

Strategic Planning Notes

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Olivia Marshall
marshallolivia@hotmail.com
(414) 550-0642



PLANNING NOTES

APSE Board Retreat
January 16-17, 2009
Hyatt, Milwaukee

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Day One – January 16

Overview

The purpose of convening the APSE board on January 16-17, 2009, was to engage in a strategic planning process to determine the future vision of the organization and the goals and action plans necessary to achieve the vision. Ultimately, the process will function to help provide clear direction and a tactical plan for APSE's growth and development. Olivia Marshall and Emalie Fletcher facilitated the two-day session at the Hyatt, Milwaukee.

Day one focused on reviewing the current state of the organization, discussing big picture ideas and formulating a draft vision statement to help move the organization forward.

Research Review

The session began with a brief review of the common perceptions, themes and ideas the board shared prior to the session. (Refer to research summary handout - attached).

Visioning Process

In order to generate ideas for a new vision statement, the board was split into four groups and completed a visioning exercise. Each group was asked to write an article describing what the organization will look like in 2012.

As a reminder, a vision statement focuses on the *future* state of the organization and not just the “now.” It is the dream of what you want the organization to become. It is where the organization wants to go and what it wants to be within a specific time frame. It is the future.

A vision statement helps answer questions like:

- Where is the organization headed in the future?
- What will be different? What will remain the same?
- How will we grow and/or change?
- What do we really want to accomplish? What successes will we realize?

VISIONING EXERCISE RESULTS

Group 1

In his recent State of the Union message, President Obama noted that the recent significant increases of employment of people with disabilities are due to efforts of APSE: The Network on the Employment, and their strong chapter structure in all 50 states, and burgeoning efforts in foreign countries. APSE has become widely known and respected as the leading authority and voice for increasing employment for people with disabilities. As a result federal and state agencies have changed their

policies and funding to support community employment. APSE led the charge for the passage last year of the Employment for All year, which eliminated the use of federal funding for sheltered workshops and similar segregating programs, and moved this funding into supporting individuals to become taxpaying citizens working successfully in the community. APSE's state chapters have had similar success at the state level with funding and policy changes. APSE's leadership has resulted in a 25% increase in the number of people with disabilities employed in the community. APSE's membership of 10,000 includes a broad-based coalition of individuals and organizations, including people with disabilities, employers, human service professionals, educators, and others. Key to APSE's success has been its ability to engage legislators and policymakers at the federal and state level to recognize the advantages of people working successfully in the community from a cost-effectiveness and civil rights perspective. APSE also recognized without the support of the business community such efforts could not be successful and therefore has worked in partnership with the National Chamber of Commerce, SHRM, and major national employers including Best Buy, Manpower, Harley Davidson, and others. APSE has an annual budget of \$5,000,000 and 15 staff. Despite its relatively small size, a key factor in APSE's success has been its ability to take full advantage of the internet as part of its grassroots efforts, to engage its membership to advocate, utilize their expertise, and take action. At APSE's recent board retreat in Tahiti, over rum and cokes, the board members stated the retreat in 2009 in Milwaukee was the turning point, and the genesis for APSE's success. That retreat resulted in a strong vision, with a stronger more diversified board, that including emerging national leaders, that were able to take on the challenge of moving forward on a pro-employment agenda.

Group 2

(CNN newsflash)

Today the Obama administration announced the success of their Employment First portion of the Economic Recovery Plan by confirming that 3% of all new jobs created over the last three years were filled by people with significant disabilities (PWSD). This was initially accomplished through the use of both federal and state personnel hire set-asides for all federal and state contracts. Overheard on the cocktail party circuit, was that APSE, a major player in this successful effort, is now as recognizable as Habitat for Humanity. Members of APSE now receive immense amounts of calls from employers due to the demonstration of the value-added by hiring people with significant disabilities. Employers also realize that hiring PWSD opens up a previously untapped customer base for their businesses.

This development represents the major accomplishment of the President's Economic Recovery Plan. Most visible, perhaps are the numerous PWSD working within the White House. The contribution of the civil rights movement cannot be ignored as APSE brought together a broad coalition of civil rights groups along with business associations to push this issue forward. Additionally, APSE was a player in the significant reforms to SSA that removed disincentives to the employment of PWSD. The business community, after the demonstration of the efficiency and productive capacity of PWSD as employees is now voluntarily stampeding to hire this

demographic. A primary mechanism in this shift in public attitude toward the employment of PWD was the use of the Internet and networking techniques piloted within the 2008 Obama campaign.

