

## **October 25, 2017: Planning to Plan? Tools to Use to Help You Better Understand your Current Business Environment**

>> Welcome everyone. Thank you for joining today's webinar planning to plan, tools to help you better understand your current business environment. This webinar is presented through the Business Acumen Center part of the grant of the National Association of States United for Aging and Disabilities and made possible by the Administration for Community Living.

>> Today we will hear from two speakers, myself, and I am Erica Anderson the director of business acumen center at the National Association of United for Aging and Disability also known by NASUAD and I'm joined by Elizabeth Priaux who is a Senior Disability Legal Specialist with the National Disability Rights Network, otherwise known as NDRN. We will share tools that you can use to collect information you need that will help structure strategic plans designed to help you meet your goals. As a reminder we usually have time for questions and answers at the end of the webinar so enter those questions in the comment box on the lower right-hand side of your screen. The slides and recording of the webinar will be available through the business acumen website shortly after so please check back after the webinar.

>> Before we talk about how to change we have to talk about change itself. Frankly everyone has difficulty thinking about change the reality is that things change. For organizations providing longtime services for people with disabilities that change may be a result of a state transition to manage long-term services and supports, customers, budgetary pressures or something else. Whatever the reason change should be recognized as a normal part of the business cycle. If embrace the way you go about addressing the change can help you meet or exceed your expectations. For most community-based organizations your overall value proposition and mission won't change or will change mildly. You will still serve people with disabilities in a person-centered or person driven way. However your success lies in your ability to adjust to changing circumstances and making the changes necessary to meet customer preferences which may be a combination of the person you are serving or the person and organization purchasing those services.

>> Your strategy to make change relies on the information you gather. The plan you develop from that information will see you through the change process. For example you want to gather information from your current strategic plan, budget, finances, quality tools, metrics and recording systems. You want to look at the method of delivery including organizational charts, [ Indiscernible ] materials and overall eyes the overall utilize material so you understand the environment and capabilities and what happens in the world around you. From here you want to think about who you want at the table when you build and execute your plan. You want people who push you, not just those that are automatically comfortable. We will walk through this by taking a look at your vision, environmental scan, SWOT analysis and champion development.

>> Let's start with your vision. The vision for your organization and intended change should inspire your work. The vision statement is your desired end state and typically a one sentence statement that drives a clear and inspirational long-term desired change resulting from an organization or your programs work. The best visions are inspirational, clear, memorable and concise. It should be compelling. It's and make people want to support what you do. Frame it so it resonates with the people who will be involved in the work and those it will impact. This includes decision-makers and the public. Most importantly it needs to be understandable. The people you serve, report to and hope to work with should be able to

understand your vision statement. Keep it short and simple. The vision describes what you hope to achieve and not all the details of what you will do.

>> As you develop the vision for your work think about whether it describes what it is you want to do and what part of your business you want to sustain or develop and how your service or organization fits within your community. Does it prompt you to think about what you will do to be successful? How will you know if you are successful?

>> With the vision in mind you can begin to think about the information you need to fulfill the vision. Completing an environmental scan will help gather information from the external environment, the world outside your organization and the world that will inform and impact your business. In no particular order you want to evaluate information from the federal, state and local leadership, the economy, managed-care and other payers, CBO's, demographics, and even technology and system requirements. Let's look at this a little bit further. When evaluating federal, state and local leadership recognize the priorities of policymakers change over time. Since LTSS is primarily funded through Medicaid dollars and understanding of how the leadership is thinking about the delivery of LTSS is essential to your success as a CBO. A review of laws and regulations that impact and guide work and those who seek to partner with can help identify opportunities for alignment between services and expectations of potential payers. For example an estate that utilizes managed longterm services and supports the spec back request for proposals outline the expectation of the plans you seek to work with. For the economy, it impacts where there might be business opportunity. What is the general economic state of your community including the school conditions of your state and locality? To what extent do change in economic conditions affect demand for the type of services you offer and availability of resources to support work? What you look up graphics and evaluation of demographics may highlight changes in ages, disability or social economic status so consider the demographics of people with disabilities and their family caregivers and our new populations that would benefit from services you offer? Are you expecting demand for services to increase or decrease over time and our needs changing is family caregivers age? For managed-care and other payers, an assessment of the market requires you a value meant the strength and weakness of competition as potential collaborators and requires you to identify and understand market trends that impact your organization. And where does the funding come from? Does it come from the county, the VA or somewhere else? What is the payer culture? What are the priorities and initiatives of funding sources and who are the collaborative forces and who might be competitors? When looking at technology and system requirements this could potentially be an issue under payers but we specifically called it out since technology systems continue to evolve and most health plans and more and more social service entities utilize an electronic platform to maintain information and share data. A look at how your current processes work in relation to potential payers or partners will enable you to identify gaps or opportunities for processing system improvement. When complementary the systems you use better enable you to meet and report expectations so what data to the expect to receive from you? What systems will you use to demonstrate value and what systems do they use? Looking at other community-based organizations, you recognize there are organizations out there that offer the same or similar services to the same or similar population. These organizations may be competitors or potential collaborators. Identifying who they are, how are they similar to your organization and how are you different? What capacity do those organizations bring to the community and what is your unique capacity? What is your niche?

>> This page simply outlines and identifies some questions we just talked about but keep in mind this is just a starting point as you brainstorm with your team and others and you will likely prompt additional questions.

>> If you evaluate those areas, document findings in this information prepares you for your SWOT analysis.

