

AGENCY TRANSFORMATION TO A TECHNOLOGY FIRST ORGANIZATION

PROJECT DESCRIPTION AND TIMELINES



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WHAT DOES AGENCY TRANSFORMATION MEAN?

Transformation is more than offering Enabling Technology, adding it as a support option, or to supplement other options. Transformation requires a change in culture, a new approach to workforce development, a new perspective on the complementary relationship between Enabling Technology and in-person supports.

It is a whole life approach to the potential role of Enabling Technology in creating opportunities for greater independence. It means that paid supports promote independence through technology in their interactions.

PILLARS OF TRANSFORMATION

Transformation results from a confluence of culture change ingredients. The integration of these cultural elements are the bases for *Sustainable Transformation*.



DIDD'S TRANSFORMATION TEAM

This project will be guided and facilitated by DIDD's ***Transformation Team***. Team members are:

- Harold Sloves, Fiscal Operations Analyst
- Technology Champions (3)
- Jeremy Norden-Paul, State Director of Employment and Day Services
- Employment and Day Services Coordinators (3)
- Dennis Watson, Project Manager/Special Projects Coordinator
- Workgroup Leaders (5)
- SMEs (Jason Ray, SimplyHome; Dan Davies, AbleLink Technologies)

OVERVIEW

SimplyHome and AbleLink Smart Living Technologies will collaborate in support of a yearlong Enabling Technology consulting, education, and pilot project across the state of Tennessee. The Enabling Technology project will be a part of a larger initiative to create sustainable change within the service delivery system focusing on Employment First, Technology First, and Person-Centered Planning. The convergence of these three areas will safely create new opportunities for independence and self-determination, while also mitigating the rising cost of care.

GOALS

1. Create a sustainable model for Enabling Technology in coordination with Person-Centered Planning and Employment First systems for agencies across Tennessee.
2. Implement the model for Enabling Technology support, including statewide training and education and pilot technology implementations.
3. Demonstrate the efficacy of Enabling Technology in providing improved quality of life, new opportunities for self-determination and more cost effective outcome-based care.

RELEASE OF APPLICATIONS: Applications will be distributed to agencies on **6/29/18**. These applications will allow agencies to apply to participate in 3 levels of immersion in Enabling Technology:

- Agency Transformation
- Expansion of Current projects
- Enabling Technology Start Up

Q&A SESSION WITH AGENCIES AFTER RELEASE OF APPLICATIONS: Approximately one week after the release of the applications, a statewide webinar will be held with interested agencies and DIDD personnel to answer question and clarify where necessary.

Agencies will have one month to complete and submit their applications. Agency selections will be completed by **July 27, 2018**.

SPECIFICATIONS OF THE ENABLING TECHNOLOGY PROJECT

I. Customized Summary Report based on their Organizational Self-Assessment to include the next steps for education, consultation and tech integration.

Following the selection of agencies for the Agency Transformation projects, SimplyHome and AbleLink Smart Living Technologies will provide an agency summary to include next steps for education, consultation and technology integration.

- a. Agencies will be required to designate two “Technology Champions” who provide ongoing support and education for staff and individuals regarding Enabling Technology.
- b. Agencies will be required to select three individuals who have self-determined the desire for community supported living and who would benefit from technology as a part of their natural support system. The proposal for each individual should include a sustainable transformational support plan that includes how the cost for monthly technology service will be paid after year 1. Agencies should be required to use this plan to cover the costs for technology services in year 2 outside of DIDD’s funding of Enabling Technology during this Enabling Technology Project.

Individuals selected can be the same individuals selected for independent community employment technology supports.

- c. Agencies will be required to select three individuals who have self-determined the desire for more independent community employment who could benefit from technology as a part of their natural support system. Proposal for each individual should include a sustainable transformational support plan that includes how the cost for monthly technology service will be paid after year 1. Agencies should be required to use this plan to cover the costs for technology services in year 2 outside of DIDD’s funding of Enabling Technology during this Enabling Technology Project.
- . Individuals selected can be the same individuals selected for utilizing community supported living technology.
- d. The above process will be repeated throughout the duration of the projects as determined by each agency’s outcomes.

II. AGENCY EDUCATION AND PREPARATION (begins August 7, 2018)

- a. Selected agencies will be required to complete the initial training for all identified employees and natural supports as identified in the agency application. SimplyHome and AbleLink Smart Living Technologies may need to adapt or create training curriculum to meet the needs of the Enabling Technology Project.

III. AGENCY KICKOFF SUMMIT (September 25-26 2018)

Participating agencies will be required to participate in a kick-off education and training summit. Agencies will have the opportunity to invite ISCs. The Kickoff will include:

Technology Champions and other appropriate team members from participating agencies will attend a two-day kickoff summit.