As a result of these activities APSE and APSE Foundation revenues now exceed \$20 million. The APSE brand is now sought after with active chapters in all 50 states. The political establishment recognizes that PWD are players and a new and vital constituency that they now rely on for advice. Keynote Speaker Barack Obama thrilled conferees during his keynote address during the 2012 APSE conference following a warm up by Bruce Springsteen. APSE membership now exceeds 3 million throughout the U.S.

Group 3

“Employment of 1st Earth”

APSE is currently leading the Global Employment First Initiative. As we speak, at this very moment, APSE’s director is busy networking at the annual meeting of the United Nations. As a result of our tireless efforts, the UN has declared that employment for people with disabilities will be typical by 2020. In addition, the secretary general is presenting recognition of Nobel Laureate to TJ Monroe who was honored for his tireless global education and dogged networking efforts to lead the UN’s global employment proclamation.

APSE has spent the past 3 years collaborating with the Auto and Financial industries to demonstrate strong process improvement training techniques and bolstered the reinvention of both industries.

Key strategies and events that raised the Global conversation:

- The US began the era of Green Initiative by including people with disabilities.
- On his hiatus Steve Jobs had a brainstorm on new educational technologies that created the ability to comprehend on a unilateral basis.
- Obama proclaimed the end of Special Education and supported Employment as part of his platform for his 2012 campaign on crating jobs that included everyone.
- Bill Gates discovered that autism was a software coding glitch and rewrote Windows to fix the problem.
- The world documentary by Ken Burns was released and titled “Employment, the Road to Freedom”. It was written and produced by National APSE members under the age of 25 on Facebook and filmed on a cell phone.

Group 4

Wall Street Journal, July 4, 2012

“State of the Union highlights economic growth utilizing a strength-based model.” A 5-part series.

Monday: Network on Employment gets initial funding for national Employment First Initiative

Tuesday: President Obama creates % standard for employment for PWD

Wednesday: Disability field leads way for strength-based hiring practices

Thursday: Training programs for employment specialists funded at 25 major universities – network creates curricula

Friday: Dr. Laura Owens appointed to Secretary of Employment, a new cabinet position

DRAFT VISION STATEMENT

After identifying the common themes of each of the above statements, the board created the following draft vision statement:

Draft Vision Statement

In 2012, APSE is leading the nation in establishing employment as the first and preferred outcome for all working-age adults.

APSE is accomplishing this by:

- Advancing a Global Employment First Initiative.
- Establishing and impacting federal and state policy (establishing a definition of employment and converting funding to support employment).
- Increasing the number of people with disabilities who are employed.
- Providing leadership, direction, resources, and assistance to its constituency.
- Expanding collaboration and partnerships with the broader community.
- Promoting strength-based hiring and management practices within the business community.
- Strengthening the infrastructure to 50 state representation, fully staffed offices, and a healthy membership and financial base.
- Building a diverse and well-connected national and foundation board that practices exemplary governance.
- Using the latest tools to connect with constituents and build the community.
- Developing, expanding, and diversifying new leaders.
- Utilizing the power inherent in our grassroots membership through collaboration with the Delegates Council and state leaders.
- Partnering with the Foundation to develop meaningful opportunities to attract and engage donors, sponsors, corporations, and entities that align with our values.



PLANNING NOTES

Day Two – January 17

Overview

The purpose of convening the APSE board on January 16-17, 2009, was to engage in a strategic planning process to determine the future vision of the organization and the goals and action plans necessary to achieve the vision. Ultimately, the process will function to help provide clear direction and a tactical plan for APSE's growth and development. Olivia Marshall and Emalie Fletcher facilitated the two-day session at the Hyatt, Milwaukee.

Day two focused on developing the goals and tactical action plans to help APSE achieve the vision set forth on the first day.

Vision Review

The session began with a brief review of the vision created the day prior. Consensus was reached regarding the vision and each of the bullet points that encompasses the vision. The finalized vision for the organization is as follows:

In 2012, APSE is leading the nation in establishing employment as the first and preferred outcome for all working-age adults.

