



Comprehensive Strategic Plan
2023



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Executive Summary

Established in 2012, Advocacy Links, LLC offered Medicaid Waiver case management services to people throughout northern Indiana. In October 2021, the state of Indiana changed how Medicaid Waiver case management services were to be delivered and Advocacy Links was not chosen as one of the companies for selective contracting for this service. In the first quarter of 2022, Advocacy Links researched other service options and funding streams to diversify its array of services. Between April – December 2022, Advocacy Links learned a lot about the initially anticipated services to be delivered and adjusted the eventual service array to focus on 4 key areas (Child Mental Health Wraparound; MyLinks/Housemate Finder; Resource & Connections; Purposeful Life and Community Engagement (PLACE)).

In this period of redesign, it became evident that establishing a Not-For-Profit business status was going to be necessary to draw down the funding through grants and donations for a few of the services to be delivered in a fiscally responsible manner. A sister organization, Advocacy Links Resource and Advocacy Links, Inc. was established and approved by the Internal Revenue Service in November 2022.

For the purposes of this Comprehensive Strategic Business Plan, “ADVOCACY LINKS” reflects both Advocacy Links, LLC and Advocacy Links Resource & Advocacy Center, Inc. as the nature and mission for both entities are in alignment.

ADVOCACY LINKS employees are committed to the following core competencies:

Listening to individuals and their families to fully comprehend the wants and needs of the individual. ADVOCACY LINKS employees coordinate customized services to meet each person’s needs.

Integrity and honesty are critical to the role of all ADVOCACY LINKS employees. They convey current, correct information to individuals, families and stakeholders in a timely fashion. ADVOCACY LINKS employees respect the privacy of all protected health information.

Networking with service providers, state entities, and local resources enable ADVOCACY LINKS, LLC Case Managers to connect waiver participants with the crucial supports to meet needs. ADVOCACY LINKS, LLC Case Managers are encouraged to continue building rapport with various organizations and sharing these connections with waiver participants, families and co-workers.

Knowledge of both current resources as well as upcoming options is mandatory for ADVOCACY LINKS employees to provide continuous quality services. ADVOCACY LINKS employees keep up with current trends and resources with ongoing training. ADVOCACY LINKS employees share this information with individuals and families as the need arises.

Support is provided by ADVOCACY LINKS employees through advocacy as well as personal contact. ADVOCACY LINKS employees are required to meet with individuals at least quarterly and more frequently as deemed appropriate by individual teams and circumstances.

Day-to-day operations of ADVOCACY LINKS are based on a mission statement centered on commitment to advocating for people who need help, maintaining fiscal responsibility, and respecting both those in services as well as those providing the services.

ADVOCACY LINKS' target area includes northern Indiana with a focus in 34 counties. People served by ADVOCACY LINKS range in age from 4 to 79.

Commitment to quality service delivery is evidenced by the ongoing training received by all ADVOCACY LINKS personnel as well as the compliance with accreditation standards and state and federal requirements as appropriate.

ADVOCACY LINKS representatives have more than 325 combined years of human service experience. Personnel are located throughout northern Indiana so ADVOCACY LINKS can ensure availability of services in geographical proximity to the participants receiving services.

The Strategic Business Plan is reviewed at least quarterly in the Leadership Staff Meetings and updated annually or more frequently if needed.

Business Description and Vision

Joy Greeney is the founder and owner of Advocacy Links, LLC and Advocacy Links Resource and Advocacy Center, Inc.. She has been working in the human services field since 1990 and brings extensive knowledge, experience and compassion to this position. She worked her way up through a variety of positions supporting individuals with intellectual/developmental disabilities such as direct care, residential group home manager, day service coordinator, residential Qualified Intellectual Developmental Professional, Medicaid Waiver Case Manager, and Case Manager Supervisor. She created Advocacy Links, LLC in 2012 at the urgency of individuals and colleagues to provide quality case management services to people in Indiana while providing a respectful working environment for Case Managers. Advocacy Links, LLC was proud to have grown to the third largest case management company in it's 10 years of providing waiver case management services. Over 3000 individuals throughout northern Indiana were receiving quality services by highly trained, respectful personnel. Advocacy Links was proud to be recognized for our high quality services by the state of Indiana through our clear record of compliance audits (there were never any sanctions imposed as a result of poor care to people we served). Whenever the state needed immediate help with high profile situations (converting group homes to waiver settings; placing 100+ individuals in new settings in less than 30 days, providing realistic feedback for new software development, etc.), Advocacy Links, LLC was the first company they called to assist with these projects because they were confident the project would be completed on time, correctly and respectfully.

In October 2021, when the state of Indiana did not choose Advocacy Links, LLC as part of the "selective contracting" process for ongoing Medicaid Waiver Case Management services, this was an enormous shock to Advocacy Links, LLC leadership as well as individuals, families, guardians, stakeholders, and community partners. However, through strong leadership and dedicated personnel, ADVOCACY LINKS used the knowledge and experience to create a new array of services that continues to adhere to the mission of the company.

ADVOCACY LINKS commits to advocating for people who need help; connecting people to fiscally responsible resources; and respecting everyone in the process.

It is the intent of ADVOCACY LINKS to use the knowledge and experience of all personnel to serve people receiving services so their needs can be met in a financially responsible fashion. As the need for additional personnel becomes apparent, additional qualified staff will continue to be brought into the organization, trained on the current procedures and continually mentored to develop their skills. ADVOCACY LINKS has invested in a quality systematic orientation training program to ensure new employees develop and demonstrate skills and commitment to our expected level of service.

Description of Services

ADVOCACY LINKS exists to provide reputable supports and services to individuals living in northern Indiana. Personnel are trained consistently to expand and maintain knowledge of current rules, regulations, trends, and business practices required by the state of Indiana (as appropriate) and accreditation standards. In addition, personnel listen to the needs of people, respect those needs and advocate on behalf of the participants to meet those needs. Representatives continuously explore paid and unpaid resources that help meet the needs of participants.

There are 4 key service/support areas summarize below:

Child Mental Health Wraparound Services: Children between the ages of 6-17 who have mental health support needs are eligible for wraparound services to help the family remain intact. Wraparound facilitators work with families to build natural supports and community connections to educate and support families.

MyLinks/Housemate Finder: Through our previous experience, we learned that there was an enormous need for a more efficient way for people who were looking for housemates to connect with one another. MyLinks is a social platform that has been created to help people interact in a safe place. Housemate Finder is an add-on function of MyLinks that provides secure information storage and the ability for individuals to filter profiles to take charge of choosing their own potential housemates rather than be forced to take whatever emergency placement is being forced upon them.

Resource & Connection: Through our previous experience, we learned that there were so many people who needed help who were falling through the cracks because they didn't have the right diagnosis, or they weren't the right age, or they lived in the wrong county. Many people were calling various community service agencies and were being turned away without any direction of where to go to get the help they needed. ADVOCACY LINKS will help whomever needs help regardless of their ability to pay for supports. These services range from minimal guidance (helping a family apply for Medicaid, Social Security, Waiver, etc.) to intensive hands-on support (deep cleaning, grocery shopping, household chores, elder care, etc.).

Purposeful Life And Community Engagement (PLACE): Through our previous experience, we learned that there was an enormous need for affordable, interesting things to do, especially in the rural counties. For young adults who have finished high school, there are limited options for engaging, purposeful activities due to staffing shortages and lack of transportation. PLACE is an opportunity for individuals to create their own preferred life by choosing and participating in

a variety of events and activities that focus on social connections, educational/support needs, and volunteer/vocational options.

Each of these key service areas has a more in-depth description as part of this comprehensive strategic plan.

Printed literature is available for individuals and their families/legal representatives, if applicable, as well as stakeholders and community partners to have a tangible, visual reminder of ADVOCACY LINKS, LLC. Digital examples of these brochures are included in Appendix B of this comprehensive strategic business plan.

As of 1/1/2023, ADVOCACY LINKS will not be expanding services other than the array described above as we only began this line of services in 2022. We need to stabilize our fiscal operations and ensure we are delivering the quality services we are known for before embarking on new service lines. As part of our initial research in our redesign efforts, there are additional service lines related to these key areas we will consider when the time is right (additional functions within MyLinks; emphasizing Elder Care supports; etc.)

It should be noted that there might be an option to provide Medicaid Waiver Case Management services again when the selective contracting ends (roughly 2024 when the waiver redesign occurs. While this is being closely monitored for consideration, there is a lot that would need to be considered as a factor in reaching this decision.

Definition of the Market

While revenue is essential for fiscal responsibility, making lots of money has never been and never will be the primary focus for ADVOCACY LINKS. As such, we don't emphasize our competition with other businesses. We are more interested in building partnerships and good relationships with other entities so we can educate individuals who need help about other options. Due to the expanded service line, there are different markets that pertain to each line. These will be explained in more detail in the specific service plans outline later in this comprehensive strategic plan.

Since we provide services in the human service field, there are also overlapping entities that also provide support and services in our 4 key areas. Some of these include:

- Adult Protective Services
- Department of Child Services
- Department of Mental Health and Addictions
- Area Agencies on Aging
- Schools (Public, Private, Charter, Homeschool)
- Medical Professionals

ADVOCACY LINKS provides services and supports in 34 counties throughout northern Indiana, but each service line operates only in a portion of the counties as we build our presence and capacity. A map of the geographic regions is included in each Divisional Service Plan later in this comprehensive strategic plan. Individuals supported by ADVOCACY LINKS range in age from 4-79 and have diagnoses that include, but are not limited to, Intellectual and Developmental Disabilities, Down's Syndrome, Epilepsy, Cerebral Palsy and Autism. As of December 2022, 125 individuals presently receive ongoing supports/services through ADVOCACY LINKS.

Organization and Management

Advocacy Links, LLC is a Limited Liability Corporation and it's Not For Profit 501(c)(3) sister organization, Advocacy Links Resource and Advocacy Center, Inc. are owned and operated by Joy Greeney. She comes to this position with over 30 years of experience working in the human service field in a variety of positions. Ms. Greeney holds degrees in Psychology and Social Science from Bethel College (University) in Mishawaka, Indiana. In November 2003, Ms. Greeney was presented with the "Case Manager of the Year" Award from the National Association of Case Management.

The business is not required to hold any specific licensing or permits, however, has received 4 consecutive 3 year accreditation awards (the highest available) from the Commission on the Accreditation of Rehabilitation Facilities (CARF) in May 2013, May 2016, May 2019 and December 2022. Additional certification was granted in the specialized areas of support for people who are Medically Fragile; Older Adult/Dementia Care; and Children/Adolescents. The accreditation survey reviews the systems we have in place and reviews our performance to insure we are implementing our systems. They also speak with employees, persons served and stakeholders about their satisfaction with our services. Advocacy Links will seek accreditation again in the Spring of 2025.

For the majority of our personnel, there are not state or federal mandates regarding the credentials required to hold position. The exception to this is for Wraparound Facilitators whose requirements are outlined in that Division's Service Plan later in this comprehensive strategic plan.

See Appendix C for the current Organizational Charts for both Advocacy Links, LLC and Advocacy Links Resource and Advocacy Center, Inc.

The positions outlined in the organizational chart have been filled with qualified candidates including many personnel whom Ms. Greeney had trained and worked with in former employment. Most of these staff have worked with Ms. Greeney for 5 years or more and have demonstrated competency, compassion, and dedication to meeting the needs of anyone who needs help. All personnel must contain appropriate knowledge and demonstrate necessary skills to fulfill the requirements of their positions. Additional members for the Advocacy Links Resource and Advocacy Center, Inc. Board of Directors will be added in the coming years as the organization grows to include a more diverse array that represents the people we support.

The only Division that has state/federal oversight is the Child Mental Health Wraparound services. The Division of Disability Rehabilitative Services (DDRS) provides grant funding for PLACE events so there is some feedback we have to provide to them related to progress

towards grant outcomes, but Advocacy Links Resource and Advocacy Center, Inc. is not a DDRS provider so we are not held to the same standards as traditional DDRS providers. A more in-depth description of this oversight is outlined in each Division's Service Plan later in this comprehensive strategic plan.

Marketing Strategy

Historically, ADVOCACY LINKS has relied on word of mouth as that was the best strategy for individuals receiving Medicaid Waiver case management services. With the new service array that became available in 2022, more traditional marketing efforts are necessary to educate the public about the new supports/services available.

ADVOCACY LINKS now consists of four divisions that provide supports to individuals in all life stages and with varying needs and abilities. Each of these divisions has a different target audience, but all will be using similar marketing strategies.

Target audiences per division include:

Wraparound: Audience includes families receiving child mental health supports through the DMHA (for children eligible for Medicaid) & DCS (for children not eligible for Medicaid).

Purposeful Life and Community Engagement (PLACE): Audience includes any individuals interested in participating in a social event or group activity that is inclusive to people of all abilities. (Activities will be advertised as inclusive unless otherwise noted in announcements.

Resource Connections: Audience includes any individuals looking for supports, guidance, or resources that could improve their quality of life and/or help them overcome barriers they've experienced.

MyLinks/Housemate Finder: Audience includes any individuals looking for exclusive content or discounts from Advocacy Links (MyLinks) and individuals looking to expand their Housemate search options.

All Divisions

ADVOCACY LINKS will continue to supply high quality and knowledgeable services.

Recommendations and word of mouth are always valuable marketing tools, but as we enter new areas of service, we will need to lean more heavily on educating people on our services and how they can be used. We will continue to further establish our reputation as quality providers within the referral systems of Wraparound Supports and Benefit Information Network Services (BINS). Marketing, education, and outreach efforts for PLACE events/activities and Resource Connections will become more necessary as a wide range of people can utilize these services.

ADVOCACY LINKS employees have an extensive history and rapport built with individuals, families, guardians, agencies, schools, government entities, medical professionals and public businesses. Throughout 2022 efforts have been made to keep stakeholders informed about the revised service lines through personal contact, email marketing, and social media postings.

Throughout 2022 the Marketing and Communications Manager has worked diligently to ensure brochures/flyers are created to reflect the supports/services provided by ADVOCACY LINKS.

Presence at Community Resource Fairs, Transition Fairs, Disability Expos, etc. throughout 2022

was a way for us to remain in contact with individuals in the disability service industry. As we move into 2023, a more defined approach to marketing is being developed to more effectively promote the various service lines which might include, but not be limited to the following:

- ADVOCACY LINKS, LLC Website
 - Informative Pages
 - Blog
 - Advocacy Links Event
 - Contact Form, Contact Information, Social Media buttons
 - MyLinks
 - Housemate Finder
- Personal interaction with providers, schools, organizations, etc.
- Involvement with reputable professional organizations
- Social Media Marketing
 - Company Facebook Page (Company announcements and Services, National/Statewide resources, Advocacy news, community building)
 - Facebook Events for PLACE events
 - Facebook Resource Group (Local Area Events, Specific Area resources)
 - Pinterest (Resource Sharing via visual bookmarking)
 - YouTube (Information & Education)
 - LinkedIn (Business Announcements, Article Sharing)
 - Instagram (Images from events and event announcements)
 - Sharing special events & activities to applicable local Facebook Groups
 - Blog
- Printed materials
 - Brochures
- Email Marketing
- Presentations
- Presence at:
 - Resource Fairs
 - Community Fairs
 - Awareness Events
- Arranging Resource & Community Fairs and Awareness Events
- Press Releases & Sharing of Event information on local community calendars
- Participation in professional organizations
- Brand development

The ADVOCACY LINKS website provides a visible presence on the internet including resource information. The website highlights the services we provide; indicates our mission; and introduces individuals to representatives who are available to work with them. The website can be found at www.advocacy-links.com . An additional website is in development for Advocacy Links Resource and Advocacy Center, Inc. at www.advocacy-links.org . In addition, Advocacy

Links utilizes social media (Facebook, Instagram, Pinterest) to share information with interested parties.

Being a member of professional organizations continues to be the intent of ADVOCACY LINKS. These organizations include, but are not limited to:

- ARC of Indiana (an advocacy organization geared to educate families who have children with intellectual or developmental disabilities)
- NACM (National Association of Case Managers)

As funds become available, ADVOCACY LINKS will consider renewing membership in INARF (a statewide membership organization which provides leadership and support to its constituency in the development of resources and promotion of quality services to increase members' ability to effectively serve the comprehensive needs of people with disabilities). Membership was paused in 2022 while we redesigned our service array.

Interacting with partner organizations and holding positions with committees in the local service area is also critical for ADVOCACY LINKS to build professional relationships and maintain a presence in the local communities. This is being achieved by sitting on local Systems of Care, Interagency Councils, etc. Representatives from ADVOCACY LINKS are present at "transition fairs" held at high schools where families are gaining information about services available to their children that are aging out of school.

ADVOCACY LINKS leadership staff maintain open lines of communication with stakeholders (agencies that provide direct support to the people for whom we coordinate services). We meet as frequently as the provider organization chooses and make contact at least quarterly. In these conversations, we discuss concerns, upcoming changes, and any other trends.

Printed literature has been developed for families to have a tangible, visual reminder of ADVOCACY LINKS. Most of the resource materials generated by ADVOCACY LINKS is available in Spanish. An example of the company's general informational brochure is included in Appendix B of this business plan.

Later in this comprehensive strategic business plan, there are Division specific plans with details about the specific marketing strategies being implemented to promote each specific Division.

Financial Management

ADVOCACY LINKS intends to remain focused in the geographic area where previous experience and professional rapport has been established. By concentrating on a limited geographic area, services can be provided more cost efficiently. ADVOCACY LINKS representatives live in the geographic area where they will be working, so travel expenses and travel are significantly less than for a company whose employees need to come from an hour or more away to meet with participants. Due to living in the area where they are working, ADVOCACY LINKS personnel are already familiar with the majority of resources in the targeted geographic area, so the time needed to train staff on local resources is greatly reduced.

Overhead costs for ADVOCACY LINKS are significantly less than those of some other service providers because all personnel work from their home offices rather than having to pay for office space in a physical building. In addition, by keeping overhead costs minimal, ADVOCACY LINKS is able to compensate employees competitive rate, thus keeping retention high and new staff training costs low.

As of 2022, Advocacy Links has shifted the array of services provided away from Medicaid Waiver Case Management. There are 4 service lines in operation as of 1/1/2023:

Child Mental Health Wraparound Services

There are two types of wraparound services that require the exact same activities to be completed but the reimbursement rate is different depending on the funding source.

- CMHW is funded by Department of Mental Health and Addictions (DMHA) and is for youth who have Indiana Medicaid and not IDD diagnoses. CMHW reimbursement rate is \$965.49/month. All work is documented on Tobi and payment comes through Indiana Medicaid's payment portal – Gainwell. Claims are paid within 2 weeks.
- CMHI is funded by Department of Child Services (DCS) and is for youth who don't qualify for Medicaid or who have an IDD diagnosis. CMHI reimbursement rate is \$850.00/month. All work is documented on KidTrax and payment comes through KidTrax as well. Claims are paid in 45-60 days.

Each Wraparound Facilitator can partner with no more than 10 youth at once as mandated by DMHA. Each wraparound supervisor can only have a combined total of 10 youth and people they directly supervise.

For budget purposes, the lower rate (\$850.00/month) is used for revenue calculations so we aren't over-budgeting. As long as each Facilitator has 10 youth with whom they are partnering, this division's revenue will exceed expenses.

MyLinks/Housemate Finder

MyLinks is a social network/resource sharing platform that is supported through memberships/subscriptions and sponsorships/donations. The platform was originally designed for creating an online housemate matching tool (Housemate Finder). Additional add-on functions will be added at a later date as the need continues and funds are available for development and maintenance. The budget for sustaining MyLinks is based on an ongoing and increasing number of paid subscriptions at various levels over the course of time:

- Introductory MyLinks Membership - \$100/year
- Basic MyLinks Membership - \$1000/year
- All Inclusive MyLinks Membership - \$2000/year
- Individual Housemate Finder - \$150/year
- Professional Housemate Finder (up to 5 active sub-accounts) - \$250/year
- Premium Professional Housemate Finder (up to 10 active sub-accounts) - \$500/year

Payment for subscriptions/memberships/gift certificates is processed through Stripe on the ADVOCACY LINKS website. Funds from payments are immediately available in Ecommerce bank account. Assuming there's a balanced distribution of membership types, the break even point for this division will be reached when 500 subscriptions are purchased.

Resource & Connections

This division is funded by private funding, contracts with community agencies (Adult Protective Services, etc.), grants and donations. The standard rate is \$75/hour to break even, but ADVOCACY LINKS is committed to providing services to anyone who needs help regardless of their ability to pay. We rely on grants and donations to help cover the cost of supports provided to those who are unable to pay.

For individuals who private pay for services, an invoice is sent to the billing contact at the beginning of the month following services rendered. Payment is anticipated within 30 days of receipt of the invoice.

The annual budget for 1 Director and 2 Connection Specialists relies on over \$125,000 in grants/donations to break even. Additional Connection Specialists will not be added until there is a clear need for additional employees in specific areas.

Purposeful Life and Community Engagement (PLACE)

This division is funded primarily by grants, sponsorships, donations, and private payment. The activities/events range in price depending on the cost of materials/space but the intent is to keep cost as low as possible so individuals can afford to participate.

Individuals wishing to participate in PLACE activities must register online through the ADVOCACY LINKS website and pay the registration fee through the online registration system. Funds from payments are immediately available in Ecommerce bank account.

The annual budget for 1 Director and 2 Life Consultants relies on over \$200,000 to provide a wide variety (at least 40/month per Life Consultant) in 12 counties throughout northern Indiana. Additional Life Consultants will not be added until there additional funding to support another 6 county geographic region.

In the appendix of this Comprehensive Strategic Business Plan, there are several documents to help project finances in the next 2 years. It's extremely important to remember when reviewing these materials that ADVOCACY LINKS completely shifted service lines at the beginning of 2022. Revenue was extremely limited as we researched and developed new service lines. There is a clear uptick in revenue in the 4th quarter of 2022. In conjunction with additional reductions in expenses throughout 2022, the reserve funds have diminished, but we are on track with revenue generating services and grants.

Appendix D contains the Balance Sheet for January 1 – December 31, 2022

Appendix E contains the Budget vs. Actual Report for January 1 – December 31, 2022

Appendix F contains the Income Statement for January 1 – December 31, 2022

Appendix G contains the projected Income Statement fiscal years 2022 - 2025

Appendix H contains the projected Cash Flow Statement for January 1 – December 31, 2023

Appendix I contains the projected Cash Flow Statement fiscal years 2024-2025

ADVOCACY LINKS, LLC has a business line of credit up to \$100,000 through 1st Source Bank. Although we have had to use some of this line of credit in the early months of operation, we paid off the entire line within the first year of operation and only utilize the line to keep it active.

Historically, ADVOCACY LINKS maintained 2 months' worth of expenses to remain financially solvent in the rare instance that Medicaid payments were interrupted. ADVOCACY LINKS intends to continue this practice as we regain steady revenue streams.

Growth Plan

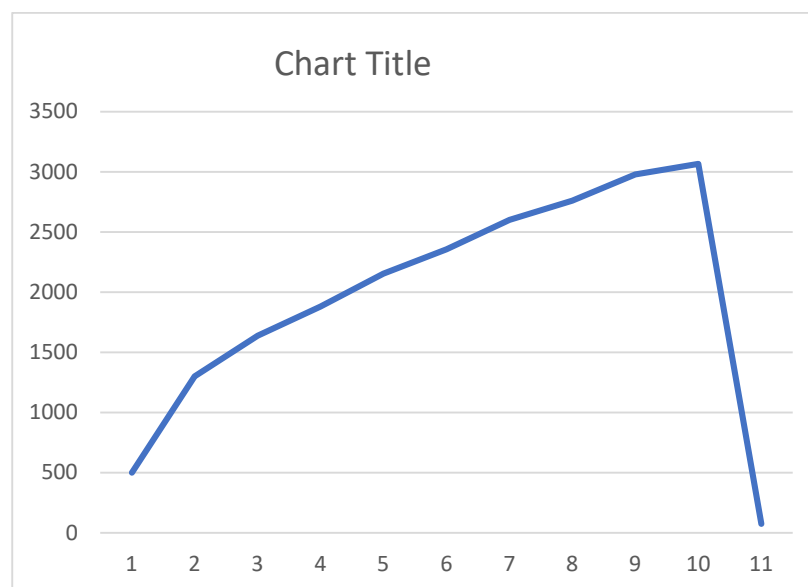
Overview Statement

ADVOCACY LINKS is committed to continued growth as the needs arise. Since its inception in 2012, Advocacy Links has grown in all areas. ADVOCACY LINKS Leadership is emphatic about providing the best possible services before expanding. Throughout the life of the company, there have been times where we have paused growth in specific areas due to concerns that needed to be addressed. Advocacy Links has worked hard to build a reputable foundation based on integrity and quality. It has never been and never will be the desire of ADVOCACY LINKS to be “the biggest” company. While we recognize that there is power in volume, we truly strive to be “the best”. Our emphasis is on the relationships that we build with people served, the training, support and respect we give our staff, as well as the collaboration we have with state personnel, industry leaders and other companies.

In October 2021, the State of Indiana entered into selective contracting for Medicaid Waiver Case Management services and did not choose to contract with ADVOCACY LINKS. All 3000+ individuals supported by ADVOCACY LINKS needed to choose a new company and over 75 employees who wanted to remain Waiver Case Managers needed to find a new employer in less than two months.

In the first quarter of 2022, ADVOCACY LINKS worked diligently to research service options and create new service lines.

Number of people served



Division	12/27/2022
Resource & Connections	10 active 13 ongoing intermittent
PLACE	1 active 35 ongoing intermittent 2 short term
Wraparound	14 active
Subscriptions	2
TOTAL	25 active 48 ongoing intermittent 2 Short Term
GRAND TOTAL "hot"	75

Increase in the number of consumers served occurs in a couple manners:

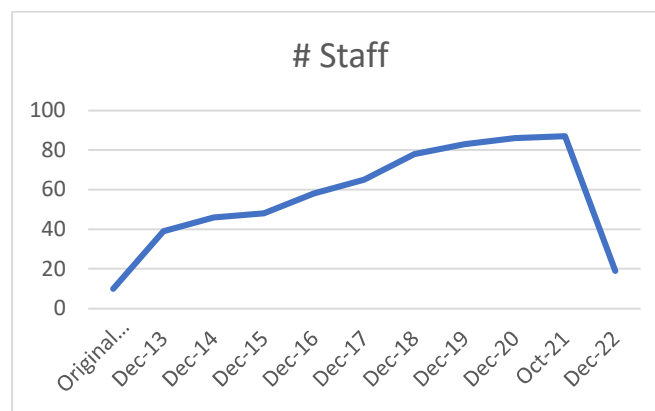
1. Youth needing partners for wraparound services
2. Individuals interested in interesting things to do outside of the traditional "day service" hours
3. People needing help hands on help or advocacy support
4. People wanting online tool to find potential housemates

Decrease in the number of consumers served occurs in a couple manners:

1. Person signs out of services
 - a. No longer wants/needs services
 - b. Moves out of state
2. Support is terminated due to lack of response
3. Person passes away

In the original business plan that was developed when Advocacy Links started in 2012, it was projected that approximately 500 people would be supported within the first 3 years. As the graph above shows, the initial projections were exceeded well before the anticipated time frame. Growth continued to occur through the years at a steady pace. The state of Indiana selective contracting dissolved the entire customer based in less than 6 weeks. In 2022, ADVOCACY LINKS has been gradually building back customer base across 4 service lines. While growth has been slower than anticipated, momentum is growing especially in the Child Mental Health Wraparound division. Projections for growth in 2023 and 2024 are conservative across all service divisions.

