HCBS BUSINESS ACUMEN CENTER

DISABILITY NETWORK BUSINESS STRATEGIES:
A Roadmap to Financial and Programmatic Sustainability for Community-Based Organizations

Step 2: Plan

Use Business Intelligence to Build the Strategic Plan for Your Organization

ADVANCING STATES

Contents

BUSINESS ACUMEN describes an organization's ability to understand and address business conditions in a way that leads to the organization's desired financial and operational outcomes. For community-based organizations (CBOs) serving people with disabilities, strong business acumen will improve the organization's ability to sustain or even grow their programs. The HCBS Business Acumen Center is devoted to providing resources to disability-focused CBOs to facilitate successful business practices. The Disability Network Business Strategies Roadmap is one such resource.

This project was supported, in part by grant number 90DNBA0001-03-01, from the U.S. Administration for Community Living, Department of Health and Human Services, Washington, D.C. 20201.

For more information, please visit hcbsbusinessacumen.org.

Step 2: Plan

Use Business Intelligence to Build Your Strategic Plan

In **Step 1: Prepare**, you conducted an environmental scan and a strengths, weaknesses, opportunities and threats (SWOT) analysis for your community-based organization (CBO). Through this process you may have found that the business environment that your CBO works in today is more complex than it has been in the past. Increases in competition or recent or impending changes to funding streams such as federal or state policies or implementation of managed long-term services and supports may create a need for your organization to work differently in order to be successful. You may need to improve efficiencies, modify your pricing strategy, or pursue broad, alternative revenue sources to ensure sustainability. Whatever themes stood out from your data collection, you will need to fully analyze, organize, and prioritize your activities before you can act on them.

"Prior planning prevents poor performance"
—R. DiRusso

Figure 1: Using Business Intelligence to Build and Implement Your Strategic Plan

This module will describe how to analyze the information you collected and provide recommendations on how to organize and prioritize that information in a strategic plan that will help your organization achieve its goals. Since building and implementing a strategic plan involves a number of people and departments, we will also discuss how to manage organizational change.

Things to consider as you review this module:

- What needs stood out from your organization's environmental scan and SWOT analysis? What do you need to do to address them? What resources do you need to be successful?
- How will your organization prioritize its objectives? How will you best utilize your available resources?
- Is your organization prepared for change? Do you have change management practices and processes in place?

A. Analyze

Data drives an organization. It is fact-based, verifiable, and can help you identify opportunities and weaknesses within your organization. Data becomes information when you understand how it impacts your business. The value of this information is to show you what is happening today and what has happened in the past. This information can then be used to help you make decisions for your business. Do not be afraid of what you might find. The use of data is not to penalize or find fault, but to help your organization improve and maximize its potential. Data analysis is a mechanism to help your organization be the very best it can be.

The use of data to make business decisions is a critical skill. In a 2017 survey conducted by the HCBS Business Acumen Center, thirty-eight percent of the responding disability-focused CBOs reported that they are very familiar with data-driven decision-making and forty-seven percent reported being familiar with the skill. The survey also asked whether CBOs are familiar with data collection and analytics. Fifty-four percent reported being very familiar with data collection while thirty-eight percent reported being familiar with data collection. Analytics, however was identified as a skill set that CBOs are less strong in. Eight percent reported being very familiar with analytics while thirty-four percent reported being familiar with analytics. These responses indicate that most organizations recognize how important it is to use data and information to make decisions, yet have challenges analyzing the information in a way that allows them to make the best decisions for their organizations.

QUALITATIVE DATA is information that can be observed but not measured. It includes information about policy or leadership changes, payer preferences and stories that illustrate success or failures.

QUANTITATIVE DATA is information that can be measured. Examples include data from financial reports and scores from quality and satisfaction surveys.

This module will help you think through how to best utilize the qualitative and quantitative data you collected in **Step 1: Prepare**. If you need additional assistance, experts in the field, consultants and advanced students at colleges or universities may be resources to help you analyze your data. State agencies may also be able to offer technical assistance on how to collect and utilize data that they have seen to be valuable to the state, health payers and providers. For example, the sharing of reports collected at the state level may be a helpful resource to understand what information is being shared, how to format it and how to use it.

The use of data to make decisions is called ‘data-driven decision-making’. The use of data to make decisions will help your organization make the most well-informed decisions for your organization. Data-driven decision-making removes emotions from the decision-making process. Thus it allows you to make pragmatic decisions that will improve your organization’s ability to achieve success. Data can provide insights that help your organization answer key business questions[1] and drive the development of your strategic plan. If at any time you question the validity of the data you collected, be sure to seek additional information. The success of a data-driven approach is dependent on the quality of the data gathered and the effectiveness of its analysis and interpretation.[2]

In **Step 1: Prepare,** you conducted a SWOT analysis that considered your organization's position within your business environment. You also created a vision for your organization by answering a number of questions:

- What will be your organization's:
  - Financial success?
  - Product or service quality?
  - Contribution to the community?
- What will your most important product lines or services be?
- What products or services will you decline to offer?
- What will the right size for your organization in terms of capacity be?
- What does customer experience at your business look like?
  - What will make that experience unique?
  - Who will your customers be?
  - How will you find them?
- If your customers were asked to list three noteworthy things about your business, what would they be?
- How will your community view your business?
- What will your payers say about you?
- What will industry experts say about you?

The results of your SWOT analysis can be used to develop strategies that will help you achieve the vision for your organization.

Use Table 1: Realizing Your Vision to integrate the vision for your organization with the data you have from your SWOT analysis.

- Strengths: What internal capacities can be maximized to promote success?
- Weaknesses: What internal capacities need to be improved so that they do not minimize your organizations opportunities for success?
- Opportunities: What will help you achieve your vision?
- Threats: What could prevent your organization from achieving its vision?

1 https://www.forbes.com/sites/bernardmarr/2016/06/14/data-driven-decision-making-10-simple-steps-for-any-business/#16e3e2a15e1e
2 https://whatis.techtarget.com/definition/data-driven-decision-management-DDDM

Table 1: Realizing Your Vision

	Vision for the Organization	How do the results of your SWOT analysis impact that vision?			
		Strengths	Weaknesses	Opportunities	Threats
Financial success					
Product or service quality					
Contribution to the community					
Most important product lines or services					
Products or services declined to offer					
Right size for the organization					
Customers experience					
What makes the experience unique					
Who our customers are					
How we will find our customers					
Three noteworthy things customers say about our business					
How the community views our business					
What payers say about our business					
What industry experts say about our business					

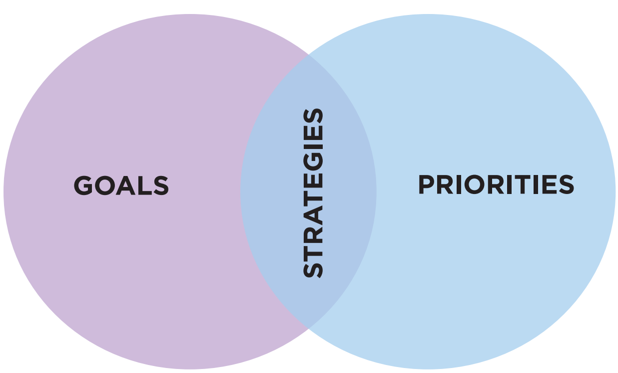
As a business, you not only want to realize your vision, but you also want to be financially successful. Is there anything not yet captured that will:

- Positively or negatively impact your business?
- Provide your organization an advantage in the market or limit its success?
- Impact your organization's ability to address the opportunities or threats in the environment?

Goals, Priorities and Strategies

Goals, priorities, and strategies can easily be confused with one another. Goals are what an organization needs to accomplish, priorities are the things that are most important to your organization, and the strategy is how you will achieve the goals.

The vision for your organization combined with your SWOT analysis will create many of the goals for your organization. For example, your CBO may want to grow its services by 20 percent over the coming year. You may have an excellent marketing person who is able to bring in new referrals, thus creating an environment that would allow you to bring in more business. This seems like an automatic win and excellent strategy to achieve your goal. However, if the person responsible for the intake process is not able to keep up with the referrals or able to devote staff resources to fill the growing need, the increase in referrals is irrelevant. An inability to keep up with the demand will potentially diminish your reputation and frustrate customers. In this case, in order to achieve the goal of an increase in services, the priority for your organization may be to increase the ability of the intake department to expedite their intake process or address staffing issues so that you can resource referrals for new services more quickly. The priorities for your organization are the things that you must address first in order to realize your organizations goals. To create an effective strategy, your organization will need to evaluate the goals alongside the priorities of all people or departments who will help achieve the goals. The strategies your organization applies should be a joint effort that helps all responsible be successful.



With a thorough understanding of how your SWOT impacts your organization's mission, you can begin to identify the potential priorities for your organization and brainstorm strategies that will help you achieve the goals for your organization.

