# Leading Statewide Strategic Planning

Presented by Ann McDaniel and Brad Williams on October 7, 2014

>>Tim Fuchs: Before I say anything else. Let me apologize
for our late start. We love this platform, it's been
very trouble free. I'm going to give you
instructions so you can view the PowerPoint and other
features of the webinar platform. Let me start
there. This is Tim I'm going to give you
instructions now for those of you on the webinar that
can't see the platform and the PowerPoint that might
have a white screen. If you move your mouse. IL-net
is operated through a partnership. We are recording
today's call so we can archive it. And of course we
will break several times during the presentation
today, three times, actually, to take your questions.
If you have a question on the call today, you can
type that in the chat screen, and that is the text
box. Type your question and hit enter and it will
show up. We will wait to address the questions
during the Q and A breaks. If you're on the phone
today, you'll be able to ask questions by pressing
star pound to indicate you have a question. And I'll
remind you of those instructions each time we break
for questions.
Let's see. So also, if you're on the webinar,
the PowerPoint will display automatically. As I just
described for others, if you're only on the phone,
you'll want to make sure to open the PowerPoint that
was sent to you in the confirmation e-mail. So we
will continue to take your questions as they come in.
And finally, please do take a moment after
today's call to fill out the evaluation form. We
really want to know what you think of today's call.
And it really is short, it's easy to complete and we
take those really seriously. And so anyway, that's
the end of my housekeeping notes. I'm sorry, I was
working through a few technical issues, continuing as
we started. So I apologize for my stop and start
comments here today.
Anyway. Let's get back to track and start the
presentation for today. I'm really happy to
have Ann McDaniel and Brad Williams with us and I want
to thank them for their patience this afternoon. Ann
of course is the executive director has presented
many times with SILC-NET. Brad is the director of
the New York SILC and has also presented many times.
They presented this webinar original a few years ago.
Have given it some updating, some refreshing, and I
know from having done it with them again, you guys
will enjoy this. It's a great overview of strategic
planning for SILCs. I'm going to turn it over to Ann
to get us started.
>> Ann McDaniel: If you're not hearing me, let me know
that. I was going to begin with the introduction to
this training and the objectives for this training.
Primarily what we're hoping to provide for you is an
understanding of the difference between the processes
that you go through for your state plan and the other
strategic planning that you probably ought to be
doing. And things you can do through both of those
processes to be effective. So our objectives include
differentiating between a SILC strategic plan process
and SPIL development describe the effective strategic
planning that supports inclusion in all processes and
full accessibility of meetings and materials,
describe effective processes for collecting and
synthesizing input and setting priorities, and
describe strategies that will engage, support and
follow up with stakeholders to ensure successful
implementation of the strategic plan. Next slide?
So a few questions to consider. Have you ever
had any of the following situations? Have you had
difficulty recruiting new members for your council?
Problems meeting a quorum when you have meetings?
Delays or setbacks with negotiating budgets
contracts, difficulty with cash flow. Lack of
organizational goals outside of SPIL, inability to
respond to crisis situations or the need to layoff or
downsize staff. Next slide?
You need to be pro active. These problems occur
usually because you are reacting to situations
instead of anticipating situations and being prepared
for them.
While writing the SPIL is your primary
responsibility, you also have organizational needs.
So the solution, we believe, is that you need to
define your organizational needs using strategic
planning methods. Next slide.
What we're really going to talk about two aspects
of strategic planning for SILCs. One is SPIL, state
plan for independent living development and the other
is SILC strategic planning development. Next slide.
So you might be thinking, isn't the SPIL a
strategic plan? Yes, it is. It should be, but the
SPIL is a plan for the independent living in your
state, not for your SILC. It works toward building
the IL network. Say SILC strategic plan is
specifically to achieve the mission of the SILC and
to support the growth and development of the SILC as
an organization, depending how you're organized.
It also directs the work of the SILC outside the
SILC's responsibility for the SPIL and the duties and
activities in the workforce, innovation and
opportunities act because those things have changed
for us and we're going to talk about that.
The workforce innovation and opportunities act
has had an impact on the kind of planning that SILCs
need to do because of the changes. I'll just give a
plug for NCIL doing webinar next week on WIOA so you
can learn what all the changes are. But specific to
the SILC, I want to highlight for you the changes to
the SILC duties. First we developed the SPIL, but we
don't develop it jointly with the DSU anymore. We
develop it with the centers for independent living.
And the duty of coordination with the state rehab
council and other councils is no longer a duty. It's
an authorized activity.
So in addition to our duties now, there's a
section on authorized activities that give us a lot
more leeway, a lot more elbow room, with what we're
allowed to do. And first under that is working with
the centers to coordinate independent living
services, services for people with disabilities with other
groups.
We also, under our authorized activities, have
conducted resource development to support SILC
activities and/or IL services by the centers.
And then the last is the catch-all. And it's
kind of clever. Perform such other functions,
consistent with the purpose of this chapter and
comparable to other functions described in this
subsection, as the council determines to be
appropriate. So if you look at the purpose of
chapter 1 of Title 7, that gives us a lot more
opportunity to do things that are going to be useful
to the IL community in our states.