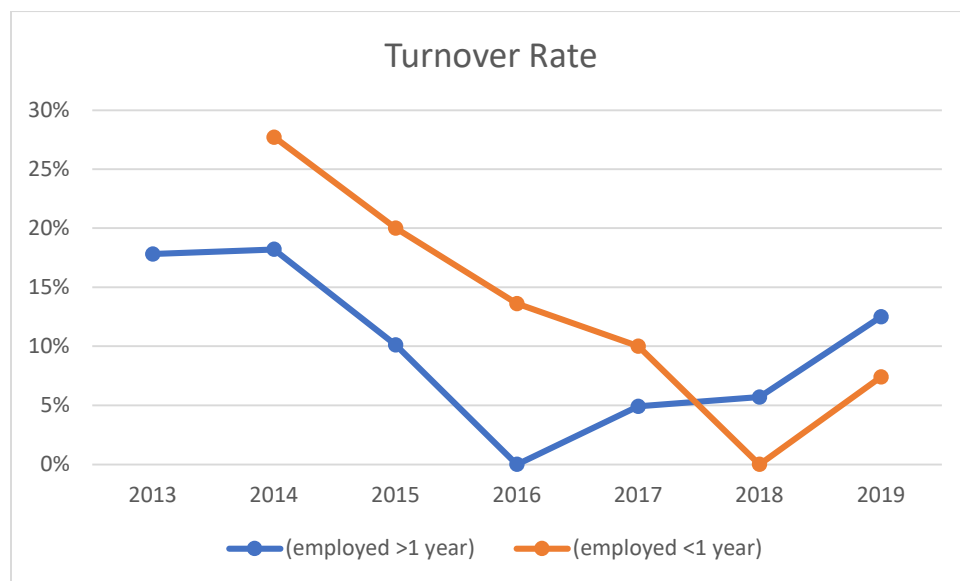
Number of staff employed



The original business plan (2012) for ADVOCACY LINKS estimated that 11 people would like to work with us. As shown in the graph above, those early projections were significantly under estimated. Because of the reputation and integrity of the business leaders, numerous professionals who have worked in the industry for many years decided to change employers. In October 2021 when the state went to selective contracting for Medicaid Waiver Case Management services and ADVOCACY LINKS was not selected as a vendor, 66% of our employees changed employers to provide continuity of services for the individuals with whom they had built strong relationships over the past several years. Another 22% of staff exited the field entirely due to the traumatic nature of the state's current and historical decisions that are creating a hostile work environment.

Throughout 2022, some key employees were retained initially to help determine the direction of ADVOCACY LINKS supports and services for the future. As the new array of services/supports developed, additional personnel were added to implement the new services. Several "new" employees were simply former employees who appreciated working for a company with integrity and positive culture. 3 "new" employees were people who had not previously worked for ADVOCACY LINKS.

Moving forward, additional personnel will not be added unless there is funding to support their addition. In 2023 we anticipate additional growth soon in the Child Mental Health Wraparound Division and will pursue adding personnel to ensure these supports are being provided as needed. There are currently 2 employees who were furloughed from their current positions due to the lack of need for those positions as of 12/31/2022. As additional positions become available within ADVOCACY LINKS, the furloughed employees will be offered the opportunity to be considered for new positions if the employee meets the requirements for the new positions.



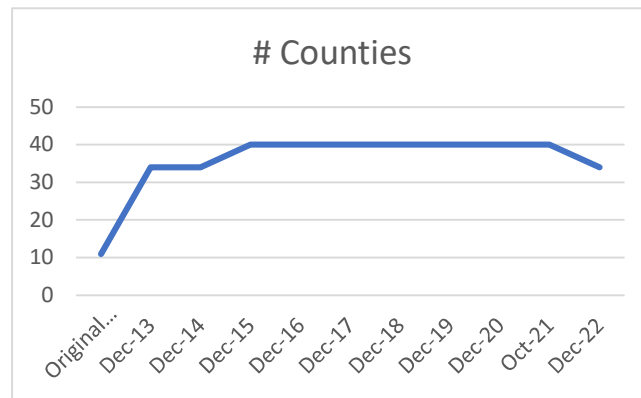
In the early years of ADVOCACY LINKS, we struggled with staff retention for new employees. Because of the complexities of the job and the vast amount of information that needed to be absorbed, employees would leave their positions within the first year consistently. Typically, people who made it past their first year of employment generally stayed for multiple years. Over the course of time since the Medicaid reimbursement rate for case management service never increased in alignment with expectations and requirements, the trend was for employees to use Case Management as a stepping stone along their career path towards a career where their salary would grow as their credentials increased.

ADVOCACY LINKS worked really hard to create a supportive, respectful work environment that helped keep our turnover rate well below the industry average. In 2021 when a contract was not awarded, everyone who wanted to remain a waiver case manager needed to find alternate employment. The turnover rate is skewed as a result of the state's decision rather than employee's dissatisfaction with their employer.

As noted earlier, ADVOCACY LINKS will not add any more employees unless there is a genuine need and funding to support additional personnel. It is anticipated that 1 new Wraparound Facilitator might be added each quarter throughout 2023. It is hoped that we can reinstate our

2 furloughed employees at some point in 2023. When considering attrition, ADVOCACY LINKS will thoroughly review the necessity and funding available to backfill any currently filled positions.

Number of counties covered

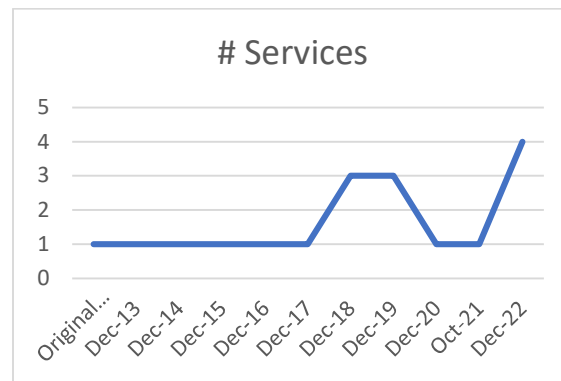


As noted in the original (2012) ADVOCACY LINKS business plan, it was anticipated that we would work in 11 counties. Initially, that was true, but when it became apparent that qualified, seasoned Case Managers in additional counties were interested in working with our company, we expanded our territory. We added the counties around the Fort Wayne area within the first few months and added the counties along the western border of the state a few months later. In 2015, six additional counties around the Muncie area were added.

As part of the service redesign in 2022, ADVOCACY LINKS modified the service delivery area to concentrate on the areas with the strongest presence and community networks that had been established. As of 1/1/2023 there are 34 counties that are receiving some type of service/support through ADVOCACY LINKS. Additional counties will not be added unless the need exists and funding is available to cover the cost of service delivery.



Number of services provided



When ADVOCACY LINKS came into existence, there was only one type of service through the Community Integration Habilitation (CIH) and Family Support (FSW) waivers – Case Management. Over the course of time, Centers for Medicaid and Medicare Services (CMS) approved additional case management type services which we also provided until the state of Indiana rolled all the case management type services into one. As part of the ADVOCACY LINKS redesign in 2022, we are now providing 4 lines of services:

- Child Mental Health Wraparound
- MyLinks/Housemate Finder
- Resource & Connections
- Purposeful Life and Community Engagement (PLACE)

For a more detailed description about each of these service lines, see “Description of Services” section of this Comprehensive Strategic Business Plan as well as each division’s specific Service Plan, also included in this Comprehensive Strategic Business Plan.

ADVOCACY LINKS remains vigilant about following the State of Indiana’s Medicaid Waiver Redesign efforts as this has been the heart of the supports/services that built the business. In 2024, Indiana plans to transition the oversight of the A&D Waiver and TBI waivers from the Department of Aging (DOA) to the Division of Disability and Rehabilitative Services (DDRS). The initial contracts that were awarded in 2021 as part of the selective contracting for CIH/FSW waiver case management will expire in 2023/2024. While the contracts might be renewed, there might also be an opportunity to apply to provide the services again. ADVOCACY LINKS Leadership will continue to follow the status of this and determine if conditions are right to apply to provide those supports again.

Through the years, ADVOCACY LINKS has explored and researched additional service provision opportunities, but based on the research has determined that the risks of adding the services

outweighs the benefits in many cases. Some of these options that have been considered include but are not limited to:

- Case Management for Aging & Disabled (A&D) waiver – this is a medical model waiver. While required tasks and service provider requirements are similar, the reimbursement rate was lower. When the rate was increased in 2017, the responsibilities and service provider requirements became exponentially more complicated.
- Case Management for Traumatic Brain Injury (TBI) waiver – this is a medical model waiver. While required tasks and service provider requirements are similar, the reimbursement rate continues to remain significantly lower.
- Deaf & Hard of Hearing Case Management – this was a new initiative on which the state of Indiana was embarking in 2019 and requesting Requests for Proposal (RFP) to provide. The recipient had to commit to serving the entire state (which we weren't prepared to do), and the reimbursement rate was significantly less than rates for other CM services currently provided.
- Money Follows The Person (MFTP) – This is a federally funded pot of money that is managed by each state however the state chooses to manage it. For the state of Indiana, these funds were supposed to be used for people transitioning out of facilities onto waiver services. They were available for up to a year before the person actually started the waiver. The state only wanted one vendor for the whole state. The program was to be renewed, with a possible new vendor. We were prepared to submit a bid in 2019 to be considered when the renewal was to happen, but instead the state decided not to renew those funds as the MFTP responsibilities were ultimately rolled into the Waiver Case Management required tasks.
- Behavioral Case Management – This is a type of Case Management that exists in the Mental Health arena. There are numerous people that we support in the Intellectual Disability world that are dually diagnosed so we are interested in learning more about this option. To date, we have not pursued this with intensity because of the other commitments on our plate.
- Vocational Rehabilitation (VR) Discovery – When VR redesigned their service delivery model, which focused on a more person-centered approach to knowing a person before pursuing employment options, this “discovery” process mirrors what Waiver Case Managers are doing when completing the Person-Centered Individualized Support Plan. It is possible that with the lack of VR staff and their recent move to “order of selection”, they might be considering farming out the “discovery” process to another entity. This would be an area that we would be interested in considering providing.
- Benefits Coordination – Social Security is a significantly complicated and avoided realm by most people who are intimidated by the complexities. Many people are confused by

the rules and regulations so they avoid getting a job because they are afraid they are going to “lose” their SSI/SSDI benefits. There is a huge need for people who are familiar with the ins and outs of Social Security to be able to logically explain the program to individuals, guardians, and family members. ADVOCACY LINKS currently is an approved Vocational Rehabilitation provider for Benefit Information Network Services (BINS) has 1 employee who has BINS certification. This service is provided under the “Resource and Connections” division.

Growth plan Goals:

Priority	Plan of Action	Person Responsible	Timeline	Cost	Status
HIGH	Increase number of revenue generating clients	All Division Directors	Ongoing through 2023	0	Ongoing
MEDIUM	Consider adding counties	Sara Fry/ Joy greeney	Ongoing through 2023	\$0	Research options as they become available

Budget

Presently, the operating budget of Advocacy Links, LLC covers the cost of all growth plan initiatives.

Dissemination of the Plan

This plan is internally disseminated as follows:

1. The Growth Plan is a part of the Comprehensive Strategic Business Plan and is included in the Annual Plan.
2. Periodically, information is shared at staff meetings, indicating that the plan is available upon request from the Managing Member and encouraging all employees to read it.
3. The Managing Member meets with the Leadership Staff to discuss and finalize the ways all personnel can assist the company in meeting the goals of this plan.

Responsibility for Plan

The Managing Member is responsible for the goals and mission of the company including this Growth Plan. The Managing Member uses a well-defined administrative structure to accomplish the goals and mission of the company.

Implementation, Monitoring and Reporting

The Managing Member and Leadership Staff have has developed the tools needed to successfully implement the plan and ensure an ongoing focus to growth issues. The Managing Member and Leadership Staff will plan, develop and deliver training to employees on growth initiatives at ADVOCACY LINKS, and the organization's policies and plan to address barriers, and the commitment to address growth on an ongoing basis.

Evaluation

Progress towards achieving growth goals will be reviewed at least quarterly in the Leadership Staff Meetings. This Growth Plan will be updated annually and more frequently if needed. The Managing Member, in conjunction with the Leadership Staff, will determine the accomplishment of goals and adjust the Growth Plan as needed.

Closing Statement

Persons having suggestions for improving this plan are encouraged to provide their suggestions, in writing, to the Managing Member.

Workforce Development Plan

Purpose & Introduction

Introduction

Training and development of the workforce is one part of a comprehensive strategy toward agency quality improvement. Fundamental to this work is identifying gaps in knowledge, skills, and abilities through the assessment of both organizational and individual needs, and addressing those gaps through targeted training and development opportunities. This document provides a comprehensive Workforce Development Plan for ADVOCACY LINKS.

The primary person and department responsible for training and workforce development initiatives, including the maintenance of this plan is Amy Rectanus, Quality & Training Manager. For questions about this plan, please contact:

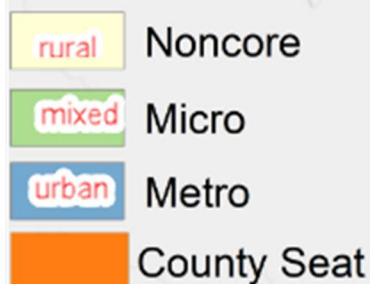
Amy Rectanus
260-446-1839
Amy.rectanus@advocacy-links.com

Location & Population Served:

ADVOCACY LINKS provides services in 34 counties throughout northern Indiana. The 4 key service lines have some representation through these counties, but are still building presence in all areas. Based on research completed by Purdue University, of the 34 counties served by ADVOCACY LINKS, 7 are “rural”, 12 are “mixed” and 15 are “urban”

Metro, Micro, Noncore

Indiana, 2020

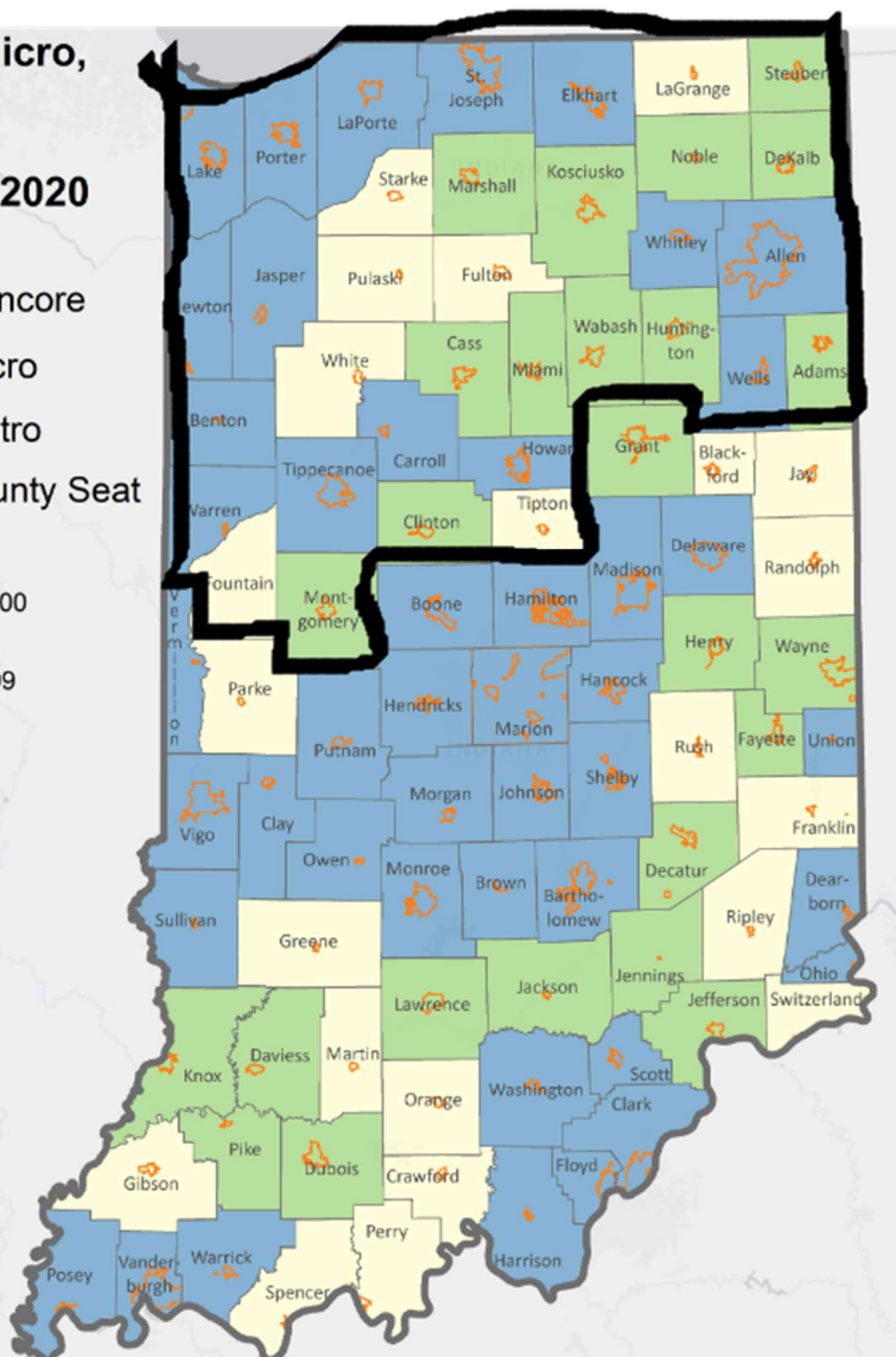


Noncore:
Less than 10,000

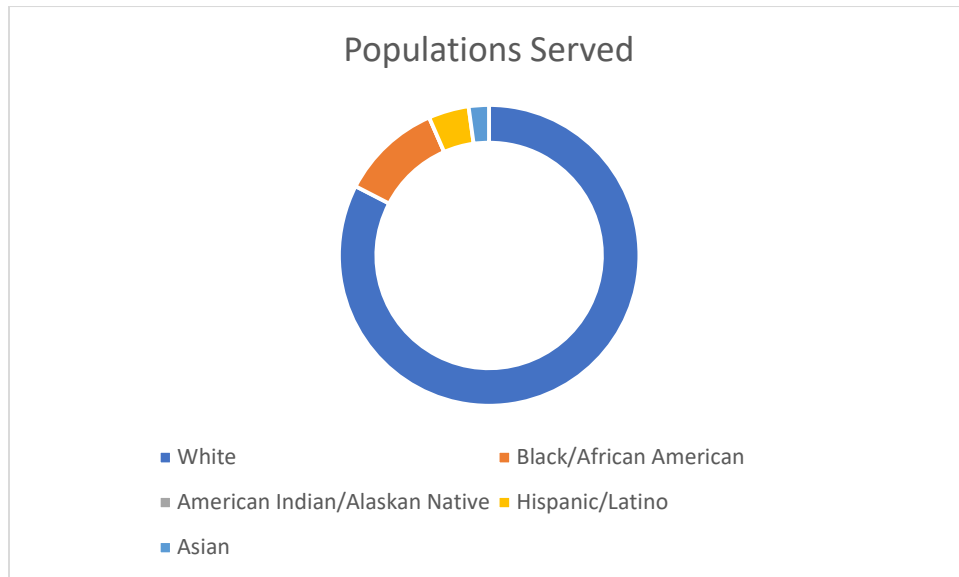
Micropolitan:
10,000 – 49,999

Metropolitan:
Over 50,000

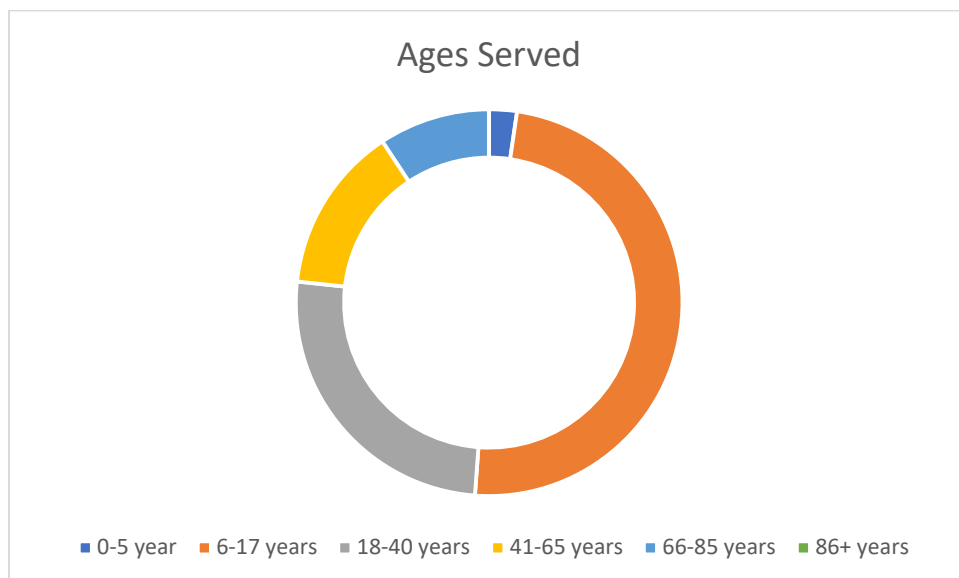
NOIS



ADVOCACY LINKS serves a diverse population throughout the northern Indiana area. While the majority of consumers are predominantly English speaking, there are pockets of individuals that require interpretation, which ADVOCACY LINKS coordinates when native speaking employees are not available.



In addition, the majority of people with whom we work are children and young adults.



Caseload Size & Oversight Structure

Currently, ADVOCACY LINKS is operating with a skeleton staff to deliver the promised services and to create opportunity for expansion and growth. As growth occurs, additional personnel will be added to support the individuals as the service dictates. Some positions are capped at the number of people with whom they can work/support. Some positions have a greater volume of people supported as the ongoing responsibilities of the positions are less intense. These differences are outlined more clearly in each division's plan located later in this comprehensive plan.

As additional personnel are added, the Supervisory/support structure as follows is intended to be implemented:

Tier	# of staff supervised	Emphasis
Tier 1	1-9	<ul style="list-style-type: none">• Learn role• Support staff• Develop relationships in target areas
Tier 2	10-19	<ul style="list-style-type: none">• Support staff• Develop relationships in target areas• Begin grooming potential next leaders
Tier 3	20-25	<ul style="list-style-type: none">• Support staff• Develop relationships in target areas• Aggressively groom next leaders• Plan for transition of supervision with 10/16 split

Currently, we have enough personnel to implement the plans of persons served, ensure the safety of persons served, manage unplanned absences, and manage ADVOCACY LINKS' performance expectations. In the event that an employee leaves, efforts are made before their departure to identify a new ongoing staff member. In the event that an employee's departure is unplanned, Leadership Staff are prepared to step in to ensure services continue uninterrupted.

As we look into 2023, and the potential for new employees exists, new employees will receive New Staff Orientation with customized training for the role they are filling. Division Directors work diligently with the Human Resources Manager and/or Business Manager to review applications, schedule interviews, and offer positions.

Learning Culture

Performance management and quality improvement are key to sustainability, forward movement, and employee satisfaction. Workforce development for all employees will ensure staff achieves the desired social service and diagnosis-specific competencies needed for service delivery, customer satisfaction, and efficient internal processes. Some current employees do not have a social service background and improving the core competencies will help them understand the premises of social service and compliment their desire to “help others.” ADVOCACY LINKS supports learning on all levels and offers job-specific training, in-house training on various topics and access to training through webinars and conferences. In addition, leadership development is achieved through the nationally recognized training resources (Fred Pryor/Career Track) as well as industry specific professional development opportunities (Charting the Life Course, INARF Leadership Academy and National Association of Case Management), Transformational Collaborative outcomes Management (TCOM), John Praed Foundation, Indiana University Canvas, and National Wraparound Implementation Center.

ADVOCACY LINKS strives to conduct business with a value driven focus while maintaining open communication and respect. All policies and procedures are posted on the employee accessible online document library at all times. Supervisors have frequent contact with their subordinates to alleviate feeling of isolation in the virtual environment in which we work. Ample support methods (online as well as in person; topic specific and general work sessions; etc.) and times are available for employees to attend at their discretion. Training opportunities (both mandatory and voluntary) are available and communicated consistently.

Funding

100% of funding for training employees comes from the ADVOCACY LINKS general budget. Where possible, ADVOCACY LINKS encourages employees to seek out low cost or no cost trainings that are regularly available through partner organizations. Historically, ADVOCACY LINKS spends about \$13,000 annually on professional development for all staff.

Policy

The training requirements for personnel for each division are different based on the oversight entity for the service provided. See each division’s service plan later in this Comprehensive Strategic Plan for division specific training requirements.

All new employees go through New Staff Orientation during their first week of employment. All new employees with direct engagement with individuals served must complete hands-on Person Centered Planning Facilitation and/or Charting the Life Course training. All new Wrap Around Facilitators are required to complete DMHA Wrap Around Facilitation training within their first year of employment based upon when it is offered.

Overall, ADVOCACY LINKS implements a best practice standard of at least 20 hours/year of training for each employee. This is broken down into at least 10 hours/year of social service related training (or training required for certification) and at least 10 hours/year of position specific training. More than 20 hours/year of training is acceptable for any position. Employees in leadership/administrative positions have additional training requirements specific to their leadership roles.

ADVOCACY LINKS hosts mandatory Company Wide Calls each month to assist employees in obtaining the majority of their required training hours. These calls have a speaker related to a social service related topic. In addition, ADVOCACY LINKS has a schedule for required training topics that each employee must complete to meet CARF requirements.

Employees are encouraged to seek out external training opportunities to meet their own specific position needs, and funding for these can be provided by ADVOCACY LINKS within budgetary constraints.

All Staff must complete all required annual training assessments with no less than the specified score set by the training entity. All training records are stored in the Bamboo Human Resource system. Quality & Training Manager tracks training completion and coordinates with supervisory personnel to ensure required hours are completed within designated timelines.

Title	Format & Location	Passing Score	Hire	Annual
Abuse, Neglect & Exploitation	Online/Bamboo	80%	Yes	Yes
Incident Report & Management	Online/Bamboo	80%	Yes	Yes
Human Rights and Protection of Individual Rights	Online/Bamboo	80%	Yes	Yes
Drug Free Workplace	Online/Bamboo	80%	Yes	Yes

HIPAA	Online/Bamboo	80%	Yes	Yes
Positive Behavior Supports	Will be recorded/online/Bamboo	N/A	Yes	Yes
1 st Aid/CPR	Online/Skills test by Advocacy Links Instructor in person	100%	Yes	Renewed as required, might be 2 years
Health and Safety Trainings	Online/Bamboo	80%	Yes	Yes
Position Specific Training Curriculum	Online/In person/Bamboo	80%	Yes	Retraining as required
DMHA Wrap Around Facilitation Training	Online/In person	As set by DMHA	Within 1 st year of employment as appropriate	As required by DMHA
PCP/CtLC hands on facilitation for Resource Coordinators	Online/In person	80%	Within 1 st year of employment as appropriate	As needed
BINS Certification for Specialized Resource Coordinators	Online	80%	Within 1 st year of employment as appropriate	Recertification required annually
SOAR Certification for Specialized Resource Coordinators	Online	As set by Social Security	Within 1 st year of employment as appropriate	n/a

Concerns & Grievances

ADVOCACY LINKS operates with an “open door” mindset to encourage all employees to share their concerns immediately and have an opportunity for the issue to be resolved without the need for formal grievances. However, we do have processes in place for people to file grievances should they so desire.

Recognition & Feedback

All along, ADVOCACY LINKS has conducted business adhering to its mission of “respecting everyone in the process” by thanking employees for a job well done, work done outside the scope of their responsibility, positive feedback from external and internal sources, etc. Efforts are being made to instill a broader mindset of employee recognition in all employees. As capacity is available in 2023, we intend to relaunch a more formal employee recognition committee to ensure this supportive working culture remains intact.

Supervisors are responsible for keeping in touch with their subordinates to ensure they are trained, supported, and accomplishing their responsibilities in a timely manner. In the event that an employee is struggling, the supervisor uses coaching, mentoring, and disciplinary action as needed to address concerns and bring about positive results. ADVOCACY LINKS strives to maintain a positive work environment and generally does not operate with punitive measures as the first means of addressing problems.

Currently, performance appraisals are conducted at least annually for all employees. New staff have an informal review as they are completing the new staff orientation phases and beginning their job responsibilities (approximately 90 days after start date).