- a. SimplyHome and AbleLink Smart Living Technologies will provide up to 4 sessions and breakouts each to educate agencies on the possibilities of Enabling Technology in the home and in the community.
- b. SimplyHome and AbleLink Smart Living Technologies will provide up to 4 sessions and breakouts each, and sessions will include:
 - i. Introduction to Your Technology Plan—facilitated discussion among the three agencies about their technology plans
 - ii. The Technology Integration Process—some hands-on time with the technology, education on the customer portal and accessing reporting, basic knowledge of each piece of technology
 - iii. Assessing individuals for community supported living
 - iv. Technology and the ISP—pairing technology as a natural support with ISP outcomes planning; also using reporting from technology data to enhance care management
 - v. Other breakout options specifically designed for Technology Champions, Admin/Leadership Team, etc., as defined by IDD

IV. TECHNOLOGY CHAMPION REQUIREMENTS

Agencies' Technology Champions are central to this Transformation Project. Key activities include:

- a. Participation in monthly statewide Enabling Technology agency vendorship and mentorship projects.
- b. Attending Person-Centered Regional training opportunities provided by TN DIDD, and also receive specialized technology training through webinar/online learning management system (LMS).
- c. Developing a small team to work on a Technology Plan for the organization; this includes consultation from the selected technology vendor. The plan becomes the guiding document for education, consultation and integration of technology through person-centered planning on the ISP and within the corporate culture. The Technology Plan also serves to document outcomes and provide benchmarks for accountability. SimplyHome and AbleLink Smart Living Technologies will review Technology Plans and offer feedback and consultation for Technology Plan approval by TN DIDD.
- d. Update policy and procedure language and submit for approval to Executive Team and/or Board of Directors for the organization.

V. ORGANIZATIONAL REQUIREMENTS

The following depicts many of the organizational activities necessary for an organization-wide transformation to occur.

- a. Complete staff trainings for all staff identified in the agency application, including all agency staff employed in support of persons supported participating in the project.
- b. Complete natural support training for all natural supports engaged with technology utilized in support of persons supported participating in the project.
- c. Provide internal resources to fully support Technology Champions and the Technology Plan.
- d. Develop, approve, and implement appropriate policies and procedures in order to support Enabling Technology implementations in the home and in the community.
- e. Develop and implement an internal communication plan for all staff, families, individuals supported, conservators and board members to convey a consistent message about Enabling Technology utilization and the transition to community support living and employment.
- f. Develop, facilitate, and demonstrate sustainable transformation:
 1. Demonstrate internal Technology Champion(s) level of commitment largely defined by their ability to commit the time required to fulfill their role at all levels of the organization.
 2. Demonstrate level of commitment at multiple levels of organization.
 3. Provide a description of proposed scope of transformation project and expected outcomes; what will be different.
 4. Demonstrate organization change and incorporation of technology.
 5. Demonstrate Financial Planning/Budget Implications/Capacity Building.
 6. Demonstrate Quality Assurance/Quality Improvement implications; the impact of Enabling Technology on Quality of Life indicators of participating persons supported.
 7. Demonstrate personnel management changes, including but not limited to, new training requirements, recruitment and screening changes, and updates to staffing practices or scheduling.

VI. PARTICIPATING INDIVIDUALS' REQUIREMENTS:

- a. Complete accessible surveys designed to gain direct feedback from participating individuals regarding the perceived benefits of the technology supports, and their willingness to participate in the Enabling Technology Project and Enabling Technology Self-Advocacy Council.
- b. Receive developmentally appropriate mentoring, education and consultation to prepare them for greater independence.
- c. Accept or decline participation in the Enabling Technology Self-Advocacy Council.

VII. TECHNOLOGY IMPLEMENTATIONS (begins November 6, 2018):

Participating agencies will select an Enabling Technology vendor(s) to support persons supported participating in the project in their home or in the community.

- a. Individual, person-centered assessments will be completed for persons supported participating in the project, and technology recommendations should be integrated appropriately into each individual support plan (ISP). Each ISP should also include:
 - i. A managed technology implementation timeline.
 - ii. A transitional staff timeline, including staff response, support plans and backup plans.
 - iii. As noted above, Agencies should have an approved transformation plan on how the ongoing monthly cost for technology services will be paid after year 1. Agencies will be required to implement this plan for year 2, unless otherwise approved.
- b. Selected technology vendors will work with agencies to successfully implement Enabling Technology supports. This may include enhanced training of the Technology Champions, support with implementation of the technologies to meet the unique needs of persons supported participating in the project, and consultation during the implementation period to provide guidance on any needed adjustments. This may include the development of a learning library to give participating support team members specific, video and picture based

training tools on the Enabling Technology solutions provided for each persons supported participating in the project.

- c. The selected technology vendors will provide ongoing service and support for technology and ensure that agency Technology Champions are trained in technology maintenance and basic troubleshooting. This should include technology tip videos and other resources to address common troubleshooting issues. The Technology Champions will be the primary liaison between the technology vendors and the agencies implementing the enabling technologies.

