Q4 2022 &amp; on-going: Transportation Manager shall consult program leadership in its vehicle management &amp; replacement activities, ensuring sufficient P-I vehicle inventory &amp; access to accommodate a full array of transportation needs (individual trips, small group trips, accessible vehicles, access 24/7 as needed)  Q3 2022 &amp; on-going: P-I shall advocate as a member of the regional RTCC (and associated transportation groups, as apparent) to promote systematic &amp; coordinated expansion of accessible transportation options. Focus on first/last mile options, accessible vehicles, evening/overnight/weekend hours of public or affordable private transportation options.</li> </ol>

	<p>Q4 2023 (estimated): P-I will meet with key regional employers to, among other areas consistent with this Plan, establish creative employer-sponsored ride-share programs intended to: support natural transportation supports of employees, and improve employer recruitment &amp; retention.</p>
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## Communication and Stakeholder Engagement

**Describe your organization’s internal and external communication plan, including messaging, modes of communication, time frames for implementation, and staff responsible.**

<b>Stakeholder Group</b>	<b>Key Messages</b>	<b>Modes of Communication</b>
People receiving services	<p>P-I as partner in support;</p> <p>P-I strategic intent to improve supports based on your feedback—better pay, more employment opportunities, and in the community (CIE).</p> <p>Clarity on what may be different (e.g., change to MW as of 8/1/23), how it affects you, and opportunities for engagement/feedback on changes.</p> <p>You drive your services. We are your partner in supports, who can help you experience that for employment and non-employment.</p>	<p>Verbal (one-to-one &amp; group); written; website &amp; social media regular postings/updates, newsletters, engagement forums, surveys.</p>
Families/Guardians	<p>Same as above, with additional messaging &amp; engagement on:</p> <p>Details of wage/job change impacts to benefits (encouraging formal &amp; informal disability benefits analysis to better support</p>	<p>General announcements; invitations to engagement sessions, one-to-one conversations, letters, develop</p>

	<p>the “Engage and Plan” stages, WIPA information access, MTI benefits brief, etc.) as applicable;</p> <p>P-I is not discontinuing non-employment-based supports (DSS);</p> <p>Safety continues to be a priority;</p> <p>Prevocational time-limit exclusion, as applicable.</p>	FAQ document on website.
Staff	Why P-I is transforming (feedback from persons served, advances in models of support & technologies, market conditions, on-going CIE employment support funding available now-ESS, impact of organizational transformation on personnel/HR/redefined staff roles, service outcome expectations/qualifications/career ladder opportunities, consistent with P-I values & purpose)	1-to-1 & staff meetings; newsletter, postings, website/social media, email, FAQ document.
Case managers	<p>P-I strategic intent to improve supports based on stakeholder feedback—better pay, more employment opportunities, and in the community (CIE).</p> <p>Clarity on what may be different (e.g., change to MW as of 8/1/23), how it affects you, and opportunities for engagement/feedback on changes.</p> <p>Expected changes in how we engage as part of EST, lead agencies (as articulated in E1MN interagency agreements), along with service authorization changes consistent with transformation (i.e., increase in EES, EDS, 1-to-1 ESS)</p>	Letters, emails, small group EST meetings, communicate individually with department supervisor in more detailed discussion and to create buy-in.
Board of directors	Discussion on stakeholder feedback, market conditions, TTCW grant opportunity, and full	In-person/virtual meetings with