The performance review process that is currently implemented is in the process of being overhauled as criteria for evals don't line up with responsibilities of some of the newer positions. In addition, the overhaul will ensure that policies and procedures are clearly outlined for the identified workforce; criteria against which people are being appraised; involvement of the employee being appraised; documentation requirements; time frames/frequencies related to the performance appraisal process; measurable goals; source of input; and opportunities for development. This overhaul will be a priority in 2023.

Compensation & Benefits

ADVOCACY LINKS has worked hard to maintain overhead costs so that the bulk of revenue can be given directly to the people doing the real work in the form of compensation and benefits. We provide an equitable wage as compared to agencies providing similar supports/services. We offer expense reimbursement for mileage, phone, internet, postage. We provide free office supplies. We offer assistance with purchasing devices or other large ticket items that are necessary to complete the job. As soon as revenue supports it again, we will reinstate the provision of health insurance, dental, vision and life insurance as well as distributions into employee's 401K plans as funds are available.

Opportunities for Advancement & Job Postings

Throughout the life of ADVOCACY LINKS, positions have been revamped and added to meet the needs of the organization at that given time. Initially, ADVOCACY LINKS was set up to operate as a small company with extremely limited administrative personnel and all positions were blended roles (everyone carried a caseload to remain proficient in the actual direct service responsibilities). Over time, it was evident that the company needed dedicated positions for critical business operation functions so some positions were added gradually (part time to begin, then morphed into full time as the needs arose). In today's work environment, many of the administrative positions are reverting back to blended roles due to the shift in service lines.

New positions have been created as needed to deliver the supports/services currently provided. As the divisions grow and more positions are necessary, additional roles will be created to enable employees to stretch their limits, experience leadership opportunities and demonstrate their expertise and passions.

All job openings are posted internally first by sending an email to all staff, discussing at staff meetings, etc. ADVOCACY LINKS would prefer to hire for open positions from eligible applicants within our current or most recent employee pool. For vital roles, if applicants from within the organization are not found, the posting will be listed in online job posting forums such as Indeed, Career Builder, monster.com as well as in college career counseling offices.

Workforce Profile

Current & Future Workforce

The current and future workforce needs of Advocacy Links reflect those of other social service companies in Indiana. The greatest struggle is the difficulty in hiring employees due to uncompetitive pay in the workforce in general. Our workforce provides essential services which require intense knowledge of paid and unpaid resources in a variety of geographic areas in addition to all phases of a person's life. While our compensation packages are comparable to other social service agencies, people can easily make more money at fast food restaurants, large retail stores or casinos.

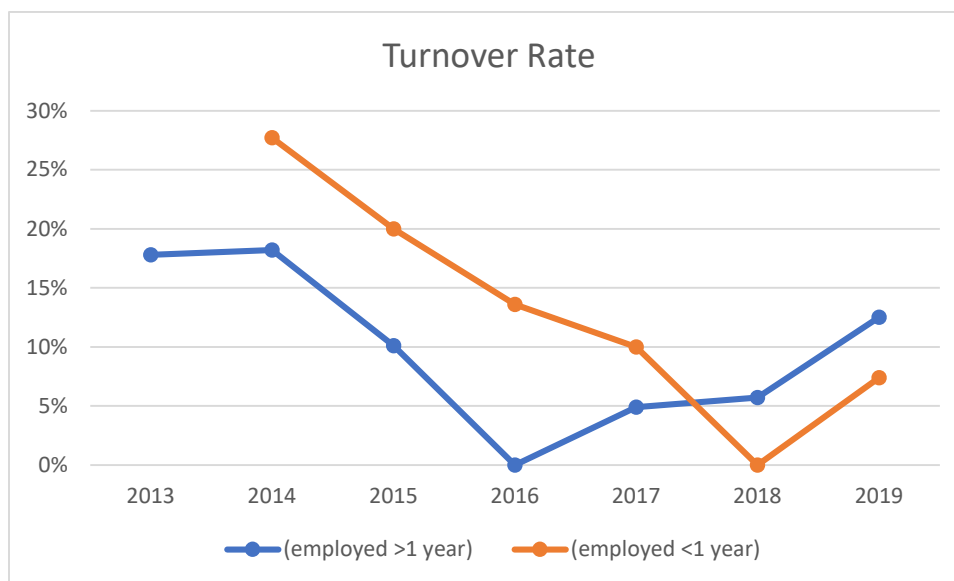
In the 34 counties in which ADVOCACY LINKS provides services, there are numerous colleges and universities that offer Human Service degrees which provide an ample pool of candidates for job openings. In addition, it is common for people who have been working in the human service industry to seek employment at an agency like ADVOCACY LINKS due to the flexible work hours, reduced responsibility for direct oversights, etc.

One of the trends we have seen with ADVOCACY LINKS employees has been that they used their employment as a stepping to a more lucrative career. Many people have worked for ADVOCACY LINKS while they are completing their Master's degree. As soon as they obtain their

degree, they pursue a career as a Behavior Specialist because they can make 4 times as much money in that role and still work flexible hours with the same population.

Prior to 2022, ADVOCACY LINKS had no control over the Medicaid reimbursement rate for the services provided so there was limited flexibility in the funds available for salaries. As new service lines were developed in 2022, ADVOCACY LINKS has more control over the rates set for the services we provide for some services. Therefore, salaries can be adjusted as revenue supports it.

Below are charts reflecting the turnover rate for ADVOCACY LINKS employees for the past 10 years. In 2021, the turnover rate for that year alone was 115.4% due to the cessation of that service delivery option.



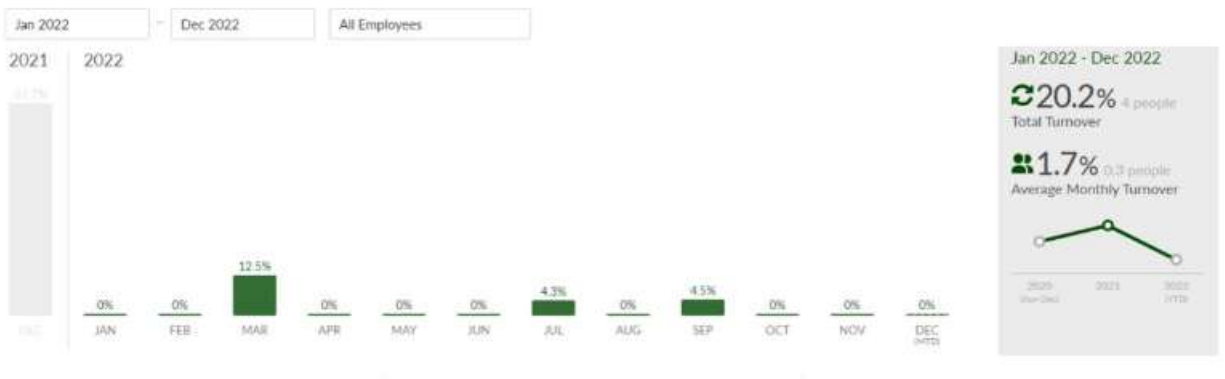
Employee Turnover

How's this calculated? [More](#)



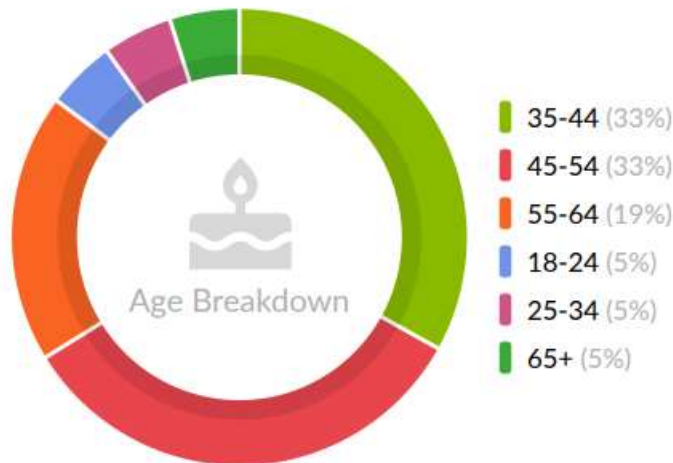
Employee Turnover

How's this calculated? [More](#)



Many of the employees who work in this field have been doing this type of work for their entire career. Many took the opportunity in 2021 to retire rather than continue to work for a new employer. Currently, ADVOCACY LINKS has 1 Part Time administrative person who is already retired but is staying employed as a means of keeping active in retirement. In addition, there is 1 Leadership Staff member who is within 5 years of potential retirement.

Only 4 employees have retired in the past 7 years, all from part time or Case Manager positions. We anticipate only 1 person will retire in the next 3 years.



For the past several years, ADVOCACY LINKS has worked with each employee in a position of leadership to develop a succession plan for their position. These succession plans are updated at least annually to ensure they are current and correct. In addition, ADVOCACY LINKS has been investing time and energy in developing leaders from the inside. We encourage strong staff to take extra responsibilities to develop their leadership skills and provide opportunities to demonstrate their abilities. We are emphasizing grooming strategies in areas where we recognize an additional leader will soon be needed. We encourage interested staff to participate in leadership training, at the company's expense.

ADVOCACY LINKS has a lean group of Leadership Staff that support the entire company and are not specifically located in a given region due to the virtual work environment in which all employees work.

Leadership Staff include:

Managing Member: Full Time employee. Must have 4 year degree in Human Services field and 1 year experience working with people who have disabilities. Critical skills required are organization, supervision, communication and technology. High level of trust is required due to security access required. Maximum caseload size: 5

Business Manager: Full Time employee. No specific degrees or certifications are required but proficiency in Human Resources and Accounting is mandatory. Critical skills required: Technology, communication, and organization. Extremely high level of trust is required due to security access required. Does NOT carry a caseload.

Quality & Training Manager/Compliance Officer: Full Time employee. Must have 4 year degree in Human Services field and 1 year experience working with people who have disabilities. Critical skills required are organization, communication and technology. High level of trust is required due to security access required. Maximum caseload size: 10

Technology Manager: Part Time employee. No specific degrees or certifications are required but proficiency in technological systems is mandatory. Critical skills required: Technology, communication, and organization. High level of trust is required due to security access required. Does NOT carry a caseload.

Nurse: Part Time employee. Must have RN license. Critical skills required: Knowledge of variety of health issues, organization, and communication. Does NOT carry a caseload.

Referral Coordinator: Full Time employee. Must have 4 year degree in Human Services field and 1 year experience working with people who have disabilities. Critical skills required are organization, communication and technology. Maximum caseload size: 10

Marketing and Communication Director: Full Time Employee. 4 year degree in Communications, Public Relations or Human Services field is preferred but not required. Proficiency in marketing and communication is mandatory. Critical Skills are communication, digital marketing knowledge, social media knowledge, website management skills, writing and editing skills. Does NOT carry a caseload.

Special Projects Coordinator: Full Time Employee. 4 year degree in Human Services field is preferred but not required. Proficiency in grant research, applications, etc. is mandatory. Critical skills required are: knowledge of grant writing and ability to research grants, knowledge and understanding of technology, ability to research and develop resources for special projects as developed, communication skills, ability to present information. Does NOT carry a caseload.

PLACE Director: Full-Time Employee. Must have a 4 year degree in a human services field, prefer to have 3-5 years of supervisory experience and prefer at least one year of experience working in the field of disabilities. Critical skills include: Supervision, provide training and support to Life Consultants, assisting with planning and hosting events, build and maintain community relationships. Maximum caseload size: 10

Resource and Connections Director: Full-Time Employee. Must have a 4 year degree preferably in a human service field with at least one year of experience working in the field of disabilities. Prefer 3-5 years of supervisory experience. Critical Skills required: provide support and supervision, assist with staff training, build and maintain community relationships, communication skills, and assessment skills. Maximum caseload size: 10

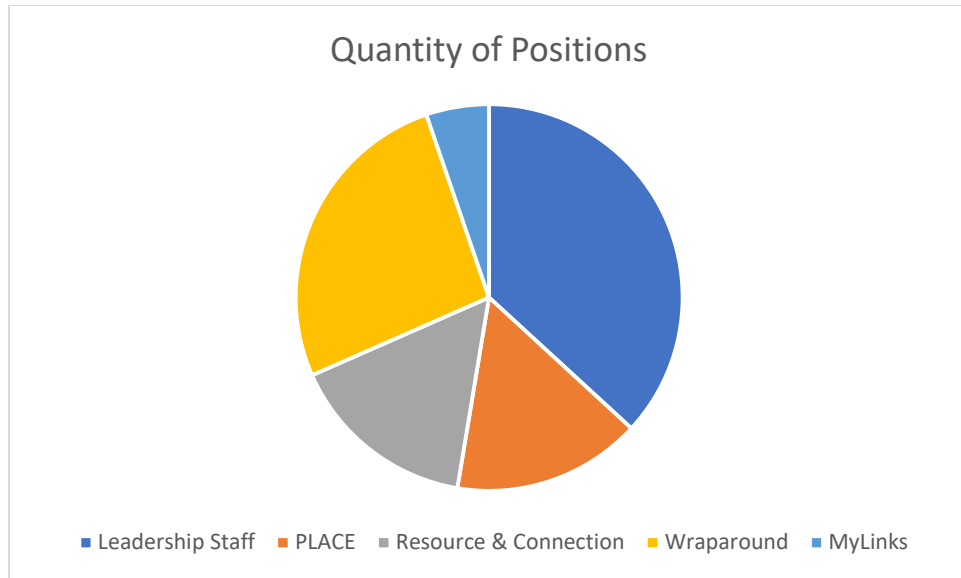
Wrap Around Support Director: Full Time Employee. A 4 year degree in a Human Services field is required. Must have at least 2 years experience working with seriously emotionally disturbed youth and their families. Prefer at least 3-5 years of supervisory experience. Critical Skills required: wraparound facilitation skills as may have a few partnerships, training of staff, communication skills, understanding of trauma-informed care, organizational skills, ability to provide support, and training to wraparound facilitators. Maximum partnerships: 10 (inclusive of youth/subordinates)

Other Staff:

Wraparound Facilitator: Full Time Employee. A 4 year degree in a Human Services field is required. Must have at least 2 years experience working with seriously emotionally disturbed youth and their families. Critical Skills required: wraparound facilitation skills, training of staff, communication skills, understanding of trauma-informed care, organizational skills, and ability to provide support. Maximum partnerships: 10

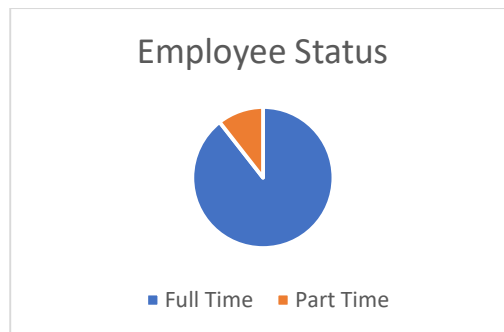
Life Consultants: Full Time Employee. 4 year degree in Human Services field is preferred but not required. Proficiency in activity planning and project management is mandatory. Critical skills include: assisting with planning and hosting events concentrating on social skills, education/support and volunteer/vocational opportunities; build and maintain community relationships; and communication. Maximum caseload size: 50

Connection Specialist: Full Time Employee. 4 year degree in Human Services field is preferred but not required. Proficiency in care coordination and communication is mandatory. Critical Skills required: provide support, build and maintain community relationships, communication skills, and assessment skills. Maximum caseload size: 50



Part Time – The Technology Manager and Nurse are currently the only part time employees of ADVOCACY LINKS. These non-salaried Leadership Staff work less than 30 hours/week as recorded on time sheets.

Full Time – All other ADVOCACY LINKS personnel are salaried employees and work 30 or more hours/week.



Competencies & Education Requirements

As noted elsewhere in this plan, most of the positions available at ADVOCACY LINKS are ones that rely on knowledge and experience rather than degrees and licenses. Employees providing Child Mental Health Wraparound services as required to have a 4 year degree in a Human Services field is required. Must have at least 2 years experience working with seriously emotionally disturbed youth and their families.

Although all employees are encouraged to participate in trainings of their interest and to increase their own professional skills, some positions don't require initial or annual training other than the 460AIC required trainings (outlined in above "policy" section and later in "mandatory training" section).

ADVOCACY LINKS needs to develop a more concise protocol for training and measuring Core Competencies for all positions specifically related to the following domains and tiers. The tiers represent different phases of career development. The individual competencies within the tiers, build upon each other describing desired skills at progressive stages of their careers.

Core Competencies will be a combination of knowledge, skills, personal characteristics/attitudes, and individual & social behaviors/judgements needed for someone to perform a job, in conjunction with identified resources consistent with each topic. Core competencies will insure the right people are equipped to achieve optimal outcome. Competencies will support the organization in the accomplishment of its mission & goals as well as to meet the needs of the people served.

Competencies will be assessed within specified time frames and with the frequency noted below. Competency assessment is more than just a checklist but is validated over time through a variety of situations and methods. Competencies across the organization ensure that each person in every position is competent in their role.

	Basic (Staff)	Advanced (Leadership)	Executive (Senior Management)
Analytical Assessment	Person Center Planning Facilitation	To be further defined in 2023	To be further defined in 2023
Policy Development/ Program Planning	Dress Code Confidentiality Ethics Human Rights HIPAA	To be further defined in 2023	To be further defined in 2023
Communication Skills	Call Back Expectations Organizational Chart	Conflict Resolution To be further defined in 2023	To be further defined in 2023

	Flexibility & Professionalism		
	Contacting new consumers		
	Do not contact BDDS		
Cultural Competencies	Person First Language	To be further defined in 2023	To be further defined in 2023
	Overview of Disabilities		
	ID/DD History		
	Requesting an Interpreter		
	Cultural Diversity		
Community Resources	Medicaid	To be further defined in 2023	To be further defined in 2023
	Medicaid Waiver		
	Social Security		
	Vocational Rehabilitation		
	Section 8 Housing		
	First Steps		
	Head Start		
	Natural Supports		
	Guardianship/POA/Emancipated/Supported Decision Making		
Job Specific Skills	Services	To be further defined in 2023	To be further defined in 2023
	Brief Review of Caseload/Partnerships		
	Review meeting time frames		
	Review ticklers		

	Review of quarterly vs. annual		
	Consumer Handbook		
	Handbook Signature Page		
	Provider Progress Reports		
	Lifecourse Framework/ MAPS		
	Overview of Referrals		
	Outcomes/Action Steps		
	Abuse/Neglect/Exploitation IRs & Follow Ups		
	Critical Incidents		
	Risk Plans		
Financial Planning & Management	Expense Reports	To be further defined in 2023	To be further defined in 2023
	Pay Stubs		
	Office Supplies		
Leadership & Systems Thinking	To be further defined in 2023	To be further defined in 2023	To be further defined in 2023
Customer Service	Who are our consumers? Satisfaction Surveys	To be further defined in 2023	To be further defined in 2023
Accountability	Activity Note Quality Guide PCP Quality Guide Care Plan Quality Guide Hot Lists/ Individual Audit	To be further defined in 2023	To be further defined in 2023
Research	Meetings to be shadowed	To be further defined in 2023	To be further defined in 2023

Continuous Quality Improvement	To be further defined in 2023	Case Record Reviews Spot Checks DMHA review (Wraparound Facilitators only)	To be further defined in 2023
Occupational Health & Safety	Drug Free Workplace To be further defined in 2023	To be further defined in 2023	To be further defined in 2023
Emergency Preparedness	Advocacy Links Health & Safety trainings	To be further defined in 2023	To be further defined in 2023
Managing Performance	Health Cloud Bamboo TOBI/KidTrax (Wraparound Staff only)	To be further defined in 2023	To be further defined in 2023
Managing Resources	To be further defined in 2023	To be further defined in 2023	To be further defined in 2023
Public Health & Crisis Leadership Competency Framework	To be further defined in 2023	To be further defined in 2023	To be further defined in 2023
Technology	Email/calendar/TEAMS RingCentral voicemail/fax ADVOCACY LINKS website PDF Printer Attaching documents to Health Cloud	To be further defined in 2023	To be further defined in 2023

Training Needs

This section provides a description of mandatory training and, identified training needs for ADVOCACY LINKS in addition to targets for achieving specific competencies among staff. The training needs incorporate results from training needs assessments, identified and required training needed for all staff (organizational level), and training to meet professional competency requirements. ADVOCACY LINKS will conduct an organization-wide training needs assessment at least once every five years.

Training Needs Assessment Results

To further prepare and organize training and educational development at ADVOCACY LINKS, surveys and assessments are conducted to obtain feedback from staff. In the last five years, ADVOCACY LINKS has requested feedback and suggestions both formally and informally with limited response. In 2023 a more comprehensive, formal attempt will be made to survey identified specific training areas employees feel would be beneficial for the organization, in addition to providing personal benefit, while improving their job performance.

Organization Specific Needs

It is anticipated that result from the training needs survey that will be completed in 2023 might reveal needs for competency-based training in the following areas:

- honesty and integrity
- performance/competence
- customer focus
- continuous improvement
- team work
- innovation
- fair enforcement of the law
- collaboration
- communication
- embracing change
- learning through experience.
- Occupational Health and Safety
- Emergency Preparedness

Discipline Specific Needs

It is anticipated that result from the training needs survey that will be completed in 2023 might reveal needs for competency-based training in the following areas:

- Planning for transitions
- Diagnostic review
- Advocacy
- Team building
- Conflict resolution
- Building community resource networks
- Person Centered Planning
- Charting the Life Course
- Encouraging natural supports
- Developing 'meaningful day' activities
- Managing medical risks
- Monitoring environmental risks
- Epilepsy
- Dysphasia
- Constipation
- Dehydration
- Incident reporting
- Mortality review
- Writing quality Service Agreements/Care Plans
- Creating thorough Person Centered Support Plans

Mandatory Training

	Upon Hire	Annually
All Employees except as noted below	<ul style="list-style-type: none"> • Abuse/Neglect/Exploitation • Incident Reporting and Management • Human Rights (which includes Protection of Individual Rights) • Drug Free Workplace • HIPAA • Required Safety Trainings • 1st Aid and CPR (update as required, which might be every 2 years) 	<ul style="list-style-type: none"> • Abuse/Neglect/Exploitation • Incident Reporting and Management • Human Rights (which includes Protection of Individual Rights) • Drug Free Workplace • HIPAA • Required Safety Trainings • 1st Aid and CPR (update as required, which might be every 2 years)

		<ul style="list-style-type: none"> • 20 Hours of Social Service industry specific training
Managing Member	As shown above for all employees	<p>As shown above for all employees</p> <ul style="list-style-type: none"> • 5 hours of Leadership/ Business Management Training
Business Manager	As shown above for all employees	<p>As shown above for all employees EXCEPT doesn't need 20 hours of Social Service industry specific training</p> <ul style="list-style-type: none"> • 5 hours of Leadership/ Accounting/ Business Management Training
Quality & Training Manager	As shown above for all employees	<p>As shown above for all employees</p> <ul style="list-style-type: none"> • 5 hours of Leadership/ Quality Improvement Training
Technology Manager	As shown above for all employees	<p>As shown above for all employees EXCEPT doesn't need 20 hours of Social Service industry specific training;</p> <p>FT employee would need</p> <ul style="list-style-type: none"> • 5 hours of Technology/Web Design/etc. Training
Registered Nurse	As shown above for all employees	As shown above for all employees EXCEPT doesn't

		<p>need 20 hours of Social Service industry specific training</p> <p>FT employee would need</p> <ul style="list-style-type: none"> • 5 hours of Health Care Training
Referral Coordinator	As shown above for all employees	<p>As shown above for all employees</p> <ul style="list-style-type: none"> • 5 hours of Efficiency/ Time Management/ Quality Improvement/Leadership Training
Division Directors	As shown above for all employees	<p>As shown above for all employees</p> <ul style="list-style-type: none"> • 5 hours of Efficiency/ Time Management/ Quality Improvement/ Leadership Training
Marketing and Communications Manager	As shown above for all employees	<p>As shown above for all employees</p> <ul style="list-style-type: none"> • 5 hours of training related to public relations, marketing, social media, digital marketing, or related area
Special Projects Coordinator	As shown above for all employees	<p>As shown above for all employees</p> <ul style="list-style-type: none"> • 5 hours of training related to grant writing, building community resources, web

		management or related area
Wraparound Facilitator	As shown above for all employees	As shown above for all employees <ul style="list-style-type: none"> • Any and all training as required by DMHA • Completion of re-certification training for wrap around as required
Life Consultants	As shown above for all employees	As shown above for all employees
Connection Specialists	As shown above for all employees	As shown above for all employees
Goals, Objectives & Implementation Plan		

Roles & Responsibilities

The table below lists individuals responsible for the implementation of this plan as well as the associated roles and responsibilities.

Managing Member	Ultimately responsible for ensuring resource availability to implement the workforce development plan.
Business Manager	Provide guidance to the Managing Member regarding workforce development and assist in creating a culture that is conducive and supportive of learning. Works with Quality & Training Manager and Division Directors to find appropriate training/development opportunities for staff. Provide guidance to the Regional Supervisors with coaching, mentoring and succession planning. Responsible for informing Managing Member of workforce development needs, plans, and issues
Quality & Training Manager	Provide guidance to the Managing Member regarding workforce development and assist in creating a culture that is conducive and supportive of learning. Works with Operations Manager, Business Manager and Regional Supervisors to find appropriate training/development opportunities for staff. Provide guidance to

	the Regional Supervisors with coaching, mentoring and succession planning. Responsible for informing Managing Member of workforce development needs, plans, and issues
Registered Nurse	Provide guidance to the Quality & Training Manager regarding Health/ Safety specific workforce development issues. Assist in creating a culture that is conducive and supportive of learning. Develop/coordinate training specific to health/safety initiatives.
Technology Manager	Provide guidance to the Managing Member regarding technology specific workforce development issues. Assist in creating a culture that is conducive and supportive of learning. Develop/coordinate training specific to technological initiatives.
Division Directors	Responsible to the Managing Member for all employees within their divisions. Supports, coaches, and mentors employees to assure that appropriate training resources and support structures are available within the region.
	Responsible to their employees to ensure that individual and agency-based training initiatives are implemented. Works with employee to develop an individualized learning plan, as needed, and supports the implementation of the plan (i.e. time away from work, coaching, opportunities for application, potential funding for training).
	Identifies high potential employees as part of agency succession plan.
All Employees	Ultimately responsible for their own learning and development. Work with supervisor to identify and engage in training and development opportunities that meet their individual as well as agency-based needs. Identify opportunities to apply new learning on the job.

Workforce Development Plan Goals:

Priority	Plan of Action	Person Responsible	Timeline	Cost	Status
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HIGH	Conduct training needs survey	Amy Rectanus	6/30/2023	\$0 (can likely use Sogo survey whose costs are already covered in budget)	To be implemented
MEDIUM	Establish progressive core competencies for each tier/domain	Amy Rectanus	12/31/2023	\$0	To be implemented
MEDIUM	Develop job specific training for all positions	Amy Rectanus (in conjunction with current staff)	12/31/2023	\$0	To be implemented
MEDIUM	Align job descriptions and performance reviews	Division Directors	12/31/2023	\$0	Initial conversations and research has begun

Budget

Presently, the operating budget of ADVOCACY LINKS covers the cost of all workforce development plan initiatives.

Dissemination of the Plan

This plan is internally disseminated as follows:

1. The Workforce Development Plan is a part of the Comprehensive Strategic Business Plan and is included in the Annual Plan.

2. Periodically, information is shared at staff meetings, indicating that the plan is available upon request from the Managing Member and encouraging all employees to read it.
3. The Managing Member meets with the Leadership Staff to discuss and finalize the ways all employees can assist the company in meeting the goals of this plan.

Responsibility for Plan

The Quality & Training Manager and Managing Member are responsible for the goals and mission of the company including this Workforce Development Plan. ADVOCACY LINKS uses a well-defined administrative structure to accomplish the goals and mission of the company.

Implementation, Monitoring and Reporting

The Managing Member and Leadership Staff have developed the tools needed to successfully implement the plan and ensure an ongoing focus to workforce development issues. The Managing Member and Leadership Staff will plan, develop and deliver training to employees on workforce development initiatives at ADVOCACY LINKS and the organization's policies and plan to address barriers, and the commitment to address workforce development on an ongoing basis.