So then how does WIOA affect SILC planning? Well,
it's made some changes to the state plan process, the
SPIL is now developed by the SILC and the centers.
It is signed by the SILC chair, at least 51% of the
center directors in your state, and the director of
the designated state entity. And this is a point
where I should point out that the designated state
entity is not necessarily the state agency that has
been your DSU. It can be, but it doesn't have to be.
One of the things you have to do in your state
plan is to identify who the designated state entity
is going to be. So you probably need to start
thinking now and having conversations with your
centers about the relationship you have with your DSU
and do you want them to continue to be the entity in
your state that's designated to receive those part B
dollars? Or do you have another state agency you
have a better working relationship with, or is a
better fit for whatever reason, that you need to be
communicating with about the possibility of them
being your designated state entity.
And then also, your SPIL planning process needs
to include how the SILC is going to accomplish its
duties and authorities.
So the second piece then that can be affected by
WIOA, is SILC strategic planning itself. Not the
state plan, but a strategic plan for your SILC. And
you would coordinate organizational strategies in
that state -- in that strategic plan with the duties
and authorities addressed in the SPIL. So you've got
to be looking at both and planning for both and
coordinating both of those plans.
So the SPIL is a strategic plan, assesses the
needs of people with disabilities and gathering
input. This is your analysis part. Getting out
there, talking with people. Finding different ways
to gather input. My screen just went black.
>> Tim: I can still see the webinar.
>> Ann: I'm back. Finding ways to gather input from
people with disabilities around your state about what
their needs are, so you can be sure you address those
as you develop your plan. Or figure out what you're
going to do. You can't address them all, probably.
Then it also includes the goals and objectives
and how the funds will be used to address those
needs. So you figure out what you can do. What your
goals are. What objectives you have that you want to
use funding for to try to address the needs of people
with disabilities around your state.
And then it also needs to include input and
feedback from others. But, the SPIL is a
time-limited, three-year plan. And it's for the
state. And it is not specifically for the SILC. So
if you're going to look at strategic planning for the
SILC, in addition to the SPIL process, let's talk
about why you might need that. First of all, the
SPIL addresses statewide independent living needs
which may include the SILC to some degree, but not in
a comprehensive way. Even though there is a SILC
resource plan in the SPIL, it usually addresses your
basic operation, your resources that you need to
accomplish your SILC duties. If there's other things
that your SILC wants to be doing and has the
authority to do, and depending how you're organized,
that can be narrow or very broad. Strategic planning
specifically for the SILC will help you identify
organizational development and longer range needs of
your SILC as an organization. And it will help you
to prioritize key issues that aren't discussed during
the SPIL development process, and allow for other
logistical planning related to committees, resources,
other activities that, if you're a nonprofit SILC,
there's a lot of things you can do as a nonprofit
that aren't part of your duties or your authorized
activities as a SILC. So you'll have to figure out
ways you're going to do those. Through strategic
planning is how you can do that.
So you get to make a plan for planning. I love a
plan for planning. First you want to decide who
is -- who needs to be involved in your planning
process. When you're doing the strategic plans. Who
all is going to be at that table.
Identify the stakeholders that you want to gather
input from. And those stakeholders can be other
entities that you work with, including your DSE.
They can be people with disabilities, they can be
providers, whoever you decide your stakeholders are.
You have to decide what methods you're going to use
for gathering input, and that can be public meetings,
that can be surveys, that can be focus groups.
There's lots of ways to do that. You have to decide
what your planning process is going to be to develop
your strategic plan. And you have to find a time and
a place for the strategic planning to occur without
interruptions. Which usually means don't do it in
your office. Don't do it in somebody else's office.
It needs to be more of a retreat atmosphere. You
need to be away from your daily responsibility so you
can focus on the strategic planning tasks. Next
slide.
My voice is gravelly today, I apologize. I'm
sipping water.
So what kind of plan do you need? What you want
and need may vary depending on the structure of your
SILC. If you're a nonprofit corporation, you might
have a much broader plan than your SILC
responsibilities. If you're an informal organization
supported by the DSU, your plan might be more focused
on how to be more effective as a SILC. And if you're
organized in other ways, if you have some other kind
of structure for your SILC as a body, you can have
other needs for a plan and what it ought to address.
The second part is your mission and your vision
affect the details and the time frame for the plan.
Missions and visions can be very long-range things.
So you're going to be looking at what are the steps
that will get you there some day. And what is it
that you want to try to accomplish within the time
frame of your strategic plan. What do you want to
accomplish -- what you want to accomplish will impact
how long it will take, and the detail of the
planning. If you're going to save the world, you're
going to have a bigger, longer plan. If you want to
say you're not organized as a SILC but you want to
be, maybe your plan is going to get you through that
process. You have options.
Is a facilitator necessary? Probably not. It's
probably not essential. But it's definitely
recommended. An outside facilitator can make a big
difference in how your process goes. They can
provide expertise in directing the strategic planning
process that allows all SILC members, staff and
stakeholders to fully participate in the process, if
none of them have to be the ones facilitating.
And they also, an outside facilitator can provide
you with impartial direction through the process and
mediate stressful discussions. Because they are
outside and they don't have any skin in the game, so
to speak.