	<p>engagement in re-evaluating organizational purpose (why)/Mission/Vision/Values.</p> <p>Provide status updates at Board meetings throughout transformation process.</p> <p>Engage in discussion &amp; development/approval of any Governance Policies requiring change due to transformation, as well as ways to actively support implementation of transformational change, given expertise &amp; community connections.</p>	written packet via email.
Local school partners	<b><i>See Partners &amp; Collaboration Section below.</i></b>	
Funders (i.e. county, VRS)	<b><i>See Partners &amp; Collaboration Section below.</i></b>	
Area employers and employment partners	<p>"We have workers, you have a workforce shortage, let's see what we can do together to make things better for all of us." 1. We have hard-working employees with a strong work ethic, ready to work for you.</p> <p>2. The services we provide are a "dual customer" system, meaning we support the worker and the business to find good matches that serve both the worker and the business. Use or create workplace employer forums in partnership with chambers or large employers.</p>	Chamber meetings, individual visits, website, informational interviews to explore partnerships & workforce solutions that are mutually beneficial.
Community members	<p>Use intentional &amp; defined opportunities to:</p> <p>Message on: Who we are (becoming) &amp; plain-language on what we do, how it improves the lives of those supported &amp; the community; how community members can support our efforts, benefits to employers (use this</p>	In-person (e.g., meaningful community life engagement activities driven by personal & recreational/leisure interests, unique skills/gifts, social

	platform to appeal to employers not reached by other methods).	connections, etc.). Local media, website/social media.
Media	Messaging on: why transformation, how it will improve the lives of those supported & the community; benefits to employers (use this platform to appeal to employers not reached by other methods).	Relationship building with local media through Marketing & Outreach Director, local stories/editorials, interviews with employers & persons successful in CIE.
Others:		

## Partnerships and Collaborations

**Describe your organization’s plans to build, expand, and/or strengthen community partnerships and collaboration efforts related to your transformation goals.** These partnerships and collaborations should include those that will support the organization’s transformation efforts and competitive, integrated employment outcomes, such as local businesses, schools, state agencies, lead agencies and other funders, and faith-based organizations.

P-I has a strong relationship with VRS and many of the local schools. See below. P-I has provided education to Pine, Isanti, and Kanabec counties about waived employment services and how that intersects with VRS services, specifically E1MN. P-I is often the resource for local and non-local counties to get assistance in navigating next steps for individuals through E1MN.

P-I is active in the Sandstone and the North 65 (Cambridge and Isanti) Chambers. For the purpose of this Plan, P-I will focus on activities to build stronger partnerships with employer partners, while continuing its on-going work to strengthen & maintain strong partnerships with counties/funders, schools, regional civic organizations, etc. Specifically, P-I will engage with its existing employer partners (contracts, vendors, etc.) using a structured process to newly define the partnership, with the focus on CIE. P-I will apply an adapted, yet similar, strategy to newly identified employers in the region.

Include objective(s) related to partnership- and collaboration-building and action steps to meet the objective(s).	
<b>Objective(s)</b>	<b>Action Steps (including quarter)</b>
1. Increase business networking throughout service region.	1. Identify which Chamber meetings need to have PI representation (Q2 2023)  Assign the accountable people to attend each of the identified chamber meetings (Q2 2023)

	<p>Q3 2023 &amp; on-going – create (or support existing) community employer forums, “business-to-business” leadership outreach (CIE successes), create an event to award an “Employer of the Year” specific to inclusiveness (Q1 2024).</p>
<p>2. Actively participate in CTIC groups throughout P-I service region</p>	<p>2. Assist transition programs to plan and provide student transition fairs (begin Q1 2023)</p> <p>Coordinate APSE presentations to CTIC groups (begin Q2 2023)</p> <p>Conduct industry specific presentations to students (begin Q1 2023 &amp; conduct at least 3x/year).</p>
<p>3. Collaborate with VRS to identify trends and adjust service provision to meet those needs</p>	<p>3. Regular and ongoing conversations with VRS counselors and Regional Area Manager (begin Q3, 2022)</p>
<p>4. Partner with lead agencies to understand E1MN and how it relates to authorized services</p>	<p>4. Conduct/support training to county staff on E1MN, MN Disability Hub website (delineates roles &amp; responsibilities), and how it relates to authorized services for a seamless employment journey to CIE (Q2 2023 and ongoing).</p>
<p>5. Leverage existing employer partner relationships to increase employer commitment to placement, CE, and reliance on P-I as a place to build &amp; develop their workforce.</p>	<p>5. Initiate Q3 2023, and develop &amp; modify formal strategy to effectively engage community employer partnerships (Q3-Q4 2023 intensive work, with maintenance &amp; monitoring work thereafter). The EDD, DO and Marketing Director will complete the written strategy design, including steps to implement &amp; monitor.</p>