Evaluation

Progress towards achieving workforce development goals will be reviewed at least quarterly in the Leadership Staff Meetings. This Workforce Development Plan will be updated annually and more frequently if needed. The Quality & Training Manager, in conjunction with the Managing Member, will determine the accomplishment of goals and adjust the Workforce Development Plan as needed.

Closing Statement

Persons having suggestions for improving this plan are encouraged to provide their suggestions, in writing, to the Quality & Training Manager and/or the Managing Member.

Cultural Diversity Competency Plan

Executive Summary

Advocacy Links, LLC has been in existence since 2012 but Advocacy Links Resource and Advocacy Center, Inc. was launched in 2022. During the first 10 years of operation, ADVOCACY LINKS worked hard to create a culturally diverse working environment by providing education, resources and training to individuals served as well as employees. We had bilingual employees and access to interpreters as needed. It is the intent of ADVOCACY LINKS to continue to move forward with striving to be more culturally diverse. In the coming years, we will be concentrating efforts to increase our exposure in more culturally diverse communities. In addition, we will be implementing more training for our employees regarding cultural diversity competence.

Cultural Competency Policy Statement

ADVOCACY LINKS is committed to a policy of cultural diversity and openness in preventing any form of discrimination. As part of our commitment to eliminate any possible discrimination, we have established the goal that the proportion of minority employees should be more representative of the relevant labor market for similar positions within our industry. This commitment extends to taking action to correct any failure to meet this goal, while still hiring the most appropriate candidate for the position. The Managing Member will oversee and monitor the implementation of this plan in cooperation with the Business Manager/Human Resources Manager.

Cultural diversity, Affirmative Action, and equal opportunities are viewed as integral parts of the mission of ADVOCACY LINKS.

Equal Employment Opportunity Policy Statement

The Managing Member and Leadership Staff of ADVOCACY LINKS recognize their responsibility for the development of equal employment opportunities that do not discriminate against employees or applicants for employment because of race, color, religion, gender, sexual orientation, politics, and national origin, veteran's status, age, genetic information, disability, or any other characteristic protected by law. ADVOCACY LINKS will ensure that all applicants have equal opportunity for employment and that disciplinary action taken during employment will be taken without regard to any discriminatory factor.

Furthermore, ADVOCACY LINKS recruitment, employment, and promotion policies shall provide opportunities for a diverse pool of qualified candidates.

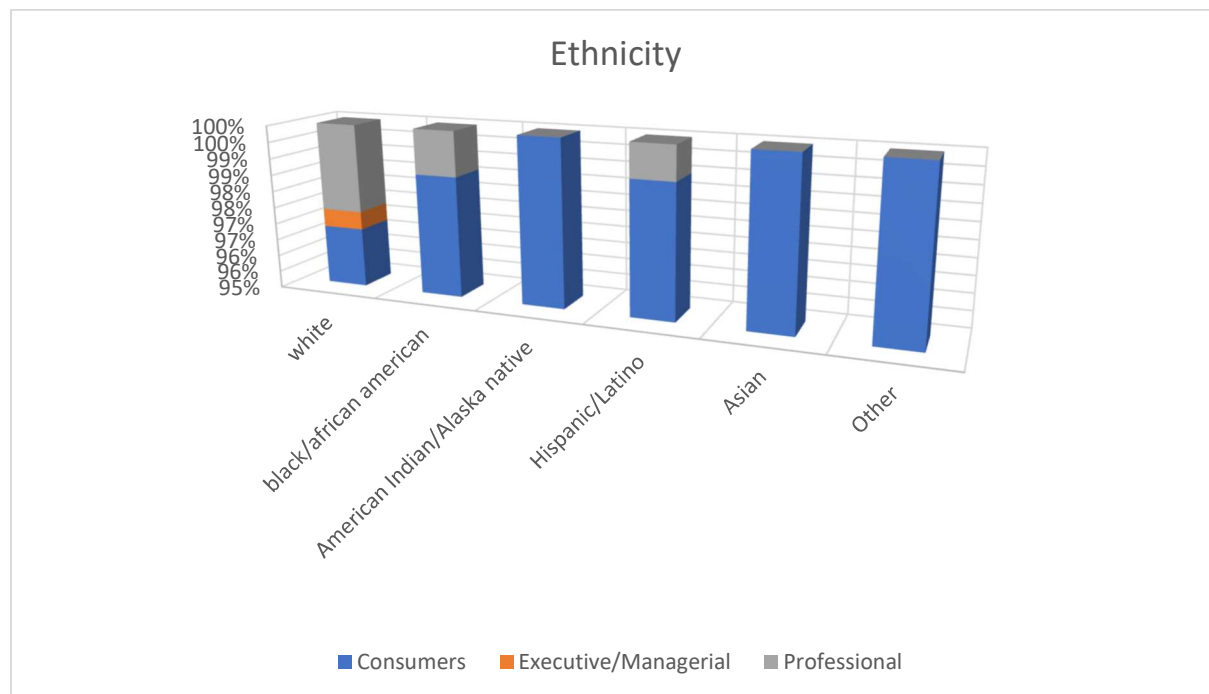
Overview of Cultural Diversity

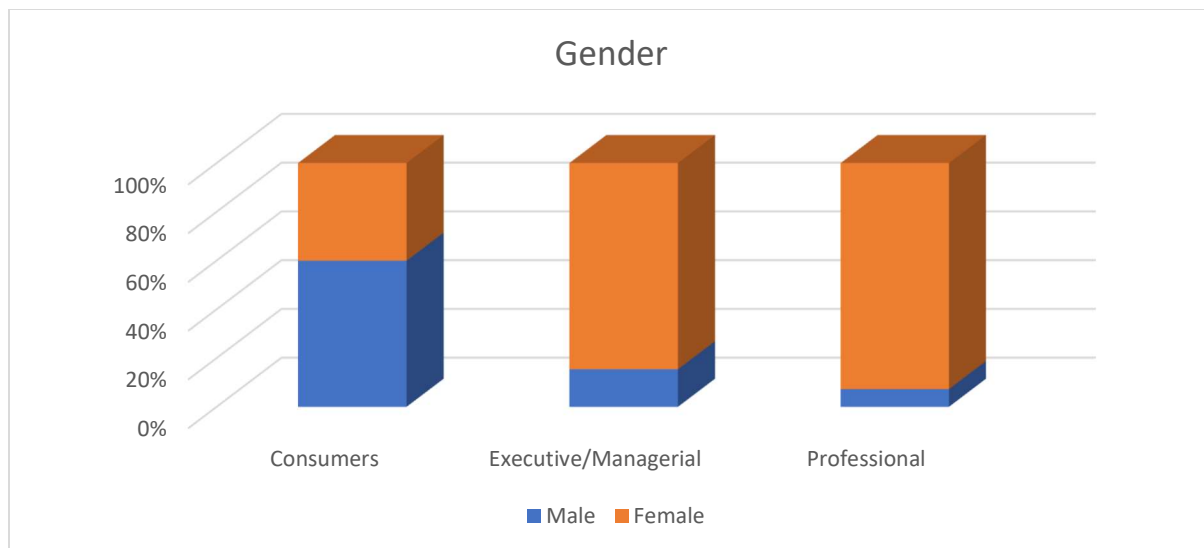
This document represents ADVOCACY LINKS' plan to provide an atmosphere of cultural diversity, equal opportunities for employment, and access to training to all ADVOCACY LINKS employees. This plan will ensure that the company is in compliance with federal laws, regulations, executive orders, and the mission of ADVOCACY LINKS.

This document should not be construed to acknowledge any past or present discriminatory practice by ADVOCACY LINKS. This document represents the good faith efforts of the Managing Member and the leadership staff to ensure equal services and employment opportunities for all protected classes, including the correction of the under-utilization of any protected class, and an environment demonstrating acceptance and respect for all employees and waiver participants.

Current Analysis of Staff and People Served

The composition of current ADVOCACY LINKS staff is identified in the following tables broken down by gender and Equal Employment Opportunity Commission (EEOC) Categories (as of December 31, 2022). The stacked tables also provide a visual reference to the same categories of consumers receiving services.





Available Minority Employee Analysis

ADVOCACY LINKS recruits individuals for employment throughout the state of Indiana as well as neighboring communities in the states of Michigan, Ohio, and Illinois. The large metropolitan communities in the area we serve offer a variety of qualified candidates with diverse cultural and ethnic backgrounds, which contributes to affirmative action goals. The minimum qualifications for Wraparound Facilitators are in accordance with the Department of Mental Health and Addictions (DMHA) regulations established for the that particular position. All other employees meet minimum professional requirements and accepted standards by other specialized accrediting agencies.

ADVOCACY LINKS seeks to employ qualified staff members who are dedicated to advocating for people who need help, connecting people to fiscally responsible resources, and respecting everyone in the process.

In the 10 years of operation, ADVOCACY LINKS has seen a growth in the number of younger people receiving waiver services due to the emphasis the state has had on getting people off of the waiting lists. There has also been a decrease on the amount of aging people we support primarily due to people passing away. People with disabilities tend to have a shorter life expectancy than the general population. There is an obvious decline in individuals served in 2022 due to the shift in service lines.

Table 3 reflects the demographic information of people served by ADVOCACY LINKS as of December 31, 2022.

Table 3: Advocacy Links, LLC – People Served by Age

	2022 Total	2022% of total	2019 % of total	2018 % of total	2016 % of total	2014 % of Total
Age 0-5 (Children)	1	2%	4%	4%	2%	0
Age 6-17 (Adolescent)	21	49%	29%	27%	23%	24%
Age 18-40 (Adult)	11	26%	47%	47%	52%	58%
Age 41-65 (Adult)	6	14%	17%	18%	19%	13%
Age 66-85 (Adult)	4	9%	4%	4%	4%	5%
Age 86+ (Adult)	0	0%	0%	n/a	0%	<1%
Total Number of People Served	43		n/a	2604	2228	1698

ADVOCACY LINKS is committed to the equal employment opportunity for qualified groups of individuals. The following cultural diversity program outlines how ADVOCACY LINKS has initiated employment procedures to expand the company's minority employee base in an effort to reflect the demographic patterns within its service area (Northern Indiana).

Plan for Administering the Cultural Diversity Competency Program

Advertising

ADVOCACY LINKS will post all job vacancies on the company's website. Position announcements are noted at staff meetings. On occasion, position vacancies are posted with other newsgroups such as, but not limited to, Indeed, Monster.com and Career Builder.com. In addition, ADVOCACY LINKS will expand its outreach and recruiting efforts in order to recruit and employ minority individuals. The position vacancy announcement will include the following:

1. Position title
2. The minimum qualifications
3. Proposed salary range for the position
4. Deadline for applying

5. Procedure for applying

Monitoring and Select Record Keeping

ADVOCACY LINKS has an Application for Employment which does not request completion of any statistical demographic information to eliminate the potential for discrimination based on this information. This information would only be available upon the applicant's filling of the position and would only be recorded to fulfill reporting requirements to demonstrate compliance with EEOC standards.

The company's applicant assessment and interview procedure allows the hiring Supervisor an opportunity to participate in the qualifying process and review all applications for an advertised vacancy. Initially, all resumes are reviewed by the Human Resource Manager and/or Business Manager. Applicants who meet the regulatory requirements for the position are then referred to the hiring Supervisor for completion of the interview process. Qualifying for positions is completed without regard for race, gender, or age. Demographic information is not provided to the hiring Supervisor. The hiring Supervisor is required to provide the Business Manager/Human Resource Manager justification supporting the decision not to interview any qualified applicant.

Hiring Procedures

Please refer to our [Employment Process \(section 11.0 in Operations Manual\)](#).

Network with Culturally Diverse Community Partners

In an effort to educate diverse populations about services for people who have Intellectual/Developmental Disabilities, ADVOCACY LINKS will make a concentrated effort to participate in activities in culturally diverse communities. In addition, marketing literature will be made available as needed in alternate languages.

Budget

Presently, the operating budget of ADVOCACY LINKS covers the cost of all activities associated with the Cultural Diversity Competency Plan.

Cultural Diversity Competency Plan Goals

It can be seen from the various tables within this plan that there is a variety of cultural backgrounds represented in the population served by ADVOCACY LINKS; however there is an opportunity for growth in employees with diverse cultural backgrounds. ADVOCACY LINKS has adopted the following goals to provide cultural competence and greater diversity in its employees.

Goal 1: Revamp Advocacy Links Cultural Competency/Diversity overview training to bring it current with relevant and interesting material.

Goal 2: Re-implement Cultural Competency Committee as personnel are available.

Goal 3: Coordinate with local experts in Hispanic culture to provide company wide population specific training.

Goal 4: Coordinate with local experts in Burmese culture to provide company wide population specific training.

Staff Training/Professional Development Strategy:

It is the intent of ADVOCACY LINKS to ensure our staff is thoroughly trained on Cultural Diversity Competency. Policies and Procedures have been written and are in the ADVOCACY LINKS Operations Manual pertaining to Cultural Diversity Competency.

During New Staff Orientation, each employee is trained on Cultural Diversity Competency. Periodically, additional training for Cultural Diversity Competency is provided in the monthly staff meetings and/or on the Training/Resource webinars.

Dissemination of the Plan

This plan is internally disseminated as follows:

- The Cultural Diversity Competence Plan is a part of the Strategic Business Plan and is included in the Annual Plan.
- Periodically, information is shared at staff meetings, indicating that the plan is on the company's internal online shared document library, encouraging all employees to read it.
- The Managing Member and Business Manager, at times, meet with the Leadership Staff to discuss and finalize the ways Supervisors can assist the company in meeting the goals of this plan. As position vacancies occur, one-on-one consultations with Supervisors are conducted to encourage and promote our commitment to this plan.

ADVOCACY LINKS takes several actions to ensure that this cultural diversity plan is disseminated. These actions include, but are not limited to, the following:

1. The Affirmative Action/Equal Opportunity Policy Statement is published in all issues of the ADVOCACY LINKS Operations Manual, and other appropriate documents
2. Copies of the plan are available upon request from the Managing Member.

Responsibility for Plan

The Managing Member, in conjunction with Leadership Staff Human Resource Manager/Business Manager/Quality & Training Manager, are responsible for the goals and mission of the company including this cultural diversity plan until the Cultural Competency Committee is re-implemented. The Managing Member uses a well-defined administrative structure to accomplish the goals and mission of the company. In addition, Amy Rectanus has been designated as the company's Compliance Officer who will serve as the initial contact, in conjunction with the Cultural Competency Committee, for cultural diversity and administrative review of grievances under this program.

Implementation, Monitoring and Reporting

The Cultural Diversity Competency Committee will develop the tools needed to successfully implement the plan and ensure an ongoing focus to Cultural Diversity Competency issues. The Cultural Diversity Competency Committee will plan, develop and deliver training to employees on what was learned about Cultural Diversity Competency at ADVOCACY LINKS, and the organization's plan to address barriers, new policies and the commitment to address Cultural Diversity Competency on an ongoing basis. The committee will also develop a more concise curriculum to be used on an ongoing basis for new employees.

The Cultural Diversity Competency Committee meets quarterly, or more often, as needed to monitor the implementation of this plan and to fulfill other obligations. This will include quarterly review of what has been accomplished and what remains to be accomplished.

Evaluation

Progress towards achieving Cultural Diversity Competency outcomes will be reviewed at least quarterly in the Leadership Staff Meetings. This Cultural Diversity Competency Plan will be updated annually and more frequently if needed. In conjunction with the Cultural Diversity Competency Committee, the Leadership Staff and Managing Member will determine the accomplishment of outcomes and adjust the Cultural Diversity Competency plan as needed.

Closing Statement

Persons having suggestions for improving this plan are encouraged to provide their suggestions, in writing, to the Managing Member and/or Chairperson of the Cultural Diversity Competency Committee.

Risk Management Plan

Executive Summary

Advocacy Links has been in operation since 2012 but in 2022 shifted it's service focus to include services not previously provided. Advocacy Links has several strengths and opportunities in the area of risk management: Strong leadership, extensive experience in the field of Intellectual/Developmental Disabilities, hyper-organization, and realistic expectations.

One of our weaknesses was our limited array of service provision prior to 2022. All services that were provided prior to 2022 were Indiana Medicaid Waiver Case Management services. When the State of Indiana decided to change to "Selective Contracting" for waiver case management services, Advocacy Links was not chosen to provide ongoing case management services. All revenue prior to 2022 came from this one funding source.

Advocacy Links now has a grand opportunity to diversify it's array of services and funding sources. Along with this opportunity comes a variety of risks especially related to inconsistent funding. While the Wraparound services are a stable funding source and steady stream of referrals, the Resource & Connections and PLACE divisions rely heavily on grants, donations, sponsorships to fund the services provided.

Our greatest threat is the potential for funding to not be available to continue to provide the help to anyone who needs help through the Resource & Connections and PLACE divisions.

Our current risk management systems are effective for the organization. It is the intent of Advocacy Links to continue to move forward with being diligent about documenting identified and potential risk as well as the responses to these risks.

Policy Statement

As noted in our mission statement, Advocacy Links advocates for people who need help, connects people to fiscally responsible resources and respects everyone in the process. It is our intent to hold true to these values in all aspects of our operation. Any identified or potential risks that could jeopardize our ability to live out our mission statement will be addressed immediately.

Overview

Since the inception of Advocacy Links there are multiple risks that the company has taken to launch and maintain the organization. We have faced financial, legislative, legal, and organizational challenges to be where we are today. The main hurdle has been modifying our service delivery model and remaining relevant in today's human service industry.

Post Traumatic Stress Disorder has been a large barrier that Advocacy Links has had to deal with in our legacy employees. A few years ago, employees were fearful of online training and webinars because so many had been impacted negatively by webinars from a previous employer. However, the Pandemic and need to use this form of communication provided more comfort in this technological practice. In 2021, all Advocacy Links employees were impacted by the State's decision to change to Selective Contracting. They found themselves immediately and inexplicably needing to seek a new employer if they wanted to continue to work with the families many had built relationships with for more than 5 years.

Advocacy Links has worked hard to develop a management structure that provides the respect, training and support that employees require. We are working diligently to rebuild the self esteem of employees whose positions were inexplicably eliminated earlier in their careers. We have established a compensation structure that is consistent regardless of an employee's years of experience. Regardless of the measures that Advocacy Links has implemented, there are still risks that exist for the continued operation of the organization.

Before risk management begins it is imperative that a foundation is established for providing structured project information, thus, the following project elements were completed and defined prior to developing this Risk Management Plan:

- work scope, schedule, resources, and cost elements:
 - Advocacy Links has a strategic business plan that outlines the overall intent for provision of quality services
 - Current budget and projected costs are reflected in the Strategic Business Plan's financial reports
 - Performance Outcome Measures are identified in the Strategic Business Plan's Performance Measurement section
- Baseline reporting requirements
 - Risk Management Discussions will occur as part of Leadership Staff Meetings every month.
 - Minutes from the Leadership Staff Meetings will reflect progress and new developments in each identified risk area.
 - Minutes from the Leadership Staff meeting are available to each Leadership staff member prior to the next meeting.
- Risk Management Roles and Responsibilities
 - Advocacy Links Managing Member or her designee is the Project Manager who chairs the risk assessment meetings, which are actually a portion of the Leadership Staff meetings.

- Leadership Staff members participate in risk assessment meetings as part of the Leadership Staff meetings.
- Feedback from key stakeholders (BDDS, collaborative agencies, service recipients, guardians, family members, and employees is received via satisfaction surveys and personal interviews and is reviewed by Leadership Staff members at the Leadership Staff meetings.

Top Three Current Risks

The top three high probability and high impact risks for continued operation of Advocacy Links are:

Lack of growth to sustain current expenses – As the company was morphing in 2022, Advocacy Links retained key employees to deliver the services that were planned in 2022. The anticipated growth did not occur as planned. Positions that were vacated during 2022 were not filled. 2 employees were furloughed as of 12/31/2022. Leadership Staff will continue to review referrals and need for services in each division at least quarterly throughout 2023 to determine when to invite furloughed employees to return.

Expenses exceeding revenue – As noted above, the growth of “paying clients” did not occur in 2022 as planned. Therefore, the expenses that were incurred throughout 2022 to relaunch the business (cost of HIPAA compliant email, web-based secure client management software, legal expenses, etc.) exceeded the revenue received through providing direct services. As we move into 2023, the number of referrals for wraparound services is increasing and stabilizing so this is helping offset the costs of the Resources & Connections and PLACE divisions (both of which will continue to require subsidizing to cover all expenses. In late November 2022, Advocacy Links received 501(c)3 tax exempt status from the IRS so we are now able to receive charitable contributions and grants.

Cyber Attacks – As with all business, Advocacy Links is at risk for cyber attacks. Currently, we use Microsoft Office 365 for our email and internal communication center. While this software is not the least expensive, we recognize the value of their HIPAA compliance credentials as well as archiving and encrypting capabilities. In addition, our Client management software is Health Cloud (by Salesforce) which also maintains a high level of HIPAA compliance for cyber security. We have researched the cost of Cyber Security insurance which at this time is an excess cost that we can’t afford to commit to without additional revenue. This will continue to be reviewed as funds are available.

Risk Management Plan

The approach we have taken to manage risks for operating Advocacy Links included a methodical process by which the Managing Member and the Leadership Team review each risk area as appropriate during Leadership Staff meetings every month. Updates and modifications for each risk area are reflected in the minutes from the Leadership Staff Meeting.

Risk Identification

Risks for operating Advocacy Links continue to be discovered and discussed at the Leadership Staff Meetings. It is our intent to continue to identify risks and determine how to best mitigate the risks as part of the Leadership Staff Meetings. Feedback will be solicited from Service Recipients, Employees, and Stakeholders in the form of satisfaction surveys and personal interviews to gain additional information about possible risks.

Risk Qualification and Prioritization

In order to determine the severity of the risks identified by the Leadership Staff team, a probability and impact factor was assigned to each risk. This process allowed the Managing Member to prioritize risks based upon the effect they may have on the continuous operation of Advocacy Links.

Risk Mitigation and Avoidance

The Managing Member has led the Leadership Staff in developing responses to each identified risk. As more risks are identified, they will be qualified and the team will develop avoidance and mitigation strategies. These risks will also be added to the Risk Register to ensure they are monitored at the appropriate times and are responded to accordingly. If necessary, the Risk Management Plan will be updated.

The risks for operating Advocacy Links will be managed and controlled within the constraints of time, scope, and cost. All identified risks will be evaluated in order to determine how they affect this triple constraint. The Managing Member, with the assistance of the Leadership Staff team, will determine the best way to respond to each risk to ensure compliance with these constraints.

In extreme cases it may be necessary to allow flexibility to one of the project's constraints. Only one of the constraints for this project allows for flexibility as a last resort. If necessary, funding may be added to the project to allow for more resources in order to meet the time (schedule) and scope constraints. Time and scope are firm constraints and allow for no flexibility. Again, the cost constraint is flexible only in extreme cases where no other risk avoidance or mitigation strategy will work.

Advocacy Links maintains commercial general liability and professional liability insurance through Capital Indemnity Corporation. Advocacy Links also carries the required Worker's Compensation insurance through Michigan Commercial Insurance Mutual.

Risk Register

The Risk Register for operating Advocacy Links is a log of all identified risks, their probability and impact to the project, the category they belong to, mitigation strategy, and when the risk will occur. The register was created through the Leadership Staff meetings led by the Managing Member. During these meetings, the Leadership Staff team identified and categorized each risk. Additionally, the team assigned each risk a score based on the probability of it occurring and the impact it could potentially have. The Risk Register also contains the mitigation strategy for each risk as well as when the risk is likely to occur.

Based on the identified risks and timeframes in the risk register, each risk has been added to the project plan. At the appropriate time in the plan—prior to when the risk is most likely to occur—the project manager will assign a risk manager to ensure adherence to the agreed upon mitigation strategy. Each risk manager will provide the status of their assigned risk at the Leadership Staff meeting held every month.

The Risk Register is shown on the following page:

Risk Identification		Qualitative Rating				Risk Response		
Risk	Risk Category	Probability	Impact	Risk Score	Risk Ranking	Risk Response	Trigger	Risk Owner
Expenses exceeding Revenue	Financial	10	10	100	1	Reduce expenses	Lack of grants, and fully funded provision of services	Joy Greeney
Lack of Growth	Financial	8	10	80	2	Adjust personnel to align with need for staffing	No referrals	Joy Greeney
Cyber Attacks	Technological	4	9	36	3	Seek legal advice; address as needed	Breach of online client data	Joy Greeney

Risk: The risk stated in a complete sentence which states the cause of the risk, the risk, and the effect that the risk causes to the project.

Risk Category: Categorization of risks by area of project affected, source of risk or other useful category.

Probability: The likelihood that a risk or opportunity will occur (on a scale from 0 to 10 with 10 being the highest).

Impact: The impact of the risk on the project if the risk occurs (scale from 0 to 10 with 10 being the highest).

Risk Score: Determined by multiplying probability and impact (scale from 0 to 100).

Risk Ranking: A priority list which is determined by the relative ranking of the risks (by their scores) within the project with the number one being the highest risk score.

Risk Response: The action which is to be taken if this risk occurs.

Trigger: Something which indicates that a risk is about to occur or has already occurred.

Risk Owner: The person who the Managing Member assigns to watch for triggers, and manage the risk response if the risk occurs.

Budget

Presently, the operating budget of Advocacy Links covers the cost of all activities associated with the Risk Management Plan. However, as risks are further explored, each risk may cause the overall operating budget to need adjusted to cover the cost of the specific risk.

Risk Management Plan Goals

Goal 1: Monitor for the identified risks.

Goal 2: Gather feedback to plan for potential risks.

Goal 3: Implement plans to address future identified risks.

Staff Training/Professional Development Strategy:

It is the intent of Advocacy Links to ensure our staff is kept informed of the identified risks that we are monitoring. Periodically, additional information about identified risks is provided in the monthly staff meetings and/or on the mandatory Company Wide Call. All staff members are encouraged to provide feedback on potential and/or identified risks.

Dissemination of the Plan

This plan is internally disseminated as follows:

1. The Risk Management Plan is a part of the Strategic Business Plan and is included in the Annual Plan.

2. Periodically, information is shared at staff meetings, indicating that the plan is on the company's internal online shared document library, encouraging all employees to read it.
3. The Managing Member and Business Manager, at times, meet with the Leadership Staff to discuss and finalize the ways Leadership Staff can assist the company in meeting the goals of this plan.

Responsibility for Plan

The Advocacy Links Managing Member is responsible for the goals and mission of the company including this Risk Management Plan. The Advocacy Links Managing Member uses a well-defined Leadership structure to accomplish the goals and mission of the company.

Implementation, Monitoring and Reporting

All areas of risk are discussed at each Leadership Staff meeting. Progress and new developments in each area are recorded in the minutes of the Leadership Staff meeting. The most likely and greatest impact risks are reviewed at each meeting while least likely and lowest impact risks are reviewed less frequently, but also recorded in the minutes of the Leadership Staff meeting. Risk monitoring will be a continuous process throughout the life of the organization.

Evaluation

Progress towards achieving Risk Management outcomes will be reviewed at least quarterly in the Leadership Staff Meetings. This Risk Management Plan will be updated annually and more frequently if needed. The Leadership Staff and Managing Member will determine the accomplishment of outcomes and adjust the Risk Management Plan as needed.

Closing Statement

People having suggestions for improving this plan are encouraged to provide their suggestions, in writing, to the Managing Member (joy.greeney@advocacy-links.com) .

Advocacy Links Technology Plan

Executive Summary

ADVOCACY LINKS is a virtual company using internet based, software and programs (required by the State of Indiana for some service lines and in-house programs for service lines without state mandated systems) to complete essential job functions. Each employee works from their home office using their own preferred technological devices to access the required programs. Each employee is responsible for obtaining and maintaining their own technological devices, but ADVOCACY LINKS does provide expense reimbursement to help cover these costs.

