Organizational Transformation Self-Assessment

What is it?

This self-assessment helps identify the extent to which your organization has practices in place that will facilitate a successful organizational transformation towards competitive integrated employment. The goal is to support an organization's staff to understand their current strengths and weaknesses. This will lead to the development of priorities that can act as a roadmap for action planning.

Who fills it out?

This self-assessment should be distributed broadly among your staff at all levels within your organization. This will promote the full range of perspectives on each practice. At a minimum, make sure that at least three people within your organization each individually complete this survey: one staff person in a leadership role, one manager/supervisor, and one direct support professional.

How do I fill it out?

We recommend printing out the assessment and filling it out by hand. When we move out of the pilot phase with our toolkit, the survey will be available online.

Under each of the ten elements, you will be asked to report the extent to which you agree that each practice or strategy is currently present at your agency. As you read each item, you can choose from six responses: 1) strongly agree, 2) agree, 3) somewhat agree, 4) somewhat disagree, 5) disagree, and 6) strongly disagree. There is also a place to indicate "I don't know" for each item.

How do I use the results?

On this assessment, lower scores indicate a better result. For example, if people consistently give your agency scores of 1 ("strongly agree") or 2 ("agree") in a particular element, you are probably doing well in addressing that element.

After filling out the assessment, sit with your team to review and discuss the findings. Identify the sections where scores were the highest (that is, where the need for change is greatest). For example, let's say that many people scored your agency a 4 ("somewhat disagree"), 5 ("disagree"), or 6 ("strongly disagree") for many questions in a particular element. That element may be the place to prioritize.

Looking at scores in this way can also help you to access the most appropriate parts of the Agency Change Toolkit.

Where did the survey content come from?

The self-assessment is broken down into ten elements, or sections. Each element has a list of agency practices for you to consider. These practices are the result of findings from research conducted with experts in the field of organizational transformation, and providers who have closed sheltered workshops within the past ten years.

Element #1: Clear and Consistent Goals

What are clear and consistent goals?

To transform your agency's services, you'll need to make an explicit commitment to increasing competitive integrated employment. This commitment will be driven by a set of specific goals. These goals must be measurable, flexible to the needs of individuals, compelling and easy to grasp, directly reflective of your core mission, modifiable, and specific to an established time frame.

My agency:	strongly agree	agree	somewhat agree	somewhat disagree	disagree	strongly disagree	don't know
	1	2	3	4	5	6	DK
seeks input from a range of stakeholders (staff, management, individuals, families, community partners, etc.) when developing its goals for transformation	◯	◯	◯	◯	◯	◯	◯
has a strategic plan for transformation	◯	◯	◯	◯	◯	◯	◯
has a strategic plan that contains measurable short and long term goals, including action steps and timelines	◯	◯	◯	◯	◯	◯	◯
shares its strategic plan with both internal and external stakeholders	◯	◯	◯	◯	◯	◯	◯
has leaders including the board of directors, executive officers and management team who are committed to the goals for transformation	◯	◯	◯	◯	◯	◯	◯
tracks the progress of its transformation goals	◯	◯	◯	◯	◯	◯	◯
shares both its goals and progress toward those goals with its stakeholders	◯	◯	◯	◯	◯	◯	◯
is flexible enough to modify its goals if necessary	◯	◯	◯	◯	◯	◯	◯
has a mission and vision statement that specifically states that integrated employment and community participation are the preferred outcomes for all individuals served	◯	◯	◯	◯	◯	◯	◯
has outlined service principles (value statements regarding service delivery)	◯	◯	◯	◯	◯	◯	◯
has staff and board members participate in discussions about values, and integrates these discussions into planning	◯	◯	◯	◯	◯	◯	◯
has a culture that is driven by and aligned with the agency's values and mission	◯	◯	◯	◯	◯	◯	◯

Element #2: An Agency Culture that Supports Inclusion

What is an agency culture that supports inclusion?

