

Protection & Advocacy for People with Disabilities, Inc. 2004-2008 Strategic Plan

Approved By the Board of Directors on December 13, 2003

INTRODUCTION

The Board of Directors of the Protection and Advocacy for People with Disabilities, Inc. as part of its commitment to continuous improvement of its program and services initiated a strategic planning process in the Spring of 2003. This process results in a plan that:

1. Leads to results;
2. Builds a shared vision that is value based;
3. Is accountable to the community;
4. Is externally focused but sensitive to P&A's organizational culture; and
5. Is a key part of effective management.

The strategic plan of P&A provides direction for governance and management. Although the plan provides direction, it requires periodic review, evaluation, and must be changed in response to significant forces and trends in the public and private sector as well as legal, fiscal, technological, and human resource environments. The strategic plan is driven by the vision and mission of P&A.

VISION

Protection and Advocacy for People with Disabilities, Inc. (P&A) is a resource where individuals in South Carolina obtain quality information and referral about disability rights, enabling people with disabilities to be effective self advocates.

Outreach strategies assure full participation in P&A services for people with disabilities who are of rural or ethnic minority cultures.

There is full participation of students with disabilities in the public school system.

People with disabilities have equal access to places and services that are available to the general public.

People with disabilities who are in confinement will receive quality services including treatment and habilitation, personal safety and liberty, basic life necessities, and integration opportunities. These services will be individualized and productive recognizing the dignity and autonomy of each person.

No one will have to live in an institution due to the lack of appropriate supports and services in the community.

MISSION

P&A fulfills its vision through its mission:

To protect the legal, civil, and human rights of people with disabilities in South Carolina by:

Enabling individuals to advocate for themselves.

Speaking on their behalf when they have been discriminated against or denied a service to which they are entitled.

Promoting policies and services which respect their choices.

P&A SERVICES

P&A assists individuals with disabilities, both physical and mental, who experience discrimination as a result of a disability or who are denied a needed service that they have a right to receive. P&A provides four types of service:

1. **Information and Referral:** P&A advocates provide brief written or oral information about callers' problems and suggest ways to resolve the problems, including information about additional resources.
2. **Case Representation:** Case representation is a service provided under annually-established priorities. Callers only become clients if they have met current case selection criteria. Clients will work with an advocate and/or attorney to resolve rights violations or discrimination.
3. **Systemic Advocacy:** P&A efforts to resolve a problem(s) on behalf of a group of people with disabilities. These efforts include changes in laws, government regulations or organizational policies.
4. **Self-Advocacy Training, Education and Outreach:** Communities in need of receiving self-advocacy training, education and outreach are identified. Advocates conduct consumer focus groups, make presentations, and meet with community leaders as established in annual priorities.

STATE TRENDS

Political, economic, social, technological and organizational trends impact the future of P&A. Key factors that could influence the direction of P&A services are summarized below.

Political

Many federal, state and local policies and court decisions will impact the direction of P&A. Currently, P&A is largely influenced by the following two factors.

1. The Individuals with Disabilities Education Act (IDEA) is the federal law that mandates that all children with disabilities must have available to them a free, appropriate public education. P&A has always received a large volume of calls from parents who are experiencing problems with South Carolina's public educational system. Because P&A has consistently served clients in this area of emphasis, P&A receives calls from many previous clients, from the time they enter the system until the time they leave.

Large numbers of children with disabilities are being expelled from schools without due process. Federal law and courts have mandated that school districts view a disruptive child with disabilities within the special education system when the disruptive behaviors are related to the child's disabilities. The 1997 IDEA amendments require that specific procedures be followed in the development of the child's Individual Education Plan and include behavior plans where appropriate. These protections have significantly increased the volume of requests P&A receives in regards to suspension/expulsion.

P&A has long believed that there is a direct connection between those students that are expelled and suspended from school due to a manifestation of his/her disability and entrance into the Department of Juvenile Justice. South Carolina's dropout rate (8th grade students no longer enrolled in grade 12, average of students for the three years ending 2000-2002) was 16,648 students which equal 31.9% of students.

2. The 1999 U.S. Supreme Court decision in Olmstead v. L.C. provides a legal framework for P&A to advocate on behalf of individuals with disabilities who are institutionalized or at risk of institutionalization. These individuals have a right to live in the most integrated setting possible, appropriate to their needs.

Under the Court's decision, the Americans with Disabilities Act requires states to provide community-based services for persons with disabilities who are institutionalized when: (a) the state's treatment professionals reasonably determine that community placement is appropriate; (b) the affected persons want community services; and (c) the placement can be reasonably accommodated, taking into account the resources available to the state and the needs of others who are receiving state-supported disability services. P&A will advocate for the least restrictive environment through advocacy for individuals, legislative and regulatory changes, education, and state planning efforts to meet this mandate.