Consider the following questions as you brainstorm potential priorities and strategies for your organization:

- **Goals**
    - What does our organization want and need to accomplish in the next 1– 3 years?
- **Priorities**
    - What areas or issues need to be addressed in order for our organization to be successful?
    - What goals or strategies lead to the greatest return on investment (ROI) for our organization?
- **Strategies**
    - How will we accomplish this work?
    - What type or amount of staff do we need?
    - What amount of financial resources do we need?
    - What methods will help generate revenue?
    - Can our organization do this alone?
    - Do we need to collaborate with another organization to be successful?

What priorities begin to stand out? For example, do you need to financially stabilize your organization in order to be sustainable? Are there opportunities to grow your business in a way that makes you both financially successful and enables you to further your mission? Identify the top 2-4 challenges or opportunities that you will use to create goals and priorities for your organization. For example: increase profitability of service lines; diversify payer sources or expand territory. Two to four priority areas is only an estimate. The size of your organization and the amount of staff able to focus on initiatives will determine how many goals you have at any time.

Document your potential strategic goals and strategies. Example 1: Examples of Potential Strategic Goals provides a template that can be used to document the potential goals for your organization along with the strategies that you may use to accomplish them.

Example 1: Examples of Potential Strategic Goals

Strategic Goal	Potential Strategy to Accomplish[3]
Increase profitability of service lines by 5% in current year	■ Reduce staff expenses ■ Reduce cost of materials or rebid vendors ■ Seek operational efficiencies ■ Increase rates
Diversify payer sources over a 3 year period	■ Customize programs ■ Seek partnerships, foundation engagements, etc. ■ Increase marketing ■ Increase contracting staff
Expand territory over a 5 year period	■ Establish strategic partnerships in new region ■ Increase marketing ■ Licensure ■ Hire staff ■ Rent office space
Secure a contract with a healthcare payer	■ Improve technology to share real-time information with health care payers ■ Enhance billing system to meet requirements ■ Secure line of credit to cover reserve needs ■ Train staff on clinical issues and new methods of service delivery
Establish a quality/ compliance oversight system	■ Review requirements ■ Hire and train staff (over 5 years) ■ Purchase software system
Increase individualized line of service	■ Hire staff (over 5 years) ■ Increase marketing efforts

[3] This list of strategies is illustrative only. It does not present a complete list of strategies that an organization may need to take in order to accomplish goals.

“No Margin, No Mission”
—Sister Irene Kraus

B. PRIORITIZE

Return on Investment (ROI)

Every organization strives to fulfill its vision and mission. Whether your community-based organization is a 501(c3) non-profit, a quasi-governmental agency, or a regional council of government, in order to fulfill its mission and vision, it will need to operate and make all decisions with sound business practices in mind. In order to continue providing services, your organization must be financially sustainable.

Profit is the financial gain of your business. It is the difference between the amount your organization earns and the amount you spend in buying, operating, or otherwise delivering your services. Even mission-focused, non-profit organizations need to incur a financial gain in order to adequately cover the costs of providing services. This profit will keep your organization afloat and will ideally leave you with a financial cushion that you can use to sustain your organization should something in your business or environment not go as expected.

Return on Investment or (ROI) is a financial metric of profitability that is used to measure the return or gain from an investment. ROI describes the outcome of an investment and can be used to help you make decisions about how and where to expend resources. ROI is calculated as a ratio with the outcome being either a profit or loss. It can help you evaluate the potential return from a stand-alone investment or compare returns from several investments.[4]

ROI = (Gain from Investment - Cost of Investment) / Cost of Investment

To anticipate the impact of a potential strategy on your organization, you will want to look at the ROI it is expected to create. In other words, you will want to evaluate the financial cost and benefit of the initiative — will you make or lose money or is it the best use of resources? Ideally, all initiatives will result in a positive ROI. However, as a mission-based CBO serving people with disabilities, you may find that there are some services or strategies that either break even or result in a loss. Your organization may decide that certain services or initiatives help you further the mission of your organization. In this case, you may knowingly choose to pursue an initiative that incurs a loss. This is a dangerous path and one that you and your Board of Directors should monitor closely to ensure that other lines of business are not only covering the costs of profit-bearing services but also the mission-based services that do not help support the organization financially.

Similarly, you will find that some initiatives cost money, but do not result in any additional revenue for the organization. For example, payer contracts may define expectations, such as accreditation or reporting requirements, that are simply a cost of doing business. In order to retain the business, you

[4] https://www.investopedia.com/articles/basics/10/guide-to-calculating-roi.asp

will need to be prepared to meet those contractual requirements so that you do not lose business or incur sanctions. As you review the ROI of the potential strategies your organization may pursue, ask yourself:

- What is the bottom line?
- How much money does my organization need to make to be sustainable, while fulfilling its mission?
- Which of these strategies will help us achieve that?

The following example will demonstrate how you can compare potential strategies with the ROI that each will have. An understanding of the ROI can help you make decisions about what strategies your organization will pursue.

Example 2: Examples of Return on Investment Calculations

Strategic Goal	Strategy to Accomplish	Cost of Strategy	Estimated Gain (Annual)	Calculation (Gain - Cost) / Cost	Return on Investment
Expand Territory over a five year period	■ Hire staff ■ Rent office space ■ Increase marketing ■ Licensure	■ Staff: $65,000/ year ■ Office space: $5,600/year ■ Marketing: $6,000/year ■ Licensure: $5,000/one time $65,000 + $5,600 + $6,000 = $76,600 $76,600 x 5 = $383,000 $383,000 + $5,000 = $388,000 Net Cost: $388,000	■ $0,000 (year 1) ■ $20,000 (year 2) ■ $50,000 (year 3) ■ $80,000 (year 4) ■ $120,000 (year 5) Net Gain: $270,000	$270,000 - $388,000 = -$118,000 -$118,000/$388,000 = -.30	-30% in total, but profitable by year 4 and generating a positive annual ROI of 4.4% in year 4 and 56.6% in year 5
Increase individualized line of service	■ Hire staff ($325,000 over 5 years) ■ Increase marketing efforts ($10,000/ year)	■ Staff: $65,000/ year (over 5 years = $325,000) ■ Marketing: $10,000/year (over 5 years = $50,000) $325,000 + $50,000 = $375,000 Net Cost: $375,000 over 5 years	$76,000/year	$380,000-$375,000 = $5,000 $5,000/$375,000 = .013	1.3%

Other examples of strategies may include increasing profitability of existing service lines by a certain percentage in the current year. To do this, you may want to reduce the cost of materials or staff, or increase rates. You may seek to diversify payer sources over a certain period of time. To do this, you may need to customize programs, increase marketing efforts or add contracting staff. For relationships with healthcare payers in particular, you may need to enhance your billing system to meet requirements, train staff on clinical issues or new methods of service delivery, obtain additional insurance, and even secure a line of credit to cover reserve needs. You may also need to establish a quality or compliance oversight system which will require the time and expense to review requirements, hire and train staff or purchase a software system. In all of these examples, you will want to estimate the potential cost and the time it will take to see a return on your investment.

Board of Directors

Running a business requires many skill sets. When you establish or update your board of directors, consider all the areas of your business where you need expertise or representation. This may include business leaders, legal counsel, advocates, payers and others.

When investments or projects yield benefits that span multiple years, the concept of net present value (NPV) should be considered. NPV accounts for differences in the value of money over time due to inflation. Accounting for NPV in your calculations will provide you the best estimate of the ROI for longer term investments. Calculations can be complex. It is recommended to consult your finance resource. For most organizations, this will be your accountant. A strategically selected board member who has a background in finance can also be helpful when evaluating longer term projects.

If you are projecting ROI for a new initiative, you will need to fully consider the costs associated with the initiative and have a realistic assumption about the expected profits or losses based on the change. For example, contracts with payers often specify requirements and expectations related to processes or outcomes. If your organization is out of compliance with these expectations, a priority objective for your organization may be to come into compliance with the payer's expectations. Doing so is a cost of doing business as it helps your organization sustain those relationships and not lose a funding source. The ROI in this case is found in the value of the sustained relationship versus the loss of the funding stream. Refer to **Step 3: Stabilize**, for more information on classifying costs and appropriate cost allocations.

Understand your revenue streams relative to your expenses and overall profitability to drive information-based business decisions.

Historical trends on revenue and expenses should be used to help you evaluate whether or not your projections are realistic and attainable. These trends can also be used to help you identify problem areas or opportunities in your business model. A simple method is to record and graph your monthly expenses over a designated time period. For established businesses or lines of service, this time period should be greater than a year so that you can realistically see the full spectrum of trends that you have experienced.

Example 3: Examples of Trend Graphs presents three examples of how you can use trend graphs to better understand what is happening in your business.