Providers must establish an agency culture that values supporting individuals in the community rather than in facilities. The culture also values positive thinking, learning, creativity, innovation, and continuous quality improvement.

My agency:	strongly agree	agree	somewhat agree	somewhat disagree	disagree	strongly disagree	don't know
	1	2	3	4	5	6	DK
uses its core values to guide decision-making	◯	◯	◯	◯	◯	◯	◯
has a culture that is aligned with new priorities and paradigm shifts (e.g., moving from a charity to a business model, from a focus on health and safety to promoting inclusion)	◯	◯	◯	◯	◯	◯	◯
integrates continuous quality improvement practices into its management structure	◯	◯	◯	◯	◯	◯	◯
creates a culture that invests in staff talent and allows for their development and growth	◯	◯	◯	◯	◯	◯	◯
ensures that staff and management stay up to date on research and best practices	◯	◯	◯	◯	◯	◯	◯
believes that regardless of the level of support needs, all individuals are able to access community-based services including integrated employment	◯	◯	◯	◯	◯	◯	◯
emphasizes the development of teams, which are regularly used for problem-solving and decision-making	◯	◯	◯	◯	◯	◯	◯
is a "learning organization" that values innovation	◯	◯	◯	◯	◯	◯	◯
makes integrated employment the first and preferred outcome considered for individuals	◯	◯	◯	◯	◯	◯	◯

Element #3: Active, Person-centered Job Placement

What is active, person-centered job placement?
Providers must be proactive in finding jobs for one person at a time. This hands-on approach creates momentum and enthusiasm as successful employment outcomes are achieved and celebrated.

	strongly agree	agree	somewhat agree	somewhat disagree	disagree	strongly disagree	don't know
My agency:	1	2	3	4	5	6	DK
engages in best practices to uncover each individual's interest, skills, passions and support needs as part of the employment process	○	○	○	○	○	○	○
uses exploration in the community to build social and human capital necessary for employment. ("Human capital" includes job search skill building, such as resume writing, interviewing, and submitting applications. "Social capital" includes meeting and socializing with new people, as well as interpersonal skill building, and practicing appropriate conflict resolution in the workplace.)	○	○	○	○	○	○	○
engages each individual's family, friends, and other staff they work with to support their employment process	○	○	○	○	○	○	○
uses an action-oriented placement plan that outlines timelines and responsibilities	○	○	○	○	○	○	○
uses the most recent best practices in providing employment support	○	○	○	○	○	○	○
has a coordinated and strategic approach to job development and business engagement	○	○	○	○	○	○	○

Element #4: A Strong Internal and External Communications Plan

What is a strong internal and external communications plan?
To reach your goal of competitive integrated employment, you'll need to communicate clear, authentic expectations. Internally, this includes all levels of staff, individuals with disabilities, and their families. Externally, successful organizations market themselves and their services throughout the community.

	strongly agree	agree	somewhat agree	somewhat disagree	disagree	strongly disagree	don't know
My agency:	1	2	3	4	5	6	DK
has a plan to communicate with all stakeholder groups throughout the transformation process that includes both internal and external stakeholders	○	○	○	○	○	○	○
involves direct support staff in developing and implementing a communication plan	○	○	○	○	○	○	○
clearly communicates what it knows and does not know about the transformation process to all stakeholders	○	○	○	○	○	○	○
broadcasts a unifying message and/or mission statement about the transformation process	○	○	○	○	○	○	○
has identified champions (staff and/or individuals/families who are enthusiastic about the transformation)	○	○	○	○	○	○	○
involves these champions in the transformation process as a way to engage other stakeholders	○	○	○	○	○	○	○
has a communication strategy that is aligned with the agency's values and strategic plan	○	○	○	○	○	○	○
uses diverse modes of communication (newsletters, email, regular mail, informal get-togethers, social media, etc.) to communicate with its stakeholders	○	○	○	○	○	○	○

Element #5: Reallocated and Restructured Resources

What are reallocated and restructured resources?
Transforming your agency means making changes to how you fund services, and how you direct your staff to budget their time and energy. You'll need active and ongoing investment in realigning all fiscal, material, and staff resources. Your overall goal: putting into place the supports and services needed for increasing competitive integrated employment.