Resolving disputes. And there honestly probably
should be disputes. If you sit down with a group of
people to do a strategic plan and everybody agrees on
everything through the whole process, somebody's not
being honest. So if you do have disputes, you need
to identify the areas of agreement. What is it that
you do agree about. That everybody's on the same
page about. Identify your common goals. Are we all
trying to get to the same thing.
And then allow for negotiation and give and take
on how to get there. How are you going to accomplish
the goals.
There's usually not only one right way to do it
and the whole point of a process is to identify all
the ideas and decide which is the best way, process
that you want to use to get to where you're trying to
get to.
Having a facilitator to mediate the discussion
when you're resolving disputes, really can help you
reach a resolution.
Q & A?
>> Tim: Just as as reminder if you're on the
webinar, you can type your questions in the chat.
Hit enter and I'll take them in the order they're
received. If you're on the phone today, you can
press star-pound to indicate you have a question.
I'll take those in the order they come in. I'll give
you about 30 seconds to type or press if you have a
question. And we'll start.
We've got a nice manageable audience today. I
see a few on the phone of the so let's start there.
We'll get your line unmuted and you can go ahead.
>> Hi. Is that me? Can you hear me?
>> TIM: Yeah, go ahead.
>> It's Rebecca trailer from the Alaska SILC.
My question is to do with the DSE, who chooses what
entity we assign to be the DSE?
>> Ann: The assignment of the DSE is part of the
state plan process. So it's the SILC and the centers
for independent living who develop the state plan.
And you guys are the ones who need to decide who your
DSE is going to be. Obviously your DSE has to be
willing to fulfill that role and that's why they have
to sign off on the state plan to say yes, we are
willing to be the DSE. They're not signing off to
say they agree with everything in the plan. But the
SILC and the centers are the one who sit down and
figure out who it ought to be, communicate with that
state agency to ensure that they are willing, because
they're going to have to sign the state plan saying
they're willing. But it is totally within the state
planning process now, which is the sole
responsibility of the SILC and the centers.
>> I like it. Thank you very much. I just
wanted that point of clarification to make sure I
heard right.
>> ANN: Sure.
>> TIM: Okay, thanks. We've got another
question that came in on the phone first, and once we
take that, we'll move to the webinar questions. You
can go ahead.
>> Good morning. Can you hear me?
>> TIM: Yes.
>> Great. I'm Mary with SILC in Nevada. My
question dovetails with the first question. The
decision about the DSU, is there a deadline for
submitting it, or is it done in the future with the
state plan? What's the process going to be for that?
And more importantly, what's the deadline?
>> ANN: We don't know. Until the ACL
promulgates new regulations for WIOA, we don't have
any information for that. I would anticipate we will
be riding a new state plan at some point and they
will give us guidance on how and when to do that and
what the deadline is. Because within that state plan
is where the DSE is identified. Does that answer
your question?
>> CALLER: Yes it does. Thank you very much.
>> ANN: Under the law, the DSE is not one of the
required partners in developing your state plan. But
in practice, you can involve whoever you want to
involve. And depending on the level of involvement
the DSE wants and the working relationships, it would
be perfectly appropriate to involve them in that.
But understand that their signature on the state plan
is not like your current DSU signature on the state
plan, where you jointly developed it and agreed upon
it and signed it and submitted it. They're signing
on saying yes, we are going to be the DSE for this
plan, and we will receive the federal funds and
follow the plan to distribute them. So it's a little
bit different role than your current DSU. And all
the details of how that's going to work, we don't
know yet. But that's the kind of thing that's going
to have to be addressed in the regulations and the
guidance that we'll all be receiving from the
independent living administration.
>> TIM: As Ann mentioned, for NCIL members we're
having a call next Tuesday and with all of the, as
much as information about WIOA as we have now and
just stay tuned, because we'll be incorporating all
this information into a number of trainings over the
course of the next year as we find out information
and the transition continues.
I'm going to go to slide nine here which is the
subject of the next question. Pam asks on slide 9,
is the first bullet about assessing need referring to
a CNA?
>> ANN: A CNA? I'm not sure I know what that
is.
>> TIM: Maybe Pam can help us figure this out.
>> TIM: Assesses need and gathers people with
disabilities input. Comprehensive needs assessment.
>> ANN: It can be. It's up to the SILC and the
centers when you're developing your plan to figure
out what kind of assessment you're going to do. It
could be a comprehensive needs assessment. It can be
an assessment of people with disabilities in areas
that aren't served by a center. Because you're
looking at the possibility of developing a new
center. Whatever it is that you're going to be going
through in your state planning process might guide
what kinds of a needs assessment you want to do, or
you need to do. But it's up to those who are
responsible for developing the state plan to figure
out how they're going to assess the needs of people
with disabilities in your state, or whatever part of
your state that you're trying to deal with.
>> TIM: Okay, great.
Okay. Next question comes from the folks at the
Michigan SILC. They're wondering if we currently
have two DSUs, could we reduce that to one DSE?
>> ANN: I would think yes. We don't have
regulations and guidance yet. But the law requires a
designated state entity, so I would think that the
answer to that could be yes. And as we get more
guidance, we'll know better what we need to be doing.