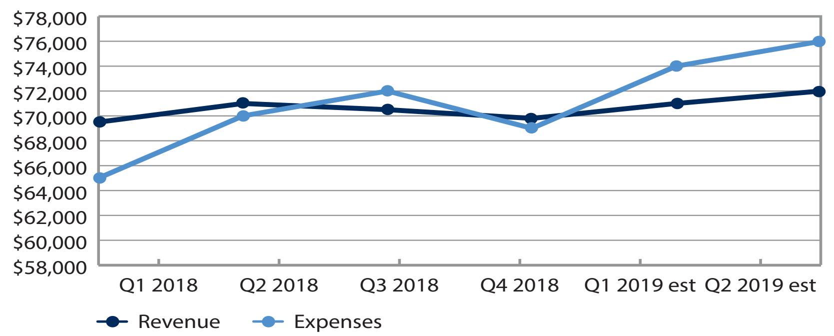
In the "General Revenue and Expense Trend" example, revenue is increasing and was higher than expenses in three of four quarters in 2018. The company also generated a profit of $4,800 in 2018. However, the broader view including projections shows a different picture. The overall trend illustrates a relatively flat revenue line with a much steeper expense trend. This picture indicates a problem with the business model that requires immediate attention. The expense trend is clearly increasing at a much faster rate than revenue and must be addressed.

In the "Projections to Expand Territory" example, revenue is increasing dramatically while expenses are flat. A quick look at the math shows that this project is projected to lose approximately $118,000 over the initial five years. The graph shows the story a little differently. The project losses decrease in each of the first three years and begin generating positive margins in year four. While the total margin gains do not exceed expenses during the first five years, they clearly trend in a positive direction and will yield positive ROI beginning in year four. This early investment and associated losses will establish additional positive ROI in future years and will diversify the revenue stream.

Example 3: Examples of Trend Graphs

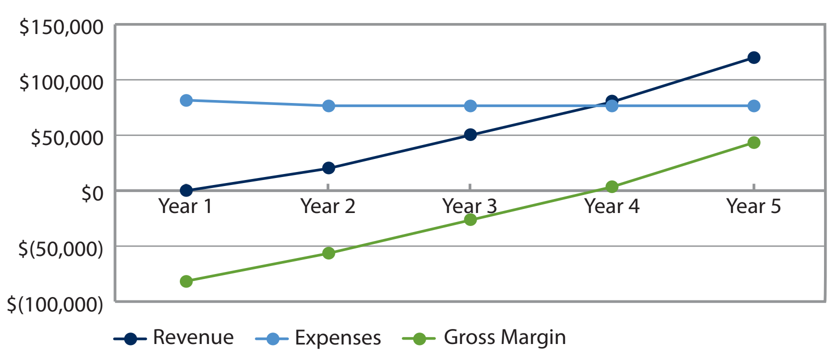
1. General Revenue and Expense Trend

	Revenue	Expenses	Margin
Q1 2018	$69,500	$65,000	$4,500
Q2 2018	$71,000	$70,000	$1,000
Q3 2018	$70,500	$72,000	$(1,500)
Q4 2018	$69,800	$69,000	$800
Q1 2019 est	$71,000	$74,000	$(3,000)
Q2 2019 est	$72,000	$76,000	$(4,000)



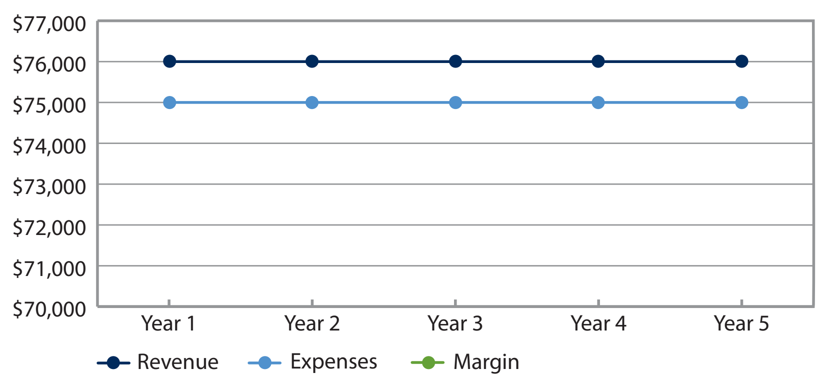
2. Projections to Expand Territory

	Revenue	Expenses	Margin
Year 1	$0	$81,600	$(81,600)
Year 2	$20,000	$76,600	$(56,600)
Year 3	$50,000	$76,600	$(26,600)
Year 4	$80,000	$76,600	$3,400
Year 5	$120,000	$76,600	$43,400



Example 3: Examples of Trend Graphs

3. Projections to Increase Line of Service			
	Revenue	**Expenses**	**Margin**
Year 1	$76,000	$75,000	$1,000
Year 2	$76,000	$75,000	$1,000
Year 3	$76,000	$75,000	$1,000
Year 4	$76,000	$75,000	$1,000
Year 5	$76,000	$75,000	$1,000



In the "Increase Line of Service" example, the organization has chosen to invest in a new line of service. Although the ROI is positive from year one, the answer is not that simple. The investment is significant and should be evaluated against other potential opportunities.

ROI calculators are available on-line. For example, the Commonwealth Fund developed a ROI Calculator for Partnerships to Address the Social Determinants of Health[5]. This calculator is available for use by CBOs and their medical partners as a means to create mutually advantageous financial arrangements for the provision of social services to high-need, high-cost populations including older adults and people with disabilities.

RISK

Another way to prioritize is to look at the areas where your organization is most at risk. One common risk area is reliance on a single payer. Many CBOs rely on Medicaid as the payer for its services. When changes result in new management of those funds (e.g. Managed Long-Term Services and Supports (MLTSS)), then CBOs need to prioritize building relationships with the Managed Care Organizations (MCOs) responsible for the delivery of those services. Other potential payers include the Veterans Administration (VA), private pay and correctional facilities (e.g. behavioral support or to assist with re-entry services). An assortment of payers and the right mix of services is an important factor to overall sustainability, profitability and business growth.

Analyzing a service mix involves assessing the ROI that each service adds to the CBO. For example, some services, such as counseling, housing assistance, independent living skills training, or employment supports may provide the most overall revenue for an organization; whereas other services offer specialized functions that improve the visibility of your organization with a payer. For instance, maybe your organization is able to meet a specific need that no one else can provide. By meeting this need at a break-even or lower profit point, your organization may become the preferred provider for that

[5] Commonwealth Fund ROI Calculator for Partnerships to Address the Social Determinants of Health http://tools.commonwealthfund.org/ROI-calculator?_ga=2.156587516.617323801.1531487588-1520909599.1527192612

payer. Individual services may be unprofitable or have limited profitability in the short-term, but ultimately will benefit business growth or sustainability of other services. Evaluate and monitor these circumstances closely so that they help and do not hinder your organization.

Table 2: Service Portfolio can help you obtain a better understanding of how each service contributes to the sustainability of your organization.

Table 2: Service Portfolio

Question	Yes	No
Do your services generate more revenue than your incurred expenses?	Consider diversifying services and payers and rank services by level of profitability.	Evaluate if fixed or variable costs are contributing to the problem and reduce costs as appropriate.
Does revenue from one service cover the expenses of another service?	This may present additional financial risk to the organization. Evaluate if fixed or variable costs are driving the loss or otherwise contributing to the problem. Reduce costs as appropriate.	This may indicate a balanced approach to sustainable growth.
Does the relationship between revenue and expenses align with the CBO's mission and vision?	This may indicate a balanced approach to sustainable growth.	Consider examining your service offering and ranking services by level of profitability as well as linking it to the CBO's mission and vision.
Does one line of service complement another, which in turn brings more revenue into the business than offering the service by itself?	This may indicate a balanced approach to sustainable growth.	Consider diversifying services and payers to complement one another.

Finally, stakeholder and champion feedback can help you prioritize your efforts. For example, you may receive feedback from consumers about the quality of services they receive. You may find that in order to address the quality of services provided, it may be necessary to hire providers with greater experience and training to stay competitive thereby triggering an evaluation of your pricing model.

Now that you have information regarding the ROI for an initiative, compare that financial impact with any areas of risk or mission-based services that you may be considering.

Organize your results with these considerations in mind:

- **Risk:** not doing something will cause the loss of business or incur sanctions.
- **Financial Reward:** doing something will result in additional funds.
- **Mission:** doing or not doing something will further the organization's mission.