My agency:	strongly agree	agree	somewhat agree	somewhat disagree	disagree	strongly disagree	don't know
	1	2	3	4	5	6	DK
has performed a financial analysis to identify potential costs related to transformation (examined cost per staff, revenue needed to break even, any other hidden costs)	○	○	○	○	○	○	○
aligns its funding with its mission	○	○	○	○	○	○	○
has a financial plan that extends beyond the transformation process	○	○	○	○	○	○	○
has realigned resources to ensure that they are consistent with the agency's goals (changing job functions, investment in mobile technology, decreased occupancy costs)	○	○	○	○	○	○	○
has a diversified funding base (state and local revenues from multiple sources, grants, fundraising)	○	○	○	○	○	○	○
has established recruitment policies that encourage the hiring of qualified staff with desired attitudes and skills	○	○	○	○	○	○	○

Element #6: Ongoing Professional Development of Staff

What is ongoing professional development?
An engaged and educated workforce is key to providing sustained, high-quality job development and coaching supports. Frequent training, continuing education, conference participation, and mentorship opportunities are critical to maintain core competencies and implement best practices. Successful organizations support employees at all levels to meaningfully contribute their ideas and energy to the mission. Professional development allows this to happen, as staff increase their skills and their investment in your agency's work.

My agency:	strongly agree	agree	somewhat agree	somewhat disagree	disagree	strongly disagree	don't know
	1	2	3	4	5	6	DK
has identified a set of core skills and competencies needed to support individuals in employment	○	○	○	○	○	○	○
promotes training at all levels within the organization	○	○	○	○	○	○	○
trains staff on core skills and competencies	○	○	○	○	○	○	○
offers a range of professional development opportunities, such as in-person and online trainings, attendance at conferences, and opportunities for certification	○	○	○	○	○	○	○
provides timely access to trainings for staff who are newly hired or entering new roles	○	○	○	○	○	○	○
supports staff to put new skills and competencies into practice (through supervision, mentoring, communities of practice, etc.)	○	○	○	○	○	○	○
provides opportunities for further training in topical areas to promote career growth and development	○	○	○	○	○	○	○

Element #7: Customer Focus and Engagement

What is customer focus and engagement?

This means making strong, vital connections with your two customer groups: job seekers with disabilities and their families, and employers. These connections are essential for success with community employment. First, you'll partner with job seekers and their family members and guardians. Second, you'll engage the business community. By collaborating with both these customer groups, you'll meet individual and market needs.

My agency:	strongly agree	agree	somewhat agree	somewhat disagree	disagree	strongly disagree	don't know
	1	2	3	4	5	6	DK
meets one on one or in small groups with individuals and families to engage them in the transformation process	○	○	○	○	○	○	○
provides open communication avenues for families (office hours, regular drop-in at a community location)	○	○	○	○	○	○	○
keeps individuals and families abreast of organizational updates using a range of communication methods, including online and print media	○	○	○	○	○	○	○
integrates information about the transformation process into agency events, activities, and communication vehicles on an ongoing basis (fundraising gatherings, BBQs, family-to-family events)	○	○	○	○	○	○	○
integrates communication about the transformation process into service planning, individual meetings, and other communication with individuals and families	○	○	○	○	○	○	○
has tailored engagement plans for each of its stakeholder groups (individuals, families, employers)	○	○	○	○	○	○	○
promotes its services broadly to the local community	○	○	○	○	○	○	○
ensures leadership and staff are members of local community organizations	○	○	○	○	○	○	○
(chambers of commerce, small business association, etc.) as a way of engaging employers	○	○	○	○	○	○	○
uses a dual customer model when engaging with employers	○	○	○	○	○	○	○
showcases and celebrates successes with the community and local businesses	○	○	○	○	○	○	○

Element #8: Performance Measurement, Quality Assurance, and Program Oversight

What are performance measurement, quality assurance, and program oversight?