But I do think you guys need to start having
conversations, at least with your centers for
independent living, about the relationships you have
with your current DSU and does that work, is there
another entity that you think could serve this role
better for you or that is a better fit. Start having
those conversations now, so that when we get guidance
about what we have to do, you're in a better position
to proceed quickly with that.
>> TIM: Okay, good.
The final question that I see from the web now
before we go back to the phone is Velja and can we
assume that the governor needs to also be in
agreement of the DSE?
>> ANN: That's probably going to have a lot to
do with how the processes work in your state. And
it's hard to answer that without knowing what the
guidance is going to be from the feds. But I know
that state to state and territory to territory, there
are a lot of differences in the way the government
works. And the kind of authority that state agencies
have to even enter into an agreement. So that's
probably going to vary greatly, depending how things
work in your state. But obviously that's going to be
something that you have to look at and that's all the
more reason that you need to start having
conversations amongst yourselves now so that you
don't get hung up on those kinds of details at the
last minute while you're still trying to decide who
would be a good DSE. I would start looking into
those things.
>> TIM: Okay. Good. Thanks.
I see one question has come into the phone queue
so caller, you can go ahead.
>> CALLER: Hi. Is there a default DSE, for
example, if our DSU decided we didn't have another
department, is there a default one?
>> ANN: A default?
>> CALLER: Yeah.
>> ANN: Not that I am aware of. But again, that
may be something that we'll get guidance about. At
this point, all we really have is what the law says
and the law says, in the state plan you have to
identify who the DSE is going to be. So if there's
going to be a default, they haven't told us yet.
>> CALLER: Thanks.
>> ANN: And you know, we're having a changeover
in even where the money is going to come from. So at
this point to say what the default might be is hard
to say. Because the DSUs that we have been having
are under a different department than we're going to
be under now. So you know, we're anxiously awaiting
a little more guidance.
>> TIM: We've got one more question in the audio
queue that I see. Caller, go ahead.
>> CALLER: Yes. I know that -- I'm sorry. This
is Will Miller from the North Carolina SILC. I know
that some states have established their SILC by
statute. North Carolina is not one of them, but I
think Idaho is a place where SILC is established by
statute, it's an autonomous entity within state
government. And this is just a question that I'm
curious about. Is it possible for a SILC that is
established in that manner to also be named the
designated state entity.
>> ANN: Oh. I don't know. I don't know. I
know that with the SILC in Idaho, they have spending
authority win the state, so it makes it seem like
that might be a possibility. But when they give us
regulations and guidance, they may say that's not an
option. So I don't really know.
My SILC, for example, it's clarified in state
code that we're going to be the nonprofit that has
been functions as the SILC. But we don't have state
spending authority. So it's very different from the
way the Idaho SILC is established in state code. And
again, you know, that varies a lot from state to
state. But I don't know whether the feds would let
us do that or not. And it might be a good question
to ask, though.
>> CALLER: I'm curious because in North Carolina,
not to get too much off track, but in North Carolina
we are established by executive order that expires in
2016 so we'll be looking for ways to sort of lengthen
the period of time that we're recognized as the SILC.
And if the SILC can be named as a designated state
entity, there might be something that the council
would want to look into. But thank you.
>> TIM: Okay. Thanks. That's the last question
that I see for this Q & A break. Ann, I want to
thank you so much for walking through that.
At this point I'm going to click over to slide
16. And turn the call over to Brad Williams to walk
us through the New York process.

>>Brad Williams: Thank you. The SILC organizational snapshot assessment
tool, I'm going to call this exercise number one.
I'm going to renumber a couple of the exercises.
Western New York independent living, which is located
in buffalo, New York, formerly the RRTC in IL
management, and those are the rehabilitation research
training centers, created the organizational snapshot
for SILCs, and also the CILs. Collects important
organizational information about SILCs as well as
Helps to expose areas that need addressing, strengths
and weaknesses, what could be referred to a committee
for work, and need for potential resources,
identifies key information going into a strategic
planning process. The snapshot takes a picture of
how this exists today. It's divided into nine
management categories. Organizational culture,
administrative management, they have it as physical
plant management, but wouldn't it be nice if SILCs
had physical plants. But you know, basically our
offices. Governance/board, financial management,
human resource management, program and services,
community relations and a sample SILC budget.
Overall, it allows you to examine how the SILC is
doing in each of these areas.
Continued.
In terms of process. Begin at least two months
prior to a meeting with facilitator.
Share results of completed snapshot with full
council in advance of meeting.
Allow people to review the information to
identify gaps, potential goals, and remember, not all
members are equal in terms of time and experience.
Apply a timeline, say five years, to be able to
address issues, view progress, and provide for
turnover of council.
Then compare current snapshot to a new one in
five years.
Need for external input.
External information should be gathered about the
SILC. External perceptions and realities.
Could reflect internal perceptions and realities,
maybe. More likely will give you a better
understanding of the differences, how your
organization is viewed by partners, the public, and
stakeholders. We know we strive to achieve diversity
on our councils, which should reflect a wide
viewpoint. But you should still get that external,
you know, input. You know, it matters, you shouldn't
go into such a process without finding out what other
people think about you as an entity.