**Describe your organization’s current partnership with Vocational Rehabilitation Services (VRS). Are you a vendor? If so, are there ways to strengthen your relationship with your local VRS office? If you are not currently an active vendor, describe your plan for becoming a VRS vendor. Include timeframes for completion and people responsible.**

P-I is a vendor and CARF accredited to provide VRS Services. The Organization enjoys a long-standing & positive relationship with the Cambridge region for adult and Pre-ETS services in Pine, Isanti, Kanabec, Chisago, Mille Lacs, Carlton counties. P-I is also cultivating a strong relationship with the Duluth region providing Pre-ETS services in Pine and Carlton Counties. The Employment Services Director and the VRS Regional Area Manager maintain continuous communication. The Employment Services Director maintains communication with the VRS counselors to help teams navigate through the E1MN process and discuss service strengths, weaknesses, opportunities, and threats. The Cambridge area Regional Area Manager wrote a letter of support for the TTCW grant. The Employment Services Director is serving a three-year term on the VRS Providers Advisory Committee and was previously invited to provide input on the E1MN MOU Interim Guidance between DEED and DHS.

If your organization is not yet a VR vendor, include objective(s) and action steps to become a vendor.	
Objective(s)	Action Steps (including quarter)
1. PHASE-Industries maintain its status as a current vendor.	1. By contract and historical experience, P-I already engages a dual enrollment strategy as recommended in the E1MN interagency agreement and CIE service mapping process.

**Describe your organization’s current partnership with local secondary education programs. Is there a collaborative effort to implement person-centered, competitive integrated employment? Is your organization currently offering Pre-Employment Transition Services (Pre-ETS) to students? Are there ways to build or strengthen your relationship with local schools and transition programs?**

Members of the P-I Employment Services Team attend three different Community Transition Interagency Committees (CTIC) meetings. One represents Kanabec, part of Isanti, and Mille Lacs Counties. A second represents Chisago County Schools (CCTIC). A third represents the Pine County Schools (PCTIC). The focus of these committees is developing opportunities for students to learn more about work and exploration of their areas of interest.

Cambridge-Isanti Schools are no longer a part of the CTIC groups. The Employment & Development Director (EDD) met with their Moving Forward program in December 2022 to discuss each other’s services and how we can work together. EDD will work with teachers to coordinate an information session for parents in spring 2023.

The P-I Employment Services Team provides Pre-ETS services for students in all the above schools. P-I recently added an underserved region of the northern part of Mille Lacs county. Two flyers have been created for schools. One directed toward teachers and another directed toward students describing P-I services and their benefits. These have been distributed to several of the area’s schools, with a plan to conduct more person-to-person outreach once staffing levels permit.

P-I was awarded a Job Development grant for the second year for the school year 2022/2023 for Pine County. The goal of this grant is to provide employment education to students with disabilities in Willow River, East Central, Hinckley-Finlayson, and Pine City High Schools. This may include a work skills day, coordinating monthly industry-specific career information sessions, and a possible field trip to a college/tech school outside of Pine County.

Include objective(s) related to building or strengthening your organization’s relationship with local schools and action steps to meet the objective(s).	
Objective(s)	Action Steps (including quarter)
1. Increase presence in Cambridge-Isanti Schools/Woodland Campus.	<p>1. Meet with Special Education teachers at the location, with a focus on mapping new transition service strategies to CIE that replace legacy transition services, closing the door to center-based/subminimum wage jobs, and introducing CE/Discovery strategies (Initiate Q4 2022).</p> <p>Provide flyers for teachers, students, parents (Q1 2023)</p> <p>Collaborate with Special Ed teacher to coordinate listening sessions (Q2 2023 &amp; on-going).</p>

<p>2. Increase presence in Mora schools</p>	<p>2. Circulate flyers for teachers and students (Q1 2023)</p> <p>Meet with Special Education teachers, with a focus on mapping new transition service strategies to CIE that replace legacy transition services, closing the door to center-based/subminimum wage jobs, and introducing CE/Discovery strategies (Q2 2023).</p> <p>Collaborate with Special Ed teacher to coordinate listening sessions (Q3 2023 &amp; on-going).</p>
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## Human Resources