Example 4: Example of a Priority Comparison Table

Strategic Goal	Strategy to Accomplish[6]	Cost of Strategy	Return on Investment	Risk	Mission
Expand Territory over a 5 year period	■ Hire staff ■ Rent office space ■ Increase marketing ■ Licensure	Net Cost: $388,000	-30% in total, but profitable by year 4 and generating a positive annual ROI of 4.4% in year 4 and 56.6% in year 5	-	-
Increase individualized line of service	■ Hire staff ($325,000 over 5 years) ■ Increase marketing efforts ($10,000/year)	Net Cost: $375,000 over 5 years	1.3%	-	X
Increase Profitability of Service Lines by 5% in current year	■ Reduce staff expenses ■ Reduce cost of materials ■ Increase rates	$40,000.00	12.5%	-	-
Diversify Payer Sources over a 3 year period	■ Customize programs ■ Increase marketing ■ Increase contracting staff (3 year contract)	$195,000	2.5%	X	-
Develop contract with a healthcare payer	■ Enhance billing system to meet requirements ■ Secure line of credit to cover reserve needs ■ Train staff on clinical issues and new methods of service delivery	$200,000	-40% However, all of the costs are up front and will diversify revenue stream and generate positive annual ROI	-	-
Establish a quality/ compliance oversight system	■ Review requirements ■ Hire and train staff (over 5 years) ■ Purchase software system	Net Cost: $495,000 Over 5 years	Cost of doing business	X	-

Next, rank the initiatives that will most greatly benefit your organization. You may identify a number of potential goals for your organization through this exercise. Goals will vary for each organization and even possibly in service areas within your own organization. Realistically, most organizations will not be able to address all issues at the same time. For example, based on your analysis, you may find that you need to diversify your payer portfolio — consolidate services or create a partnership with another CBO or update systems within your organization in order to stay compliant with current expectations. Some organizations may be able to address all of these at the same time — others may not. To achieve success, you will want to strike the balance between maximizing all opportunities while not overestimating or overextending your capabilities.

[6] This list of strategies is illustrative only. It does not present a complete list of strategies that an organization may need to take in order to accomplish their goals.

Priority Matrix

A priority matrix is an analysis and decision-making tool used in project management, business analysis, and business process improvement systems. A priority matrix allows your organization to evaluate potential goals and strategies based on what is most important to your organization.

The use of a priority matrix provides a structure for all those involved in your strategic planning process to discuss competing priorities openly. Together, you can achieve consensus on the priorities that are most important to the organization and avoid potential confusion and hidden barriers as a result. Use these tools when it is necessary to evaluate several criteria against proposed goals and strategies.

A priority matrix can take on many forms, depending on the needs of the user. To design a simple matrix, determine the criteria (priorities) important to your business and compare them to the list of goals or strategies that your team is trying to narrow down to. Example 5: Example of a Priority Matrix is an example of a matrix that could be useful to a CBO when trying to determine which strategies are most important to the organization and should be included in the strategic plan.

To use the tool, identify your key criteria, answer whether or not your potential strategy meets that criteria and then total the positive responses at the end. The strategy with the greatest number of positive responses indicates one that will most likely be important and impactful to your organization.

Example 5: Example of a Priority Matrix

Proposed Goal/ Strategy	Key Criteria[7]						Total
	Large # of People Impacted	Federal or State Compliance	Positive ROI	Expanding Trend	Actionable and Feasible to Implement	Reasonable Time/ Reasonable Resources Required	
Expand congregate services	Yes	Yes	No	No	Yes	No/Yes	4
Contract with a MLTSS plan	Yes	Yes	Yes	Yes	Yes	No/Yes	6
Establish customized line of service	No	No	Yes	Yes	Yes	Yes/Yes	5

[7] Criteria identified is for example purposes only. Your organization will identify the appropriate criteria based on the goals of your program.

Organizational Growth Stages

To complicate matters, you may find that your CBO will fluctuate through various stages of growth as you navigate change. Another way to prioritize is to select your objectives based on the stage of organizational development you are in.

Stage 1: Survival — If your organization is in this stage, you may be having difficulty paying bills on time or maintaining clients. As such, your organizational priorities are likely to include: getting clients, generating revenue, and adding value.

Stage 2: Maintenance and Improvement — At this stage, organizations will attempt to preserve certain survival techniques, while refining their efficiency and creating processes to prepare for growth. For example, your organization may need to refine its policies and procedures to improve its efficiency.

Stage 3: Growth — New opportunities may put your organization into a state of growth. "Growth is generally limited by a very small set of factors at any given time such as people, money, operations, or strategy.[8]

Stage 4: Sustainability — Sustainability requires that an organization focus on external and internal factors. Organizations must balance their time and effort on both business development and operations. You may need to update internal systems to meet reporting requirements, prioritize relationship development, data collection, and services development. While it may be important to grow the organization, it is important for organizational management to provide resources and incentives to staff members in order to retain quality employees. There must be a solid infrastructure within the organization to handle the growth that is achieved.

Whether we like it or not, the business environment is constantly changing. To be successful, never put pride over practicality. If your organization or services are no longer relevant or simply need to change, focus your efforts in a way that will help you develop your business so that it can respond to the challenges ahead of you.

To find the right balance, work with your team of champions — including key staff, Board of Directors, and others to review the potential priorities based on your organization's mission and vision, ROI, risk, and stage of organizational growth. By the nature of prioritization, resources will need to be allocated to activities that will result in a more significant impact, resulting in some items or objectives being eliminated from the initial draft of your strategic plan.

With your objectives and priorities in hand, you are now in a position to develop your strategic plan.

[8] Adapted from: https://www.forbes.com/sites/chriscancialosi/2016/03/07/what-are-the-greatest-priorities-for-rapidly-growing-companies/2/#19fcbac93cc8

C. ORGANIZE

The best way to achieve results is to have a well-designed plan. In business, there are a variety of plans that will be used to help you organize, execute, and track the success of your efforts. A strategic plan will help you document your long-term strategies and an operational plan will help you implement and monitor your efforts on an annual basis. Each of these documents will help your CBO define and communicate the work that you will do. Let us take a look at the purpose of each:

- **Strategic Plan:** A strategic plan is a long-term (5+ years) plan with an inclusive and broad-reaching approach that utilizes information and data from multiple sources. A strategic plan is intended to close a gap for organizational success in the future.
- **Operational Plan:** An operational plan is a short-term plan that focuses on the achievable activities that can be completed within a relatively short time (usually 1 year). The operational plan is a project management document that you can use to examine the daily operations of the organization to ensure that you are on track to reach your goals.

A combination of the strategic and operational plans will provide the structure you need to lead and monitor your organization. Figure 2: Integration of the Strategic and Operational Plans provides an overview of how the use of the two plans work together.

One way to sort out the details of the strategy is to use a driver diagram (Figure 3: Driver Diagram). A driver diagram is a visual display of a theory of what "drives," or contributes to, the achievement of the project's goal. If your goal is not yet measurable, this is the time to define the details of what you want to achieve. A measurable goal is one that is SMART. SMART stands for Specific, Measurable, Attainable or Actionable, Realistic and Time-Bound. For example, your overarching goal may be 'to improve the health and social outcomes for the people you serve'. In this case, you may have several smaller goals to help you achieve your overarching goal, with one being to 'improve access to behavioral health services by twenty percent in the next calendar year." A driver diagram can be used to describe the elements that need to be in place to achieve the SMART goal. Ultimately, this clear assessment of what is impacting your goals can lead you to the methods you will use to impact change and attain your overarching goal.

A driver diagram shows the relationship between the overall goals of the project and the primary and secondary drivers that impact the successful implementation of that goal. It progressively identifies the specific factors that impact the work that needs to be done in order for you to achieve the SMART goal. Primary drivers are the factors that contribute directly to achieving the goal. Secondary drivers include the lower-level components or factors that impact the primary drivers to which you can identify the specific actions and interventions that will be used to impact change. The specific ideas to test or change are the immediate things or 'low hanging fruit' you can address to help move your work forward and impact all of the drivers/goals.