Formats for gathering input. Public comments,
open forum if available. We have this available to
us. Focus groups. Facilitated discussions, survey
results, needs assessment results.
You know, I've found that focus groups and survey
results are probably desired going into a planning
process. They're best connected and could work out
well. But use what you have available.
Next slide?
>> TIM: So we plugged in this Q & A session just
to check in to see if you had any questions about
that overview. So I imagine this will be brief, and
that's fine.
>> BRAD: Tim, let me add to that. That this is
like the preliminary step to the process. And that's
why we did this. Because rather than go through the
entire process, this is like the background work that
has to happen before engaging in the full, you know,
strategic planning process. So we felt that it was
just good to get some -- or have the possibility of
having some questions and answers on this first part
of the process.
>> TIM: Good. Thanks Brad.
So if you have a question, you can press
star-pound on the phone. Or type your question in
the chat screen. And I'll give you guys a little
time to do that.
So again if you have any questions about the
organizational snapshot as a preliminary step.
I'll give it about 15 more seconds to make sure
nobody has questions. I don't see any questions on
the phone. And I don't see anybody typing. So, but
again, we will have another Q & A session at the end
of Brad's full section before the end of the call.
So no worries.
I'll go ahead to slide 22 and Brad you can
continue.
>> BRAD: And what I'll add is, you know, the
SILC organizational snapshot, just like the CIL
organizational snapshot is a tool. It's an
assessment tool. It's not perfect. It's what -- you
use it for your purposes. But it will allow you to
fill in the information and get a picture of what
your SILC is, and where it is at today. What you use
for comparative purposes and you see where your gaps
are at. And that allows you to see what might be
working and where you might have some needs. The
external input is important because you want to know
what others are thinking. And that is information
that you need to gather ahead of time before going
into this next part of the process.
So, the New York experience. Basically you
conduct the experience into your findings, obtain
external input, conduct strategic plan session and
share materials in advance. We use Peter Drucker
self-assessment tool exercises and Albert Humphrey
SWOT analysis. This is the structure and I'll
explain it. Next slide.
So exercise number 2, Humphrey Humphrey SWOT
analysis. SWOT stands for strengths, weaknesses,
opportunities and threats. The assessment provides a
quick overview of organizational dynamics. Helps to
identify strengths and opportunities from which to
build, identifies weaknesses and potential threats,
and determines if the threats are real and
controllable or uncontrollable. Issues and goals
usually come from strengths to build on, weaknesses
to be strengthened, opportunities to be taken, and
threats to be avoided.
Continue.
Looked at in reeling to an organization's life
cycle. As organizations change and grow from
start-up phase to growth phase, through governance
phase and on to the institutional phase, they develop
certain characteristics which can be both positive
and negative and require different management and
leadership abilities. Base.
Based on information identified in the SILC
organizational snapshot, and personal experience
related to the council members, the group is
encouraged to generate a list of up to 5 to 10 items
per SWOT area. Just be creative. Whoever is
facilitating, you certainly, ten is more than enough.
Five is a good number. You certainly want to get
people involved. We're talking about what strengths,
weaknesses, opportunities, and threats.
Strengths would be your committee structure is
strong and functional. You conduct really good
studies, surveys and reports.
Opportunities. You want to maximize use of your
website. Maybe previously access ARRA funds to
replace outdated IT. Now you're probably looking to
tap into I and E funds to replace your IT.
Weaknesses. Lack of resources. IT
infrastructure outdated, something maybe you try to
replace every five years. And notice how sometimes
you have your opportunities and your weaknesses are
opposite one another. With the IT.
Threats. Lack of funding diversity. State or
federal budget cuts.
The point is, you decide. And you prioritize.
Next slide?
Exercise number three. It's Drucker worksheet 1.
What is your current mission statement? Does the
mission statement need to be replaced? Maybe, maybe
not.
New mission statement. Well, you take some time
to create it mpletd and this can be challenging for
anyone who has ever gone through this process.
Mission guidelines, purpose of the organization.
Who you are and what you do. Can take time to
achieve this. An hour plus. Needs to be
facilitated. Like Ann was saying earlier. You can
get a consultant or maybe from your network who is
really good at facilitating. Sometimes it's
beneficial to have someone who's just a really good
consultant a facilitator in the process. Sometimes
it's beneficial to have someone who's a little bit,
somewhat knowledgeable about the network and/or who
you are a little bit. Sometimes, sometimes not. But
they definitely have to be really good facilitator
and know the process. Next slide?
Exercise number 4. What is the current vision
statement? Does the vision statement need to be
replaced? Again, maybe, maybe not.
New vision statement, you've got to get to it.
You've got to create it, modify it.
Vision statement elements. It's more
comprehensive. It's compelling, global. Inspires
commitment and action. Same aspects apply to the
vision statement. It takes time, it has to be
facilitated. A lot of work. And effort.
Next slide. I'm going to call this exercise
number 5 and it's actually Drucker worksheet 5.