P&A has taken several steps to enforce the implementation of Olmstead in South Carolina. On July 1, 2002, Governor Hodges signed legislation amending the Nurse

Practice Act to allow people with disabilities the option of self-directed attendant services. This means that individuals who require in-home care in order to live at home or in a community placement, as opposed to an institution, are now able to choose ANY person - a paid attendant, friend or family member - to provide assistance with functions of daily living, self-care and mobility. Previously, such services had to be provided or supervised by licensed nurses. This law does not directly change how Medicaid or other third-party payers operate, but it removes a major legal barrier and gives more flexibility. We hope to build on this change to promote policies that will take full advantage of this option.

Economic

The State of South Carolina has experienced severe budget cuts over the last three years. These cuts have not only affected P&A, but all of the state agencies that provide services to people with disabilities in South Carolina. Currently, each area of service is a separate entity with a different Director and a separate budget. However, new legislation is under consideration that proposes to “restructure” all health and human services in South Carolina. This would change how services are being provided to individuals with disabilities and affect fiscal allocations (all under HHS, one ED, division heads, and one massive budget).

For the past three years, P&A has received increased federal dollars and decreased state dollars. The total annual budget has slightly increased each year. Given the economy at both federal and state levels, economic sustainability is a major concern for P&A if the economy continues to decline.

Federal and state resources for infrastructure and program expansion will be increasingly more difficult to secure without forging new partnerships and expanding funding sources. In addressing the increasing needs of the disability community, P&A will need to explore the private sector for new funding and resources.

Social

Unfortunately, people with disabilities in South Carolina encounter several significant barriers to accessing services, programs, products and goods. In general, the following facts impact the demand for P&A services:

- P&A surveyed consumers regarding what issues P&A should be working on. The majority, thirty six percent of primary consumers, ranked “freedom from abuse and neglect” as the number one priority with “Not be unnecessarily secluded or restrained, chemically or physically,” ranked second.
- Number of reports of abuse and neglect in any type of South Carolina institution: Department of Juvenile Justice, South Carolina Department of Corrections, Nursing homes, Residential Care Facilities, psychiatric facilities, DD facilities, etc. These instances range from unsafe conditions to inappropriate chemical and physical restraints.
- 76% of people with serious Mental Illness (MI) live at or below poverty level.

- 16% of SC Dept Corrections inmates have a MI (there are more people with MI in prison than in psychiatric hospitals).
- In elementary school, 16,078 six and seven year olds and 16,960 eight and nine year-olds were enrolled in special education classes during 2001-02, approximately 16.2% and 16.1% of their age groups respectively: 16.0% of White 8 – 9 year olds were in special education and 16.3% of African American and Others.
- Community supports are not in place to assist individuals in his/her transition back into the community. Large sums of money are still allocated by the state government for institutional care versus community based services. Some wait for days in an emergency room for admittance; there is currently a focus on medicating patient without counseling to prevent psychotic episodes.
- Inadequate transportation services for people with disabilities in almost every city that has a public transportation system in South Carolina. There are 26 public transportation systems in SC according to the American Public Transportation Association.
- The fastest growing ethnic population in South Carolina is the Hispanic community which has increased in size by over 200% since 1990. It is estimated that by 2010, Hispanics will comprise the largest, ethnic, minority population in South Carolina.
- Employment discrimination in applications, interviews, requests for accommodations, etc.
- Inaccessible streets, sidewalks, and public places, goods and services: Architectural barriers in public places limit the ability of people with disabilities to live free and independent lives.

Technological

Technological innovation is described as the major force driving change and impacting any type of corporation. (Bryson, 1995) New technology, specifically information technology, increases the demand for personnel to be skilled in their ability to utilize technology. The ability or inability to adapt to new technological demands could affect the nature of the work within the corporation. Organizational performance, accountability, funding, and issues related to data use, accessibility, and privacy are paramount in this new technological era. P&A must address internal technological capacity, its impact on consumers, and develop a plan to assure that P&A is equipped with the necessary tools to forge ahead.

Organizational Trends

Previously, P&A was organized by funding program and geographic region. As of February 2001, P&A changed to a team structure. Service delivery staff now work on one of four teams: Information and Referral (I&R), Conditions in Facilities (CF), Community Access (CA), and Education (ED). P&A experienced a twelve percent increase in the number of phone

calls from FY 2000/ 2001 to FY 2001/2002. Over the last three years, P&A has opened fewer cases, but provided increasingly more Information and Referral services.

