# 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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