You'll need to establish a clear framework for implementing and measuring administrative, management, and program strategies over defined periods of time. This helps to determine the impact of your efforts, and your success in obtaining results.

You'll learn to use data to demonstrate employment successes, and to create buy-in to the transformation process. You'll also identify areas where you need to strengthen your organization.

My agency:	strongly agree	agree	somewhat agree	somewhat disagree	disagree	strongly disagree	don't know
	1	2	3	4	5	6	DK
has identified outcome measures (hours worked, wages, # of individuals employed, etc.)	○	○	○	○	○	○	○
collects outcome data	○	○	○	○	○	○	○
has identified process measures (time between plan development and placement, types of intervention provided, etc.)	○	○	○	○	○	○	○
collects data on process measures (time between plan development and placement, types of intervention provided, etc.)	○	○	○	○	○	○	○
measures stakeholder satisfaction (for example: customer, family, or employer satisfaction surveys)	○	○	○	○	○	○	○
analyzes data that it collects	○	○	○	○	○	○	○
uses data when making policy or practice decisions	○	○	○	○	○	○	○
shares the data it collects with stakeholders	○	○	○	○	○	○	○
measures employee satisfaction	○	○	○	○	○	○	○

Element # 9: A Holistic Approach

What is a holistic approach?
Providers must consider the whole person with wrap-around life supports as necessary, and use a career planning process that involves multiple stakeholders (staff, parents, friends) and necessary accommodations. This approach also involves how the agency conceptualizes and organizes its work.

My agency:	strongly agree	agree	somewhat agree	somewhat disagree	disagree	strongly disagree	don't know
	1	2	3	4	5	6	DK
conducts individual-level employment planning in the context of the individual's whole life	◯	◯	◯	◯	◯	◯	◯
encourages individuals to include family and friends in addition to staff in their planning efforts	◯	◯	◯	◯	◯	◯	◯
develops employment plans that support meaningful inclusion in the workplace	◯	◯	◯	◯	◯	◯	◯
integrates support for employment into all services and supports (residential staff support individuals to be dressed properly, family support have a pro-employment perspective in their work with families)	◯	◯	◯	◯	◯	◯	◯
uses non-employment day supports for discovery, career exploration, and other experiences that promote employment	◯	◯	◯	◯	◯	◯	◯
looks broadly to identify resources and opportunities in the community that will support the individual to achieve their goals	◯	◯	◯	◯	◯	◯	◯

Element #10: Multiple and Diverse Community Partnerships

What are multiple and diverse community partnerships?
This refers to engaging with organizations and state systems to create buy-in for the change process. These partnerships can happen with school districts, state agency offices such as vocational rehabilitation, faith-based organizations, and transportation resources.

My agency:	strongly agree	agree	somewhat agree	somewhat disagree	disagree	strongly disagree	don't know
	1	2	3	4	5	6	DK
has a broad range of community partnerships (school districts, other social service agencies, civic organizations, etc.)	◯	◯	◯	◯	◯	◯	◯
engages these partners in its transformation efforts	◯	◯	◯	◯	◯	◯	◯
uses board members' professional networks to develop new partnerships	◯	◯	◯	◯	◯	◯	◯
uses staff members' professional networks to develop new partnerships	◯	◯	◯	◯	◯	◯	◯
is knowledgeable about the resources that partners may contribute to our work	◯	◯	◯	◯	◯	◯	◯
uses these partnerships to improve individual outcomes (opportunities for employment, career exploration, volunteering, etc.)	◯	◯	◯	◯	◯	◯	◯
engages state agencies on an ongoing basis as we progress through the transformation process	◯	◯	◯	◯	◯	◯	◯
engages other funders on an ongoing basis as we progress through the transformation process	◯	◯	◯	◯	◯	◯	◯