Figure 2: Integration of the Strategic and Operational Plans

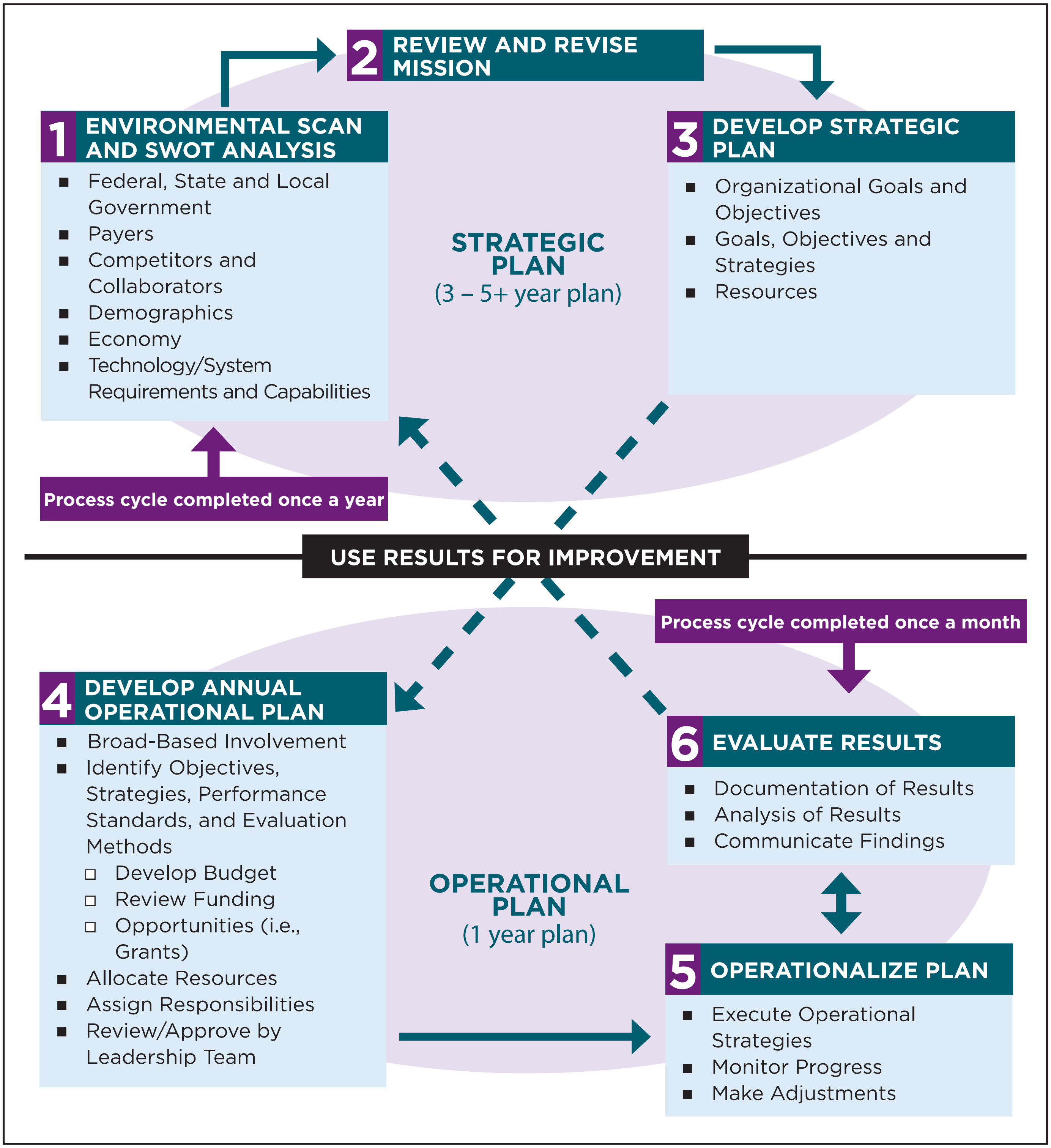
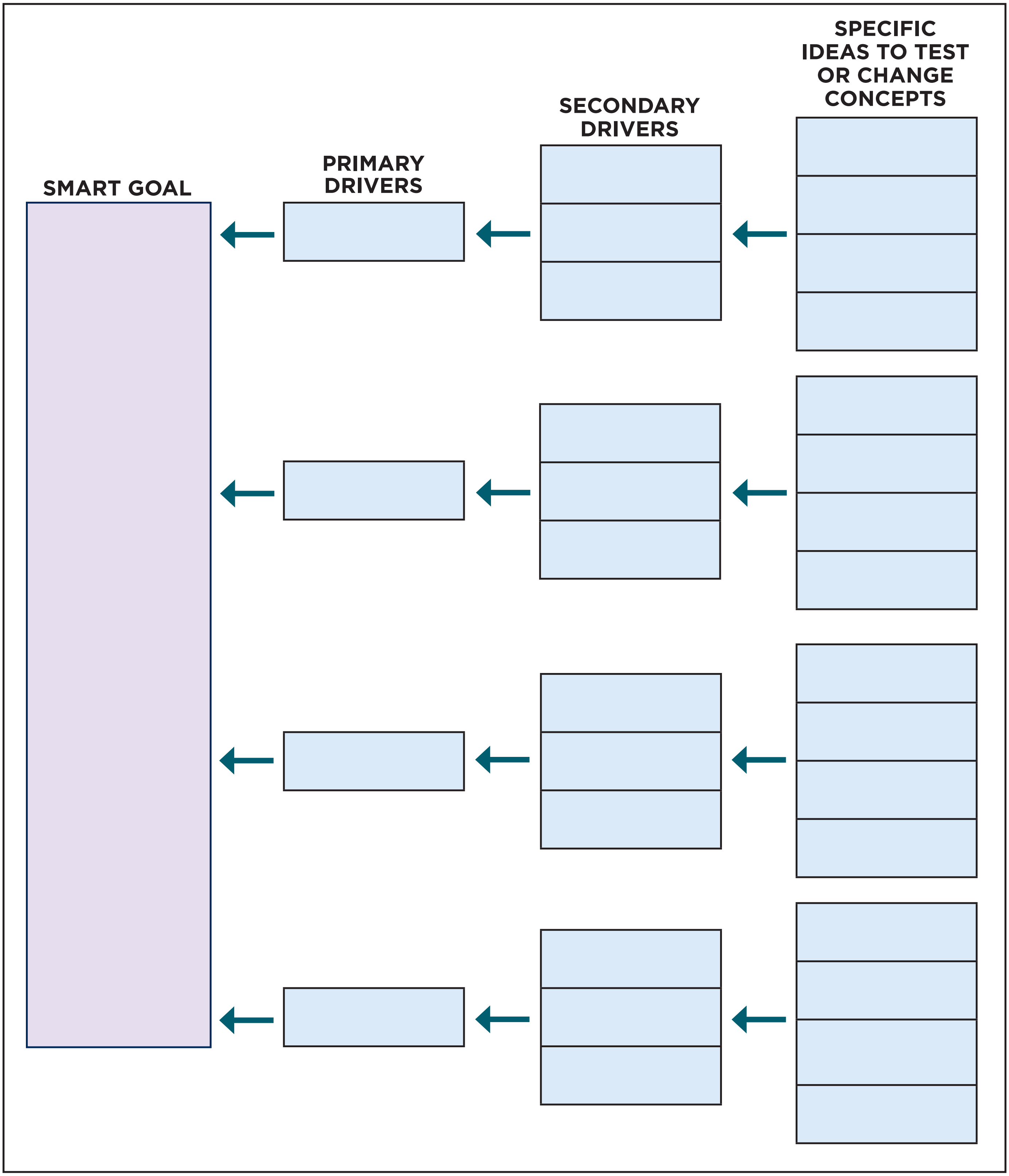
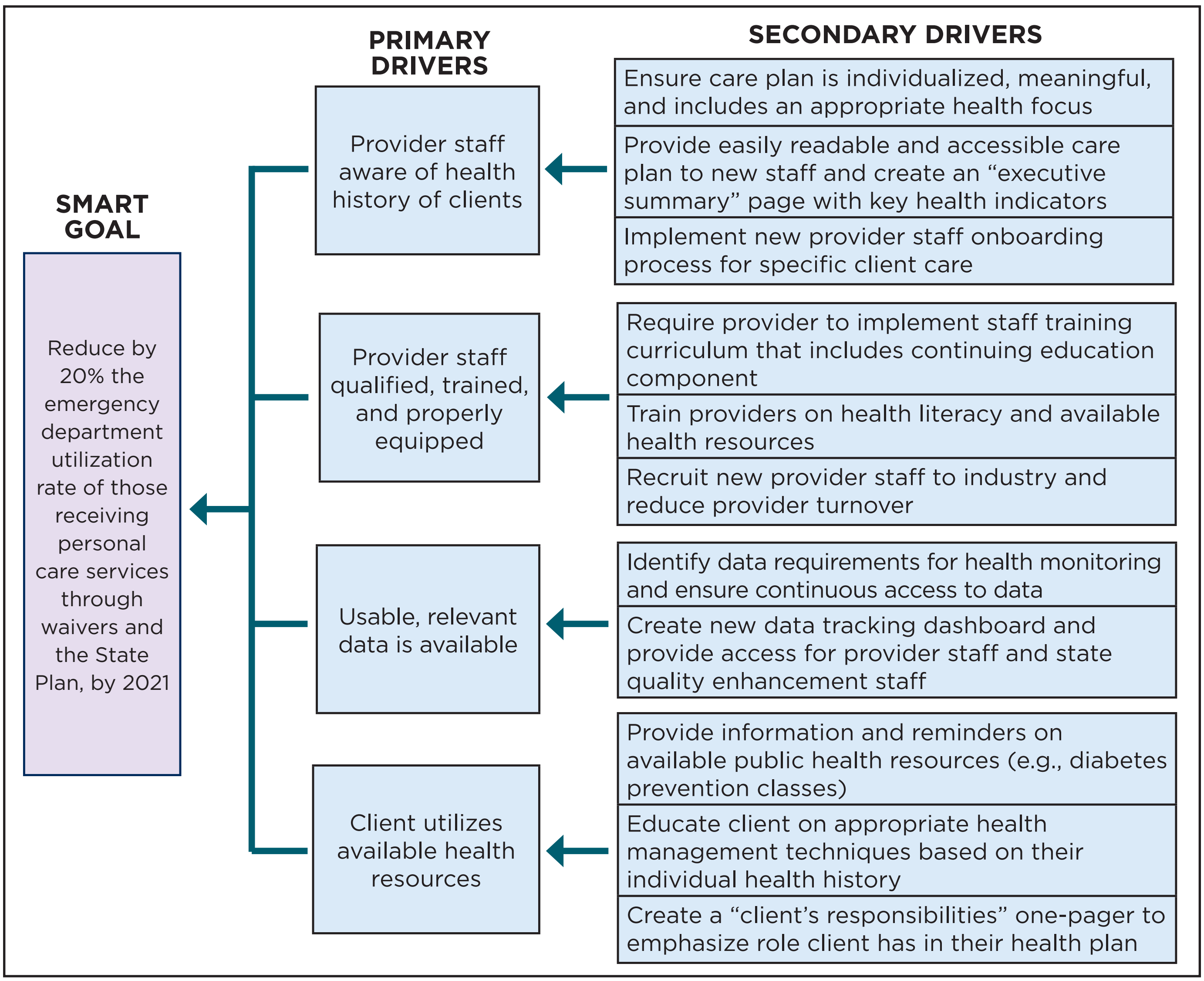


