

Operating Plan: 2007

MAJOR STATE GOALS

M-I: Texans with intellectual and developmental disabilities are empowered to make their own choices and decisions.

1. Support the efforts of Texas Advocates to promote self-determination and self-advocacy among Texans with intellectual and developmental disabilities.
 - (a) The Arc contracts with Texas Advocates to provide administrative and program support for the Peer to Peer Project. Grants + 175,200 <175,200>
 - (b) Support members of Texas Advocates to testify/attend/participate in at least 10 state-level meetings, workgroups, hearings, etc.
2. The Arc supports Texas Advocates to implement targeted organizational priorities. FSS <10,000>
 - (a) Acquire funding to support/expand services.
 - (b) Support Quarterly Texas Advocate Board Meetings.
 - (c) Support the Texas Advocate Annual Conference. FSS <2,500>
3. Advocate for statewide and HHSC system-wide adoption of self-determination principles.
 - (a) HHSC/DADS adopt and incorporate self-determination principles throughout their systems and divisions. GA <1,000>
 - (1) Continue to meet with HHSC/DADS key staff members on a regular basis.
 - (2) Actively participate in and influence the adoption of HHSC/DADS regulatory proposals that embrace the principles of self-determination.
 - (3) At least one volunteer represents The Arc of Texas on the Consumer Directed Services Workgroup.
 - (4) The Arc of Texas representative on the Promoting Independence Advisory Council advocates for an evaluation and overhaul of the long term care system based on principles of self-determination.
 - (b) Develop and seek legislative adoption of a state policy statement on self-determination.
 - (1) Local constituent groups meet with key legislators and attain support for the policy statement.
 - (2) At least 2 individuals will attend and testify at legislative hearings, as appropriate.

M-II: Texans with intellectual and developmental disabilities will receive necessary supports and services from a well organized and adequately funded service delivery system to facilitate their full inclusion in their communities.

1. Advocate for an I/DD service delivery system of the future that is based on The Arc of Texas' guiding principles. GA <1,500>
 - (a) Maintain and strengthen guiding principles for the consolidation and redesign of the Texas I/DD service delivery system.
 - (b) At least one volunteer and one staff person meet with DADS staff on a quarterly basis
 - (c) Develop legislative and regulatory proposals, as needed, to pursue guiding principles.

- (d) At least one volunteer attends/participates in the HHSC Advisory Council quarterly.
 - (e) At least one volunteer participates in quarterly DADS Advisory Council meetings.
 - (f) At least one volunteer participates in Promoting Independence Advisory Committee meetings.
 - (g) When in Austin on other business, volunteers will visit their legislators and their staff.
2. Monitor and actively participate in the 80th Legislative Session. GA <8,400>
 - (a) At least 40 volunteers will participate in 18 Advocate Days at the Capitol during the legislative session.
 - (b) At least 10 volunteers testify to specific budget issues at appropriate budget hearings.
 - (c) At least 10 volunteers testify to specific legislative issues (i.e. bills) at appropriate committee hearings.
 3. Advocate for state approval of and sufficient initial funding to implement the second two years of a multi-year plan to reduce the Medicaid Waiver Program Waiting Lists.
 - (b) State officials will approve a plan to reduce the Waiting Lists within parameters supported by The Arc, to include necessary appropriations.
 - (2) Constituent teams will advocate for funding priorities with targeted, key legislators.
 - (3) Targeted legislators receive multiple and varied constituent contacts on budget issues.
 4. Advocate for legislative and regulatory action to strengthen the service delivery infrastructure in order to enhance the quality of supports and services.
 - a) In collaboration with advocacy partners, establish annual statutory and regulatory goals.
 - (1) Expand the "Money Follow the Person" concept to ICF/MRs via legislative and regulatory action.
 - b) The legislature adopts proposals to strengthen service delivery infrastructure as reflected in collaborative goals, including but not limited to strengthening the safety-net, direct care pay equity, and equitable reimbursement rates.
 - (1) In collaboration with Mental Retardation Authorities, private and public providers, The Arc of Texas will develop regulatory and legislative (budget) proposals to ensure a meaningful safety-net.
 - (2) In collaboration with public and private providers, The Arc of Texas will support proposals to strengthen the supports and services delivery infrastructure.
 - (3) The Arc of Texas will work closely with DADS/HHSC as they develop a multi-year plan to significantly reduce and/or eliminate the waiting lists, in order to influence the service delivery system of the future.
 5. Advocate for HHSC/DADS implementation of a Quality Assurance initiative to assess and improve the quality of services and supports regardless of the funding source.
 - a) Monitor the implementation of the QA/QI tool
 - b) Promote budgetary and regulatory action that supports the implementation of the new QA/QI tool by independent third-party entities, preferably self-advocates.
 6. Promote awareness of the need to expand community-based services for Texans with intellectual and developmental disabilities.
 - a) Support a coalition around MR/DD community supports and services needs.
 - GA <600>
 - (1) At least one volunteer will actively participate in coalition meetings.
 - (2) The coalition endorses The Arc of Texas' legislative priorities.
 - GA <5,250>