Due to the significant number of individuals with disabilities requiring protection and advocacy services, P&A is challenged to develop the most effective organizational framework for providing the highest quality services for people with disabilities. This framework will need continuous evaluation to assure that P&A is effectively using its limited resources.

P&A values consumer input in guiding its focus; therefore gaining feedback about quality of and satisfaction with services is gathered on an annual basis. This year, P&A conducted a telephone survey, as well as, a mail out survey. The telephone survey indicated that the overall satisfaction level of those "satisfied" with P&A was 67%. Twenty two percent were not pleased with P&A services or advocates. The mail in survey indicates a much higher rate of satisfaction with P&A, around 90%.

Quality improvement comprises those preventive, monitoring, and post evaluative activities conducted to improve the manner in which P&A provides advocacy services to individuals with disabilities. This strategic plan proposes to expand those components of P&A's quality improvement system to assure quality advocacy services for individuals with disabilities throughout South Carolina.

CROSS CUTTING PRINCIPLES

The Committee identified two cross cutting concepts during discussions about the future of P&A. These concepts are the driving force not just of this strategic planning process but for the entire organization.

P&A will listen to and act on the stated needs and desires of constituents. The work of the organization is driven by the principle of self determination. P&A recognizes that:

Individuals with disabilities (and their families) have competencies, capabilities and personal goals that should be recognized, supported and encouraged.

Individuals with disabilities (and their families) are the primary decision makers and have a role in decision making.

A commitment to diversity is integral to the character of P&A.

P&A will continually improve the quality of services. The question "how can we do what we do better" will constantly be asked. Staff and Board will find ways to celebrate successes yet never be satisfied with the status quo. Organizational culture will continue to reflect a need to be better, more efficient and more effective.

Therefore the principles of self determination (including diversity) and continuous improvement are infused throughout the strategic plan. The Committee determined that these principles are an essential component.

Priority Areas

The Board and Staff of P&A identified three priorities for the next five years to better serve its constituents: capacity building, accountability, and visibility. These priorities begin with a rationale and specify desired outcomes that will be achieved through a series of strategies. Those strategies that are enhancements are designated by a double asterisk (**). Those strategies will not require additional resources but can be accomplished within the current budget.

Those strategies that are new directions are indicated by a dollar sign (\$) and will require additional funding in order to accomplish. In some situations such as the development of a public relations plan, efforts are under way to obtain those resources. In other situations it will be necessary to raise the additional funding or shift funding from other projects.

Priority One: CAPACITY BUILDING

P&A will increase and strengthen its capacity to provide protection and advocacy services to people with disabilities by diversification of its funding base (creating different types of funding), increasing the percentage of money over which the Board has total control (discretionary funds), increasing in-kind resources (volunteers/pro bono work) and developing more effective collaborative partnerships.

Outcomes 1- 6:

1. P&A will have increased its annual budget by \$200,000 by FY 2009.
2. By FY 2009 P&A will have diversified its funding base, with annual nongovernmental revenue of \$100,000.
3. By FY 2009 \$50,000 of P&As funding base shall be unrestricted.
4. P&A will develop a fund raising component of this plan by June 2004 to guide its activities.
5. P&A will increase dollars derived from litigation.
6. P&A will identify a baseline for in-kind resources, specifically pro bono and direct service volunteers by October 2005.

Strategies:

- a. Expand collaborative training efforts with groups such as, independent living centers, South Carolina Centers for Equal Justice, and other legal and advocacy groups.**
- b. A development group will be created that includes representatives of Board, and key individuals from the community to develop and implement the capacity building plan. \$

Priority Two: ACCOUNTABILITY

P&A will create a mechanism for on-going program evaluation which shall assess the organizational structure; the internal systems support provided staff, advisory council and board members. This shall include the regular evaluation of policies and procedures, technology needs and usage, staff support including salary and benefits, staff development (orientation and training), job descriptions and performance appraisals, board and Advisory Council (AC) development (orientation, training and leadership development).

Outcome 1: Every P&A Board member will receive on-going training which provides them with the knowledge, skills, and opportunities to exercise their fiduciary responsibilities to people with disabilities and funders. This will include orientation prior to their first meeting and annual training related to responsibilities of governance.

Strategies:

- a. Formalize the current orientation practice to assure the participation of existing Board members in orientation of new Board members prior to their first full Board meeting through the creation of Board policy beginning September 2004. **
- b. Within the first year of their tenure as a member of the Board of Director, all members will be offered at least one opportunity for a customized training activity beginning September 2004. **
- c. Beginning in March, 2005 generic training for the full Board will be incorporated into the March Board meeting and will be based on a Board survey/self evaluation.
\$

Outcome 2: P&A employees will receive ongoing training which provides them with the knowledge, and skills to assure quality services in response to people with disabilities and funders. Training activities will be done annually and identified in conjunction with performance appraisals.