**Draft a comprehensive human resource management plan that considers essential components below and how they will support the overall goals and transformation efforts of the organization.**

- Development and/or updating of job titles, roles and responsibilities and job descriptions that align with the mission, vision, values, and transformation efforts
- Staff compensation plan, including how it provides a progressive career path based on training, competency, and skill development
- Recruitment, hiring, and onboarding
- Training and capacity-building
- Ongoing mentoring and professional development
- Staff retention

### **Talent Management & HR Personnel Objectives & Action Plans**

- Build new competencies in workforce (internal & external workforce structures) to carry out Transformation Goals using best practice strategies & technologies.
  - Initiate Q2 2023 (anticipate 12-18 months for completion): Create position & workforce structure consistent with assessed needs in order to successfully implement & maintain Strategic Goals, including creation of multi-tiered point-of-services positions (e.g., DSP Generalist, DSP Specialist 1, DSP Specialist 2, Employment Consultant, wage differential for CE Certification for any of the point-of-service positions). Update job titles, responsibilities & roles – rewrite job descriptions & differential wage ranges using new learning competency categories for each specialist position – establish pay rate for each specialist position (point-of-service).
  - Q2 2023 (initiate) through Q1 2024: Create an avenue for existing employees to inform point-of-service essential job functions, share their interests & preferences, assess their aptitude for a given position(s), and provide a training path for those interested to gain

required new competencies to move into new position Adopt certification standards for key point-of-service roles (e.g., CE Certification for Employment Consultants & DSP Specialists providing Discovery, EES & EDS; 90-Day Intensive Mentoring & Internal Certification Program provided by the Employment & Development Director for DSPs aspiring to the DSP Specialist position; CLE competency training for DSP Generalists, Disability Hub's benefits learning path, etc.). Include aptitude assessment (tech/software) for existing staff & new applicants. Plan for existing staff & plan for new hires/recruitment. Plan for assignment of each point-of-service position informed by generalist/specialist credentialing.

- Q2 2023 (initiate) through Q1 2024: Modify recruitment, screening & on-boarding strategies to attract applicants with key competencies and aptitudes consistent with modernized Transformation Plan & best practices. This will include evaluation & changes to recruitment sources, screening questions & aptitude testing, new hire orientation & on-boarding process, workforce assignments, and performance review processes.
- Q2 2023 (initiate) through Q1 2024: Improve & align employee training Procedure, on-boarding & talent management policies, practices and plans to achieve excellence in individual & overall workforce buy-in, technical competencies, talent management & supervision, and correction-response measures. Revisit updated core competencies for DSP generalist, as well as design specific transformation-related core competency expectations for all non-point-of-service positions (specific to each position's respective area).
- Q2 2023 (start) through Q1 2024: HR designates small project subgroup to revise associated talent management policies & procedures, including modernized training plans, practices & resources to promote Transformation Plan & defined competencies.
- Build on success by recognizing & rewarding employee performance.
  - (Q3/Q4 2023) Formal procedure developed & implemented to Incentivize employee activities & outcomes related to goals (allocation of milestone bonuses strategy, wage implications- staff competency/specialty costs and outcome bonuses, etc.)
- Timely, effective & consistent communication to workforce:
  - (Q2 2023): HR Internal communication Plan developed, implemented & managed (in relation to positions, job descriptions, etc.). Include timelines. Access what other organizations have done in this area.