- b) The coalition plans and executes a Rally/Capitol Day 2007 on February 14th to include at least 1,500 advocates, families, friends and professionals.
 - (1) At least 12 local chapters of The Arc of Texas will participate in Capitol Day 2007.
 - (2) At least 3 legislators will address the Capitol Day 2007 rally participants.
 - (3) Every legislative office will receive at least one volunteer visit (with appropriate leave-behinds) on February 14th.
 - (4) At least 3 newspapers articles will be written as a result of Capitol Day 2007.
 - (5) At least 3 television stations will cover the Capitol Day 2007 event.

Subject to the availability of funds:

- (6) Provide sack lunches for 1,500 Capitol Day 2007 participants.
- c) Develop and initiate an ongoing media campaign in order to personalize the Medicaid Waiver Program Waiting lists. GA <1,250>
 - (1) Kick-off the New Year by launching a new webpage featuring The Arc's intensive Media and PSA Campaign by January 15th.
 - (2) Kick-off the 80th Legislative Session with a press conference by January 15th, where our legislative platform is presented.
 - (3) In collaboration with advocacy partners and local chapters, implement media campaigns in 5 targeted media markets.
 - (4) Build relationships with at least 5 key reporters.
 - (5) Develop and implement a media plan for distributing and showing the PSA and longer video in local communities, statewide conferences and other important community meetings.
- d) Identify and recruit a "friend" for the community-based supports and services waiting list crisis.
 - (1) Meet with this individual on at least a monthly basis.
 - (2) Honor the "friend" at a reception.
 - (3) At least 5 volunteers will attend the reception where our "friend" is honored.
- e) Action Alerts and general updates are distributed as needed.
 - (1) At least 1000 persons are subscribed to the Capwiz email list.
 - (2) At least 75 persons respond to each Action Alert.
 - (3) Staff will communicate weekly via Capwiz email list.
 - (4) Staff will communicate weekly via Newsnet.
 - (5) A monthly Actionline Newsletter will be distributed via Capwiz.

7. The Arc will organize and train the grassroots.

- a) Implement the DD Council-funded Local Advocacy Network Grant through May 31, 2007 Grants + 33,269 <33,269>
 - (1) Continue the basic- and advanced-advocacy training sessions scheduled and initiated in 2006.
 - (2) Document participant contact with policy makers.
 - (3) Provide policy updates to participants via Capwiz.
 - (4) The disability policy collaborations in El Paso, the Rio Grande Valley and Central Texas will meet monthly to pursue advocacy goals.
 - (5) At least three Advocacy Teams (A-Teams) will be established and will conduct monthly meetings to pursue advocacy goals.
 - (6) Conduct training and support, as needed, to local community organizers.
 - (7) At least 20 trained volunteers will provide legislative testimony during the legislative session.