One of the immense strengths that our company has, is the elaborate amount of experience we have represented by our staff, as they are able and willing to mentor new employees. In an environment where knowledge and technology are constantly growing and evolving, training and development are key factors to enhance job performance, improve productivity and increase morale.

While current information technology usually represent the material objects (such as machines, hardware, or software), it is the intent of ADVOCACY LINKS to continue to invest in training and professional development of employees, which is crucial for a business to retain clients, stay competitive, and keep a firm grasp on company goals.

Policy Statement

It is the intent of ADVOCACY LINKS to ensure our staff are thoroughly trained on how to use the required software programs. Policies and Procedures have been written and are in the ADVOCACY LINKS Operations Manual pertaining to the use of software, passwords, technology, etc.

Background Information

This plan was developed by the Technology Manager as a result of the past several years experience using the required internet-based programs. Feedback has been provided by employees and various internal focus teams and taken into consideration as modifications are made to this plan.

Current State of Technology

While it may have been tempting to retreat to what systems companies know after disruptions caused by COVID-19 crisis in 2020, ADVOCACY LINKS has had the opportunity to purchase their own software and build the system to meet the needs of our current supports/services. While, for the most part, we no longer need to wait for the “new normal” technology from the State of

Indiana, we can prioritize our own tech and build it ourselves from our perspective. We can create a new vision for the future that includes how well people thrive. We meet regularly with 4411 Creative for ongoing discussions for troubleshooting new website/MyLinks/Housemate Finder functionality. In addition, we meet weekly with Insight Powered, the consultant that is helping us insure Health Cloud system is configured and functioning as we need for our current service lines.

Presently, the following primary internet based software is what we've chosen to utilize for our business software programs:

- **Health Cloud by Salesforce (CRM).** This cloud based software allows us to track and better connect with businesses, track customer activity and potential customers. This software is relatively easy to use, easy to customize and offers powerful reporting tools
- **Microsoft TEAMS** (an online resource for conference calling which enables participants to see another person's computer screen). We use this regularly for staff meetings and training/resource sharing opportunities. Also provides videotelephony and online chat services through cloud based peer to peer software platform for teleconferencing, telecommuting, and social relations.
- **RingCentral** (virtual phone system for simplified toll free access to employees and voicemails are sent to email). There is one toll-free phone number designated for our agency. Each staff member has an extension which has all of their calls sent directly to whatever phone number is being used for their business line (usually the staff person's cell phone number). This enables people who do not have long distance on their phone to access their ADVOCACY LINKS representative free of charge. Any messages left on this system are automatically sent to the employee's email for easy tracking and response.
- **Website** (www.advocacy-links.com) This site contains general information for public viewing.
- **BambooHR** - This website creates, collects and organizes all the information throughout the employee life cycle. Hiring, Onboarding, Terminating are all done in a single, secure database with different reports available
- **Digital Signatures** – Hello Sign, esign genie - Electronically request and add legal & secure signatures to documents, 'reasonable effort' for patient confidentiality
- **Office 365 System** – All staff members use the company's HIPPA secure email system for all work related correspondence. The version we subscribe to includes access to Word, Excel, PowerPoint, OneNote, Outlook and Publisher applications. Proofpoint essentials provides cyber-security functions of email encryption, anti-virus, spam, content & outbound filtering to ensure that all email sent is free from viruses, malware and other malicious content

- **DropBox** – cloud based document storage location shared by all administrative personnel for collaborating on agency documents.

In addition, Advocacy Links, LLC also utilizes the following technological resources, which are all requested, credentials issued and maintained for the Wrap Around services our company provides by the State of Indiana:

- **TOBI** (mandatory Indiana statewide access site for Child Mental Health WrapAround programs.)
- **DARMHA** (Data Assessment Registry for Mental Health and Addiction)
- **DMHA Incident Reporting** (website to file appropriate critical incidents required by the State of Indiana Division of Mental Health and Addiction).
- **KidTraxs** (online portal to enter Dept of Child Services for waiver services. Data interacts with licensing agencies like Child Protective Services)
- **Certified email system** (HIPAA Compliant mandatory email system through which all emails from state personnel come.)
- **JIRA Help Desk Support** (Indiana Office of Technology Help Desk that can only be accessed by Supervisor level or Administrative Support Advocacy Links personnel)

Budget

Presently, the operating budget of ADVOCACY LINKS covers the cost of all required technological resources. Our vendors mid-sized business team is adequately prepared and can confidently support our company employees easily up to 300 staff, so we have lots of room for growth.

Technology Plan Goals – FY2022/2023

In 2022, our technology challenge was to conduct research, identify and implement ways to use technology in a responsive need to our new business model. With the need to have multiple revenue streams, we continue to explore and uncover how we are able to achieve this by engaging in scenario planning, discussing opportunities and challenges that could result in long term benefits and how might these fit into the strategic plan.

For the better part of 2022 we have worked feverishly overhauling our primary website and have substantially built-out our version of roommate finder/home sharing platform application.

Our 2023 website goals presence are primarily to increase awareness, improve customer satisfaction, generate more qualified leads, increase unique website visitors and enhance returning traffic. We also plan to develop our website out to include our non-profit branch of the business.

For the future, we hope to be able to utilize the collection and report analytics of our website data to be able to understand the success or failure of our website goals, to drive strategy, and improve the user's experience.

Goal 1: Re-implement Technology Committee as personnel are available. This will likely occur in 2024.

Goal 2: Ensure website is functioning to process subscriptions, memberships, donations, gift certificates.

Staff Training/Professional Development Strategy:

During New Staff Orientation, each employee is trained on the use of each technological system as required to complete the functions of the staff person's position. Not all positions require all technological functions, so training is customized for each type of position (Administrative vs. Division). In addition, different positions have different security levels within the various programs which enable access to different sections of the software relevant to the employee's position. Throughout the first few months of a staff member's employment, continuous hands-on and virtual training is provided until the employee is able to demonstrate proficiency with the use of all software.

Periodically, additional training for use of technological systems is provided in the monthly staff meetings and/or on the Company Wide Training Calls/webinars. Divisions Directors and Leadership Staff are readily available to answers any and all questions from staff. Should a question arise that is not able to be answered by our own staff, a "Help Ticket" can be submitted through JIRA Help Desk Support to secure clarification from State Officials, if the question is related to state mandated software.

As needed, the Company Nurse, Quality & Training Manager, Committee Members and/or Managing Member develop additional trainings (which are available on our Office 365 shared document library).

Dissemination of the Plan

This plan is internally disseminated as follows:

1. The Technology Plan is a part of the Comprehensive Strategic Business Plan and is included in the Annual Plan.
2. The Managing Member and Technology Manager, at times, meet with the Leadership Staff to discuss and finalize the ways Leadership Staff can assist the company in meeting the goals of this plan.

Responsibility for Plan

The Technology Manager is responsible for the goals and mission of the company including this Technology Plan. The Managing Member uses a well-defined administrative structure to accomplish the goals and mission of the company.

Implementation, Monitoring and Reporting

All areas of the Technology Plan are discussed periodically at Leadership Staff meetings. Progress and new developments in each area are recorded in the minutes of the Leadership Staff meeting.

The Technology Committee will develop the tools needed to successfully implement the plan and ensure an ongoing focus to technological issues. The Committee work group will plan, develop and deliver training to employees on what was learned about technology at ADVOCACY LINKS, and the organization's plan to address barriers, the new policy and the commitment to address technology on an ongoing basis.

The Technology Committee meets on a quarterly basis, or more often, as needed to monitor the implementation of this plan and to fulfill other obligations. This will include quarterly review of what has been accomplished and what remains to be accomplished.

Evaluation

Progress towards achieving technological outcomes will be reviewed at least quarterly in the Leadership Staff Meetings. This Technology Plan will be updated annually and more frequently if needed. The Technology Manager and Managing Member will determine the accomplishment of outcomes and adjust the technology plan as needed.

Closing Statement

Persons having suggestions for improving this plan are encouraged to provide their suggestions, in writing, to the Managing Member or the Technology Manager.

Accessibility Plan

Overview Statement

ADVOCACY LINKS is committed to the implementation of the Americans with Disabilities Act and to addressing other barriers to participation. Advocacy Links, LLC recognizes that accessibility is critical to the quality of life of persons served and their full inclusion in the community. ADVOCACY LINKS will not discriminate against persons served, employees or any other stakeholders and will address all barriers to accessibility identified through an inclusive process. It is the intent of ADVOCACY LINKS to partner with community service organizations to ensure that modifications and adjustments are made to make lives easier for people who face barriers to traditional services and supports.

In accordance with standards set forth by Commission on the Accreditation of Rehabilitation Facilities (CARF), ADVOCACY LINKS, with input from persons served and staff, has developed a comprehensive plan to work towards eliminating perceived and real barriers for persons receiving services, personnel and stakeholders.

This plan guides the identification of barriers to accessibility, planning, implementation and monitoring of accessibility to support the delivery of quality services and the full inclusion of individuals with disabilities in the community.

The goal of the Accessibility Plan is to provide barrier-free access to services and supports for persons served, employees and all other stakeholders. The Accessibility Plan objectives are to:

1. Promote the identification and removal of barriers to full accessibility of services and supports.
2. Establish the process to identify barriers and gaps in existing services and supports.
3. Continuously improve the level of accessibility to services and supports.
4. Encourage input from persons served and all other stakeholders.
5. Allocate resources to address the identified barriers.

Barriers currently identified, actions taken to address those barriers and/or a timeline to remove those barriers are addressed in each of the following 8 sections.

Attitudinal

ADVOCACY LINKS is committed to addressing attitudinal concerns and barriers as they relate to participants served. Social stigma associated with individuals with disabilities exists within society, and ADVOCACY LINKS is dedicated to enhancing the quality in which individuals are viewed and treated through continued training and education available to employees, stakeholders, and the general public. As eligibility criteria for services creates inherent barriers to appropriate supports, ADVOCACY LINKS strives to ensure that information is available to the community through partnerships with State and Federal agencies, school systems, outreach

programs, and service providers. ADVOCACY LINKS continues to provide a quick response to persons served when they bring forth concerns regarding the services they are receiving. Leadership Staff are able to investigate and respond to any concerns or issues regarding programs or services. In addition, ADVOCACY LINKS uses a satisfaction survey for all persons served and/or their guardians to provide feedback, express concerns, and receive input. The Quality and Training Coordinator and/or Managing Member is responsible for reviewing the information received from surveys obtained. General satisfaction of persons receiving services is assessed via this survey at least annually.

Any recommendations on service delivery are referred to the ADVOCACY LINKS Leadership Staff for follow-up. The ADVOCACY LINKS Leadership Staff meets at least monthly to discuss and potentially implement any suggestions, ideas and propositions from the individuals we serve, guardians and team members.

All ADVOCACY LINKS employees complete annual training on human rights which addresses specific attitudinal issues.

The ADVOCACY LINKS Cultural Competency Committee meets quarterly to discuss cultural, ethnic, societal, religious, and civil and human rights issues. They identify areas which may present barriers to accessibility within services/supports and develop goals and some training to address these barriers.

Community Integration

ADVOCACY LINKS' commitment towards educating the public, reducing social stigma, and encouraging community integration is evident in the community events at which we are present. Community events and activities and resources are discussed at monthly staff meetings and information is also disseminated to all employees through email. This information is shared with stakeholders through team meetings for individuals served and ongoing collaborative discussions with stakeholders. Following are several events in which ADVOCACY LINKS has been involved and provided resources to individuals and family members and educated them on community integration opportunities.

May 2022

- LaPorte Small Business Coalition Community Resource Fair, LaPorte, IN (LaPorte County)
- Disability Expo, Fort Wayne, IN (Allen County)
- Special Education Resource Fair, Chesterton, IN (Lake County)
- Mental Health/Suicide Prevention Walk, Plymouth, IN (Marshall County)

June 2022

- Alzheimer & Dementia Stand By Me Walk, South Bend, IN (St. Joseph County)

July 2022

- Marshall County System of Care Community Carnival, Plymouth, IN (Marshall County)
- Elkhart County Fair Disability Awareness Day, Goshen, IN (Elkhart County)
- Children's Fest, Fort Wayne, IN (Allen County)

August 2022

- Chasing Dreams Walk in Hobart, IN (Lake County)
- Kid City Interactive Learning Fair in Kendallville, IN (Noble County)
- Knowledge Series Vendor Fair in Gary, IN (Lake County)

September 2022

- Self Advocates Picnic in Plainfield, IN (Statewide exposure)
- Fall Provider Fair at the Market in Valparaiso, IN (Porter County)
- My Autism Ally Acceptance Walk in Fort Wayne (Allen County)
- DSANI Buddy Walk in Fort Wayne (Allen County)

October 2022

- Goodwill Career Center Trick or Treat Resource Fair in Elkhart (Elkhart County)

November 2022

- Boys & Girls Club Resource Fair in Nappanee, IN (Elkhart County)
- Changing Lives Together Networking Event in Columbia City (Whitley County)

December 2022

- Community Resource Fair in LaGrange, IN

<u>Barrier</u>	<u>Plan of Action</u>	<u>Priority</u>	<u>Cost</u>	<u>Timeline</u>	<u>Person Responsible</u>	<u>Status</u>
Absence of community events and activities in	Network with providers and	Moderate	N/A	Ongoing	Leadership Staff/Accessibility Committee	Most employees are meeting as

certain districts.	community organizations to identify upcoming events and activities or opportunities to sponsor events.					appropriate with community partners relevant to their roles
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Environmental/Architectural

ADVOCACY LINKS does not currently own any property or have any physical structures that are available to persons served or stakeholders. All business is conducted from each employee's home office, but when meetings are held, ADVOCACY LINKS staff go to the home of the person served, or meet in another community-based location (library, coffee shop, day service provider, etc.) In accordance with the Americans with Disabilities Act, service locations for persons that we serve are accessible or alternative program sites are available to insure equal access to persons with physical disabilities. If meetings are held in the community, ADVOCACY LINKS employees find locations that are suitable to meet the physical needs of the persons that we serve, personnel, guardians, team members and providers.

State and federal agencies ensure that Medicaid funded providers and programs comply with environmental barriers by completing internal emergency drills and physical site inspections. Environmental inspections have been completed at agency sites and the homes of the individuals we serve to ensure a safe, clean and healthy environment for the persons served and formal environmental inspections are completed as part of transition activities when a person moves from one residential location or provider to another. Informal environmental inspections are conducted by ADVOCACY LINKS personnel each quarter when the representative meets with the individual served.

No barriers have been identified at this time.

Financial

ADVOCACY LINKS operates through several different funding streams depending on the service line. Ongoing access to services/supports are contingent upon consistent funding for the provision of services. See "Financial Management Plan" as part of this comprehensive strategic business plan for more information.

One of the responsibilities of Connection Specialists might be to assist people in services are paying their bills on time, having enough money to buy food, etc. Connection Specialists frequently connect people to resources and service organizations (Medicaid, Social Security, food pantries, food stamps, Section 8 housing, etc.) to ensure needs are being met.

Communication

ADVOCACY LINKS strives to maintain open and honest communication with people we support, family members, guardians, stakeholders and employees. There have been a few instances of communication breakdown between specific employees and team members. These situations have been resolved individually with those specific employees and teams. Supervisors will continue to monitor these interactions to ensure that communication is maintained.

On our company website (www.advocacy-links.com), ADVOCACY LINKS has a variety of informational links and articles. The Marketing & Communications Manager and Technology Manager are responsible for keeping the website up to date with current information and resources, which are provided through the Leadership Staff. The company also has a Facebook page, and accounts on Pinterest and Instagram. All social media platforms, where resources and upcoming events are shared, are maintained by the Marketing & Communications Manager maintained by the managing member.

Monthly Divisional Staff meetings, conducted by Division Directors for each of their Divisions is one of the methods of relaying information to employees. In addition, the Managing Member facilitates the monthly Leadership Staff meeting to convey information to Leadership Staff. Each month, there is also a Company Wide webinar on which new resource information is shared and new training is presented. Staff Meetings and Company Wide webinars are mandatory for all employees.

Periodically, various employees obtain information that would be helpful for colleagues and/or other waiver participants. When this information is passed along to the Leadership Staff, it is forwarded to all staff and posted to our company website, if appropriate. Case Managers are encouraged to share this resource information with the people they support, family members, and guardians.

Satisfaction Surveys are another communication tool that ADVOCACY LINKS utilizes to gather feedback from people served, stakeholders and employees. Information provided is shared with Leadership Staff and addressed appropriately.

The Division Directors are committed to meeting with stakeholders on a regular basis to maintain open communication. These interactions occur via personal contact, phone

conversation with as much frequency as requested by the specific stakeholder. Feedback from these interactions is shared with Leadership Staff and relevant employees as appropriate.

ADVOCACY LINKS has developed printed materials (brochures and other literature) that are distributed to interested individuals at conferences, transition fairs and other public community events to share our mission.

ADVOCACY LINKS recognizes the need to respect the cultural diversity of the region. Agency forms can be made available in alternate languages such as Spanish and Braille. Additional language translations of forms will be made available as needed. We have a Spanish speaking employee on staff and maintain a contract with an interpreting company to best meet the needs of individuals and families whose primary language is not English.

No barriers have been identified in this area at this time.

Transportation

In some portions of the state in which we provide services, there is a huge need for transportation services for people to access community-based services. ADVOCACY LINKS does not provide transportation as a service but there are occasions that a representative might drive an individual to a location as part of other supports being provided.

ADVOCACY LINKS representatives work closely with local transportation agencies and Medicaid providers to ensure that individuals served have access to their community through transportation services. Our representatives provide the individuals we serve and family members with resources to access transportation services that are affordable or at no cost to them.

At this time, there are no barriers in this area that are not presently being addressed.

Employment

As an employer, ADVOCACY LINKS complies with all applicable sections of the Americans with Disabilities Act. It is our policy not to discriminate against any qualified applicant or employee because of a person's disability. ADVOCACY LINKS is committed to providing reasonable accommodations to a qualified employee with a disability. Employees with a disability who believe they need an accommodation should contact the Human Resources Manager/Business Manager.

One of the barriers that had surfaced in this area in the past few years relates to the lack of culturally diverse applicants. As of 12/31/2022, we currently have 1 Bi-Lingual employee who is

fluent in both English and Spanish to best support individuals in the Kosciusko/Elkhart county area where there is a large portion of the population potentially needing services.

At this time, there are no barriers in this area that are not presently being addressed.

Technology

Increasingly, new technology offers the resources to meet the varied needs of our community. As technology continues to play a vital role in providing access to information, ADVOCACY LINKS is committed to meet the demands for an increased access to technology.

In 2022, ADVOCACY LINKS invested in a stand-alone, HIPAA compliant Customer Management System (Health Cloud) to store confidential records for the individuals we support. Employees are still becoming familiar with the new software program.

<u>Barrier</u>	<u>Plan of Action</u>	<u>Priority</u>	<u>Cost</u>	<u>Timeline</u>	<u>Person Responsible</u>	<u>Status</u>
Unfamiliar software	Initial and ongoing training for position specific functions in Health Cloud	High	N/A	Ongoing	Leadership Staff	ongoing

Budget

Presently, the operating budget of ADVOCACY LINKS covers the cost of all accessibility requirements.

Accessibility Plan Goals

Specific goals, as well as plan of action and current status, are outlined in the tables above in each identified accessibility area. In addition,

Goal 1: Re-implement Accessibility Committee as personnel are available. This will likely occur in 2024.

Dissemination of the Plan

This plan is internally disseminated as follows:

1. The Accessibility Plan is a part of the Comprehensive Strategic Business Plan and is included in the Annual Plan.
2. Periodically, information is shared at staff meetings, indicating that the plan is on the company's website (www.advocacy-links.com) and encouraging all employees to read it.
3. The Managing Member meets with the Leadership Staff to discuss and finalize the ways Leadership Staff can assist the company in meeting the goals of this plan.

Responsibility for Plan

The Chairperson of the Accessibility Committee, in conjunction with the ADVOCACY LINKS Managing Member is responsible for the goals and mission of the company including this Accessibility Plan. The ADVOCACY LINKS Managing Member uses a well-defined administrative structure to accomplish the goals and mission of the company.

Implementation, Monitoring and Reporting

The Accessibility Committee has developed the tools needed to successfully implement the plan and ensure an ongoing focus to accessibility issues. The Committee will plan, develop and deliver training to employees on accessibility at ADVOCACY LINKS, and the organization's policies and plan to address barriers, and the commitment to address accessibility on an ongoing basis.

The Accessibility Committee meets on a quarterly basis, or more often, as needed to monitor the implementation of this plan and to fulfill other obligations. This will include quarterly review of what has been accomplished and what remains to be accomplished.

Evaluation

Progress towards achieving accessibility outcomes will be reviewed at least quarterly in the Leadership Staff Meetings. This Accessibility Plan will be updated annually and more frequently if needed. The Managing Member, in conjunction with the Accessibility Committee Chairperson, will determine the accomplishment of outcomes and adjust the Accessibility Plan as needed.

Closing Statement

Persons having suggestions for improving this plan are encouraged to provide their suggestions, in writing, to the Managing Member or Chairperson of the Accessibility Committee.

Strategic Plan

Wraparound Support Services

PURPOSE: (Why do we want to do this?)

Over the last ten years Advocacy Links has developed a stellar reputation for providing quality supports and services in North/North Central Indiana. This rich history is with individuals who have intellectual/developmental disabilities, including but not limited to those with dual diagnosis. Advocacy Links wants to provide Wraparound Facilitation as a continuum of our high ethical standards, quality services, and resource sharing our communities have become accustomed. We want to continue to support youth and their families using the person focused, respectful approach for which we are known.

Description of Services/Service Delivery:

The youth and their family lead the treatment planning process with the Wraparound Facilitator facilitating the meetings. The wraparound facilitator coordinates service delivery and encourages the youth and family to grow their network of community and natural supports. Wraparound Facilitators should be the cheerleader for the family while assisting in planning.

Wraparound services are delivered in a combination of face to face meetings and alternative communication. Each youth and family receiving services will have one team meeting each month held in person either in the family home or community, based on family preference.

Each week the wraparound facilitator will contact each member of the youth's team via telephone, text message, or email. This is non-negotiable. Contact with the family should be made no more than 48 hours after receiving the file from DMHA. The initial meeting with the team should be scheduled within 7 days with the first child and family team meeting held within 30 days from the start of wraparound services. During, facilitators will guide the meeting and the team will share progress and make updates to the plan of care. The purpose of weekly calls is to ensure there is progress toward completion of tasks and to continue discussion as to what is working.

Wraparound facilitators will enter plan of care, crisis plans, and all budget needs in the required system of DMHA/DCS, TOBI, and KidTraks. Level of need will be completed every six months, more often if needs change. All work will be entered in TOBI or KidTraks per program requirements. Advocacy Links also requires facilitators enter master files for all youth in Health Cloud that includes activity notes, contacts and the plan of care. This will be used to track information through reporting as well as link the file to other programs for resources as needed/requested.

Reason to provide this support:

We want to provide another option for High Fidelity Wraparound Services based on our core values of advocating, linking others to resources, and respecting others. Many counties only have one provider/facilitator for Wraparound. Offering this service in these counties is providing youth and their families with choice.

We want to continue sharing resources we have developed through a person centered approach. We have built relationships with others through schools, counseling services, provider agencies, and community members that we feel benefit others.

We want to assist youth and their families in building a team of support through our expertise in person-centered planning and life-course planning. Advocacy Links is committed to ensuring each youth and family receiving services has their voice heard and their choices respected. We have extensive history and knowledge of youth dually diagnosed with emotional disturbances and intellectual/developmental delays. We have a lot to offer the industry in this area.

Definition of Market:

We are still understanding who are competition is. As off 11/1/2022 there is one entity working as the access site to process all wraparound referrals for DMHA/CMHW. CMHI continues to use access sites throughout the state that also act as wraparound service providers. As of 11/1/2022 there are 15 companies providing Wraparound Facilitation for youth and families to choose. This number includes Advocacy Links and correlates to agencies working in the same counties as Advocacy Links.

The below chart depicts providers offering Wraparound Facilitation in the 34 counties Advocacy Links serves as well as their availability. This chart is current as of 11/9/2022.

County	Provider	Availability
Adams	Advocacy Links	12
	Park Center, Inc.	5
	Choices, Inc.	0
Allen	Park Center, Inc.	5
	CrossRoads Child and Family Services	12
	Advocacy Links	12
	Choices, Inc.	2
Benton	Wabash Valley Alliance	2
	Advocacy Links	12

	IPMG	9
Carroll	Wabash Valley Alliance	2
	Advocacy Links	12
	IPMG	3
Cass	Four County Comprehensive Mental Health Center	0
	Advocacy Links	3
	IPMG	14
Clinton	Wabash Valley Alliance	2
	Cummins Behavioral Health Systems, Inc.	1
	Advocacy Links	3
	IPMG	3
DeKalb	Northeastern Center, Inc	8
	Advocacy Links	12
Fulton	Four County Comprehensive Mental Health Center	0
	Advocacy Links	3
	IPMG	10
Elkhart	Oaklawn Psychiatric Center, Inc	0
	Advocacy Links, LLC	8
	Choices, Inc.	0
Kosciusko	Otis R. Bowen for Human Services	29
	Advocacy Links	8

Howard	Integrated Support & Facilitation	0
	Advocacy Links	3
	Choices, Inc.	0
	IPMG	14
Huntington	Otis R. Bowen Center for Human Services	29
	Advocacy Links	12
	Crossroad Child & Family Services, Inc	5
	Choices, Inc.	0
	IPMG	11
Jasper	Wabash Valley Alliance	2
	Advocacy Links	12
	IPMG	23
Lake	Edgewater Systems for Balanced Living, Inc.	2
	Integrated Support & Facilitation	0
	Advocacy Links	12
	Choices, Inc.	0
	IPMG	25
LaPorte	Integrated Support & Facilitation	0
	Advocacy Links	12
	LaPorte County Comprehensive Mental Health Council, Inc	5
	Choices, Inc.	0
	IPMG	13

Miami	Four County Comprehensive Mental Health Center, Inc.	0
	Advocacy Links	3
	IPMG	14
Newton	Wabash Valley Alliance	2
	Advocacy Links	12
	IPMG	23
Porter	Porter Starke Services, Inc.	0
	Integrated Support & Facilitation	0
	Advocacy Links	12
	Choices, Inc.	0
	IPMG	25
Pulaski	Four County Comprehensive Mental Health Center, Inc.	0
	Advocacy Links	15
	IPMG	9
Starke	Porter Starke Services, Inc.	0
	Advocacy Links	12
	Choices, Inc.	0
	IPMG	12
St. Joseph	Bowen Center	0

	Oaklawn Psychiatric	0
	Advocacy Links	8
	Choices, Inc.	0
Tipton	Integrated Support & Facilitation	0
	Advocacy Links	3
	Choices, Inc	0
	IPMG	3
Wells	Park Center, Inc.	5
	Advocacy Links	12
	Choices	2
White	Wabash Valley Alliance	2
	Advocacy Links	3
	IPMG	9
Whitley	Bowen Center	29
	Advocacy Links	12

Strengths:

We are familiar with the responsibilities and expectations of being a provider for services that are built around a person's strengths/wants/needs/desires.

Advocacy Links has well established resources and connections in the 34 counties that we serve throughout northern Indiana. We have connections within our communities at schools, medical/psychiatric offices, and various other resources built (food banks, free and low cost furniture, churches, therapists, mental health centers, schools, etc).

Our reputation in each of the counties will assist to connect families to their communities. Community members recognize Advocacy Links as the "go to" resource to get people who need help connected to genuine help in a timely and respectful manner. We are also known for being responsive to those reaching out for help.

We are well versed in person centered thinking and the process of the life course to assist youth and their families in further developing strengths and their vision of a good life. We are trained in extracting this information to build outcomes and strategies that will lead youth and their families to increased self-esteem and stronger familial bonds.

We already have a foundation in the wraparound principles including: family voice and choice, team-based meetings and conversations, connecting people with natural supports, collaboration with teams, community based, culturally competent staff at Advocacy Links, individualized plans and services, building plans based on strengths of the youth/family/team members, planning outcomes and strategies for success, and providing unconditional care to our youth and their families.