Everyone customers, can you can be selling widgets or
ideas or bread, everybody has a customer. You need
to identify your primary customer. And you're going
to be identifying that customer and reassessing who
your primary customer is. We can say that a consumer
is a CIL primary customer, but just who is a SILCs
primary customer? This will take some thought and
discussion. I know for us it took us a bit. It
turned out to be New Yorkers with disability. Was it
New Yorkers with disabilities who comment on the
state plan? You can't say that. This is what you're
going to get engaged in. But you have to determine
who your primary customer is. Then you identify your
supporting customers.
Next slide? It's Drucker worksheet 15. The top
5 priority goals. We could do a full-blown strategic
plan but we're going to urge and modify. So let's
identify goals based on top priorities from the SILC
snapshot, SWOT analysis, external input, consistent
with mission and vision. Assign responsibility of
each goal to appropriate council committee. I love
to do work by committee.
Have the committee work on action steps to
facilitate progress on the goal.
And I didn't put this in there, but you should
identify connection to any of your customers. Right?
When relevant. Identify, like I said, the potential
resources, if appropriate. And identify a time
frame, up to five years. This is your plan. I think
you can create this priority strategic plan that is
going to be important for you. What you need to do.
I think this is going to be spot-on. And you can
connect it to your committee structure and what's
going to be vital for your needs as a SILC.
Next slide?
Outcomes of strategic planning. Clear picture of
your organization from the inside out. Updated
mission and vision statements. Usually.
Identified customers and organizational needs.
Put your goals to work toward with action steps to
achieve progress.
Be sure to include newly defined SILC areas under
WIOA.
A stronger, more productive SILC. Next slide?
Resources. Well, I've listed three items. A
link to a free SWOT analysis template and a link to
the Drucker foundation website, nation to the
self-assessment tool that I'm familiar with, and
last, a link to the SILC snapshot via the ILRU
website, a courtesy because western New York
independent living had it a few cycles ago. I don't
think it's actively on their site anymore. I very
much appreciate the ILRU putting the snapshot up for
people to have access to. But those are the
resources.
Next slide?
>> TIM: Okay. This is the final Q & A break.
We had gotten a question about the snapshot, and I
too appreciate that ILRU is willing to post that
along with those other rees he resources. Let's see
if we have any other questions for Brad and Ann
close. You can type your question in the chat under
the list of attendees or you can press star pound if
you're on the telephone today. I'll give you guys
about 30 seconds to indicate you have a question.
First in, I see a question on the phone. Caller,
you can go ahead. Are you there? Let me try it one
more time. Your line is open. You can go ahead.
Okay. It looks like they disconnected.
Anyhow, we've got a question on the web. Velja
is wondering Ann, if the DSE is responsible for
funding the SILC.
>> ANN: Okay. That's a very good question.
Within WIOA there is parameters that say the part B
dollars may be used to fund the SILC. But only up to
30% of the part B dollars. Now, there's a possible
way around that if the centers and the SILC agree
that it needs to be more than 30% and they put it in
the state plan and explain why, then it can be more
than 30%. But a really interesting thing in WIOA, is
that the piece in Title I, the rehab part of WIOA
that deals with innovation and expansion funds and
says the language says that they shall use a portion
of those innovations and expansion funds to fund the
SILC is still in there. So under federal law, the
DSU that you have now is supposed to continue to have
responsibility for providing I and E funding to fund
the resource plan of the SILC.
The DSE that you select does not have
responsibility for funding the SILC. They will have
responsibility for receiving the part B dollars and
distributing them according to what the SPIL says
they're supposed to be used for.
So it's real interesting how that's playing out.
Now, remember, you also have a new authorized
activity that is resource development. And so you
are not only allowed, but you have full authority
under the law to do resource development to generate
additional funding to support SILC activities. I
hope that answers your question.
>> TIM: Thanks Ann. We've got another question
on the phone. So let's go there. Oh, it looks like
they disconnected as well. We've got a few people
typing. We'll just wait for those to be completed.
Okay. More callers on the phone. You can go ahead.
>> CALLER: Okay. Can you hear me this time?
>> TIM: Yeah, sure can.
>> CALLER: Great. I had some difficulty getting
connected somehow at my end. At any rate, I had a
couple of quick questions. I know we have to wait
for the new regs, what if your state is actually in a
situation where you need to draft, to develop
significant revision to the plan right now?
>> ANN: That's also a very good question. I
will tell you that --
>> BRAD: I can that very practically.
>> ANN: Go for it.
>> BRAD: Well, we in New York, we had some
issues with our state plan process which happens near
the end. And rather than test the three issues, and
of course it was kind of an expedited, September 19th
or so, that's when we were told it had to be in, we
let it go and we said we would address our issues
post SPIL. It was good hindsight because of course
the government shutdown happened, et cetera, et
cetera. We did letters and correspondence with our
post SPIL issues which brought us right into an RSA
determination letter for our current SPIL, 14 through
16, for which we had to do some technical edits for
the issues we addressed, but without the need for
public input or hearing. And I'm literally doing,
and getting the clearance for now. I'm still doing
it now.
>> ANN: You're talking about minor technical --
this is significant, in terms of reallocation.
>> BRAD: Okay. All right.
>> CALLER: A significant amount of money.
It's a two-fold question. In order to do all of
the things that we're talking about on the phone, it
would be very able to utilize our staff. However the
current DSU has advised us they have the authority to
hire our staff. So that's one of the things we're
trying to get clear in the state plan. But we can't
use the staff to address all these new
responsibilities if the current DSU says we, the DSU,
have the authority to select your staff, to hire your
new staff person. So we're kind of between a rock
and a hard place.