- b) Develop and submit a grant proposal to expand current local advocacy initiatives. Subject to the availability of funds:
- c) Support at least 7 communities in establishing and maintaining effective A-Teams.
- d) Plan and execute a statewide conference focused on community organizing for disability advocates.
- e) Train 5-7 key volunteers to communicate effectively with elected officials and members of the press.

M-III: Children with intellectual and developmental disabilities are fully included in all educational settings. Grants Training +251,250 <142,000>

1. Through collaborative efforts with local chapters, educate students and parents to effectively advocate for inclusion and transition opportunities for their children.
 - a) The Arc provides educational advocacy workshops and information for 150 parents per year.
 - (1) Provide educational advocacy update at Inclusion Works Conference
 - (2) Develop, print and distribute an addendum to and/or revise the It's a New IDEA manual based on changes in Federal and State Laws and Regulations.
 - (3) Update presentation materials based on revised It's a New IDEA manual. FSS <6,400>
 - (4) Use web site to promote and distribute manual and training materials
 - (5) Provide updated information, materials and referral to families and students. (Offer all files as downloadable PDF files)
 - (6) Encourage/support organizational partners to link to The Arc web site.
 - (7) Conduct one "train the trainer" event and four (4) workshops for local Arc Chapters and other family support organizations. FSS <2,350>
 - (8) At least 50% of local chapters send at least one staff and/or parent representative to IW conference.
 - (9) Provide training on inclusion for 200 parents at the 2007 IW conf.
2. Train educators to support children with disabilities in inclusive classes.
 - a) 800 Educators participate in The Arc inclusion training activities.
 - (1) Conduct 2007 Inclusion Works Conference for 800 educators
 - (2) Seek funding to conduct IW conference in 2008.
 - (3) Plan and coordinate 2008 IW pre-conference activities.
 - (4) At least 25% of local chapters facilitate sending a local school district team to attend the 2007 IW conference.
 - (5) Offer professional education credits for teachers at IW conference.
3. Advocate for policies and statutes that would increase supports for more students with disabilities to be included in general education settings and to progress in the general curriculum.
 - a) Advocate with TEA and the state legislature for policies, rules, and statutes that promote students with disabilities participating in and progressing in the general curriculum
 - (1) Participate in Stakeholder groups to align TEA rules with IDEA and NCLB and protect current rules that go beyond IDEA and/or NCLB
 - (2) Pursue legislation to allow students with disabilities to participate in Graduation Ceremonies with their same age peers

- (3) Advocate for School Finance and Accountability System that provides adequate funding and monitoring so students with disabilities will get supports and services in public schools protected by IDEA regulations, in regular education environments with supports and modifications, and will support students to participate and progress in the general education curriculum.
- (4) Protect current statutes that go beyond IDEA and/or NCLB requirements.
- (5) Participate and monitor TEA process to develop and implement new statewide TAKS Alt and TAKS Modified assessment system to ensure students with disabilities are participating in assessments on grade level..

M-IV: Aging persons with intellectual and developmental disabilities receive supports and services that empower them to make choices about their future.

- 1. Promote public awareness of the unique needs of aging Texans with intellectual and developmental disabilities.
 - a) Develop a “white paper” documenting the size and scope of challenges facing aging Texans with intellectual and developmental disabilities and their families.
 - b) In collaboration with local chapters, publicize the needs of aging consumers and their families via four major media outlets.
- 2. Actively participate in the implementation of the Governor’s Executive Order on Aging Texas Well (RP-42).
 - a) Advocate for an in-depth analysis of the needs of persons with intellectual and developmental disabilities who are aging.
 - b) Advocate for adoption of a coordinated inter-agency state plan to ensure provision of supports and services to aging Texans with intellectual and developmental disabilities and their families.

M-V. Develop the Real Life Program to assist individuals with disabilities in community living with the assistance from their Support Networks.