Weaknesses:

Wraparound Facilitation is a new program for Advocacy Links that will have a learning curve as things get started. Staff will be learning the TOBI and KidTraks systems, which are also new. Advocacy Links does not currently have a formal training program for new Wraparound Facilitators. While we know how to advocate and connect, we are learning the process of wraparound supports.

Threats:

Wraparound facilitation is not a heavily populated service to date due to lack of education in the community. There are no guarantees on the number of referrals that will come through or the counties in which we will receive referrals. While the company has worked with a dual diagnosis population for many years, this is a new service for us.

While many counties only have one company/facilitator serving the area, there are several other companies providing this service.

We had many contacts and supports built through DDRS and BDDS. We are still learning the key players through DMHA and DCS as well as how the program works.

Organization and Management:

Staffing and supervision needs will change as partnerships grow and more facilitators are hired.

Wraparound facilitators ideally partner with 10 youth- absolutely no more than 12 youth.

Supervisors/Directors should have a combination of 10 made up between youth and facilitators.

Initial structure will include one director (Sara Fry) with three facilitators (Caitlin Swinehart and Dawn Alvarado, Gabrielle McCaskill). Advocacy Links wants to have facilitator presence in all 34 counties served. As partnerships increase and referrals come in more steadily, additional facilitators will be hired. Additional Directors will be put in place once the supervision to youth ratio allows.

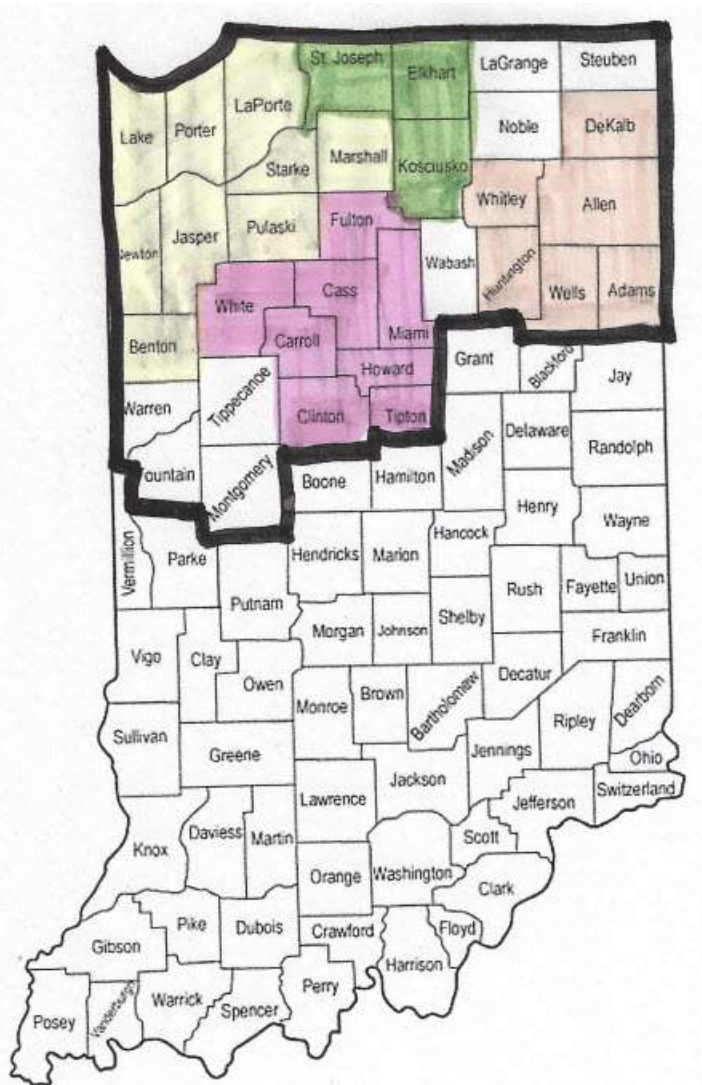
With this service starting later than the initial projected goal, we would like to see a base of each facilitator having at least one youth to partner with by the end of this fiscal year (2022) with a slow, steady growth continuum. Advocacy Links does expect growth to occur. Over the course of 2023 we

would like to have facilitator presence in all 34 counties the agency serves. We would also want to provide facilitator choice in counties. In 2023 we want to see growth of at least two facilitators to offer, especially in more populated counties.

Our initial projections for growth include:

As current facilitators reach 6 – 8 partnerships within a 3 – 4 county geographic region, an opening will be posted to pursue adding an additional facilitator.

St. Joseph, Elkhart, and Tippecanoe counties will likely be the first areas of expansion.



Marketing Strategy:

Advocacy Links has a goal to have presence at all resource fairs and community outings offered in all 34 counties served in northern Indiana. Informational brochures on Wraparound Services will be available at each event. Wraparound Directors and Facilitators will also network with local mental health centers,

physicians, schools, and other community partners to share brochures and information. It is a priority for Advocacy Links to be aware of all resources. All Wraparound Facilitators attend SOC meetings in relevant counties. Advocacy Links is also involved in area continuum of care and interagency meetings that are offered in counties we serve. Facilitators and Director also share mental health resources with other company employees as pertinent.

Financial Management:

In order for ADVOCACY LINKS to operate in a fiscally responsible manner, it is necessary for Wraparound staff to maintain full caseloads (10 people being supported or partnered). Due to the intensity of the work, while DMHA allows for up to 12 people occasionally, ADVOCACY LINKS will not ask personnel to do this with any regularity.

As of January 2023, ADVOCACY LINKS will be piloting wraparound services in 7 additional counties outside the 34 county service area to determine if this is an area we can support in an ongoing manner.

Growth Plan/Workforce Development Plan:

As of 11/2022, Advocacy Links employs one Wraparound Director and three full-time Facilitators. A new Facilitator will be starting mid-December. Advocacy Links wants to have Facilitator presence in all 34 counties we serve in Northern Indiana. As of 11/2022 we do not have presence in the following counties: Warren, Fountain, Tippecanoe, Montgomery, LaGrange, Noble, and Steuben. In 2023 we would like to add facilitators in these counties as well as additional facilitators in the metro areas we already have presence in. This would include adding facilitators to: St. Joseph, Elkhart, Lake, Porter, Allen, and Howard counties.

The chart below depicts counties with no current Advocacy Links Wraparound Facilitator presence. There is note of current providers and availability of Wraparound Facilitators in these counties as of 11/2022.

County	Provider	Availability
Fountain	Wabash Valley Alliance	2
	IPMG	0
	Northeastern Center	8
LaGrange	Northeastern Center	8
Montgomery	Wabash Valley Alliance	2
	IPMG	7

	Cummins Behavioral Health Systems	4
Noble	Northeastern Center	8
	Choices	0
Steuben	Northeastern Center	8
Tippecanoe	Wabash Valley Alliance	2
	IPMG	0
Wabash	Bowen Center	25
	IPMG	11
Warren	Wabash Valley Alliance	2
	IPMG	0

Performance Analysis and Improvement:

Wraparound Facilitators receive process based supervision twice each month. Our goal is to see continued growth on scores through this supervision with each Facilitator starting with a score of at least 50% in 2023.

In 2022 through the initial phase of scoring on the WISP, Advocacy Links scored very high. We will be moving to the next phase in 2023 and plan to keep that momentum with another round of high scores. We will continue to provide the same person centered, caring, resource based service we are known for.

Over the next year we will have Wraparound Facilitator presence in all 34 counties. We will also have at least two Facilitators present in metro areas of Indiana including St. Joseph, Lake, and Tippecanoe counties.

As we have become more involved with state Systems of Care and interagency meetings, we found many counties that we serve do not have functioning groups. Wraparound Facilitation will work with other Advocacy Links programs to create interagency meetings that include a wide variety of resources in counties that do not currently have functioning groups. We would like to have 3 – 5 routine interagency meetings set up in counties that do not currently offer community based resource sharing.

Strategic Plan

MyLinks/Housemate Finder

PURPOSE: (Why do we want to do this?)

In the past 10 years of providing Indiana Medicaid Waiver Case Management services, one of the inefficiencies that existed was the lack of opportunity for individuals to have a louder voice in their housemate selection process. There was not a reliable or efficient tool to use to inform others about people looking for housemates. ADVOCACY LINKS believes we can provide an efficient, online tool for helping individuals review their options and make their own choices.

Reason to provide this support:

Strengths:

We have the knowledge, experience and networks set up in the disability related field.

Have solid presence and good reputation in many counties.

Software is developed

Weaknesses:

Promotion of the social platform/matching tool has been minimal

It's necessary to charge a fee to use to cover costs

Opportunities:

Additional features (Housing Locator, Equipment Exchange, etc.) can be added later as need arise and funds allow.

Threats:

There's a potential that another entity might create a similar tool before Housemate Finder gets established

Software glitches that frustrate users

CURRENT ANALYSIS OF MyLinks/Housemate Finder:

Currently in the field of disability services, there is a "Housemate" spreadsheet that circulates in an email attachment but it is not updated with current/correct information with any regularity. It only goes to waiver case managers who have requested to be on the email mailing list. Therefore, not only is the information outdated, it's also not going to all the people who actually need to review it.

ADVOCACY LINKS worked with 4411 Creative, an Indiana based web development firm to create a social network platform (MyLinks) as part of our website. The social network platform enables individuals and professionals to interact in a safe space. Housemate Finder is the first add-on function of the social network that provides a secure online place for people looking for others to share residential space and costs. This tool provides users with the power to research potential options at their own discretion and make connections of their own.

Individuals needing a housemate are able to set up their own profile with whatever information they are comfortable sharing. They can set up filters and search the online database of other people looking for housemates and then make connections to determine if they want to meet or move forward in the process of potentially sharing living space/costs.

Professionals can also create and manage profiles on Housemate Finder for people they support who don't have the technological skills/ability to navigate the online tool on their own.

The system has launched and is ready for subscribers. As of 1/1/2023, there are only 2 subscribers. Promotions and Marketing efforts will be intense in the early part of 2023.

WE PROMISE: (what can individuals expect from us?)

ADVOCACY LINKS will ensure that information stored on MyLinks/Housemate Finder is secure and won't be sold to telemarketers, etc. MyLinks/Housemate Finder will provide a social network opportunity and housemate options contingent upon the widespread use of the tool.

COUNTIES SERVED:

MyLinks/Housemate Finder is an online tool so is not limited to specific counties.

STAFFING SUPPORT STRUCTURE: (What are the various personnel needed to operate this area?)

Special Projects Manager – The person in this position oversees the implementation and usage of the software.

When subscriptions reach 500, ADVOCACY LINKS will review the need for additional personnel to review content and functionality of MyLinks/Housemate Finder.

TECHNOLOGICAL SUPPORT: (Is there a required technological process imposed by oversight entity? How/where do we access that?)

MyLinks/Housemate Finder is built on the Wordpress website platform. 4411 Creative is available for technological troubleshooting as needed.

EQUIPMENT: (What equipment/devices are needed to deliver these supports?)

ADVOCACY LINKS employees use their own devices to operate/oversee MyLinks/Housemate Finder. Since the software is web-based, users can access the system wherever there is a Wi-Fi signal from their own preferred devices and/or access through public devices in libraries, coffee shops, etc.

SERVICE DELIVERY FORMAT: (Is this possible to be delivered virtually or from home office or is a physical location necessary for this area? If a physical location is needed, what does that look like?)

MyLinks/Housemate Finder is an online tool. There is no specific physical location required to use the tool. The only requirement is internet access.

LICENSING/REGULATIONS/LAWS/STANDARDS: (What are the rules and standards that need followed to do this? What licensing/oversight is necessary? (460 IAC/CARF/BDDS/etc.)

While there are no rules or regulations that dictate supports/services provided through MyLinks/Housemate Finder, ADVOCACY LINKS uses a secure online platform for storing content and processing subscriptions.

At least quarterly, the Special Project Manager will reach out to users to seek feedback on if the tool is delivering what people expect. The Special Project Manager will consult with our web developers to determine how/when to modify the system.

When users close their accounts, there's another opportunity for people to provide feedback about satisfaction with the tool.

MARKETING & ADVERTISING: (How do we get clients? Where/how do we market?)

Brochures/Flyers have been created. These printed materials are available at the resource fairs where ADVOCACY LINKS is represented. Digital flyers are emailed to interested individuals and collaborative partners.

MyLinks/Housemate Finder is promoted on social media.

NETWORK WITH COMMUNITY PARTNERS

In an effort to educate diverse populations about supports and services available through Advocacy Links, we will make a concentrated effort to participate in activities in culturally diverse communities as well as with a wide variety of population groups. In addition, marketing literature will be made available as needed in alternate languages.

BUDGET: What is the revenue source/stream? How do we receive funding? Medicaid, Grants, VR, private pay? What does this look like?

All of the revenue to cover costs related to MyLinks/Housemate Finder must come from subscriptions, memberships, gift certificates, sponsorships, and grants.

TRAINING/PROFESSIONAL DEVELOPMENT STRATEGY

It is the intent of ADVOCACY LINKS to ensure our staff are thoroughly trained on ways to do their jobs. Policies and Procedures have been written and are in the Operations Manual pertaining to MyLinks/Housemate Finder oversight.

During New Staff Orientation, each employee is trained on the responsibilities of their position. Other employees of ADVOCACY LINKS are trained during New Staff Orientation with an overview of the MyLinks/Housemate Finder services to ensure there's an understanding of the availability of the services offered.

DISSEMINATION OF THE PLAN

This plan is internally disseminated as follows:

1. The MyLinks/Housemate Finder Plan is a part of the Comprehensive Strategic Business Plan and a summary of accomplishments and opportunities is included in the Annual Progress Report.
2. Periodically, information is shared at staff meetings, indicating that the plan is on the company's internal online shared document library, encouraging all employees to read it.
3. The Managing Member and Business Manager, at times, meet with the Leadership Staff to discuss and finalize the ways personnel can assist the company in meeting the goals of this plan. As position vacancies occur, one-on-one consultations with the Resource and Connections Director or Director of Training are conducted to encourage and promote our commitment to this plan.

ADVOCACY LINKS takes several actions to ensure that this plan is disseminated. These actions include, but are not limited to, the following:

1. The MyLinks/Housemate Finder plan is available on the company's internal communication network.
2. Copies of the plan are available upon request from the Managing Member.

RESPONSIBILITY FOR THE PLAN

The Managing Member, in conjunction with the Special Projects Manager, is responsible for the goals and mission of the company including this MyLinks/Housemate Finder Plan. The Managing Member uses a well-defined administrative structure to accomplish the goals and mission of the company.

IMPLEMENTATION, MONITORING & REPORTING: (How do we determine the quality of services/supports for this area? What does performance review look like?)

This plan will be implemented by the Special Projects Manager and Managing Member. Each month, progress or regression will be recorded on the "To Do Timelines" goals that team has agreed upon. Additional goals will be implemented as the need arises.

The Special Projects Manager needs to develop tools to determine if quality services/supports are being delivered as well as what factors would be considered for an employee's performance review in this area.

The Special Projects Manager will plan, develop and deliver training to employees on the organization's plan to address barriers, new policies and the commitment to provide services on an ongoing basis.

The Special Projects Manager meets bi-monthly, or more often, as needed to monitor the implementation of this plan and to fulfill other obligations. This will include quarterly review of what has been accomplished and what remains to be accomplished.

EVALUATION

Progress towards achieving MyLinks/Housemate Finder outcomes will be reviewed at least quarterly in the Leadership Staff Meetings. This Plan will be updated annually and more frequently if needed. In conjunction with the Special Projects Manager, the Leadership Staff and Managing Member will determine the accomplishment of outcomes and adjust the MyLinks/Housemate Finder plan as needed.

CLOSING STATEMENT

Persons having suggestions for improving this plan are encouraged to provide their suggestions, in writing, to the Managing Member and/or Special Projects Manager.

Strategic Plan

Resource Connections

PURPOSE: (Why do we want to do this?)

We want to assist individuals and families who need extra help. This may include:

- Connecting people to resources in their communities
- Walking beside individuals and families to navigate resources and supports

Reason to provide this support:

Strengths:

We have the resources and experience in many disability related areas.

Have solid presence and good reputation in many counties.

Weaknesses:

Relying on self-pay individuals who may not be able to pay

Geographic area is constricted by staff areas

Opportunities:

Work with all life stages to provide support without relying on eligibility needs

Assist individuals in applying for various benefits/services

Provide advocacy for individuals

Elder care

Threats:

Not enough referrals coming in.

Other companies who also provide a similar service to Connections Specialists

CURRENT ANALYSIS OF Resource and Connections:

Resource and Connections – based on feedback provided from individuals/families on surveys and one on one, individuals/families need assistance navigating special needs resources. Feedback was also provided on elder care coordination and there is a need in Northern Indiana to provide additional services and supports.

Feedback from individuals/families has been positive

We serve a number of individuals who are unable to pay for our services.

WE PROMISE: (what can individuals expect from us?)

Advocacy Links will respond to individuals we support in a timely fashion and connect people to the resources they are seeking.

For individuals and families looking for someone to assist them in navigating services and resources, we commit to partnering with them to locate the assistance they need. We will provide answers in a timely manner and commit to meeting with them in the fashion they request.

COUNTIES SERVED:

We are committed to serving the 34 counties that Advocacy Links already has a strong presence.

STAFFING SUPPORT STRUCTURE: (What are the various personnel needed to operate this area?)

Director of Resource & Connections – 1 person to oversee the Resource and Connection specialists

Connection Specialists – 10 staff to coordinate activities in 5-6 counties each -ideally spread out throughout the 34 counties we serve.

We currently have the Director and 3 Connections Specialists. There will be staggered filling of the positions as the need arises and qualified applicants are found. Decisions about what areas to cover and which applicants to employ will be made from the pool of applicants received.

TECHNOLOGICAL SUPPORT: (Is there a required technological process imposed by oversight entity? How/where do we access that?)

Individual information will be housed on Advocacy Links Health Cloud system. Email is used through Office 365. Teams is used for quick communication between team members.

EQUIPMENT: (What equipment/devices are needed to deliver these supports?)

The Director of Resources and Connections will complete work on their own laptop and phone.

The Connections Specialists will complete work on their own laptops and phones.

All team members use expense reimbursement per the expense reimbursement policy in the Operations manual.

SERVICE DELIVERY FORMAT: (Is this possible to be delivered virtually or from home office or is a physical location necessary for this area? If a physical location is needed, what does that look like?)

Director of Resources and Connections – The majority of this position would be completed virtually. The Director would need to travel to meet with stakeholders to develop relationships as desired. They would also need to attend resource fairs.

Connections Specialist – This position would be blended between virtually and in person. While some of the work may be completed virtually, travel would be necessary to meet with families/individuals who chose in person assistance.

LICENSING/REGULATIONS/LAWS/STANDARDS: (What are the rules and standards that need followed to do this? What licensing/oversight is necessary? (460 IAC/CARF/BDDS/etc.)
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Resource and Connections would follow CARF standards for Supports coordination. As this is self-pay at this time, there are no other rules and standards.

Standards of Support needed

Progress notes-*through Health Cloud* -for each encounter

Monthly or weekly contact -depending on contract

Follow up surveys after completed

Reaching out within 48 hours of receiving the connections referral

Minimum Qualifications:

High School Diploma but degree preferred

Experience working with low-income families, developmental disabilities and/or mental health.

Good communication and written skills needed

Time management skills

Ability to work independently and remotely

MARKETING & ADVERTISING: (How do we get clients? Where/how do we market?)

We will attend resource fairs as available in all counties we serve. We will build connections with judges/courts, APS, local doctor's offices, and support groups.

NETWORK WITH COMMUNITY PARTNERS

In an effort to educate diverse populations about supports and services available through Advocacy Links, we will make a concentrated effort to participate in activities in culturally diverse communities as well as with a wide variety of population groups. In addition, marketing literature will be made available as needed in alternate languages.

BUDGET: What is the revenue source/stream? How do we receive funding? Medicaid, Grants, VR, private pay? What does this look like?

Resource and Connections is a private pay service. Whether hourly or through Mylinks memberships.

We are researching grants and community funding options to help cover some costs for Resource and Connections as needed.

ADDITIONAL IDEAS to RESEARCH LATER

1. PAS – there are private companies that contract with Maximus to provide level 1 and level 2 screenings

PLAN GOALS

- Build and maintain relationships with local service providers
- Have at least 2 SOAR certified Connection Specialists by 3/31/2023
- Support at least 5 new revenue generating people each month through 12/31/2023.

TRAINING/PROFESSIONAL DEVELOPMENT STRATEGY

It is the intent of Advocacy Links to ensure our staff is thoroughly trained on ways to do their jobs in the area of Resource and Connections. Policies and Procedures have been written and are in the Advocacy Links Operations Manual pertaining to Resource and Connections.

During New Staff Orientation, each Connections Specialist employee is trained on the responsibilities of their position. Other employees of Advocacy Links are trained during New Staff Orientation with an overview of the Connections Specialist services to ensure there's an understanding of the availability of the services offered.

DISSEMINATION OF THE PLAN

This plan is internally disseminated as follows:

- The Resource and Connections Plan is a part of the Advocacy Links Strategic Business Plan and a summary of accomplishments and opportunities is included in the Annual Progress Report.
- Periodically, information is shared at staff meetings, indicating that the plan is on the company's internal online shared document library, encouraging all employees to read it.
- The Managing Member and Business Manager, at times, meet with the Administrative Staff to discuss and finalize the ways personnel can assist the company in meeting the goals of this plan. As position vacancies occur, one-on-one consultations with the Resource and Connections Director or Director of Training are conducted to encourage and promote our commitment to this plan.

Advocacy Links takes several actions to ensure that this plan is disseminated. These actions include, but are not limited to, the following:

- The Resource and Connections plan is available on the company's internal communication network.
- Copies of the plan are available upon request from the Managing Member.

RESPONSIBILITY FOR THE PLAN

The Advocacy Links Managing Member, in conjunction with the Director of Resource and Connections, is responsible for the goals and mission of the company including this Resource and Connections Plan. The Advocacy Links Managing Member uses a well-defined administrative structure to accomplish the goals and mission of the company.

IMPLEMENTATION, MONITORING & REPORTING: (How do we determine the quality of services/supports for this area? What does performance review look like?)

This plan will be implemented by the Resource and Connections team, led by the Resource Connections Director. Each month, progress or regression will be recorded on the "To Do Timelines" goals that team has agreed upon. Additional goals will be implemented as the need arises.

The Resource and Connections team needs to develop tools to determine if quality services/supports are being delivered as well as what factors would be considered for an employee's performance review in this area.

The Resource and Connections team will plan, develop and deliver training to employees on the organization's plan to address barriers, new policies and the commitment to provide Resource and Connections on an ongoing basis.

The Resource and Connections team meets bi-monthly, or more often, as needed to monitor the implementation of this plan and to fulfill other obligations. This will include quarterly review of what has been accomplished and what remains to be accomplished.

EVALUATION

Progress towards achieving Resource and Connections outcomes will be reviewed at least quarterly in the Administrative Staff Meetings. This Resource and Connections Plan will be updated annually and more frequently if needed. In conjunction with the Resource and Connections team, the Administrative Staff and Managing Member will determine the accomplishment of outcomes and adjust the Resource and Connections plan as needed.

CLOSING STATEMENT

Persons having suggestions for improving this plan are encouraged to provide their suggestions, in writing, to the Managing Member and/or Director of Resource and Connections.

Strategic Plan

PLACE Division

(Purposeful Life and Community Engagement)

PURPOSE: (Why do we want to do this?)

Advocacy Links has a rich history of strong relationships with individuals and families in Indiana. Advocacy Links provided Medicaid Waiver Case Management services from 2012-2021. Advocacy Links staff have many years working with individuals who have expressed need for additional options of services to be able to have a choice.

Interactions via personal contact, satisfaction surveys, feedback forums, social media groups, etc. with individuals and their representatives, throughout the service area indicate that they have limited options that will provide opportunity for social engagement, learning and peer interactions. Many areas, especially rural counties of the state, have limited options of Medicaid Waiver providers or Day Habilitation programs that fit their needs and desires for community engagement. Current Medicaid Waiver Provider picklists for Day Habilitation reflect the lack of sites located in the majority of the rural counties within our 34 county service area.

With a clear presence of need of services in our focus areas and a strong history of quality services focused on the individuals, Advocacy Links desires to provide opportunities to individuals seeking to have social options in their local communities. Our hope is to ensure that there are ways individuals can interact with peers and the broader community to become integrated and respected citizens through the activities and events that we are able to develop in their local neighborhoods. In addition, the hope is that by becoming actively engaged members of the community, individuals can build and strengthen natural supports to decrease reliance on paid supports.

There are 3 significant issues that contribute to the need for this service:

Staff shortages are an on-going concern for all persons receiving support through the DDRS services. Even in counties where a Day Habilitation site is located, the staff shortages prevent new individuals from being served as agencies prioritize individuals who are already served by their agency (specifically in their residential programs) so there is not enough staff to bring on new people into these sites. Most staff providing day habilitation are committed to providing “on site” programming for the masses rather than person-centered customized activities which may or may not be “on site.” Community Based activities are few and far between due to the extreme shortage of personnel to provide necessary supports.

Lack of consistent, reliable transportation in the rural counties adds a greater degree of accessibility to meaningful activities. Through our research, while transportation services might be “available” in most counties, there are numerous common barriers:

- Only available for limited hours (9 AM – 4 PM) and days (Monday-Friday).

- Only for specific populations (over age 55)
- Only for specific purpose (medical appointments only)
- Limited geography (5 mile radius of transportation hub)
- Lack of wheelchair accessible vehicles
- Route Scheduling

Another significant issue contributing to substandard transportation services is the reality of delays that result from the “route schedule” concept. Most transportation providers give passengers a 2 hour window for pick up/drop off. If a passenger is supposed to work from 10-1 over the lunch period, his pick up window might be 8 – 10 AM so he can arrive to work on time but after work, his pickup window would be 1-3 PM. So essentially, he might be riding around in a vehicle for 4 hours of his day – not because he wants to, but because that’s the scheduled route.

Isolation of individuals creates many concerns with increased depression as well as limits one’s ability to build friendships and establish a sense of ‘belonging’ by being an active member of their community. Being provided with activities that will teach as well as lead individuals to building independence creates a way to overcome the limitations of only being able to be in one’s home. Currently, individuals have the ability to be in their community, but not necessarily a part of their community.

WE PROMISE: (what can individuals expect from us?)

PLACE (Purposeful Life and Community Engagement) has been created to provide opportunities for socialization, education, vocational skills and volunteering opportunities in local communities for all persons. The opportunities of PLACE are driven by feedback of individuals and structured to give choice of activity and participation. These events will be provided with complete choice of the individual participants to make the decision on what they wish to join.

Each person will have more opportunities for building a good life through engaging activities and events. Through community engagement in activities and support programs, individuals will have access to more opportunities in the broader community to include them in day to day life and activities. This will happen through coordinating efforts of connecting with community sponsorships and inclusion of all populations to build upon the need for natural supports to improve community inclusion. Activities will be recurring along with a blend of creative and new activities throughout the program.

DESCRIPTION OF SERVICES/SERVICE DELIVERY FORMAT: (Is this possible to be delivered virtually or from home office or is a physical location necessary for this area? If a physical location is needed, what does that look like?)

Using the Life Course Planning tools, Advocacy Links established the vision for what we want to provide:










- People to understand it's OK to work to contribute to the local community
- People to be active, engaged parts of their communities where they are missed if they are not present
- People to have genuine friends

- People to have opportunities to work in interesting jobs that they prefer
- People to make a reasonable wage for the work they do
- People to have the opportunity to do things that other people their age are doing

In addition, what we don't want is as follows:

- People to be stuck going to a big building and staring at the walls 5 days/week with nothing interesting to do
- Replicating supports and services that already exist
- People to be stuck at home every evening and weekend because there's nothing to do and nowhere to go

In alignment with the Charting the Lifecourse “Exploring Life Possibilities”, Advocacy Links strives to help individuals move from traditional life options to innovative life options by offering a variety of events/activities in the various life domains. While everyone is welcome to attend events and activities, a higher concentration of events and activities will be geared toward young adults who have finished high school as well as adults.