## Finance

### **Begin planning out your organization's projected shifts in funding and expenses.**

PHASE-Industries anticipates and has projected key Chart of Account (i.e., accounting line items) budget & actual changes as a function of its transformation initiative. As part of the natural internal budgeting process paired with the TTCW Plan development activities, multiple project teams within the

organization are addressing key budgetary line items, developing fiscal assumptions based on transformation activities at different stages of transformation, and translating the results of these assumptions into a revised annual budget (Q1 2023 for revised 2023 budget; Q4 2023 for 2024 annual budget). Further, PHASE-Industries will be participating in organizational mentoring (via Kaposia, beginning Q2 2023, and possibly others), to learn more about financial sustainability from organizations that have succeeded in transforming their services and outcomes from a predominantly center-based focus to a person-centered, distributed model of CIE and meaningful CLE supports. This will include examining funding streams, business strategies, staff buy-in and accountabilities, and new revenue opportunities.

Pertinent to the TTCW Plan development, the organizational budget revision is scheduled for Board review in Q1 2023, with assumptions derived from internal project groups, organizational leadership, and with granular examination of service-transformation-based revenue shifts for existing individuals served, along with projecting (conservatively) service revenue trends in the support of new entrants to service. The determination of revised annual budget values will include the study and projection around the correlation relationship between related revenues and expenses categories, and how those correlation coefficients will change as a result of modified organizational activities, along with modernized support outcomes, during different cycles of the transformation initiative. For example, contracted work revenues (i.e., in-center or enclave work when P-I is the employer of record) are examined & projected by: 1) assumption of reduction based on CIE outcome success, 2) assumption of short-term change in historical correlation value with program participant wages paid by P-I during the 12-months following relinquishment of DOL 14c certificate, in that these wages will increase significantly for a short period to ensure continuity of supports while P-I works to successfully implement transformation supports person-by-person, 3) assumption that these revenues will gradually and consistently decrease every month across a multi-year period, until such time as those revenues (and the associated paid work provided in a traditional Prevocational support setting) are either eliminated entirely or de minimis, and 4) assumption that the existing linear correlation relationship between these revenues and program participant wage expense will dissipate consistently over time, as individuals choose a path to competitive employment and outcomes are achieved (i.e., individuals will move from employment with P-I to CIE).

Goal	Action Steps to Meet Goal	By Whom	By When
<p>Increase revenue (from baseline) from Vocational Rehabilitation by 20% (2023), 30% (2024).</p>	<ul style="list-style-type: none"> <li>• Build Employment Consultant position quantity based on established revenue target expectations for each position.</li> <li>• 80% of Employment Consultants CE certified by Q4 2023; 100% by Q4 2024.</li> <li>• Continue positive &amp; active collaboration with local VR offices</li> </ul>	<ul style="list-style-type: none"> <li>• HR, EDD</li> </ul>	<ul style="list-style-type: none"> <li>• Beginning Q1 2023; revenue targets established Q2 2023 (reviewed monthly and revised quarterly, as needed).</li> </ul>
<p>Increase long-term waiver employment service revenues, specifically in EES, EDS &amp; 1-1 EES.</p>	<ul style="list-style-type: none"> <li>• Create point-of-service competencies to expertly deliver EES, EDS, ESS 1:1, and CE supports. 20% point-of-service positions CE certified, and 45% of point-of-service positions successfully attain internal specialist certification by Q4 2023. For 2024, the target increases by 15% and 20%, respectively.</li> </ul>	<ul style="list-style-type: none"> <li>• HR, COO</li> </ul>	<ul style="list-style-type: none"> <li>• Beginning Q1 2023, and continuing each quarter to achieve annual target described in Action Step cell.</li> </ul>
<p>Build &amp; maintain on-going financial viability &amp; health.</p>	<p>Establish business plan to sustain revenues via launch of billable services; transition revenues from center-based/centralized service units to CIE/decentralized</p>	<p>CEO, COO, CFO</p>	<p>Initiate Q1-2023, Monitor &amp; revise as needed (but, no later than Q4 2023), and continue on monthly monitor schedule.</p>

	service units via MA Waiver and VRS operating agreement (i.e., job development, job coaching, etc.). This includes maintaining sufficient days cash-on-hand at least 90-days.		

**Quality Assurance and Improvement**

**Provide an overview of your organization’s ongoing quality assurance and improvement plan.** Include key metrics to be tracked and the plan for tracking them.