- 1. Continue five demonstration projects. + 5,000 <5,000>
 - a) Continue to research other organization’s and state’s systems of support for families and individuals with disabilities using support networks and/or innovative systems of providing support services.
- 2. Educate families, individuals and professionals concerning the concepts of the Real Life program. + 9,200 <9,200>
 - a) Provide at least ten information presentations.
 - b) Distribute promotional materials through presentations, conferences, and fairs.
 - c) Collaborate and develop partnerships with at least four local Arc Chapters and provide training for those local Arc Chapters.
- 3. Develop and print a resource manual that will include creative and generic resources and ideas for the Support Network’s use including an instructional manual that will outline the details of developing and managing a Support Network.
 - a) Define and develop the Support Network’s role and operations.
 - b) Define and develop the role of the Support Network facilitator and include the details of this position within the manual.
 - c) Continue to research community resources and develop community partnerships as well as additional ideas for bartering and sharing within the Support Networks.

4. Implement and manage a grant-making plan for individuals wishing to transition to community living. (Foundation for the Challenged grant) + 15,000 <15,000>
 - a) Inform individuals of the grant-making fund through conferences, newsletters and local Arc Chapters and other organizations.
 - b) Distribute the grant dollars awarded to the fund to eligible participants in Real Life.

5. Implement the AmeriCorps* Planning Grant. Grants +43,539 <43,539>
 - a) Contract with a consultant to develop the AmeriCorps* member training and recruitment plans, facilitator training and recruitment plans and training materials.
 - b) Develop partnerships with universities and other organizations for recruitment of AmeriCorps* members.
 - c) Develop an evaluation survey and plan.
 - d) Develop partnerships with housing, financial, and other support organizations to provide creative options for community living.
 - e) Recruit and organize an Advisory Committee for Real Life.

6. Submit the Vista continuation grant application to include the current Vista position as well as well as an additional Vista position to serve as a Support Network facilitator for the Austin area.
 - a) Implement the VISTA continuation plan if this plan is approved and recruit the VISTA positions.

7. Continue additional fundraising efforts for the Real Life program (see Development Plan). FSS + 700 <700>

8. By June of 2007, hire a two-year Real Life program coordinator to facilitate the development and organization of Real Life, the Real Life grants and the Family support networks. FSS + 15,000 <439>

ONGOING GOALS

O-I: Continue operation and expansion of the Master Pooled Trust.

FSS + 340,000 <18,275>

1. The Arc of Texas will provide up-to-date information to families and attorneys on the Master Pooled Trust.
 - a) The Arc of Texas will update Master Pooled Trust web site materials.
 - b) A Master Pooled Trust newsletter will be mailed yearly to beneficiaries/primary representatives.
 - c) MPT will continue to do satisfaction surveys and an annual report and mail to beneficiaries and other select contacts.
 - d) MPT will provide presentations to groups on request.
 - e) Continue to implement its marketing strategies.

2. MPT will service existing trust accounts.
 - a) Daily disbursements will be made.
 - b) Quarterly statements will be mailed to beneficiaries.
 - c) Annual updates of Joinder will be made for beneficiaries.
 - d) Meet with Bank One two times a year re: investments and policies.
 - e) Form 1099 will be mailed to beneficiaries by January 31, 2007.
 - f) Form 1096 will be mailed to IRS by February 28, 2007.

- g) Checks will be deposited daily.
- h) One million dollar increase in new enrollments.
- i) Consult with primary representatives as needed.
- j) Ongoing communication with bank and accountant.
- k) Relationships with state agencies will be maintained by continuing to clarify disbursement guidelines.

O-II: Identify and advocate for people with intellectual and developmental disabilities who are involved with the Texas criminal justice system.