APSE is accomplishing this by:

- Advancing a Global Employment First Initiative.
- Establishing and impacting federal and state policy (establishing a definition of employment and securing and converting funding to support employment).
- Increasing the number of people with disabilities who are employed.
- Providing leadership, direction, resources, and assistance to its constituency.
- Expanding collaboration and partnerships with the broader community.
- Promoting strength-based hiring and management practices within the business community.
- Strengthening the infrastructure to 50 state representation, fully staffed offices, and a healthy membership and financial base.
- Building a diverse and well-connected national and foundation board that practices exemplary governance.
- Using the latest tools to connect with constituents and build the community.
- Developing, expanding, and diversifying new leaders.
- Utilizing the power inherent in our grassroots membership through collaboration with the Delegates Council and state leaders.

- Partnering with the Foundation to develop meaningful opportunities to attract and engage donors, sponsors, corporations, and entities that align with our values.

Goal Planning

In order to generate ideas and context for goal planning, Bob Lawhead presented data regarding Colorado's trends in community service programs and participation. Overall, Colorado has seen a decrease in supported employment since 2001, from a high of 24.0% to 21.5%. At the same time, the number of day/work participants has increased, but in the areas of day programs and sheltered workshops. Legally, funding sheltered workshops is illegal, but it is occurring in every state daily and it is not being enforced.

Bob is concerned that other states are seeing the same trends and after talking to employers and others in the field believes funding is the issue. He believes that there is a narrow window of opportunity for APSE to get the attention of the incoming Obama administration to get funding, follow the law, and reverse the trends. (Refer to SE% Age Graph 88-06 and Day Service # Graph 88-06 handout - attached).

After Bob Lawhead shared the data and provided context for goal planning, board members shared ideas in an open floor format. After some discussion and word-smithing, the following goals were agreed upon.

FINAL GOALS

- Employment First Initiative (including set-asides - % of job creation program)
- Resources shifted to strong federal advocacy
- Shift resources to businesses/employers (Identify champions and develop database)
- Change state policy
- Facilitate local organizing
- Redesign concept of "conference" ("20th year conference marks the end," summit idea, call to action, webinars)
- Draft communication strategy
- Develop next generation of leaders
- All 50 states represented
- Multiple media/make communication pieces easier to understand
- Marketing campaign (name change?)
- Organize alternative learning (Russian OD&L /speaker)
- Create tools and be catalyst for grass roots
- Rebuilding energy through education (administrators, providers, etc), marketing
- Help states use tools to create more impact
- Bring state presidents together "kick-off"
- Secure major foundation grant for 5 year commitment (organizational capacity building and grassroots political reform – combine all resources)
- Improve internet presence/website: leverage technology
- "Traveling Team" idea/ panel (develop strategy regarding transition)

- Develop specific board goals (diversity, well-connected, etc.; establish continuity and structure)
- Identify and using key partners and strategies
- Hire part time lobbyist (deal with issues TODAY); develop a way to afford it
- Innovative best practices study (employer-driven ideas) and communicate, look at things differently
- HR Connect (focus on business piece)
- Develop and maintain database and connection with business champions (1,000 contacts)
- Develop presence at physician conferences and strategy from birth of child (talk to other groups)

Goal Prioritization

As you can see, several goals were developed and deemed important. However, given the organization's and the board's resource restraints, it was important to group together the goals with similar themes and narrow the number of goals that the board will address to three goals for the immediate future.

The top three goal priorities were determined through voting. Each board member was given three stickers to use as votes, with results as follow:

Advocacy – Hire PT lobbyist today (6 votes) – grouping 2
 Secure major foundation grant for 5 year commitment (org. capacity-building and grass roots political platform; combine all resources) (7 votes) – grouping 1
 Shift resources to businesses – ID champions and develop database (4 votes)
 Resourced shifted to strong federal advocacy (4 votes) - grouping 2
 Re-design concept of conference – submit idea, webinars ,etc. (5 votes) – grouping 3
 Craft communication strategy (3 votes) – overarching theme
 Employment First Initiative (throughout) (7 votes) overarching theme

Grouping 1 = Securing major foundation grant
 Grouping 2 = Advocacy and Lobbyist
 Grouping 3 = Conference redesign

It was decided that Employment First and crafting a communication strategy are overarching concepts that need to be worked into each of the goals. It was also decided that strong federal advocacy overlaps with hiring a lobbyist, so those two ideas were grouped together. The revised top three goals are listed below.

Prior to the start of the Annual Conference at the end of June, the board will regroup to check on the status of the goals. If the board feels it is appropriate at that time, the group can easily add another goal to focus on.

TOP THREE GOALS

1) Secure a major foundation grant

- 2) Advocacy and part-time lobbyist
- 3) Conference Redesign

***Employment First, a communication plan and technology are overarching themes that need to be incorporated into each of these goals**

Action Planning Process

Following the goal planning, the next step in the process was to determine an action plan for each of the three goals. The board members were divided into three groups based on their interest area.