>> ANN: Hopefully that rock is going to move
soon.
>> CALLER: Hopefully. That's why I was hoping to
get some help on the call. Because for example you
talked earlier about the fact that you know there has
to be some discussion between the SILC members and
the centers about who you want as your DSE, we can't
even get to that point because there's a new -- our
executive director retired, so we wanted to put out
opportunities to hire a new one. And the current DSU
said no. We're going to issue a contract. And we
are going to hire the person as we, the DSU. And
we're in the new, it's after October 1. We feel like
we should be directing the activities of our staff to
do all of the different things we're talking about on
the call today.
>> ANN: Under the law, before WIOA passed, and
under WIOA, the SILC is supposed to be able to
supervise its own staff.
>> CALLER: Right. Here's the problem. The law
says supervise. It doesn't say hire. It says
monitor and evaluate. It doesn't say hire.
>> ANN: Well you're unfortunately in a bad time
of trying to deal with this. Because currently there
is an MOU between the administration on community
living and the rehibl tationz services administration
for the RSA to consider to administer the program
until the transition.
>> CALLER: Right it's a difficult time all the
way around. We were just hoping to get some
additional, I don't know, suggestions or guidance.
Because all of these things we're discussing today
are things that the SILC wants to begin working on
but we can't really do it without the the assistance
that we need.
>> ANN: Right. And if you're wanting to amend
your state plan to address those new things you're
allowed to do.
>> CALLER: That's a part of it.
>> ANN: I wouldn't try to do that yet.
>> BRAD: One thing you could do, couldn't you
have like forums or dialogues or couldn't you collect
information in terms of some of the things that you
would like to do, so that you wouldn't have to wait,
so you would have the information?
>> CALLER: Well, if -- okay. The problem is if
the current state unit is going to hire the employee
and direct the activities of the employee, we're kind
of trying to do that on our own. And as to modifying
the state plan or revising the state plan, we're
talking about a change of about $400,000 in funds.
And where it is going. And that's why we felt it was
necessary to have public hearings. But I hear you.
We could do all those things, but we can't do them if
we don't have access -- I mean, our SILC chair didn't
even get information about this training, today's
training. She's not getting any of the NCIL -- the
state council is a member of NCIL but not all the
information is going to the DSU. I know it's not the
focus of the discussion. I understand that. It's
just we thought maybe when we talk about what we're
supposed to do, somebody might have an idea on how we
could actually be able to do that.
>> ANN: And there's no big secret yet.
>> CALLER: I understand.
>> ANN: It's not like somebody else knows how to
do this and you don't.
>> CALLER: I thought you might have some insight.
>> ANN: You could try to write an amendment to
your state plan and send it in, but your DSU has to
sign it at this point in time.
>> CALLER: That's exactly my question.
>> ANN: Because the existing state plan, see
what I mean? And it has to go to RSA so I don't
expect that --
>> CALLER: So the DSE thing doesn't kick in until
it's time for a whole new state plan. It's not a
revision.
>> ANN: Right. Right. Because you don't have a
DSE yet and we don't know what the process is yet.
>> CALLER: That clarifies it a little bit for us.
Thank you.
>> ANN: Tim? Do we have more questions?
>> TIM: I'm sorry. I was talking to the mute.
The most eloquent I've been all day and I had my mute
on, of course. I was asking the caller if you could
have your chair contact us at the NCIL office please.
I want to make sure he or she gets our announcement
so we can take care of that quickly for them.
We have another question, before I go to that,
we've had a few callers indicate they have a question
and then withdraw. And there was one important
instruction I didn't say. If you press star pound to
indicate you have a question, that's all you need to
do. And we will see it. If you press it again, it
actually withdraws your question. So I just wanted
to make sure that was clear. I'm sorry I didn't say
that at the beginning of the call. You can press
star pound to indicate you have a question, and we
take it in the order it was received. If you press
it again, it will withdraw your question. So just
wanted to point that out.
But, the next question that we have is actually
coming in via the web. And Mary is asking about the
remaining 70% of title VII part B funds allocated
after the 30% for the SILC. Has an amount been
allocated of the innovation and expansion funds?
>> ANN: This is all things that you're going to
have to decide as you develop your state plan.
Obviously if you've been getting innovation and
expansion funds and you want to continue do that,
you're going to have some negotiate that with your
current DSU, your VR agency.
The 30%, 70% is what the law says is the maximum
of 30% can be used for the SILC. There also can be
5% used by the designated state entity for
administrative costs. But you'll have to outline all
that in your state plan of the so you can use the 70%
of the Title VII Part B funds, you can fund the
center for independent living, you can give money to
all the centers to provide specific programs, you can
fund independent living services, there's a lot of
things you can do with that membership. But that
will all be part of your state plan development
process for you all to sit down together and decide,
after you have heard from people with disabilities
around your state about what their needs are, then
you sit down and decide, okay, this is how much money
we have. What can we accomplish with this and how do
we want to allocate it, for what purposes.
>> TIM: Okay. Thanks, Ann.