1. Raise awareness about this population and their needs.
 - a) Continue to work with the Texas Correctional Office for Offenders with Medical or Mental Impairments.
 - (1) At least one person will represent The Arc of Texas at all TCOOMMI meetings.
 - (2) The Arc of Texas will work to influence all TCOOMMI special needs offender initiatives.
 - b) Continue to work with Texas Appleseed.
 - (1) Offer support and expertise in the development and distribution of Attorney, Consumer, and Family Handbooks for individuals with intellectual and developmental disabilities in the criminal justice system.
 - c) Support the Criminal Justice Coalition for People with Intellectual & Developmental Disabilities. GA <1,500>
 - (1) Host bi-monthly meetings in Austin.
 - (2) Host bi-monthly meetings in Houston.
 - (3) At least three volunteers will actively participate in the coalition.

Subject to the availability of funds:

- d) Work with Coalition partners to plan, solicit funding, and execute a Fall 2007 Conference to raise awareness about individuals with intellectual and developmental disabilities in the criminal justice system.

O-III: Pursue the HHSC Rider 55 Study recommendations and highlighted policy issues.

1. Develop regulatory and statutory recommendations, as needed, to support the expansion of community supports and services.
 - (a) Meet with HHSC/DADS staff on at least a bi-monthly basis.
 - (b) Update and distribute The Arc's white paper on the future of the MR/DD supports and services delivery system.

O-IV: Identify the transportation needs of individuals with intellectual and developmental disabilities.

1. Promote public awareness about the unique transportation needs of this population.
 - (a) Develop a "white paper" documenting the size and scope of the challenges facing this population.
 - (b) In collaboration with local chapters, publicize the needs of this

population via four major media outlets.

O-V: Identify the employment needs of individuals with intellectual and developmental disabilities.

1. Promote public awareness about the unique employment needs of this population.
 - (a) Develop a “white paper” documenting the size and scope of the challenges facing this population.
 - (b) In collaboration with local chapters, publicize the needs of this population via four major media outlets.

SUPPORT GOALS

S-I: Adequate income and other resources will support the activities of The Arc of Texas.

1. The Arc of Texas will establish an **annual fund** campaign that will continue to increase number of contributions. Projected revenue \$25,000.
 - a) The Arc of Texas will continue to conduct the Share the Vision campaign that will benefit the annual fund.
Outcome: Established campaign will continue to support operational/unrestricted funding. (\$15,000 of the above \$25,000 total.)
 - b) The Arc of Texas will recruit new donors and current donors will be cultivated.
Outcome: New donors will increase by 10% of the current donors.
DEV + 25,000 <5,800>
2. The Arc of Texas will continue to promote **online giving** through the web site and the Spread the Word program. + 10,000 <1,700>
 - a) Continue to draw members and potential donors into the web site with the e-newsletter and online registrations.
 - b) Implement another Spread the Word campaign with the assistance of a contractor.
Outcome: Online giving will increase to \$10,000.
3. Continue participation in the **Local Independent Charities** campaign.
 - a) The Arc of Texas will continue membership in this federation to secure payroll contributions from municipal, county, state and federal employees.
Outcome: Workplace giving will maintain at \$11,000. + 11,000
4. The Arc of Texas will continue to identify **potential foundation and corporate funders and partnerships.**
 - a) The Arc of Texas will research and develop a list of potential funding sources and potential partnerships.
Outcome: At least two additional partners will be secured.
 - b) The Arc of Texas will submit proposals to the top three to five funders in 2007.
Outcome: New support will be recruited and funding will be further diversified (at least \$25,000 from grants and partnerships.)
5. The **Leadership Awards fundraiser** will be conducted in the spring of 2007. Projected gross revenue of \$40,000. + 49000 <10,150>

6. The Arc of Texas will continue to strengthen development efforts of the **Board of Directors**.
- a) Fundraise online through Spread the Word.
 - b) Identify individual donors and corporate or foundation donors.
- Outcome: Seventy five percent of the board members will complete at least two development tasks during 2007.

S-II: To enhance the operations of The Arc of the United States and local chapters of The Arc.