Each group was charged with developing an action plan for their goal and was asked to consider the following:

- What are specific steps necessary to achieve the goal?
- What group/person is responsible for that step?
- Are there any additional resources need?
- What is the timeframe the action should be completed in?
- What are the measurements? Or, how will we hold ourselves accountable?

ACTION PLANNING PROCESS EXERCISE RESULTS

***Please refer to the attached goal action plans to see the results of this process.**

Mission Statement

Next, the board was divided into two groups for a brief mission statement exercise. Each group was asked to answer the following three questions:

1. What does APSE do?
2. Who does APSE do it for?
3. Why does APSE do it?

The groups were also asked to form their responses in an “elevator speech” framework, meaning that if you only had 30 seconds in an elevator with someone, how could you best explain what APSE is and does?

MISSION STATEMENT EXERCISE RESULTS

Group 1

APSE: Advancing employment for people with disabilities through advocacy, policy influence and education by convening, connecting, collaborating, partnering, technology use, targeted messaging, message clarity and multi-media.

Group 2

APSE leads in the advocacy of employment as the first and preferred outcome for all working age adults.

We then combined the mission statements of the two groups. The new mission statement became:

New Mission Statement

APSE leads the advancement of equitable employment for people with disabilities.

Wish List & Parking Lot

After fulfilling our objectives of creating a vision, goals, action plans and an updated mission statement, we finished day two with a brief discussion of “wish list” and “parking lot” items to explore at a later time prior to the start of the Annual Conference in June. These are important items we do not want to lose track of but didn’t have time to cover during this session.

- Review board members’ roles / orientation for each new member
- Define Network and Foundation board roles, responsibilities and interaction
- Committees to utilize / get trained on Google Documents and other online/technology tools to help function effectively and efficiently
- Monthly communication to delegates
- Study list serves (i.e. Constant Contact) and determine which one to use
- Develop a sponsorship policy
- Look into the possibility of a blog
- Recruit board members (focusing on diversity)
- Provide defined committee meeting schedules
- Newsletter
 - Ask on new member application whether people prefer a mail or email version
 - Be able to call on people to write articles
- Every board member (100% participation) contacts state and federal legislators and leaders to introduce themselves; make this expectation clear
 - Board members get training on this during orientation
- Increase membership – focus!
- National leadership, i.e. “APSE Society”
- How to communicate this

Closing Comments

As the retreat came to a close, the board was asked to share final thoughts, feedback or comments about the session.

- I'm very happy with last couple days; the opportunity is now. We've been through this before so I wanted it to be different this time.
- I'm excited for the future. I think we're moving in the right direction.
- I enjoyed the conversations. I'm hopeful. I wanted to be a believer, and today I am. I want to keep that going. It's exciting to think we are a national association that's trying to elevate the game.
- I'm privileged to be on the board and I enjoy the company here. It re-energies me and reminds me of why I got into the field. I'm scared to death for the short-term future of APSE because there are lots of challenges ahead, but I think we're doing the right thing.
- I think this is the best session we ever had. We have a highly talented and committed board and we are very fortunate to have Laura as Executive Director because she has administrative experience and the public policy piece. I'm very enthusiastic.
- I learned a lot more at this session than I have at others. Sometimes new people on the board feel out of place so they don't speak up. We need to let them to know that they can talk and help them to be able to know what to expect.
- I'm excited and think we're moving in right direction. I'm most appreciative of the foundation being an integral part of this, and I feel for the first time their partnership.
- I was ready to pack up my tent and walk away. I am glad I came and I feel re-engaged. I feel I will be used well; I don't want to be miss-used.
- Thank you to everyone for coming these past days. I appreciate your time and coming because we can't do it alone. This is exactly what I hoping was going to happen. This was very different from what we've done in the past, and to help alleviate fears I will tell you that we are moving forward with this process and I will be calling on you to do your part. We will also be having a follow-up session in June.
- Hope is not a dream, but a way of making dreams become a reality.

Next Steps

1. The board should review these notes and action plans and make changes as necessary. (Note: Action planning teams should be sure to finalize plans – hold conference call to determine final action plan if necessary.)
2. Prepare to reconvene in June prior to the Annual Conference to discuss action plans and progress to date.
3. Use the attached action plans as your working tool and document to help you stay clear on priorities, track your progress, and work to achieve your vision. Thank you!