P-I uses a combination of structured measurement & reporting mechanisms to manage & improve key quality metrics. These are collected through monthly Key Indicator Reports, Annual Outcomes Measurement Reports, and Annual Survey Reports. Data currently tracked, aggregated, analyzed and used to inform system changes include: competitive placements (CIE specifically), demographics, census is each type of service, movement from one service to another (and one funding stream to another), outcomes progress, reductions in number & percent of people earning subminimum wages in center-based work & community employment (by location), performance improvement goal progress, wage & hour, detailed P&L data, stakeholder complaints, employee engagement values, accessibility metrics (length of time between referral & service initiation), and satisfaction survey across all stakeholders.

These metrics will continue to be tracked, but new targets established in key areas, as part of the implementation of this Plan, to set expectation & performance measurement standards. For example, targets will be established for:

- Rate of pay to meet or exceed minimum wage by 8/1/2023 (and 6/1/2023 for new entrants), when P-I is the employer of record. Metric collected 2x/month through ADP records, and reported by payroll to program leadership & senior leadership via email.
- Percent and number of persons served in DSS and Prevocational choosing employment-based supports (Waiver or VR), measured monthly and reported by Program Leadership in Key Indicator reports.
- Percent and number of persons successfully placed in competitive employment, with additional metric measurements around demographics, preceding supports (if any), time to placement, time in placement, level of support in placement, change in placement/job status, etc. This will be measured by Program Leadership monthly, reported in Key Indicator reports.
- Number and percent of persons served in individual competitive jobs, group integrated jobs, self-employment, facility-based employment, community based non-work, transportation supports, volunteer activities. Measured & reported monthly by Program Leadership in Key Indicator Reports.

**Describe your organization’s knowledge management plan.** Include how you will manage and centralize company information, data, and knowledge to improve efficiency, operations, communications, service delivery, and outcomes. Describe how data is used to support quality improvement and organizational/stakeholder outcomes.

Include objective(s) for your organization’s knowledge management plan and action steps to meet the objective(s).	
Objective(s)	Action Steps (including quarter)
1. P-I will effectively and efficiently define, collect, collate, review/analyze, report, and utilize key data in the course of transformation (and overall) performance management and performance improvement.	1. Q2 2023 & on-going: In addition to the data collected & procedures outlined in the P-I Outcomes & Performance Management Procedure (based on CARF Standards), the TTCW Project Team will identify in a written procedural addendum the key data points identified in this Plan for collection, how/when/where to collect & store data, accountable parties to analyze & summarize data, accountable parties to report data (with conclusions & recommendations for improvements, where needed), and the process by which data/performance measures are used to modify key strategies/goals in the TTCW Plan (and, as applicable, the Strategic Plan, Organization Risk Management Plan, DEI Plan, Accessibility Plan, Technology Plan, Budget Plan, Talent Management Plan, Operating/Project Plans, etc.). Detailed documentation of these actions shall be recorded in TTCW Project Team Minutes, as well as Monthly Division Key Indicator Reports, accordingly. Summaries of data & trends will be documented using format provided by MTI Technical Advisors during the 3/2023 Performance Measurement MTI Training (see sample dashboard report below).

**SAMPLE DASHBOARD REPORT**

Activity	Current Number	Current Percentage of Individuals	Annual Goals	Quarterly Goals	Monthly Goals
Reduction in percent and number of Subminimum wage earners			Reduce by 100%	25%	9%
Number & percent of Individuals achieving competitive employment (for people choosing employment outcome):			Increase by 20%	5%	2%
Number & percent of Individuals maintaining competitive employment (30 days, 90 days, 180 days, 365 days):			100%	100%	100%
People choosing employment (new & switch/adding) (# & % of people in each stage of E1MN): DSS to ESS 1-1, EES, EDS, CIE supports Prevoc to ESS 1-1, EES, EDS, CIE supports New PP to ESS 1-1, EES, EDS, CIE supports ESS Group to ESS 1-1, EES, EDS, CIE supports			Increase by 20%	5%	2%
Baseline and number/percent reduction in Group Integrated Jobs (enclaves)			Reduce by 20%	5%	2%
Number & percent of individuals attaining Self-Employment			Research this model, and create design within 18 months from 4/2023.		
Reduce individuals (% and #) employed in Facility-based employment			Reduce by 20%	5%	2%
Number/percent of time in Facility based non-work (DSS)			Reduce by 50%	12%	4%
Number/percent of time in DSS provided in community			Increase by 50%	12%	4%
Volunteer job			Increase by 25%	6%	2%