Okay. I don't see any other questions. But I'll
give you all time. Again, you can press star pound
if you have a question on the phone. Or you can type
your question in the chat. We have plenty of time
left, so don't be shy.
And again, I know everyone is really hungry for
this information on WIOA. So I know you heard us say
it, but just a reminder that coming up on Tuesday for
NCIL members, NCIL is having a call on everything we
know at this point. And just trust whether it's
through NCIL or through the IL-NET project over the
course of the next year, as soon as we learn more
information, we will share it with you all via
e-mails, trainings like this, et cetera.
And don't forget in the meantime, you can always
send us questions. That's what we're here for at
NCIL and that's a big role of the IL-NET project.
>> ANN: If people didn't receive the
announcement of the training directly, can they
access it on the NCIL website?
>> TIM: Of course. And if any of you didn't
receive that announcement, or are concerned you
aren't getting training announcements from IL-NET or
communications from NCIL, of course you can reach out
to me Tim@ncil.org. I want to make sure you're
hearing from us on both the IL project and NCIL
communications.
I'm going take about two minutes to wrap up here.
So if you have more questions, don't be shy. We've
got time before we close.
I'm going to go ahead to the next slide. 33.
Where Brad and Ann have been generous enough to
provide their contact information. Thanks to you
all. So their phone and e-mail addresses are here.
And as I mentioned my e-mail is just tim@ncil.org.
Don't hesitate to reach out to me whether it's later
this afternoon or six months from now. We would love
to hear from you all.
Here on slide 34, wrap up and evaluation. This
is the link to the evaluation form that I mentioned.
Please do fill that out so we know what we thought of
today's call. I didn't mean to bring this up one
more time. I want to apologize again for the
technical problems in the beginning of the webinar.
In the year and a half since we switched to this
platform it has been absolutely trouble-free. But
these things are certainly going to crop up from time
to time. But we'll meet this afternoon to make sure
that that's taken care of and doesn't happen again.
Thanks for your patience everybody.
And as promised, it looks like we have one more
question that's coming in on the phone. So let's go
to that since we have time. Caller, go ahead?
>> CALLER: I'm wondering if there's common goals
or if the goals are only as per customers only? Is
there a list or an example of common goals?
>> BRAD: That's a very good question. And I
think the way that we have worked with it is you get
to customize and prioritize your goals and I'm
glad you asked this question. Because like a
strategic plan is only as good as you make it. And
then if it like sits in a computer file and it
doesn't get engaged and people don't revisit it or
check it out or if it doesn't get activated by the
committee and you don't look at it and people in your
council isn't active in making folks accountable to
it, then it is really not a plan. It's just a
concept on paper. So you know, it's only as good as
you end up making it and try to engage people in
making it happen.
So, for instance, we chose, I'll give you
examples, updating our technology. Which we
successfully did. And we're updating it now and
getting our technology and we're getting a new web
platform. If you actually visit our web platform
right now, it looks really old and it's going to get
updated. That's one. We realized that we needed to
increase our visibility. That's a nebulous one. But
you know, that was one that we identified. And we
needed to do some branding. We needed to do some
public relations. And with the IT we needed to get
that out there. And who is the New York State
independent living council, and not only branding out
there, but then I had to deal with relationships.
Remember customers, primary and supporting customers?
We needed to get out there and start developing our
relationships. And these were parts of our goal.
And part of that is who you then start doing work
with and making relationships with. And that's what
we chose. Remember how I said it's all based on your
need and your strengths, opportunities, weaknesses,
threats. You know, it's what you decide, what you
decide is important. And so then you decide. It can
be something like that. And it could be something
related to resources too. Which you know, in our
SILC-dom we had to do a very -- we developed a
committee. Our committee of SILC members are
volunteer. They can work on the issue, we can
identify ideas. A staff, of course. We can only do,
address it as individual people who, you know, at
home can address it. But when it comes to actual
resource development, can't do it at the office.
That's going to change with WIOA, but that's how we
addressed it in the previous. We're about to do this
new cycle, but I'm glad you asked that. The plan is
only as good as you make it and carry it out. And
the goals can be as specific to what you want to make
them. And they can be to things like visibility and
like relationships. Because they can be the most
important things for you in your council. But they
might not be the most important thing for another
council.
Does that answer your question?
>> CALLER: Yes, very much.
>> BRAD: Thank you.
>> TIM: Great.
Okay. We'll continue to wrap up here. So
basically the only thing left to say is I want to
thank all of you for taking the time to join us
today. Don't forget these presentations are all
archived on ILRU's website at ilru.org. Go to
training and the menu bar and select on demand
training and you'll see the archive of this webinar
within 48 hours. Probably sooner. And you can share
that with colleagues at your organization, at the
SILC, on your council or at CILs within your state if
you want them to be able to see the presentation that
you saw today.
So anyhow, I want to thank all of you for being
with us today. Brad and Ann, an excellent job. Thu
for doing this. We appreciate your time preparing
the presentation and talking with everyone today.
Again, don't hesitate to reach out to us. If you
have follow-up questions or if you're not getting
announcements from us, we want to make sure you're in
the loop. Have a wonderful afternoon. Bye.

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