Figure 3: Driver Diagram



For example, the state of Missouri identified a need to reduce the use of emergency departments by those receiving personal care services through the waiver system and the state plan by twenty percent over a five year period. They identified that in order to do this, provider staff needed to be aware of the health history of clients and that the staff needed to be qualified, trained, and properly equipped. They also identified that data needed to be usable, relevant, and available and finally that the clients needed to use the available resources. From here, they identified a number of secondary drivers including a need to have a care plan that is individualized, meaningful, and includes an appropriate health focus; that providers need to be trained on health literacy and available health resources; that the state needed to identify data requirements for health monitoring and ensure continuous access to data and that clients needed to be educated on appropriate health management techniques based on their individual health histories.

Example 6: Example of a Driver Diagram to Reduce Emergency Department Utilization amongst those Receiving Personal Care Services



Again, to best use a driver diagram, begin with a strong SMART goal. A SMART goal begins with a vision that resonates and is meaningful. It should inspire people to do the work and generate stakeholder/champion buy-in. Finally, it should be ambitious and not something that has already been accomplished. To begin, draft your SMART goal, but then take the time to react to it and refine it as necessary. Think through how you can improve your goal. Is it the right one for your organization? In Example 6: Example of a Driver Diagram to Reduce Emergency Department Utilization amongst those Receiving Personal Care services, Missouri evaluated their goal: 'Reduce by twenty percent the emergency department utilization rate of those receiving personal care services through waivers and the State Plan by 2021', by breaking down the SMART goal and discussing a number of questions:

Questions used to evaluate the draft SMART goal:

- Is the goal ambitious?
- Is the focus in the right area? Or should it be more specific or defined, such as to:
    - Focus on avoidable ER visits?
    - Focus on reducing/controlling avoidable acute events that lead to ER visits?
- Is this the right population to be focused on? Can it be narrowed to a geographic region or subpopulation?

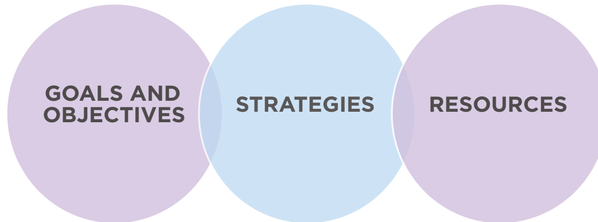
The more clear you are with what you want to accomplish, the more prepared you will be to achieve your objectives.

Strategic Plan

Where do you see your organization in five years? What do you need to do to achieve that? The high-level details of this effort are what you will outline in your strategic plan. It will be where you document the goals and objectives of the priorities you identified from the results of your environmental scan and SWOT analysis along with a high-level description of how those goals and objectives will be achieved. You will later break these into smaller, short-term goals via the operational plan. The following elements will be used to construct your strategic plan.

- Organizational goals and objectives — the attainable, organizational aspirations.
- Strategies — how you will achieve your goals.
- Resources — the people who will be held accountable for managing the implementation of the strategic goal.

Figure 4: Elements of a Strategic Plan



As you develop your strategic plan, be cognizant of maintaining your organizational mission. Maintaining your mission takes strategic discipline. Management and board members will need to meet regularly to assess whether completed work and proposed projects align with the organizational mission. Further, it is important for those responsible for the management of your organization to develop measurable benchmarks that have the flexibility to be revised or rejected based on knowledge ascertained during on-going environmental scans and SWOT analyses. Measurable benchmarks that CBOs may outline within strategic plans include: customer outcomes achieved; customer growth and retention; staff retention; contract compliance; revenue; operating productivity; overhead costs; and monthly profit or loss.

Example 7: Example of a Strategic Plan Template

Mission Statement		
To support and provide advocacy for community-based organizations to ensure the availability of programs, services and reimbursement systems that allows them to fulfill their individual missions.		
Focus Areas and Goals		
Workforce Sustainability	**Quality, Accountable and Sustainable System Reform**	**Efficiencies and Simplification**
1. Work with system partners to develop a reimbursement system that encourages growth in direct support professionals (DSPs), with the goal for the average DSP wage to be 200 percent of the federal poverty level. 2. Collaborate with system partners to develop an effective on-boarding process that effectively prepares new workers for their roles. 3. Work with system partners to review and advocate for changes to regulations that impact the experience of work and the ability of DSPs to impact the lives of people with disabilities.	1. Work with system partners to develop recommendations for value-based reimbursement systems, including identification of outcomes for measurement and a rate structure that allows successful achievement of those outcomes. 2. Work with system partners to create a system that supports community integration in all areas, including day services, community employment and choice of residence. 3. Work with system partners, specifically health partners to improve the health of people with disabilities.	1. Work with system partners to identify and advocate for changes to regulations and practices that do not improve consumer lives or impedes operational efficiency or effectiveness. 2. Work with system partners to develop and implement simple reimbursement systems. 3. Work with system partners to simplify and implement uniform state reviews of providers, including national accreditation and deeming for licensure and county board accreditation.

The next step is to dive deeper into the details through the development of an operational plan. The operational plan is a project management tool that will be used on a regular basis to monitor your performance. Operational plans use the goals of the strategic plan to identify short-term goals that will be implemented and monitored. These plans determine who will implement the actions taken to achieve the aims of the strategic plan.[9]

Operational Plan

The operational plan provides an organizational roadmap to how your organization will achieve its goals in the current year. It helps those responsible for the work to monitor their progress. It incorporates the following elements:

Part 1: Business Description and Strategies (narrative that precedes the project plan)

- Executive Summary
  Summarizes the important aspects of your organizational mission, values, and strategic plan. This should provide an overview of your objectives in a concise way.
- Business description
  Consists of the organizational vision and mission, as well as a description of the business model of the organization.
- Market analysis
  Summarizes the findings from your environmental scan and SWOT analysis.
- Strategies
  Outlines the strategies for sales and delivering services.
- Responsibilities of accountable person(s)/department(s)
  Highlights the accountable person(s)/department(s) for managing the identified strategies.
- Budget allocation for goals
  Determines the necessary funding and resources that will be delegated for each target/goal.
- Financial projections
  Assesses the ROI of your business and will be used to communicate projected finances.

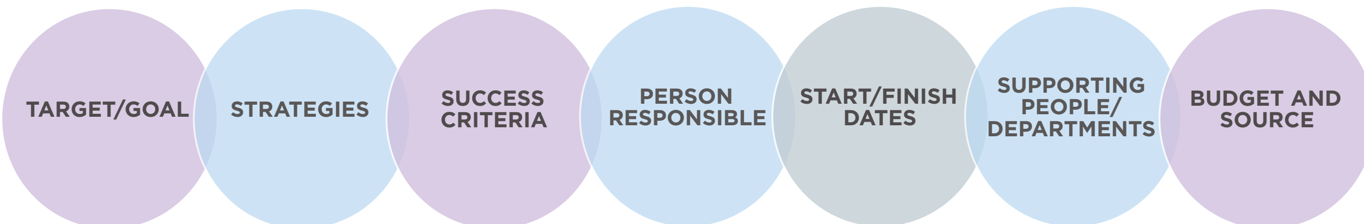
Part 2: Project Management Tool (drives the work and monitors progress)

- Target/Goal of each specific initiative
  Identifies the components needed to accomplish the goals of the strategic plan. These components become the targets/goals of the operational plan.
- Strategies
  Determines the best (most efficient and effective) strategies for accomplishing the goals of the plan.
- Criteria for success
  Establishes criteria/measures for determining the success of each strategy.

