

## Establish Project Goals, Plans and Timeline

### Sample Business Plan



# Agency 1 BUSINESS PLAN

Prepared by:  
Ability Beyond

480 Bedford Road  
Chappaqua, New York, 10514  
(914) 984-2325

[www.abilitybeyond.org](http://www.abilitybeyond.org)

## **I. EXECUTIVE SUMMARY**

Agency 1 (referred to from hereon in as the “Company”) was established as a C Corporation at 480 Bedford Road, Chappaqua, New York 10514 with the expectation of rapid expansion in the helping industry.

### **Business Description**

The Company was formed in 1953 as C Corporation under New York state laws and headed by Tom Fanning.

Ability Beyond was founded in 1953 by a group of parents who had a dream. They dreamt of a better life for their children—a life in which disability did not define who they were, what they did or where they could go. Over the years, Ability Beyond has pioneered ways to help thousands of people with physical and mental disabilities discover their abilities and become a part of their communities.

For over 60 years, we’ve led the field in serving people with disabilities in Connecticut and New York by providing person-centered, cutting-edge, and cost-effective services to people with a variety of challenges. With nearly 3,000 people benefiting from our services across two states, our size, scope, and experience motivate us to constantly utilize creative new technologies to develop innovative approaches to care for those in our programs. Our best practices are nationally recognized and replicable, and are being adopted by organizations around the country to serve thousands more people at the state and national levels.

Ability Beyond provides residential services, innovative community job training and placement, supported living, recreational and educational opportunities allowing the individuals we support to live full and rewarding lives.

We are a resource for over 2,500 people – many of whom have developmental disabilities, autism spectrum disorder, brain injury, mental illness, and often accompanying physical disabilities. The majority of individuals we support are adults or young adults and the services we provide can address an episode in someone’s life or span a lifetime.

At Ability Beyond, we discover, build and celebrate the ability in all people. Our unique approach to supporting our clients helps people of all abilities to make connections and succeed in the community. The Company currently employs 1,500 full-time employees and 300 part-time employees.

## **Management Team**

The Company has assembled an experienced management team:

- Director of CT & NY Day, Work and Transportation Services
- Program Manager
- Assistant Services Director
- Assistant Services Director
- Services Manager
- Services Manager NY Day and Work Services

## **Business Mission**

Our mission is in our name...

At Ability Beyond we discover, build and celebrate the ability in all people.

## **New Service**

The Company is prepared to introduce the following service to the market:

Community Based Services: We will close all Sheltered Workshop Settings and transition the individuals in those programs to community-based activities. We will incorporate prevocational, vocational and recreational activities in the individuals' day so that they he/she has to option to engage in these activities.

At Ability Beyond we strive to provide the highest quality of services and as we grow and evolve, we will remain focused on the individual. We will ensure that every person has the opportunity to live, work and be a part of their community, with a focus on ensuring that we are guided by HCBS protocols.

There is a growing need for agencies such as Ability Beyond to help people with disabilities find independence in their community, we are will to work with other agencies with similar goals.

## **II. BUSINESS SUMMARY**

### **Industry Overview**

In New York State, There are 7,085 people in sheltered workshops across the state being served through the Office of People with Developmental Disabilities.

No sheltered workshops as they exist today will remain in operation by 2020.

“As part of our transformation agreement with the federal Centers for Medicare and Medicaid Services, new admissions to sheltered workshops in New York State ended as of July 1, 2013, and recent regulations issued by the federal government will end funding for non-integrated workplace settings nationwide over the next five years,” said Jennifer O’ Sullivan, director of communications for the state agency.

“OPWDD began a system wide transformation several years ago to provide supports that are fully integrated into every person’s community of choice, are person-centered and are focused on individual needs and preferences. Offering more opportunities for community living, employment and self-direction are at the heart of what we are doing to accomplish those goals,” she said.

### **Business Goals and Objectives**

- To close all Sheltered Workshop; transitioning individuals to Community Based Services.
- To increase the number of individuals served in Community Based Services.

### **Legal Issues**

The Company affirms that its promoters have acquired all legally required trademarks and patents.