# Section 3: Employment Practices and Community Life Engagement

## Programs and Services

**Describe what employment supports and services your organization currently provides as well as how your service offerings will change to meet your transformation goal.** Are there service options that you will add? Are there any services you will no longer offer after the transformation? How will your service model prioritize community employment? How will virtual services fit into your offerings if you choose to offer them? What steps will your organization take to promote competitive, integrated employment as the first and preferred option for individuals receiving services?

P-I services are currently provided through the Day Program or the Employment Service Program. Day services have typically been long term services where participants can work on site, on work crews, or participate in work related activities. Employment Services has provided short term employment supports for participants to assess their work skills and find employment. Employment Services also provides long term employment supports that result in greater job retention. Individuals served in the employment program were directly referred from VRS, as well as from EST members of those currently receiving services in the day program. There is a gap in services, knowledge, and expertise when a participant from the day program wants to explore work options. Day support services will continue to be a choice for participants. However, P-I will incorporate training, practices, and development of internal practitioner competencies in meaningful community life engagements (CLE) to promote full community inclusion using person-centered & individualized supports.

Include objective(s) related to transforming your organization’s services and action steps to meet the objective(s).	
Objective(s)	Action Steps (including quarter)
1. Individuals choosing non-employment day supports will experience personally meaningful, individualized supports that promote full participation & inclusion in the community.	1. Q2 2023 (initiate) & on-going: Key staff will participate in CLE training through MTI; HR will add CLE training component to both basic new employee orientation and a more intensive training as part of the DSP Specialist certification; P-I will engage MTI resources & supports to formalize a training curriculum (as well as key outcome metrics) in this area.  2. Q2/Q3 2023: Staff/positions identified to be the experts in providing meaningful and inclusive opportunities using CLE best practice

	<p>strategies. These positions will undergo the DSP Specialist internal certification training.</p> <p>3. Q3 2023 (initiate) &amp; On-Going: Key CLE outcome &amp; performance measurements reviewed &amp; incorporated into organizational (and Transformation Plan) performance management &amp; reporting.</p>
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**Provide an overview of your organization’s person-centered job placement process after transformation.** What needs to change from how job placement is currently approached? How will this process look different depending on whether a person is currently supported by the organization or if they are new to the organization? How will you support the person to build relationships with others and to use those natural supports (I.e., co-workers/neighbors) to increase inclusion/integration outcomes?

Day and employment services will integrate their respective daily operations, shared staff, and interpersonal/procedural rhythms to both eliminate the gap to streamlined E1MN supports, as well as create alignment & consistency between the different stages of support for any one individual. Conversations with individuals supported about employment services will start prior to the start of services. Individuals will be informed on employment supports (track), non-employment/CLE supports (track), and the combination of the two. Regardless of the initial track an individual chooses, conversations around employment will both continue and be encouraged. The primary goal here is full informed consent, using a comprehensive, effective, person-centered, and continual process that supports pursuit of interests & opportunities, change of direction/choice, and encouragement to fully explore & experience the world, free from restraint. Individuals can choose to partner with P-I support professionals that have gained the expertise in providing those ongoing conversations and support strategies. Individuals wanting to explore the idea of work can specifically partner with an employment expert to assist them in exploring what work would look like for them. If desired, they will explore a variety of jobs, learn job requirements, participate in informational interviews of businesses, understand how working may affect their benefits, what additional benefits they may become eligible for, budgeting, self-advocacy and any other activities that allow the person to make a truly informed choice about their employment. Individuals will be supported to create an employment portfolio. The portfolio will include the person’s ideal employment conditions, their skills and interests in order to best match work opportunities in their community, identify supports needed, resumes (written, picture or video) and other activities that help them launch their job search. They will pursue their job search and receive long term job supports to retain their employment, as needed. Participants will be supported through their employment journey by staff qualified to provide employment services through the PHASE-Industries credential training program. The staff in both the day and employment programs will be trained in employment services so that services can be provided seamlessly.