[9] https://articles.bplans.com/business-plans-vs-strategic-plans-whats-the-difference/

- Responsibilities of accountable person(s)/department(s)
  Educates and delegates the accountable person(s)/department(s) for managing the strategies associated with the operational plan.
- Start/Finish dates
  Identifies start and finish dates for each strategy.
- Supporting people and departments
  Reinforces communication between accountable person(s)/department(s) and managing members to remain on track.
- Budget allocation for goals
  Identifies the necessary funding and resources that will be delegated for the target/goal.

Figure 5: Elements of an Operational Plan Project Management Tool



Example 8: Example of an Operational Plan

Target/ Goal	Strategies	Success Criteria	Person(s) Responsible	Start Date	Finish Date	Supporting People and Departments	Budget & Source
1) Increase Workforce Wages	Aggressively pursue maximum possible provider reimbursement.	Increasing average DSP wage by 200% of the federal poverty level.	Chief Executive Director (CEO) and Chief Financial Officer (CFO)	March 1, 2019	August 1, 2022	CEO will provide the overarching guidance. CFO will provide analysis of finances and provider reimbursement.	N/A
2) Reinvesting Money into Workforce Issues	Collaborate with system partners to reinvest in wages, trainings, supervision, and other related workforce issues.	System partners commit money to universal design principles and assistive technology resources.	Board of Directors and CEO	March 1, 2019	August 1, 2021	Board members will reach out to determine potential system partners. CEO will address and monitor implementation within own organization.	Assistive Technology Grant ($3,400)
3) Directly Support Professionals and People Who Have IDD	A) Provide immediate trainings to current employees. B) Determine and offer incentives for employment. C) Advocate and eliminate negative barriers for people who have IDD.	Increased staff retention and employee satisfaction.	CEO and Chief Operating Officer (COO)	March 1, 2019	June 1, 2019	CEO and COO will review and update current policies to reflect the feedback from staff. CEO will advocate against legislative barriers.	Professional Development Grant ($4,000)

D. MANAGE

Now that you have the tools in place, you will want to monitor the work to ensure that you meet your goals. **Step 5: Monitor, Evaluate, and Respond** focuses on the things you will want to monitor to ensure that your plans stay on track. You will want to be nimble in your ability to adjust if strategies do not result in the outcomes you anticipated. The leadership vision, strategies, and overall coordination require a structure to ensure that the change you desire is implemented timely and effectively. Employing the disciplined practice of project management whenever possible can help your organization implement a structured change. Project management entails addressing all aspects of a change process from beginning to end, including an approach to planning, executing, and controlling activities associated with the change.

Management Tools

Navigating organizational change can be difficult, especially for mission-driven CBOs that are trying to adapt their business model to new business endeavors or the demands of a changing business environment. The use of management tools and techniques can help you identify and work through organizational change in a way that aligns your organization's mission with its future direction. This section reviews some of the most commonly used management tools and techniques available to support your organization. These tools and techniques each serve a specific purpose. For example, some tools help to evaluate the need for a change whereas others will help to implement the change. Some tools are designed for larger-scale initiatives, whereas others are more appropriate for smaller-scale adjustments. You may find the need to use different tools over time as objectives and goals change.

When considering a tool or tools, note that almost all speak to a clear vision of how and why the change needs to occur. Throughout the research, it is clear that these tools and techniques are only as good as the commitment to launch and sustain the organizational change initiative.

Choose a technique that is most in line with the organizational change you are working on, spend some time familiarizing staff, board etc., with the model, and apply it consistently throughout the change process, even if things get tough. Take time to pause and have discussions about challenging experiences or roadblocks before proceeding. Discuss challenges and obstacles with your team as they arise to help everyone stay on the same page. In many circumstances, this can help enhance morale during change.

Table 3: Project Management Tools

Tool/Technique	Considerations	Description
Lewin's Change Management Model[10]	Useful when trying to minimize the disruption of business operations.	This three-step model (unfreeze-change-freeze) provides guidance on how to go about helping people change. 1) The "unfreezing" is designed to get people to gain perspective about the activities they perform regularly. Looking at and considering bad habits can open up opportunities for new approaches. 2) Change can start once people have considered opportunities by unfreezing. The "change" phase takes time as the organization implements and responds to the new activities. 3) Making the change permanent occurs in the "freeze" step. Once re-freezing takes place, people can take advantage of the new activity that is the result of the change.
Kotter's 8 Steps[11]	Best used for large scale change management activities.	The eight steps include: 1) Creating a sense of urgency that is aspirational and helps people see the need to act quickly. 2) Building a coalition of volunteers from the organizational ranks to guide, coordinate and communicate the activities being undertaken. 3) Forming a strategic vision and initiatives that help people see the difference from the past and how the effort links to the vision. 4) Enlisting a volunteer army that is designed to drive the change. 5) Enabling action by removing barriers such as inefficient processes or silos. 6) Generating short-term wins that can be collected and communicated. 7) Sustaining acceleration by using successors as a catalyst to keep moving, and 8) Instituting change by reinforcing new behavior and linking it to organizational success.
McKinsey 7s Model[12]	Valuable when organizational re-design is being considered.	This tool analyzes an organization's design by reviewing seven key internal elements: 1) strategy 2) structure 3) systems 4) shared values 5) style 6) staff, and 7) skills. Looking at these elements helps management identify if the elements are effectively aligned towards helping the organization achieve its objectives.

10 http://journals.sagepub.com/doi/pdf/10.1177/0018726715577707
11 https://www.kotterinc.com/8-steps-process-for-leading-change/
12 https://www.mckinsey.com/business-functions/strategy-and-corporate-finance/our-insights/enduring-ideas-the-7-s-framework

Communicate Change

When your organization undertakes a major change or initiative, it can be helpful to develop a communications plan to help you communicate the change appropriately. Often times the most important group to convince that change is important, is your organizations staff. A communications plan will help your staff understand what and why something is happening. In addition, it will prepare them to share the information with others. As a leader of the organization, you want to control the message about your company's strategic direction and any resulting change. When you provide your team with the right information and resources, you empower and enable them to accurately describe and support the change your organization goes through. Support from your team will help to build momentum for support from the rest of your organization's stakeholders.

In your communications plan, you will want the information coming from the organization to be clear, consistent, and answer all questions. You will want to ensure that you cover the important points of the change and communicate the information to the right people. Written documents may include concise measurables, pictures or graphics that are appealing to the eye, and a summary that can introduce people to the reason for the change along with high-level details of the change.

Consider the following when developing a communications plan for your change initiative.

Communications Plan Checklist

- Determine the audiences that need to be reached to implement a successful plan. What do you need from different groups? The purpose of an audience may be to understand or implement the change, or to gain buy-in. Know what you need from different groups in order to tailor your message effectively.
- Consider order of communication. For example, the board may need to be informed first, followed by staff and others.
- Communicate at key times such as around planning, decision-making, and implementing.
- Utilize your champions (**Step 1: Prepare**) in the communications plan. Endorsement from a trusted and respected leader or peer will be the most cost-effective and perceptively reliable form of advertisement for your organization.
- Make sure the message is clear and effectively lays out your goals. For instance, verify that the goals are properly understood by staff and champions. Staff throughout the organization need to know what is happening and how they can help.
- Ensure accessibility of the material.
- Get the plan approved by your leadership, boards and advisory committees. Their support will be critical. Do this at regular intervals or benchmarks — not just at the end.

- Establish milestones for consistent messaging. For instance, set benchmarks for implementing the communications plan and set up regularly scheduled meetings or calls to provide updates and take questions from staff.
- Identify other avenues to receive feedback. In addition to the typical avenues such as meetings and emails, consider setting up an anonymous survey for your staff or community partners to identify questions that need to be answered. Surveys can be an effective tool to obtain honest and anonymous feedback, but requires additional considerations:[13]
  - **Size of survey participants** — If there are hundreds of employees, it may be difficult to bring everyone together to ask open-ended questions and then analyze the responses.
  - **How your organization wants to interpret the data** — Quantitative analyses (such as scales) may be easier and less time-consuming to measure, but qualitative analyses will likely provide insight that is unable to be reproduced in quantitative analyses.
  - **Length of survey** — Only include questions that you really want the answer to. Unnecessarily long surveys may be a deterrent to respondents.
  - **Location of participants** — Transportation and proximity to the organizational site may create problems for in-person meetings. It can become even more complex when dealing with time zone differences for participants. Surveys may be beneficial in this circumstance.
  - **Times that participants are available** — Some participants (e.g., stakeholders and champions) are likely to have different time availability than others (e.g., employees). As such, your organization will need to determine the best time that most of the targeted participants are available and conduct your survey during that time. This factor is a bigger consideration for conducting organic, small discussions rather than online surveys.
  - **Participant's access and ability to use technology** — Online survey platforms provide a sense of anonymity for participants. This anonymity may create responses that are more honest than open-discussion for customers and staff. Unfortunately, this method of collection is dependent upon participants having access to internet, the accessibility of the survey platform and participants knowing how to properly fill out the information. Similarly, an organization may provide a suggestion box, but that may not be as anonymous because staff members usually can see who places comments into the box.
  - **Focus groups of different types of stakeholders** — Focus groups can provide a live and multifaceted reaction to a communication or marketing plan.