### **III. MARKETING SUMMARY**

#### **Target Markets**

The Company's major target demographics are as follows:

Connecticut and New York – Westchester, Dutchess, and Putnam Counties in NY, Fairfield, Litchfield, Hartford, New Haven, Middlesex Counties in CT

The estimated number of potential clients within the Company's geographic scope is 7,000.

#### **Promotional Strategy**

The Company will promote sales using the following methods:

“Ability Beyond will transform day and work services into integrated, community-based services by providing people with options based on their individual preferences and abilities by January 1, 2005”

#### **Situation Analysis**

##### *Strengths*

It is necessary to have the support of everyone involved as much as possible prior to beginning this initiative, with clear messaging, and expectations.

Create individual communication plans for the following stakeholders all with one consistent message:

- People you serve
- Family Members
- Staff
- Community members/Partners/Donors
- Board of Directors and Trustees

##### *Weaknesses*

Gaining the buy in of all stakeholders is difficult.

##### *Opportunities*

Closing a sheltered workshop is a process by which an agency transforms their current day and work services/programs into integrated, community-based services by providing people with options based on their individual preferences and abilities.

Like all Americans, those with disabilities want to have the opportunity to participate in activities that create a full and satisfying life: having a meaningful job that leads to a career, engaging in

leisure activities, joining clubs and other organizations, attending cultural events, doing volunteer work, taking courses and seeking out people with similar interests. Yet, these opportunities are scarce because of enduring prejudices, inaccessibility and inadequate transportation.

Many huge barriers still exist that force Americans with disabilities to remain segregated from the mainstream of society. Unemployment rates for working-age adults with disabilities continue to hover at around 70% for a variety of reasons, including the lack of employment opportunities, insufficient vocational and educational training, some high cost of assistive technologies, prejudices based on historical and erroneous stereotypes and inadequate transportation options. If people with disabilities are to be truly integrated into the community, they must have the opportunity to work, to recreate and to volunteer in their communities. Public education and outreach as well as familiarity bred by exposure to people with disabilities in the workplace and elsewhere, are key to facilitating meaningful inclusion in community life.

In accordance with legislation (Olmstead Decision, Workforce Innovation and Opportunity Act (WIOA), Home and Community Based Services (HCBS) it is imperative that individuals with disabilities are offered full access to employment that matches their skills and interests, and full community participation as they choose—outside of a sheltered workshop.

The overall goal of closing a sheltered workshop is for individuals with disabilities to become fully integrated into the communities where they live and work. As an agency you should engage the people you serve, and their families in the process and philosophy of full inclusion. You should develop a caring, increasingly competent, well-trained and dedicated work force to serve people with disabilities in community settings. You should shift your agency's resources to a "program without walls."

The transition will require changes in your agency's use of its physical premises, increased staffing and staff training and the incorporation of new technology. You should secure job opportunities in community settings, internship and volunteer opportunities, for each person you serve who has the desire and the potential to work. A wide array of recreational, cultural, educational and community service choice opportunities should be created so persons with disabilities will not be segregated into limited "disability clusters". Programs that raise public awareness about the abilities of persons with disabilities should be developed. All of this will help defeat negative stereotypes in order to promote familiarity and acceptance that will result in more employment and community inclusion.

As the individuals you serve begin to participate in this process, each person's Interdisciplinary Team should meet and information should be made available to the guardians and families of

those individuals involved. Guardian and family input is vital and valued to help realize individual consumer program goals and promote successful community integration for all people served.

All stakeholders must be involved in the planning and implementing process. No one can stand outside the process. As a Board member, staff, family member, consumer, or member of the community, their ideas, leadership and commitment are vital to achieving the goal of closing a sheltered workshop.

In the helping industry, customers make choices based upon quality of services.

### **Services**

First-rate service is intended to be the focus of the Company and a cornerstone of the brand's success. All individuals will receive conscientious, one-on-one, timely service in all capacities, be they transactions, conflicts or complaints. This is expected to create a loyal brand following and return business.

#### **IV. FINANCIAL PLAN**

Attached we have provided the following financial information:

- Funding rates