1. To provide training, technical assistance and intervention services to support affiliated chapters.
 - a) Establish and promote four regional meetings for the purpose of collaboration among affiliated chapters in close proximity to one another. <3,000>
 - b) Establish and maintain an electronic resource databank focused on ideas and methodology concerning strategies of the enhancement of membership and financial standing.
 - c) Create and promote a Presidents Manual and a Treasurers Manual to act as a catalyst/tool to increase board efficiency. <500>
 - d) Conduct The Arc of Texas annual meeting for the purpose of business and the sharing of ideas. Training + 15,000 <16.225> Grants + 6,000 <6,000>
2. Support the practices and platforms of The Arc US.v
 - a) Make significant steps toward establishing each chapter's own personal 501(c)3 for liability purposes held by the state office.
 - b) Participate in the following meetings of The Arc of the United States:
 - Annual Meeting <8,300>
 - Governmental Affairs Conference
 - 2 State Executive Directors Meetings <1,130>
 - Special Medicaid Conference
 - Summer Volunteer Leadership Conference <1,105>
3. Visit each local chapter no less than once a year for the purpose of evaluation of status/standing and to provide information pertaining to the happenings concerning the organization on both the state and national levels. <8,000>

Subject to the availability of funds:

4. The Arc of Texas will develop and execute at least one Chapter Development Summit event, which would include training sessions for chapter representatives regarding Board development, staff development, chapter affiliation requirements, advocacy, leadership development, etc.

S-III: To support and enhance the governance role of the Board of Directors.

1. The Nominating Committee annually presents a slate of qualified nominees for state and, when appropriate, national leadership positions. Indirect <1,200>
 - a) Nominations solicited from chapters by February 1st annually.
 - b) Slate presented six weeks prior to Annual Meeting.
 - c) Committee recommends nominees for committees to President by May 1 annually.

2. New Board members receive general orientation and Roles and Responsibilities training prior to initiating service on the Board.
 - a) Staff and President conduct new member training within 30 days of election/appointment.
3. Board members are trained on prioritized self-identified topics meeting.
 - a) Training workshops are presented at each Board meeting.
 - b) 80% of Board members rank training as “good” or better.
4. Board members engage in meaningful dialogue about issues of interest to influence future plans and priorities of The Arc.
 - a) The President leads the Board in “dialogue” sessions at each Board meeting.
5. The President appoints committees and establishes Charges to the Committees within 30 days of the Annual Meeting.
 - a) Committee members receive charge upon appointment.
6. Board members provide meaningful input into the development of the 2008 Annual Plan.

S-IV: To optimize the work of the staff of The Arc by enhancing skills and knowledge of individual staff members

1. All staff members participate in training opportunities to enhance skills and knowledge. Training <800>
 - a) Each staff member identifies two training priorities via Performance Evaluation process.
 - b) Each staff member participates in at least one individualized training opportunity by 12/15/07.
2. Staff participates in team-building or related activities to enhance collaboration. Training <500>
 - a) Staff identify joint training preferences.
 - b) Staff participates in two joint training experiences by 12/31/07.
3. Staff participates in professional organizations. Training <1,050>
 - a) Executive staff and project managers join/participate in appropriate professional organizations.

S-V: To ensure that effective business and administrative practices promote organizational achievement and accountability.

1. Provide administrative and planning support to maximize Household Recycling profits through 2007. + 925,681 <5,250>
 - a) Continue to implement and monitor expense review and reduction strategies.
 - b) Monitor DFW consolidation and mailer activities.
 - c) Meet semi-annually with Donor Services Managers.
 - d) Meet semi-annually with Norquist Salvage officials and continue monthly conference calls.
2. Monitor implementation of the Drop Box program in Dallas and Houston + 78,000 <800>
 - a) Maintain effective lines of communication and coordination with local chapters.

- b) Meet at least annually with S&B officials
 - c) Monitor receipts, contracts and quality controls
3. Conduct all of the business affairs of The Arc of Texas in accordance with policies, ethical standards and professional expectations.