VIII. ONGOING TRAINING, MENTORING, AND STATEWIDE AGENCY VENDORSHIP INITIATIVES (begins October 1, 2018)

In an effort to create greater statewide technology acceptance and sustainability, participating agencies will participate in ongoing training, regional mentorship projects, and community building with TN DIDD.

- a. Monthly virtual meetings will be provided to allow for Technology Champions to share ideas, best practices, challenges and successes, along with gaining new training. SimplyHome and/or AbleLink Smart Living Technologies will provide a 30-minute continuing education opportunity. The final 30 minutes will allow participating agencies to present on the status of their project, challenges and successes, new ideas, and best practices.
- b. Quarterly in-person meetups will be facilitated by SimplyHome and/or AbleLink Smart Living Technologies. Each quarterly meetup will include:
 - i. One-hour of continuing education for technology Champions from participating agency organizations.
 - ii. In parallel, participating agencies and DIDD will collaborate to develop an Enabling Technology Self-Advocate Council which will conduct quarterly meetings to facilitate peer mentoring, provide educational opportunities, and opportunities to give feedback to Technology Champions and selected technology vendors. (See IX. Below).
 - iii. 30-minute project updates from each participating agency: Project updates should include a status of their technology implementations and agency transformation along with a report of the feedback gained from the quarterly interviews and reports.
 - iv. 30-minute update from Enabling Technology Self-Advocates to the Technology Champions on their experiences and feedback in participation with the Enabling Technology project. Opportunities for

Enabling Technology Self-Advocates to train Technology Champions on effective technology solutions and outcomes will be afforded.

- c. Participating agencies will serve as mentors for new participating agencies in their regions in subsequent years. Following the meetup structure mentioned above, agencies will share best practices, and will help make recommendations on successful technology implementation plans. Where appropriate, agencies will be invited to share stories of successful outcomes gained through the utilization of Enabling Technology at quarterly or annual meetups.
- d. TN DIDD and their vendors will continue to market the Enabling Technology, and participating agencies will be required to participate in the utilization of their projects in such marketing.
- e. Reporting on efficacy of Enabling Technology: Agencies will be required to participate in quarterly surveys, beginning 90 days following implementation of Enabling Technology, and a larger annual survey to show the qualitative and quantitative benefits of the utilization of Enabling Technology.

Each agency should conduct quarterly follow-up interviews with appropriate team members and, if appropriate, the person supported to make sure that the technology implementation is meeting the desired outcomes and goals. Necessary changes should be implemented when identified. These follow-up interviews may also include gathering person-centered feedback directly from the person supported using cognitively accessible surveys. Metrics included in these interviews should include specifics on the previous quarter to cover:

- i. Quality of Life and CQL outcomes for participating individuals
 - ii. QA/QI implications
 - iii. Staff changes or reallocations
 - iv. Financial impact and capacity building
 - v. Timeliness of plan implementation vs proposed timeline
- f. Agency should participate in an annual follow-up interview and assessment with appropriate team members and, if appropriate, the person supported to make sure that the technology implementation is meeting the desired outcomes and goals. This annual review should include a reassessment of the person supported needs and goals with the selected technology vendor. Necessary changes should be implemented when identified. These follow-up interviews may also include gathering person-centered feedback directly from the person supported using cognitively accessible surveys. Metrics included in these interviews should include specifics on the previous year to cover:

- i. QOL and CQL outcomes for participating individuals
- ii. QA/QI implications
- iii. Staff changes or reallocations
- iv. Financial impact and capacity building
- v. Timeliness of plan implementation vs proposed timeline

Additionally, participating agencies should complete the agency self-assessment at the end of the first year to demonstrate growth in their organization culture and development of technology supported outcomes.

IX. ENABLING TECHNOLOGY SELF-ADVOCACY EDUCATION AND MENTORING PROJECT
(begins October 2018)

Development of a model education and mentoring project to foster self-advocacy: All education and mentoring opportunities will be created by applying a developmentally appropriate person-centered approach to model development. Selected individuals at the agency and/or TN DIDD will be trained to implement the model. It will include:

- a. Survey to assess the individual's awareness of self-advocacy, community supported living, and technology.
- b. Direct instruction with trained facilitators using tools such as online course modules, tablets with applications, and community-based activities.
- c. Formation of a peer council that meets quarterly via webinar or in person. Peer council will connect with existing self-advocate groups across the state to help spread awareness and support for the utilization of Enabling Technology.
- d. Participation in the quarterly in-person sessions for Technology Champions and administrators.
- e. Group activities designed to facilitate peer mentoring for those who desire to grow their self-advocacy skills and knowledge of community supported living.
- f. Use of social media as a tool for connecting peers and mentors.
- g. Development of video stories (one from each region) to share at conferences, self-advocacy groups, etc.