A simple tracking tool can help you manage your communication strategy. Identify your key stakeholder groups and what type of information each needs. Example 9: Example of a Communication Plan Tracking Tool is one way that you can track this information.

[13] https://www.pcmag.com/article2/0,2817,2494737,00.asp

Example 9: Example of a Communication Plan Tracking Tool

STAKEHOLDER GROUPS	Draft Strategic Plan	Final Strategic Plan	Detail of Specific Initiatives	Impact/ Outcomes
Internal				
Board of Directors	X	X	-	X
Administration	X	X	-	X
Directors	X	X	-	X
Managers	-	X	X	X
Front-line Staff	-	X	X	X
External				
Payers	-	-	X	X
Regulatory Agencies	-	X	X	X
Clients/Families	-	-	X	X
Collaborators	-	-	-	X
General Public	-	-	-	X

CONCLUSION

To analyze data, prioritize objectives, develop plans, and communicate changes, an organization must expend a significant amount of time and effort. However, when done well, the process to fully understand what your data means and how you can use it to manage your organization can help you not only sustain, but build your organization. By the end of this effort, you will have:

- A current, relevant and important mission and vision;
- Data and a customer-informed strategic plan that aligns with the mission and vision;
- An operational plan that aligns with the strategic plan;
    - Data collection and analysis systems to stay the course; and
    - Effective communication strategies to keep staff, stakeholders and champions informed.

RESOURCES

The HCBS Clearinghouse (hcbs.org) contains resources about the development of business relationships between community-based organizations that serve persons with disabilities and health plans and other integrated health services. To explore more resources related to business acumen for disability organizations, visit www.hcbs.org and conduct a keyword search for the topic you are interested in or use the general term “business acumen” to see all related topics.

APPENDIX

The following templates can help you and your team document your findings and ideas as you develop your organization's strategic plan:

- Realizing your Vision
- Potential Strategic Priorities
- ROI Calculations
- Priority Comparison Table
- Priority Matrix
- Driver Diagram
- Strategic Plan Template
- Operational Plan Template
- Communication Plan Tracking Tool

Business Acumen for Disabilities Grant

The Business Acumen for Disabilities Grant is provided by the Administration for Community (ACL) to ADvancing States in collaboration with national partners.[14] The HCBS Business Acumen Center is dedicated to providing resources to sustain disability organizations. To learn more, visit hcbsbusinessacumen.org

14 Grant Partners include: ADvancing States, American Association on Health and Disability (AAHD), American Network of Community Options and Resources (ANCOR), MERCER Health & Benefits, National Association of State Directors of Developmental Disabilities Services (NASDDDS), National Council on Independent Living (NCIL), National Disability Rights Network (NDRN), Sage Squirrel Consulting, and the University of Minnesota — Institute of Community Integration

Realizing your Vision

	Vision for your Organization	How do the results of your SWOT analysis impact that vision?			
		Strengths	Weaknesses	Opportunities	Threats
Financial success					
Product or service quality					
Contribution to the community					
Most important product lines or services					
Products or services refused to offer					
Right size for the organization					
Customers experience					
What makes the experience unique					
Who our customers are					
How we will find our customers					
Three noteworthy things customers say about our business					
How the community views our business					
What payers say about our business					
What industry experts say about our business					

Potential Strategic Priorities

Strategic Goal	Potential Strategy to Accomplish

ROI Calculations

Strategic Goal	Strategy to Accomplish	Cost of Strategy	Estimated Gain (Annual)	Calculation (Gain - Cost) / Cost	Return on Investment

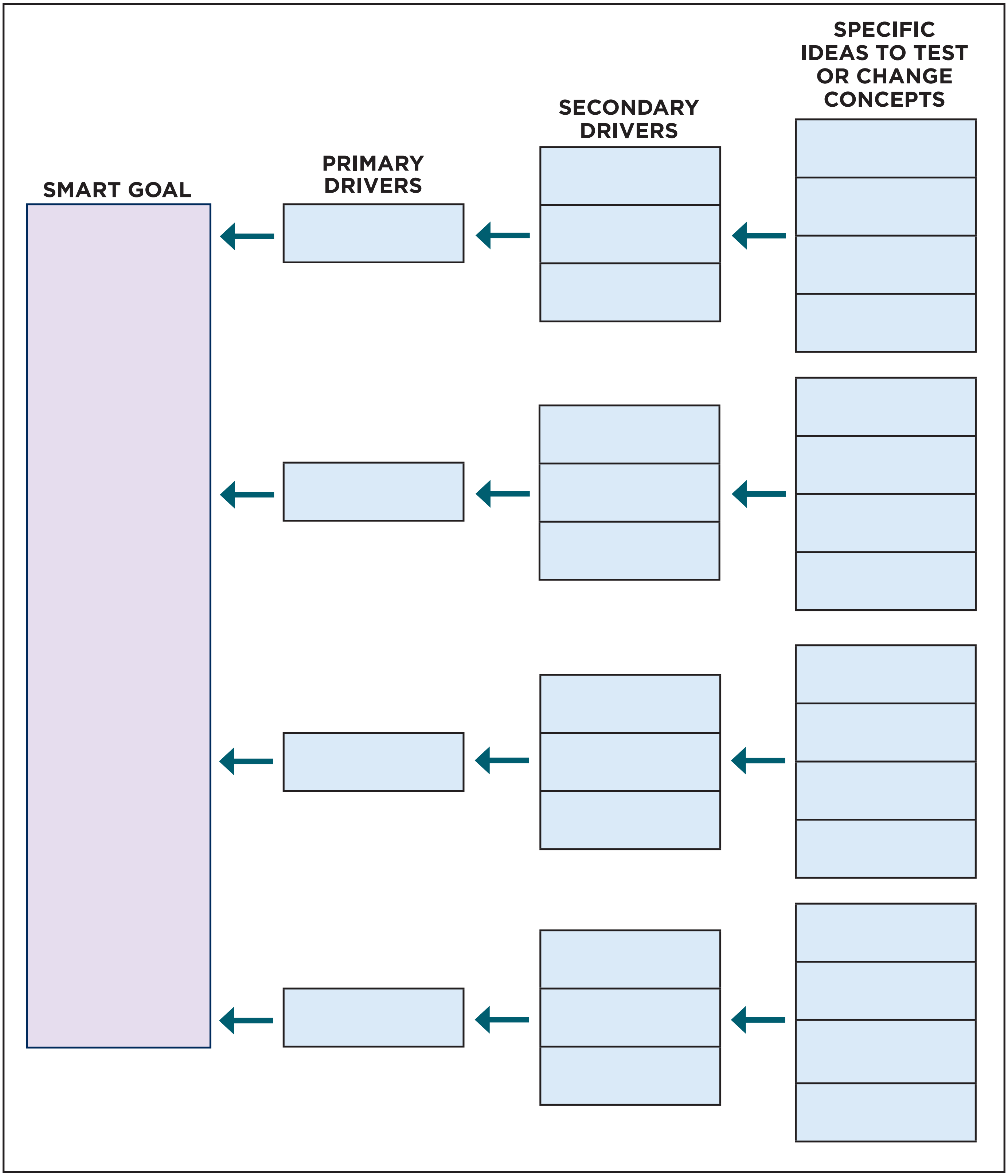
Priority Comparison Table

Strategic Goal	Strategy to Accomplish	Cost of Strategy	Return on Investment	Risk	Mission

Priority Matrix

Proposed Goal/ Strategy	Key Criteria						Total
	1	2	3	4	5	6	
Strategy 1							
Strategy 2							
Strategy 3							
Strategy 4							
Strategy 5							
Strategy 6							
Strategy 7							

Driver Diagram



Strategic Plan Template

Mission Statement		
(List Mission Statement)		
(Time Frame) Focus Areas & Goals		
Goal #1 (List Strategies for Implementation)	**Goal #2** (List Strategies for Implementation)	**Goal #3** (List Strategies for Implementation)

Operational Plan Template

Name (Reflecting Aspect of Strategic Plan)							
Target/ Goal	**Strategies**	**Success Criteria**	**Person(s) Responsible**	**Start Date**	**Finish Date**	**Supporting People and Departments**	**Budget & Source**
1)							
2)							
3)							

Communication Plan Tracking Tool

STAKEHOLDER GROUPS	Draft Strategic Plan	Final Strategic Plan	Detail of Specific Initiatives	Impact/ Outcomes
Internal				
External				

ADvancing STATES
241 18th Street South Suite 403
Arlington, VA 22202-3414
Phone: 202-898-2578
www.advancingstates.org