	 Daily Life & Employment	 Community Living	 Social & Spirituality	 Healthy Living	 Safety & Security	 Citizenship & Advocacy	 Supports for Family Unit	 Supports & Services
Innovative Life Options	New ideas; things that someone has tried, and you replicate or adapt for your own needs; things that haven't been thought of yet or tried.							
	<ul style="list-style-type: none"> • Micro-enterprises • Careers • Competitive employment • College or tech school • Supported employment • Work crews or enclaves • Job coaches • Volunteering • Special college programs 	<ul style="list-style-type: none"> • Co-op • Adapted living space • Environmental technology • Shared living • Public transportation • Independent Supported Living (ISL) • Home of Your Own (program) • Independent Living Center 	<ul style="list-style-type: none"> • Friendships • Dating/relationships • Parks and Recreation • Inclusive faith community • Service/social club/groups • Special Olympics • Special passes • Social skills classes 	<ul style="list-style-type: none"> • Gym membership • Community Health Centers • Health fairs • Family practice providers • In-home or community based therapies • Family member or school staff implement therapy • Special Olympics 	<ul style="list-style-type: none"> • Limited/ joint bank account, automatic bill pay, personal contract, agency agreement • Personal safety devices • Limited guardianship • Remote monitoring • Special Needs Trust • Power of Attorney 	<ul style="list-style-type: none"> • Voting • Neighborhood group or organization • Self-Advocacy • Visiting your legislator • People First/SABE • Disability Rights Day at the Capitol • Project STIR 	<ul style="list-style-type: none"> • Social Media • Technology • Blogs • Family & friends • Peer Support/P2P • Face-to-face local support groups • Online Support Groups • Sib-shops 	<ul style="list-style-type: none"> • Exchange networks • Time banks • Human service co-ops • General education • Self-Directed Supports • \$\$ follows the person • Technology/remote monitoring
Traditional Life Options	<ul style="list-style-type: none"> • Sheltered workshops • Day habilitation 	<ul style="list-style-type: none"> • Institutions • Intermediate Care Facility (ICF) • Group Homes 	<ul style="list-style-type: none"> • Separate or special church service • Special group outings & activities 	<ul style="list-style-type: none"> • Center-based therapies (PT, OT, Speech, etc) • Special or institutional medical care 	<ul style="list-style-type: none"> • Full guardianship • 24 hour supervision 	<ul style="list-style-type: none"> • Paid advocate or having someone else advocate on your behalf 	<ul style="list-style-type: none"> • Institution or center based support group • Intensive all-day parent training • Disability specific groups 	<ul style="list-style-type: none"> • Systems supports • Provider and agency staff

Events are being planned in person and virtually for all PLACE activities. All activities will focus on 3 key areas to establish ongoing relationships and build natural supports:

	Social	Educational/Support	Volunteer/Vocational
Examples	Coffee & Mingle Mom's Group Cards with Friends Virtual Bingo Scavenger Hunt Water Ski Show Theater Shows Concerts	Teen Talk Cooking Classes Craft Classes Fishing Hunting Money Management Photography Yoga Gardening Exercise Nature Hike Museums Local History Tours	Meals on Wheels Sort Canned Food at the Food Pantry Play with Cats at the Shelter Walk dogs at Shelter Make Soup Mixes at Church Community Services Clean up Trails at the Park Rake/Shovel for Shut Ins

In Person events are being planned in collaboration with community entities to utilize various types of spaces in each community. These types of spaces currently include places such as coffee shops, parks, malls, community gathering lunch spaces, libraries and churches. At this time, each Life Consultant works to ensure that the cost for the spaces is free or kept to a minimum. If there is a charge for a space, this amount is worked into the costs of the event that are passed on in the fees charged for the event.

- Future in person spaces may require consideration of additional fees and collaboration as the program grows.
- Sponsorships could be a benefit to the program to cover costs of spaces that are currently not available due to costs involved. This may include such activities as renting a movie theater for a sensory friendly movie night.

Virtual events are being planned utilizing Microsoft Teams. Links to a Microsoft Teams meeting are emailed to registrants upon the completion of their registration and again as a reminder 3 days before

the event. Instructions are included with registration notices to request that registrants download the free Microsoft Teams to be prepared for signing into the event.

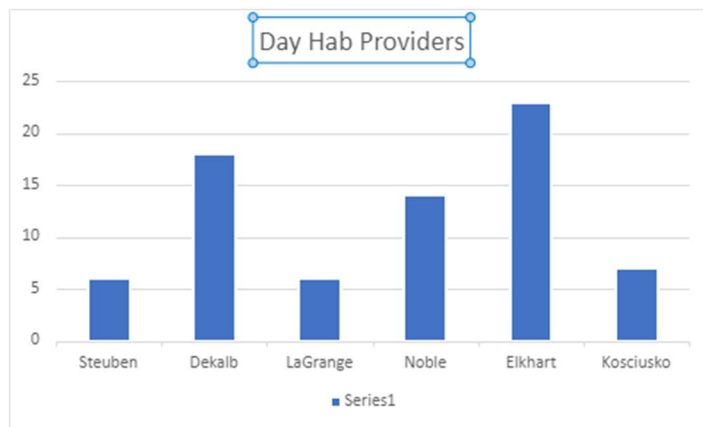
DEFINITION OF MARKET:

While different organizations and entities provide a variety of activities in the community, often these events are limited to specific populations of people. The intent of Advocacy Links is to partner with various organizations and entities providing activities to promote the events and coordinate engagement for people who need this type of support.

PLACE activities are inclusive (open to anyone who is interested in participating), but our “market” for comparing our services to other organizations will be compared to organizations primarily serving individuals who have Intellectual or Developmental Disabilities.

Several different organizations and entities provide community based or facility based activities funded through the Medicaid Waiver however, there are significant barriers for people accessing these limited supports. Advocacy Links serves 34 counties, most of which are “rural” versus “urban” so the barriers (transportation, limited staffing, etc.) are intensified.

Presently, of the counties we serve, there are several counties who do not have companies providing Medicaid waiver funded services for meaningful activities. In many other counties, there are providers providing this service to existing clients, but due to limited staffing capacity, new people wanting to receive services can’t. The current picklists for these services are not an accurate reflection of the companies actually accepting new clients, but rather a collection of companies that say they provide services in particular counties. The following chart shows 6 counties in Northeast Indiana where providers are showing on the Medicaid Waiver provider pick list as providing services, but whether or not they are accepting NEW participants is not able to be collected.



As noted in the DDRS 2024 Transition Plan and Waiver Redesign presentation on 11/10/2022, there are currently 31,600 people receiving Medicaid Waiver Services through FSW and CIH waiver. In the coming years (currently targeted for 2024), DDRS will be assuming oversight of the A&D and TBI Waivers as well, adding 32,830 more people eligible for Day Habilitation funding through Medicaid Waiver.

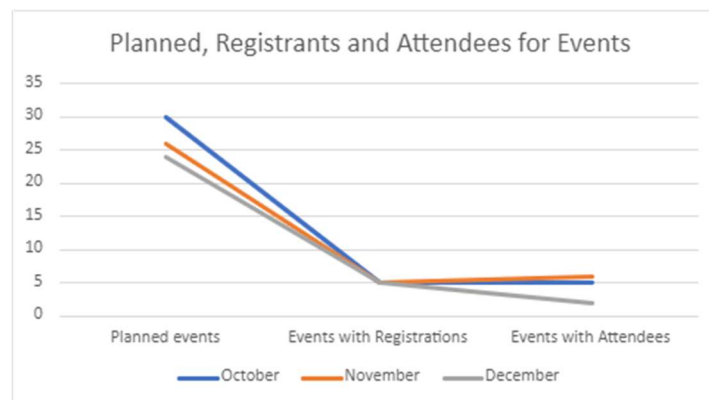
Anyone wanting to participate in PLACE activities is welcome to join however, there is an emphasis on providing a variety of meaningful activities for individuals who have finished high school and are starting their adult life. Currently the age range of individuals served by Advocacy Links is 4 - 79. In 2022, 61 individuals were supported through PLACE activities/events.

CURRENT ANALYSIS OF PLACE:

PLACE is currently planning a variety of events and support groups in 2 regions of the targeted 34 counties of service. The counties currently covered by the Life Consultants are defined on the service area map included in this document.

For 2023, the target goal is 40 events (planned & attended) per region per month.

As of the middle of November 2022, there is attendance at 10 events in the 4th quarter of 2022.



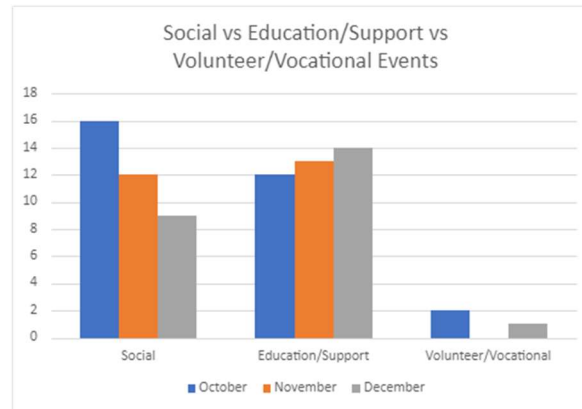
Attendees have provided positive response to the activities facilitated in all of 2022 thus far.

Community interest in PLACE is strong, however there remains a disconnect between the interest expressed and the registrations completed.

Life Consultants have been asked to complete additional marketing efforts in the 4th quarter of 2022 to seek additional engagement with targeted populations. This effort is focused through using Facebook to share the events to additional community pages and community calendars to build on the engagement through Facebook advertising.

There continues to be limited engagement with any activities that charge a fee. Some increase has been noted in early December for free events offered.

Current events are heavy on social engagement type activities. The variety of events will need to be expanded into future efforts.



Support groups offered have not developed as it was hoped as groups of many different types were offered. Focus will change for future planning.

Strengths:

Knowledge of services and gaps in services to be able to determine where to target efforts.

Network and connections from Advocacy Links history of providing quality services.

Staff live in the areas that they are working to develop services.

Focused on hearing the wishes of stakeholders and seeking to address their wishes.

Weaknesses:

New program learning as we go

Service area is 34 counties. Currently, Life Consultants attempting to provide events in 12 counties.

Determining the best marketing strategies to reach the largest audience.

Getting registrations completed by persons who engage with or see the advertising.

Determining time of day and day of week for best engagement of activities.

Opportunities:

Community members who are interested in the types of services we make available.

Community agencies and businesses who are interested in partnering with our efforts

Utilization of community supports to offer sponsored events to avoid charging individual participants.

Building relationships in our local communities.

Broad array of activity types that can be developed to build the program

Threats:

Lack of registrants and engagement with activities developed.

Lack of willingness to pay for activities.

Area of services offered being too large for initial services.

Unable to hire staff to cover all areas of service focus due to financial constraints.

ORGANIZATION AND MANAGEMENT: (What are the various personnel needed to operate this area?)

PLACE is a division of Advocacy Links Resource and Advocacy Center, Inc., a Not-For-Profit, 501(c)3 organization owned and operated by Joy Greeney. Ms. Greeney brings over 30 years of personal experience working in the field of disabilities in a variety of positions including Business Owner, Medicaid Waiver Case Manager, Supervisor, Residential Direct Care Staff, Day Program Team Leader, Residential Qualified Intellectual Disability Professional, and Volunteer Intern. Ms. Greeney holds degrees in Psychology and Social Science from Bethel University. In November 2003, Ms. Greeney was presented with the “Case Manager of the Year” Award from the National Association of Case Management.

PLACE (PLACE) Division Director – 1 person to oversee all PLACE efforts and ensure that the strategies and goals are being implemented.

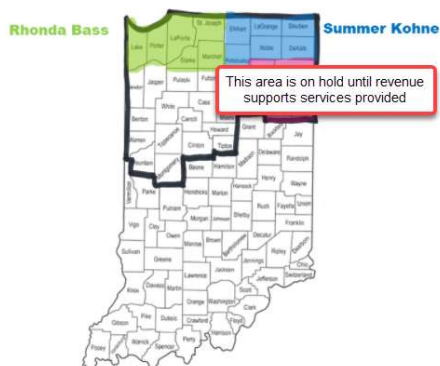
Life Consultant –This person creates, plans and oversees events associated with socialization, education, vocational skills and volunteering opportunities in their assigned region. The current region for each Life Consultant is 5-6 counties. There are 6-7 positions available to cover the entire target service area.

There are currently 2 Life Consultants who are assigned 6 counties in their regional geographic areas.

There is a map attached to show the following information:

- Northeast Region: Steuben, Dekalb, Lagrange, Noble, Elkhart and Kosciusko counties
- Northwest Region: St. Joseph, Marshall, Starke, LaPorte, Porter and Lake counties

P.L.A.C.E. Regional Map
as of November 2022



Additional Life Consultant positions will be determined as there is feasibility to expand the program. Currently due to financial constraints, the other target service areas are being considered, but do not have any active Life Consultants in place.

Direct Administrative Assistance is provided by Special Projects Manager (Grant Writer to help provide revenue to cover program costs) and Marketing/Communications Manager (graphic design, social media, etc.). Indirect Administrative Assistance is provided by Managing Member, Human Resources/Business Manager, Technology Manager, Quality & Training Manager, Referral Coordinator, and Nurse.

As funds permit, it would helpful to hire a Technical Assistant to help edit copy, post to social media, create flyers, upload to registration site, etc. These are time consuming tasks that could free up time for Life Consultants to host and develop activities and events.

PLACE events/activities are not overseen by any oversight entity so there are no “required” technological systems/processes. Advocacy Links holds to the highest ethical business practice standards and follows standards outlined in Indiana Administrative Code (460 IAC 6) related to similar community based service delivery models. In addition, Advocacy Links has received 4 consecutive 3 year accreditation awards (the highest award available) through Commission on Accreditation of Rehabilitation Facilities (CARF) in 2013, 2016, 2019, and 2022.

GROWTH AND WORKFORCE DEVELOPMENT

In 2022, 61 individuals were supported through PLACE events/activities. Our initial hope is to have a core group of 8-12 regular participants in each county. “Regular participant” will be defined as someone who registers/attends/participates in at least 1 event each quarter. Earlier in this plan is a chart reflecting the number of events planned/registrations received/ actual attendees at events in the 4th quarter of 2022.

Increase in the number of consumers served occurs in a couple manners:

- People are interested in events
- Events happen at time convenient to individual
- Individual has transportation/support to attend the event
- Cost of event is within individual’s personal budget

Decrease in the number of individuals served occurs due to the following:

- People are not interested in the events
- Events don’t happen at a convenient time
- Individual does not have transportation/support to attend the event
- Cost of event is too high

It is the intent of Advocacy Links to ensure our staff is thoroughly trained on ways to do their jobs in the area of PLACE activities. Policies and Procedures have been written and are in the Advocacy Links Operations Manual pertaining to PLACE activities/events.

During New Staff Orientation, each PLACE employee is trained on the responsibilities of their position, including but not limited to the Charting the Lifecourse Concepts and Tools. Other employees of Advocacy Links are trained during New Staff Orientation with an overview of the PLACE activities/events to ensure there's an understanding of the availability of the services offered.

Additional PLACE personnel will added as financial stability is established and new territory is developed and/or additional need exists in current regions. In December 2022, Advocacy Links modified the service area to pause activities in one region (of the original 3) to ensure financial stability of the organization. Each quarter through 2023 Advocacy Links will reviewed the circumstance to determine when the region can be opened back up. Our hope is to offer activities in that area again in 2023.

TECHNOLOGICAL SUPPORT: (Is there a required technological process imposed by oversight entity? How/where do we access that?)

PLACE staff utilize HealthCloud, Microsoft Office 365 (Outlook, Word, Excel, Teams, etc.), Facebook and other social media platforms for promotion. Google Docs is used for satisfaction surveys.

PLACE marketing personnel utilize WIX to publish the event listings. This includes an eCommerce platform that facilitates participants making payments for events if required. The Marketing Manager and PLACE Director also use Canva to put together graphics for social media and flyers to share for advertising each event. Advocacy Links will be switching platforms at some point in the near future to utilize WordPress for events as the development of the new website platform is completed.

Equipment/Devices needed to deliver these supports: Each PLACE staff member maintains their own devices (phone, tablet/computer) to complete their job responsibilities.

As funds are available, Advocacy Links will consider purchasing/maintaining additional technological devices to increase the efficiency, equitability, and accessibility of services. This may include such things as a computer/tablet to facilitate gathering information for quality management and data gathering purposes and/or a hot spot to assist individuals in accessing internet service when it is not readily available. All decisions in this area will be made by the Managing Member with input from the PLACE Director and Life Consultants.

MARKETING & ADVERTISING: (How do we get clients? Where/how do we market?)

Due to the extensive history and rapport that Ms. Greeney and other key PLACE personnel have established with waiver participants, families, agencies, schools, and government entities, word of mouth advertising continues to be an effective tool. However, since the activities/events are a new service for Advocacy Links, additional marketing efforts are under way.

Printed Flyers and Social Media: Printed and PDF Flyers are created. This information is distributed through resource fairs, email contacts and in-person contacts with community partners. The primary method of communicating activities/events will be through social media/website/event calendars. Life Consultants further promote events by sharing Advocacy Links social media postings to other social media pages that promote activities within the region of the event and community calendars available in the local communities.

Flyers in Spanish have been developed and are shared in communities and resource fairs that would benefit from these resources.

Email Marketing: Master Records are created in HealthCloud for individuals who are interested in being part of a monthly email sent from the Marketing/Communications Manager. Life Consultants have some regular contacts that are made to promote the events in their region. The Marketing/Communications Manager is to be included in these emails to ensure that quality communication is being sent to participants in this manner.

Network with Community Partners: Life Consultants have conversations with individuals and stakeholders in their local communities to share about the PLACE activities and encourage participants to bring friends to events.

In an effort to educate diverse populations about supports and services available through Advocacy Links, we will make a concentrated effort to participate in activities in culturally diverse communities as well as with a wide variety of population groups.

Local Media: Some interest has been sparked that has led to interviews with local newspapers/television/radio and Chamber of Commerce groups that assisted with spreading the word about local activities for the community to join.

FINANCIAL MANAGEMENT: What is the revenue source/stream? How do we receive funding? Medicaid, Grants, VR, private pay? What does this look like?

Throughout 2022, Advocacy Links has tried to create events/activities at a reasonable cost so they remain affordable for people interested in the activities. To date, it is apparent that this division is going to rely on Grants, Sponsorships, and Donations to cover the bulk of the operating costs. A grant has been secured through Indiana's Division of Disability Rehabilitation Services to further develop the concept of providing activities to help individuals become more engaged with community partners and build natural supports. This grant only provides \$50,000 over the course of 2023-2024 so additional revenue streams are being pursued.

It is our intent to keep the costs of activities and events as minimal as possible, but it is necessary to charge a fee to help cover at least a portion of costs as well as to encourage follow through on the part of registrants. PLACE events will be paid per activity through the registration payment portal and will vary depending on the cost of the activity. Free opportunities will also be made available in each region.

- Each Life Consultant will facilitate at least one event/activity with at least 1 attendee in each targeted county each month by 3/31/2023.
- Each Life Consultant will facilitate at least one event/activity in each key focus area (Social; Educational/Support; Vocational/Volunteer) with at least 1 attendee each month by 3/31/2023.
- Each Life Consultant will facilitate at least two events/activities in each targeted county with at least 1 attendee/event each month by 6/30/2023.
- Each Life Consultant will facilitate at least two events/activities in each key focus area (Social; Educational/Support; Vocational/Volunteer) with at least 1 attendee/event each month by 6/30/2023.
- Each Life Consultant will facilitate at least three events/activities in each targeted county with at least 1 attendee/event each month by 9/30/2023.
- Each Life Consultant will facilitate at least three events/activities in each key focus area (Social; Educational/Support; Vocational/Volunteer) with at least 1 attendee/event each month by 9/30/2023.
- Each Life Consultant will facilitate at least four events/activities in each targeted county with at least 1 attendee/event each month by 12/31/2023.
- Each Life Consultant will facilitate at least four events/activities in each key focus area (Social; Educational/Support; Vocational/Volunteer) with at least 1 attendee/event each month by 12/31/2023.

All 34 counties in Advocacy Links Service area will have personnel available and events/activities planned

- MidEast Region (Allen, Adams, Wells, Huntington, Wabash, Whitley Counties) will be relaunched when need is evident and funds allow. To be reviewed quarterly by Managing Member through 12/31/2023.
- There will be a core group of 8-12 participants in 3/6 counties for each Life Consultant by 6/30/2023.
- There will be a core group of 8-12 participants in 5/6 counties for each Life Consultant by 12/31/2023.
- A Technical Support Assistant will be hired as need arises and funds allow. To be reviewed quarterly by Managing Member through 12/31/2023.

Participants will strengthen relationships and build natural supports in the community

- At least 80% of registered participants will follow through with attending events/activities each month throughout 2023.
- At least 50% of participants will attend at least 1 event/activity each quarter throughout 2023.
- At least 25% of participants will attend at least 3 recurring events/activities (where the same people/community partners are involved) in a series of 4 or more scheduled events by 12/31/2023. (For example, if the basic money management class lasted 4 weeks and was led by the same 1st Source Bank representative...did the participant attend at least 3 of the 4 sessions?)
- At least 25% of activities/events will be led by a partner from the community (versus relying on Advocacy Links staff) throughout 2023. (For example, 1st Source Bank representative leading

class on basic money management or County Extension office conducting a class on making heart healthy meals on \$50/week)

Provide high quality services in a fiscally responsible manner. Each quarter, the amount received from sponsorships, grants, donations is enough to offset the cost of program expenses.

- The Special Projects Manager will be consistently researching grant options and applying for ones that align with PLACE initiatives for an average of \$18,000/quarter.
- At least \$31,250 will be raised each quarter through sponsorships, gift certificates, and donations for the entire division (not per Life Consultant).
- Each Life Consultant will plan 40 activities each month as outlined in this plan by 6/30/2023.

Advocacy Links will build partnerships with Medicaid Waiver provider organizations to eliminate barriers to helping individuals pursue their best life.

- Each Life Consultant will arrange at least 1 partnership (series of at least 4 events/activities) each month with the same provider in the same county by 6/30/2023.
- Each Life Consultant will develop a second partnership in a different county by 9/30/2023.
- Each Life Consultant will develop a third partnership in a different county by 12/31/2023.
- Each Life Consultant will represent Advocacy Links at a Community Resource Fair in their region at least once each quarter through 12/31/2023.

Advocacy Links will utilize technology to provide/monitor/evaluate services in an efficient and effective manner.

- PLACE Director will coordinate with Technology Manager, Marketing/Communications Manager and Website Developer to ensure there is a smooth transition of the PLACE events/activities from WIX to Wordpress by 6/30/2023.
- Special Projects Manager will research/apply for grant funds to provide hot spots/tablets for each Life Consultant by 12/31/2023.
- Quality & Training Manager will implement pulse surveys with emoticon ratings by 1/31/2023.
- Each Life Consultant's average monthly satisfaction rating for all events will be at least 90% throughout 2023.
- PLACE Director will contact each sponsor within 7 days of sponsored event to ensure positive response to the use of their engagement throughout 2023.

DISSEMINATION OF THE PLAN

This plan is internally disseminated as follows:

1. The PLACE Plan is a part of the Advocacy Links Strategic Business Plan and a summary of accomplishments and opportunities is included in the Annual Progress Report.
2. Periodically, information is shared at staff meetings, indicating that the plan is on the company's internal online shared document library, encouraging all employees to read it.
3. The Managing Member and/or PLACE Director, at times, meet with the Administrative Staff to discuss and finalize the ways personnel can assist the company in meeting the goals of

this plan. As position vacancies occur, one-on-one consultations with PLACE Director are conducted to encourage and promote our commitment to this plan.

Advocacy Links takes several actions to ensure that this plan is disseminated. These actions include, but are not limited to, the following:

1. The PLACE Plan is available on the company's internal communication network (TEAMS).
2. Copies of the plan are available upon request from the Managing Member.

RESPONSIBILITY FOR THE PLAN

The Advocacy Links Managing Member, in conjunction with the PLACE Director, is responsible for the goals and mission of the company including this PLACE Plan. The Advocacy Links Managing Member uses a well-defined administrative structure to accomplish the goals and mission of the company.

IMPLEMENTATION, MONITORING & REPORTING: (How do we determine the quality of services/supports for this area? What does performance review look like?)

This plan will be implemented by the PLACE Director. Each month, progress or regression will be reviewed via monthly meetings. Quarterly Goals will be set in place and assigned to all Life Consultants to address the needs of the PLACE program.

The PLACE Director has worked with the Quality & Training Manager to develop quality markers to ensure appropriate services are being provided.

The PLACE Director will plan, develop and deliver training to employees on the organization's plan to address barriers, new policies and the commitment to provide PLACE activities on an ongoing basis.

The PLACE Team meets every month, or more often, as needed to monitor the implementation of this plan and to fulfill other obligations. This will include quarterly review of what has been accomplished and what remains to be accomplished.

The PLACE Director meets monthly 1:1 with each Life Consultant and as needed to assist with questions or development of regional programs.

EVALUATION

Progress towards achieving PLACE outcomes will be reviewed at least quarterly in the Administrative Staff Meetings. This PLACE Plan will be updated annually and more frequently if needed. In conjunction with the PLACE team, the PLACE Director and Managing Member will determine the accomplishment of outcomes and adjust the PLACE Plan as needed.

CLOSING STATEMENT

Persons having suggestions for improving this plan are encouraged to provide their suggestions, in writing, to the Managing Member (joy.greeney@advocacy-links.com) and/or PLACE Director (MJ.Frey@advocacy-links.com) .

Performance Analysis & Improvement

Throughout 2022, ADVOCACY LINKS engaged in strategic planning sessions quarterly as we researched service line options and began implementing services. As of December 2022, ADVOCACY LINKS has committed to focusing supports/services around 3 key service lines and set the following Rocks (overarching priority outcomes). Each Division and Leadership Role has established goals/objectives to help ADVOCACY LINKS make progress towards the “rocks”:

Focus of 4 service lines/divisions:

- Child Mental Health Wraparound

ADVOCACY LINKS will have Wraparound Facilitator presence in all 34 counties by 12/31/2023.

- MyLinks/Housemate Finder

Special Projects Manager will support Housemate Finder through trouble shooting and marketing through 3/31/2023.

MarComm Manager will increase social media/web/marketing activities for MyLinks/Housemate Finder and Resource & Connections through 2023.

Launch MyLinks Membership Drive by 4/1/2023.

Market MyLinks/Housemate Finder to targeted audiences throughout 2023:

- Case Management Companies by 3/31/2023
- INARF by 6/30/2023
- Self Advocates Picnic = September 2023

- Resource & Connections

Resource & Connections Director will ensure at least 2 Connection Specialists are certified in SOAR by 3/31/2023.

- Purposeful Life And Community Engagement (PLACE)

MarComm Manager will complete marketing review for PLACE division to look for ways to streamline by 3/31/2023.

Technology Manager will assist with technology portions of Membership Drive, Subscriptions, etc through 2023.

PLACE Director will support each Life Consultant to increase the number of planned events per month to be at 40/month/Life Consultant by 3/31/2023.

25% of returning participants will attend at least 1 PLACE event/quarter by 3/31/2023.

PLACE Director will coordinate with Technology Manager, Marketing/Communications Manager and Website Developer to ensure there is a smooth transition of the PLACE events/activities from WIX to Wordpress by 6/30/2023.

Each Life Consultant will facilitate at least one event/activity with at least 1 attendee in each targeted county each month by 3/31/2023.

Each Life Consultant will facilitate at least one event/activity in each key focus area (Social; Educational/Support; Vocational/Volunteer) with at least 1 attendee each month by 3/31/2023.

Each Life Consultant will facilitate at least two events/activities in each targeted county with at least 1 attendee/event each month by 6/30/2023.