Strategies:

- a. On an annual basis the senior management team will review the core agency-wide orientation package beginning September 2004. The addition of any new programs will trigger an automatic review of the orientation package. **
- b. Team specific orientation components will be reviewed annually ensuring that agency wide expectations for Teams are included as well as issue specific training beginning September 2004. **
- c. A short review of key orientation elements will be repeated at the six month

evaluation of new employees. Also included will be an opportunity for employees to identify their individual orientation needs and to 'evaluate' the orientation curriculum/checklist. The critique of the orientation program will be forwarded to the senior management team beginning January 2004. **

- d. A survey of all staff will be completed by March 31st of each year regarding their training needs beginning March 2004. **
- e. By March 31st of each year, all Team Leaders/Supervisors will submit a needs report for their Team to the senior management team beginning March 2004. The report will include identification of and justification for requests for additional staff, equipment, materials, etc, necessary to implement their priorities. **
- f. The senior management team will review the results of the employee survey and the needs report as part of their budget development beginning June 2004. **

Outcome 3: P&A advisory council members will receive annual training to provide them with the knowledge and skills to represent their constituency and the Board of Directors and staff regarding annual program priorities.

Strategies:

- a. Formalize the current orientation practice to assure the participation of existing Advisory Council (AC) members in orientation of new AC members prior to their first full meeting through the creation of Board policy beginning September 2004. **
- b. Within the first year of their tenure as a member of an AC, all members will be offered at least one opportunity for a customized training activity September 2004. **
- c. Develop mechanisms to recruit and support a diverse membership for each of the ACs. Each AC will identify such mechanisms by October 2004. **

Outcome 4: P&A will develop a series of evaluation mechanisms by which programs and services are reviewed for quality, efficiency and effectiveness. These evaluation mechanisms will be in place by October 2004.

Strategies:

The Planning Committee will be charged with the responsibility to complete the following:

- a. Formalize existing practices regarding review of data including who receives what by June 2004. **
- b. Develop a mechanism to assure that services are accessible to emerging

populations by October 2004. **

- c. Work with the senior management team to develop a mechanism to follow up written client satisfaction surveys by October 2004. **

Outcome 5: P&A Senior Management will annually review its organizational structure including technology and the Board of Directors will review every three years.

Strategies:

- a. Formalize existing practices regarding review of data including who receives what by June 2004. **
- b. The senior management team will review the information from the staff surveys completed in March of each year and provide recommendations with budget implications in a summary report to the Board each June beginning in 2004. **
- c. Management will periodically obtain outside evaluations of its use of technology. \$
- d. The Planning Committee of the Board will identify criteria to be used in its tri-annual evaluation of the agency's infrastructure by October 2007 and will complete the first tri-annual evaluation by March 2008. **

Priority Three: VISIBILITY

P&A shall improve its visibility through public relations and outreach strategies both within the disability community and the public at -large.

Outcome 1: P&A staff will obtain an outside consultant to work with P&A staff in developing a public relations component of this plan by June, 2004 to guide its activities.

Strategies:

- a. An outside consultant will be obtained to work with P&A in developing the PR plan. \$

Outcome 2: P&A will provide information about who it is and what it does to specific audiences including policy makers, the disability community, potential supporters, and the media.

Strategies:

- a. Training will be developed so employees learn how to tailor their message to specific audience including learning how to simplify the message. Training will be completed upon completion of the PR plan which will be used as a guide by June 2005. \$

Outcome 3: P&A shall develop and specifically target its message to the emerging populations factoring in accessibility (disability and language), literacy, eligibility, culture, and existing resources.

Strategies:

- a. The Identification of emerging populations will be incorporated into program evaluation by June 2005. **
- b. Advisory Councils and the priority setting process will include identifying the needs of emerging populations by June 2005. **

Outcome 4: Three strategies will be initiated by October 2004 which will improve the access of people with disabilities to the Board of Directors and staff of Protection and Advocacy in order to inform P&A of priorities for services.

Strategies:

- a. Board and AC meetings will be posted on the website with an invitation to participate in meetings and information about requesting reasonable accommodations by March 2004. **
- b. The PR plan will identify specific mechanisms for soliciting input from the community by June 2004. **
- c. By June 2004, Each AC will identify a mechanism to obtain more public input into the priority setting process. **