Individuals who have moved from day services and are working in competitive integrated employment may benefit from the social support from their peers and with others in their community. P-I staff will

help individuals make these social connections, which will also result in an increase in fully inclusive day support services.

Include objective(s) related to developing or strengthening your organization’s job placement process and action steps to meet the objective(s).	
Objective(s)	Action Steps (including quarter)
1. Train a DSP champion at each licensed site in E1MN. They will understand Engage, Plan, Find, Keep and how it relates to service delivery and intended outcomes. They will demonstrate competency about their knowledge of the employment journey as well as tools and techniques that can be utilized in the process.	1. Q2 2023: Begin training a DSP at each location. These DSPs will be certified in knowledge, skills and abilities to deliver Discovery & Customized Employment at each location.
2. Train the larger group of staff that will be providing employment services	1. Identify which staff/positions at each site that will provide employment services Q2 2023.  2. Q2 2023 (initiate) & on-going (see HR metrics in previous section): Provide "coaching and mentoring" to all staff trained in employment exploration, discovery, employment development, and employment support to ensure transfer of learning to practices (leading to person-centered CIE outcomes).

A key component of developing an effective, inclusive employment program is to take a holistic approach to the supports a person needs to obtain and maintain CIE. A piece of this is wrap-around, meaningful day supports. **How will you structure and deliver wrap-around, meaningful day activities for people who are not yet working, are retired, or work part-time?** How will these services support a person’s path to employment who may not have yet identified employment as a goal? Will these service options ensure the ability to interact with community members without disabilities and paid staff? In what other ways will your program’s transformed services address the needs of the whole person as they seek community employment?

All people need to feel valued whether they are working or not. This often includes being a part of something. P-I will promote & provide CLE supports to help build natural supports & “community.” P-I will help each person identify their occupational goals – meaning how they choose to occupy their time. This may include hobbies, volunteering, learning something new and connecting with others that have the same interests.

Include objective(s) related to developing or strengthening your organization’s day program services and action steps to meet the objective(s).	
Objective(s)	Action Steps (including quarter)
1. Support meaningful life engagement supports that promote full community inclusion and the	1. Train key point-of-service personnel to plan and implement meaningful CLE embedding values and guidance from

development of natural supports/relationships & “community.”	researched fidelity standards (UMASS). Q2/Q3 2023
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**Describe your plan for ensuring all people considering and using employment supports have access to high-quality benefits counseling.**

P-I ESD currently uses DB 101 to assist people to review their benefits and how work may impact that at a basic level.

Include objective(s) related to developing or strengthening access to benefits information and counseling for those your organization supports and action steps to meet the objective(s).	
<b>Objective(s)</b>	<b>Action Steps (including quarter)</b>
<p>1. All direct care staff will be trained in some level benefits coaching at the level that matches the service they are providing.</p>	<p>1. Get schedule of training for all three levels and fees from Disability Hub MN (Q4 2022)</p> <p>2. Match the level of training needed for each position: (Q3 2023)</p> <p style="padding-left: 40px;">Level 1 – Basic training for all staff so that everyone is providing participants with accurate statements. Would add it to new staff orientation</p> <p style="padding-left: 40px;">Level 2 -Goes a little deeper and is for staff that help participants make an informed choice about work</p> <p style="padding-left: 40px;">Level 3 – Is Benefits Coaching. This is a certification through the Disability Hub and can also be billed through VRS. It’s more in-depth knowledge professionals need to provide coaching to people with complex questions about benefits.</p> <p>3. Q1 2024 – create long-term plan to include identifying a staff member to be formally trained as a CWIC (Certified Work Incentive Coordinator). This is a billable service to VRS and is fundamental to the engagement and planning stages of supporting CIE.</p>