Each Life Consultant will facilitate at least two events/activities in each key focus area (Social; Educational/Support; Vocational/Volunteer) with at least 1 attendee/event each month by 6/30/2023.

Each Life Consultant will facilitate at least three events/activities in each targeted county with at least 1 attendee/event each month by 9/30/2023.

Each Life Consultant will facilitate at least three events/activities in each key focus area (Social; Educational/Support; Vocational/Volunteer) with at least 1 attendee/event each month by 9/30/2023.

Each Life Consultant will facilitate at least four events/activities in each targeted county with at least 1 attendee/event each month by 12/31/2023.

Each Life Consultant will facilitate at least four events/activities in each key focus area (Social; Educational/Support; Vocational/Volunteer) with at least 1 attendee/event each month by 12/31/2023.

Revenue must exceed expenses

Provide high quality services in a fiscally responsible manner. Each quarter, the amount received from sponsorships, grants, donations is enough to offset the cost of program expenses

Special Project Manager will continue to research grant opportunities for specific initiatives outlined in divisional strategic plans throughout 2023.

Special Project Manager will submit at least 6 grant applications by 3/31/2023.

Business Manager will develop/implement new monthly budget tracking to provide “at a glance” information for both NFP and LLC by 1/31/2023.

Business Manager will develop monthly billing report for each service/Division Director to keep everyone involved in the financial status by 1/31/2023.

Referral Coordinator will continue research about funding through Medicare.

Resource & Connections Director will increase ongoing, revenue generating R&C clients by 5 each month through 12/31/2023.

2 more wraparound facilitators will be added in metro areas by 3/31/2023.

Special Projects Manager will research/apply for grant funds to provide hot spots/tablets for each Life Consultant by 12/31/2023.

The Special Projects Manager will be consistently researching grant options and applying for ones that align with PLACE initiatives for an average of \$18,000/quarter.

At least \$31,250 will be raised each quarter through sponsorships, gift certificates, and donations for the entire PLACE division (not per Life Consultant).

Each Life Consultant will plan 40 activities each month as outlined in this plan by 6/30/2023.

Managing Member and Business Manager will monitor for Identified Risks (expenses exceeding revenue, lack of growth, cyber attacks).

Managing Member and Business Manager will Gather feedback to plan for potential risks.

Managing Member and Business Manager will Implement plans to address future identified risks.

Build/Maintain Positive Connections

MarComm Manager will integrate MailChimp software with Health Cloud system to streamline direct communication and activity notes by 6/30/2023.

Quality & Training Manager will set yearly training topics/schedule for Company Wide Calls by 2/28/2023.

Referral Coordinator will schedule Howard County Community Resource Fair to occur by 6/30/2023.

Resource & Connections Director will make/maintain at least 30 business contacts per month through 12/31/2023.

PLACE Director will contact each sponsor within 7 days of sponsored event to ensure positive response to the use of their engagement throughout 2023.

Each Life Consultant will arrange at least 1 partnership (series of at least 4 events/activities) each month with the same provider in the same county by 6/30/2023.

Each Life Consultant will develop a second partnership in a different county by 9/30/2023.

Each Life Consultant will develop a third partnership in a different county by 12/31/2023.

Each Life Consultant will represent Advocacy Links at a Community Resource Fair in their region at least once each quarter through 12/31/2023.

MidEast PLACE Region (Allen, Adams, Wells, Huntington, Wabash, Whitley Counties) will be relaunched when need is evident and funds allow. To be reviewed quarterly by Managing Member through 12/31/2023.

There will be a core group of 8-12 PLACE participants in 3/6 counties for each Life Consultant by 6/30/2023.

There will be a core group of 8-12 PLACE participants in 5/6 counties for each Life Consultant by 12/31/2023.

A Technical Support Assistant for PLACE, etc. will be hired as need arises and funds allow. To be reviewed quarterly by Managing Member through 12/31/2023.

At least 80% of registered PLACE participants will follow through with attending events/activities each month throughout 2023.

At least 50% of PLACE participants will attend at least 1 event/activity each quarter throughout 2023.

At least 25% of PLACE participants will attend at least 3 recurring events/activities (where the same people/community partners are involved) in a series of 4 or more scheduled events by 12/31/2023. (For example, if the basic money management class lasted 4 weeks and was led by the same 1st Source Bank representative...did the participant attend at least 3 of the 4 sessions?)

At least 25% of PLACE activities/events will be led by a partner from the community (versus relying on Advocacy Links staff) throughout 2023. (For example, 1st Source Bank representative leading class on basic money management or County Extension office conducting a class on making heart healthy meals on \$50/week)

We will have 3 – 5 routine interagency meetings set up in counties that do not currently offer community based resource sharing by 12/31/2023.

Division Directors and Managing Member will network with providers and community organizations to identify upcoming events/activities or opportunities to sponsor events, establish partnerships, etc. throughout 2023.

Re-implement Technology Committee as personnel are available. This will likely occur in 2024.

Relaunch employee recognition committee as personnel are available. This will likely occur in 2024.

Reinstate health/dental/vision/life insurance & 401k contributions as revenue is available. This will likely happen in 2024.

Quality & Training Manager will revamp Advocacy Links Cultural Competency/Diversity overview training to bring it current with relevant and interesting material by 12/31/2023.

Re-implement Cultural Competency Committee as personnel are available. This will likely happen in 2024.

Coordinate with local experts in Hispanic culture to provide company wide population specific training. This will likely happen in 2024.

Coordinate with local experts in Burmese culture to provide company wide population specific training. This will likely happen in 2024.

Implement QA/QI Systems for all divisions

Business Manager will continue monthly trainings regarding NFP support and bookkeeping through 12/31/2023.

Quality & Training Manager will finalize quality standards for all 4 service lines by 1/31/2023.

Quality & Training Manager will complete at least 1 file review for each service line by 3/31/2023

Referral Coordinator will develop/implement quality standards to improve Health Cloud entry of referral information by 3/31/2023.

PLACE Director will fully implement Google Form quality documenting with at least 70% satisfaction by 3/31/2023.

Quality & Training Manager will implement pulse surveys with emoticon ratings by 1/31/2023.

Each Life Consultant's average monthly satisfaction rating for all events will be at least 90% throughout 2023.

PLACE Director will review general agency policies (including but not limited to interview questionnaire, performance review, training checklist, etc.) to determine need for division specific documents by 3/31/2023.

PLACE Director will write division specific policies as needed to put in section 19 of the Advocacy Links Operations Manual by 6/30/2023.

Wraparound Facilitators receive process based supervision twice each month. Our goal is to see continued growth on scores through this supervision with each Facilitator starting with a score of at least 50% in 2023.

Reimplement Accessibility Committee as personnel are available. This will likely occur in 2024.

Quality & Training Manager, Division Directors, and Technology Manager will collaborate to ensure Initial & Ongoing Training for position specific functions in Health Cloud occurs throughout 2023.

Division Directors and Business Manager will align job descriptions, interview questionnaires and performance reviews for all positions by 12/31/2023.

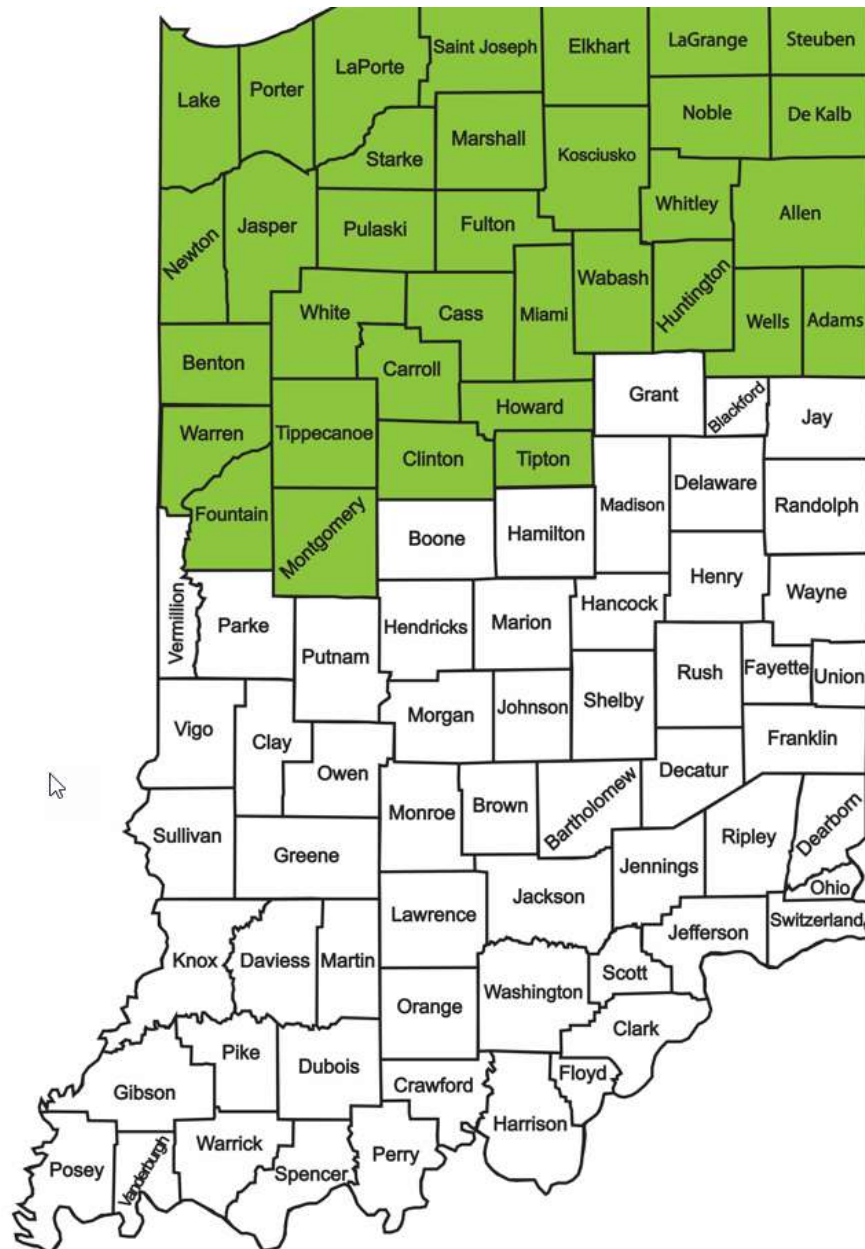
Quality & Training Manager will collaborate with Division Directors to develop specific job training for all positions by 12/31/2023.

Quality & Training Manager will collaborate with Division Directors to establish core competencies for each tier/domain by 12/31/2023.

Quality & Training Manager will conduct training needs survey with all staff by 6/30/2023.

Appendix A

ADVOCACY LINKS provides services to participants in 34 counties in northern Indiana. To minimize driving time and expense, staff originate in the majority of counties in this geographic area. All staff meetings and trainings are centrally located for the participants when online trainings are not able to be utilized.



Appendix B - Sample Brochures



Contact Us
Advocacy Links
 5659 Riverdale Drive
 Elkhart, IN 46514
 Email: info@advocacy-links.com
 Toll-Free (24/7/365): 888.537.5733
 Fax: 888.847.0805
 www.advocacy-links.com

Advocating for people who need help
 Connecting people to fiscally responsible resources
 Respecting everyone in the process



Contáctanos
Advocacy Links
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 Elkhart, IN 46514
 Correo Electrónico: info@advocacy-links.com
 Teléfono Gratis (24/7/365): 888.537.5733
 Fax: 888.847.0805
 www.advocacy-links.com

Abogando para personas que necesitan ayuda
 Conectando personas con recursos que son fácilmente responsables
 Respetando todos en el proceso



What We Do
 We are dedicated to using a person-centered approach to connect people with natural and paid supports, including but not limited to:
 • Advocacy
 • Resource Sharing
 • Education
 • Training
 • Benefits Counseling





We have the highest level (3-star) of accreditation through CARF in the following service areas:
 • Service Coordination
 • CHS/Multisystem
 • Medically Fragile
 • Older Adults/Dementia Care



Lo Que Hacemos
 Nosotros somos dedicados a utilizar un enfoque centrado en la persona para conectar personas con recursos naturales y apoyos pagados, que incluye pero no se limita a:
 • La Abogacía
 • El Educación
 • La Formación
 • Asesoramiento sobre beneficios





Nosotros somos acreditados por CARF y nosotros somos orgullosos de ser miembros del NACH y The Arc Indiana.

To request a referral and assessment for Child Mental Health Wraparound Supports, contact the State of Indiana Access Site.
Child Advocates
 info@childadvocates.org
 317.255.5255
 or call 201 to request an assessment

Contact Us
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 Elkhart, IN 46514
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Advocating for people who need help
 Connecting people to fiscally responsible resources
 Respecting everyone in the process

Housemate Finder
Membership Levels & Benefits

Our Individual Membership Level is geared towards individuals, caregivers, or family members. Our Professional memberships include one primary account for a case manager, QAP, or Residential Manager and sub accounts to assist in or oversee housemate searches.

Benefit	Individual	Professional
Cost per Year (Year of benefit starts on date of purchase)	\$100	\$250
Enrollment in MyLinks	★	★
Housemate Finder Registration	★	★
Primary Housemate Finder Account	★	★
Sub Accounts on the Housemate Finder, which can be deactivated or activated to reflect different profiles	★	★
10% Discount on all P.A.C.E. services and activities	★	★

For more information, visit us at
 info@advocacy-links.com | info@advocacy-links.com | 888-537-5733



Connecting you to meaningful resources.

Child Mental Health Supports Defined
 Child Mental Health supports are provided to youth who have a diagnosis of a serious emotional disturbance. A person-centered treatment plan is built upon the child and family's strengths to identify the following:
 • The unique needs of the child
 • Services and strategies that assist the child and family in achieving more positive outcomes in their lives
 • To utilize family access to needed services so that children do not enter the child welfare or protection system for the sole purpose of receiving services
 • To make sure families do not get blocked from agreeing to agency funding to access services
 • To ensure that children are receiving services in the appropriate system
 • To build community collaborations through examining current practices and cross-agency community collaborations to maximize resources
 • To conduct a multi-agency approach for all children within communities in order to build supportive and service conditions

Eligibility Guidelines
 Individuals must meet MCS eligibility and Medicaid eligibility guidelines in order to be eligible for CMHS services. To be eligible individuals must:
 • Be 4 through 17 years of age
 • Have two or more Diagnostic and Statistical Manual of Mental Disorders, 4th Edition diagnoses
 • Youth who are experiencing significant emotional and/or functional impairments that impact their level of functioning at home or in the community (e.g., sexually emotionally distressed classification)
 • Demonstrate a level of need by meeting the following criteria:
 • Receive a score of 4 or higher on the Division of Mental Health and Addiction approved assessment tool
 • Have one or more of the following behavioral or emotional needs:
 • Adjustment to trauma
 • Sexual aggression
 • Substance use
 • Delinquency
 • Suicide risk
 • Demonstrate a significant need to at least one of the family or caregiver crisis that results in negative impact on the applicant's mental health:
 • Mental Health
 • Substance use
 • Family crisis
 • Substance abuse

What is MyLinks?
 MyLinks is a private social media platform that connects individuals of all populations to resources, meaningful events, and housemate options.
 The MyLinks Housemate Finder helps our individuals who are looking for someone to share expenses and a living space. More information about our membership levels can be found on the back of this brochure.
 Higher membership levels also connect you with an Advocacy Links Resource Connection representative to provide resources or help coordinate your individual support needs.

MyLinks Membership Levels & Benefits

See more details below to determine which level is best for your organization:

Benefit	Individual	Basic	All-Inclusive
Cost per Year (Year of benefit starts on date of purchase)	\$100	\$250	\$1,000
Enrollment in MyLinks	★	★	★
Early access to exclusive content	★	★	★
10% Discount on all P.A.C.E. services and activities	★	★	★
Access to an Advocacy Links Resource Connection representative	★	★	★
Housemate Finder Registration	★	★	★
Early registration for additional resources throughout the year are reserved in MyLinks	★	★	★
Opportunity to host and provide input on new resources before they're released	★	★	★



Advocacy Links

Advocating for people
who need help

Connecting people to fiscally
responsible resources

Respecting everyone
in the process

Do you have a P.L.A.C.E.?

Purposeful Life And Community Engagement

At Advocacy Links, we're proud to connect our individuals to events and activities that promote a healthy, purposeful, and fulfilling life, including a variety of affordable opportunities for all age groups, in both rural and urban counties.



We can help connect individuals to activities & events such as:

Outings to local movies and theaters
Day trips to Indiana destinations
(Major cities, state parks, amusement parks, etc.)
Fitness Clubs
(Bowling, Walking, Swimming, Dance, etc.)
Social Clubs (Coffee, Book, etc.)
Gaming Groups (Board Games, Video Games)
Common Interest Classes
(Art, Gardening, Cooking, etc.)
Sporting/Athletic Events
Educational Classes
Volunteer Projects

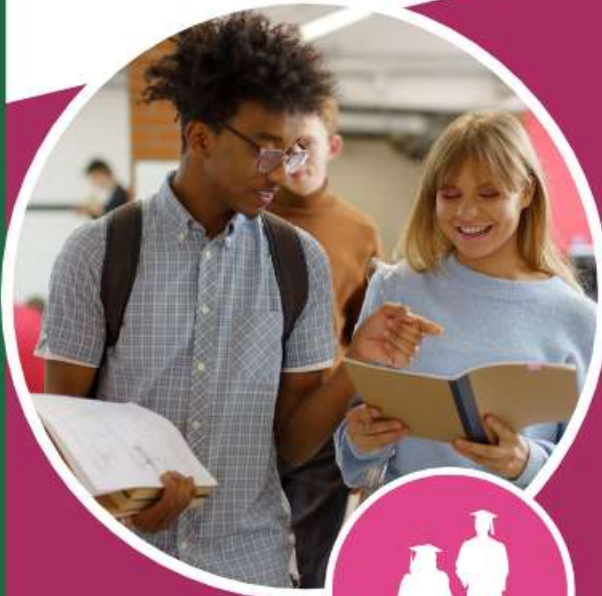
For more information, visit us at
advocacy-links.com
info@advocacy-links.com
888-537-5733



Resource Connections for Young Adults



Advocating for people who need help
Connecting people to fiscally responsible resources
Respecting everyone in the process



We can help with:

- Navigating IEPs & school-related services
- Finding adaptive devices & toys
- Establishing a daily routine
- Finding tips and advice on parenting
- Finding accessible devices for homes and vehicles
- Connecting to community resources & activities
- Contacting local emergency services about personalized emergency response systems
- Planning for special needs trust
- Navigating public benefits
- Locating pediatricians or other specialists
- Connecting with parenting support groups
- Exploring organized activities such as scouts or 4H
- Locating before or after school care
- Learning about stranger danger and community safety
- Fitness & nutrition

For more information, visit us at:
advocacy-links.com
info@advocacy-links.com
888-537-5733



Resource Connections for Aging Adults



Advocating for people who need help
Connecting people to fiscally responsible resources
Respecting everyone in the process



We can help with:

- Health care assistance
- Physical movement & exercise
- Welfare check-ins
- Menu planning & meal prep
- Supportive decision making
- Meaningful day activities
- Community access & engagement
- Socialization
- Hobby exploration & artistic outlets
- Volunteer opportunities
- Technology navigation
- Maintaining independence
- Personal task completion
- Home environment & adaptations
- Electronic monitoring
- Retirement
- Coordinate transportation
- Senior discount navigation
- End of life preparation
- Budgeting & financial planning
- Dignity of risk

For more information, visit us at
advocacy-links.com
info@advocacy-links.com
888-537-5733

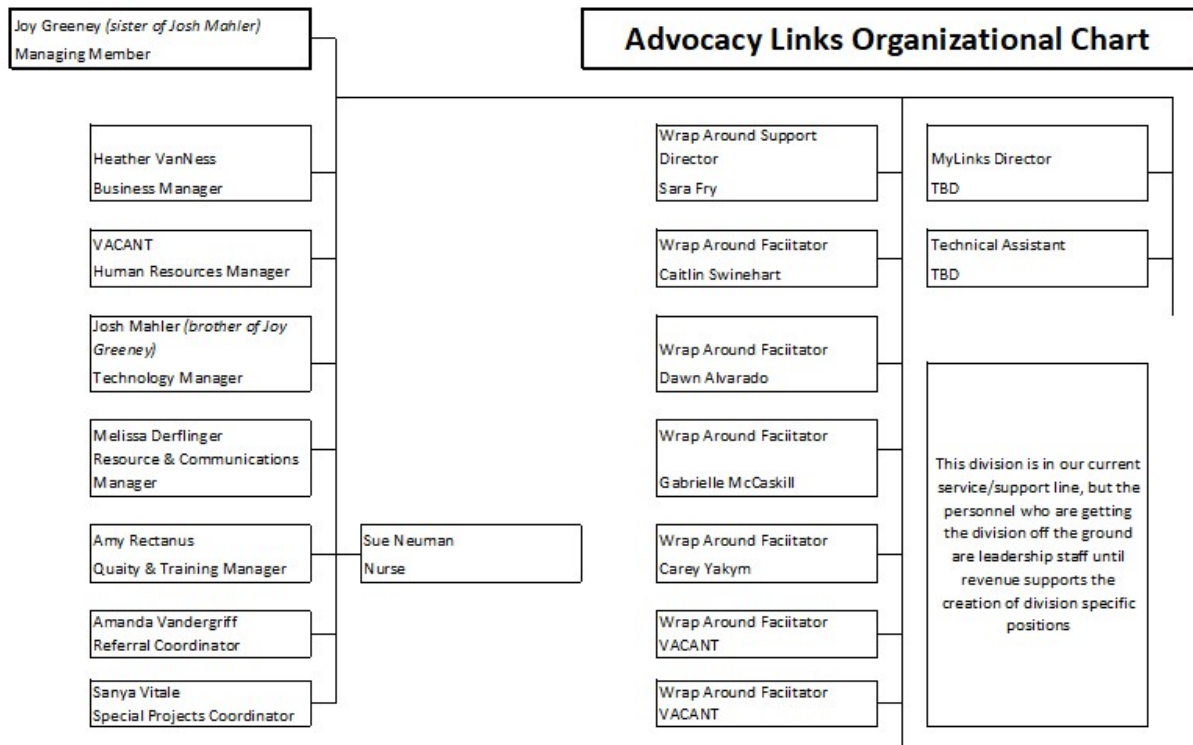
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Us



Proud Members of



Appendix C – Organizational Chart



Advocacy Links Resource and Advocacy Center, Inc. Organizational Chart

Board of Directors

Joy Greeney
President

Florence Hobby
Vice President

Heather VanNess
Secretary/Treasurer

VACANT
Member at Large

VACANT
Member at Large

VACANT
Member at Large

VACANT
Member at Large

Director of Resources
& Connections
Kara Kimes

Connection Specialist
Valerie Cassity

Connection Specialist
Cheryl Guyer

Connection Specialist
Jennifer Noffsinger
(FURLOUGHED)

BINS Liaison
VACANT

Connection Specialist
VACANT

Connection Specialist
VACANT

PLACE Director
MJ Frey

Life Consultant
Summer Kohne

Life Consultant
Rhonda Bass

Life Consultant
Aunah Knab
(FURLOUGHED)

Life Consultant
VACANT

Life Consultant
VACANT

Life Consultant
VACANT

Appendix F contains the Income Statement for January 1 – December 31, 2022

Type	Date	Name	Account	Original Amount	Paid Amount
Jan - Dec 22					
Deposit	12/07/2022	GAINWELL	4022 - services CM...	5,792.94	5,792.94
Jan - Dec 22					5,792.94

Type	Date	Name	Account	Original Amount	Paid Amount
Jan - Dec 22					
Deposit	09/07/2022		4011 - revenue Res...	318.75	318.75
Deposit	10/12/2022		4011 - revenue Res...	93.75	93.75
Deposit	10/24/2022		4011 - revenue Res...	225.00	225.00
Deposit	10/24/2022		4011 - revenue Res...	386.25	386.25
Deposit	11/07/2022		4011 - revenue Res...	187.50	187.50
Deposit	11/16/2022		4011 - revenue Res...	350.00	350.00
Deposit	11/16/2022		4011 - revenue Res...	490.00	490.00
Deposit	12/09/2022		4011 - revenue Res...	165.00	165.00
Deposit	12/21/2022		4011 - revenue Res...	356.25	356.25
Deposit	12/27/2022		4011 - revenue Res...	358.75	358.75
Deposit	12/27/2022		4011 - revenue Res...	183.75	183.75
Jan - Dec 22					3,115.00

Appendix G contains the projected Income Statement fiscal years 2023 – 2025

	PROJECTED INCOME STATEMENT Advocacy Links 1/1/2022		
	FY 2023	FY 2024	FY 2025
TOTAL REVENUE Revenue =	\$1,195,346.64	\$1,838,819.19	\$1,980,896.27
COST OF SERVICES PROVIDED	\$1,011,017.40	\$1,398,487.99	\$1,600,597.11
GROSS PROFIT	\$184,329.24	\$440,331.20	\$380,299.16

Appendix I contains the projected Cash Flow Statement fiscal years 2024 - 2025

Advocacy Links - Appendix I - Projected Cash Flow

	2024 Total	2025 Total
INCOME		
PLACE	\$130,500.00	\$137,025.00
Resource & Connections	\$252,000.00	\$264,600.00
Wraparound	\$918,000.00	\$1,009,800.00
MyLinks/Housemate	\$123,024.92	\$129,177.00
Sponsorship/Gift Certificate	\$150,000.00	\$175,000.00
Grant Funding	\$265,294.27	\$265,294.27
TOTAL INCOME	\$1,838,819.19	\$1,980,896.27
PROGRAM EXPENSES		
Resource & Connections Pay	\$155,340.00	\$195,340.00
Wraparound Pay	\$420,180.00	\$506,180.00
PLACE Pay	\$155,340.00	\$195,340.00
MyLinks Pay		
Special Projects Manager Pay	\$27,540.00	\$28,366.00
Technology Assistant	\$9,000.00	\$9,270.00
Program Staff Payroll Taxes	\$69,100.00	\$84,105.00
Expense Reimbursement	\$72,000.00	\$72,000.00
Employee Care - picnic	\$2,400.00	\$2,400.00
PLACE Events	\$4,200.00	\$4,500.00
Interpretation Services	\$600.00	\$600.00
Technology Expense	\$14,400.00	\$14,400.00
ADMINISTRATIVE EXPENSES		
Admin Pay	\$301,074.64	\$310,107.00
Admin Staff Payroll Taxes	\$27,096.72	\$27,910.00
Professional Fees - Accounting	\$19,596.00	\$21,000.00
Payroll Expenses	\$73,633.44	\$73,633.44
Insurance - business liability	\$9,000.00	\$9,000.00
Admin Expense	\$3,890.88	\$3,890.88
Depreciation & Amortization	\$986.76	\$986.76
Licenses	\$600.00	\$600.00
Dues & Subscriptions	\$1,200.00	\$1,200.00
Office Supplies	\$1,200.00	\$1,200.00
Interest & Banking Fees	\$720.00	\$720.00
Postage & Delivery	\$600.00	\$600.00
Professional Development	\$1,200.00	\$1,200.00
Professional Development Lodging	\$1,200.00	\$1,200.00
Telephone & Communications	\$2,700.00	\$2,700.00
Lodging & Travel (Admin)	\$3,600.00	\$3,600.00
Shredding	\$600.00	\$600.00
Insurance - workers compensation	\$13,585.43	\$15,793.91
Insurance - health	\$36,600.00	\$42,600.00
FUNDRAISING EXPENSES		
Fundraising Staff Pay		
Special Projects Mgr split	\$18,360.00	\$18,910.00
Fundraising Staff Payroll Taxes	\$1,542.00	\$1,702.00
Marketing & Advertising	\$15,577.56	\$15,577.56
Printing & Reproduction	\$9,000.00	\$9,000.00
Total Expenses	\$1,473,663.43	\$1,676,232.55
NET PROFIT	\$365,155.76	\$304,663.72