>> Strengths, weaknesses, opportunities and threats analysis otherwise known as SWOT assesses your organization's ability and general position to findings of your environmental scan. It's an opportunity to identify major factors affecting your operations and formulate a response strategy. During review of your environmental scan results look at your organization and identify the strength, for example history of serving population, knowledge of community resources and weaknesses and inability to meet pay requirements. Look at this along with opportunities like is there a new population you may be able to serve or a geographic area or a way to demonstrate how [ Indiscernible ] of health impact potential payers and the outcomes they monitor? What are the threats? Is there a new organization entering the system all of which may impact success? This information will be used to formulate your strategic plan.

>> The material I mentioned earlier can prepare you for this activity so think about what you have that will inform your work and bring together those from the organizations that have the most insight into your current strategic plan, your budget and finances, your quality tools and metrics you utilize, reporting system, and strengths and weaknesses of how you are currently staffed or implementing processes. The opportunities and threats are the findings of what you identified during the environmental scan. This information help identify where to focus efforts as you work towards achieving your vision. Now you need the right people to help you build and execute the plan.

>> Who should be at the table? As we mentioned you will want people that push you to think differently or to go beyond boundaries or identify new opportunities. You want people who can help you plan and understand the broader landscape as well as intricacies of challenges and opportunities you might embark on. Who will do the work? Who will be responsible for seeing the change through? Who needs to update processes and make decisions and communicate with those around you? Who are the people who will connect you to others to keep building relationships and can help you find and connect the right people? Who can make sure you are communicating in the right ways with the right people at the right time? Any of these people might come from unexpected or unconventional places. That might be business leaders or community leaders or faculty etc. Think about your objectives and challenges and who can help you best meet them. Don't limit yourself to traditional stakeholders that you might currently engage.

>> The people at the table become your champions. To find them review the environment from the perspective of those with an interest or concerning your business. These people and organizations help validate or further inform your understanding of the business environment in your role within it. Stakeholders may include but are not limited to people using services, their families, community groups and business partners and philanthropies, private-sector or anywhere. Each stakeholder provides a different perspective with an interested in or impacted by decisions in a different way. With this I want to hang the webinar over to Elizabeth who will talk more about stakeholders and champions.

>> Thank you, Erica. As we said in the beginning my name is Elizabeth Prialux and I work at the National Disability Rights Network which is a membership association for the advocacy agency and I will be

expanding on what Erica started to talk about which is the importance and value that stakeholders and champions bring to understanding your environment and promoting your business or product. As she said, stakeholders are people with an interest in your product or service.

>> People who can provide staff, money, technology, information or influence, as well as people who help validate or further inform your understanding of the business environment in your role within it. They may include but are not limited to people using your services, their families, staff, community groups, business partners and potential funding sources. This will basically involve getting all these resources growing your network beyond the people you already know and later in this webinar we will discuss where to look to grow your network. The best stakeholders will become the champions for your organization. I want to walk us through some examples of how stakeholders become champions. The first example are consumer stakeholders. It is a stakeholder who identifies that yours is the only transportation company that will come when it snows and the only transportation company that will come to the door when it rains or snows and offer assistance getting to the vehicle. This seems to be a very positive element of your program that is unique and can be a selling point to differentiate your program from other services. Be Mac on this next slide you see another example of how a consumer stakeholder adds value. The stakeholder identifies yours is the only agency that makes an effort to match its personal attendant with clients that speak the same language or the only agency that permits a change in departure time with less than 36 hours notice. This is vital information that you can use to promote your product. Another example is how community-based organizations from a complementary business can identify gaps and the services that your agency can fill. In this example an agency provides personal assistant services. A group home provider that you have engaged with the out your business contacts you with concerns about their existing personal assistance agency.

>> Next slide. I'm sorry I am slow with the slide changes. In this situation the agency learns a competitor agency is short staffed in the evenings and you learn that agency has been requiring staff to put the residence they help in bed by 8 PM because there is no one after those hours on staff. The group home contacts you and would like to enlist your assistance to fill the gaps in the hours but they are stuck in a contract. You contact the short staffed personal assistance provider and you offer them a short-term contract to fill evening hours. Maybe you can reach out to another one of your stakeholders such as a legal aid program or personal assistant or a P&A a program and asked them what are the requirements for a community-based organization to have sufficient staff? With that information you are armed to contact that short staffed personal assistance provider. Either way whether they allow you to contact or not you can tell the group home that is short staffed that you are available when your existing contract expires. This is an example how you identify gaps and let the agencies know you can fill them. Stakeholders that are payers can partner with you to increase capacity and bring in new revenue. An example of this is on the next slide.

>> You are a nutrition services provider for various entities including an adult Day program. The adult day program is in negotiations with the Managed Care Organization to provide services on learns that the Managed Care Organization wants nutrition services. The day program contacts you and suggests a partnership so that together you offer a more competitive service. You will be more likely to get the managed care innovation contract which is an example how stakeholders can partner with you to increase capacity and bring in new revenue. As you can see champions are the stakeholders that are able to offer value to your business in a number of ways. They help you identify gaps in the services currently available, inform the development of programs, and attest to the value and benefit of your

services. They may also utilize services and connect you to resources a new opportunities such as funding options you might not have been aware of. Here are some ways of looking at how to utilize stakeholders and champions in their work. First you must identify them. Who are the existing and necessary stakeholders? Remember to look and think beyond your current network. What are your objectives? Go back to your analysis that Erica went through and identify from that where your objectives are and then you develop a plan. How will you identify your value to stakeholders? Then you engage. How will you maximize the bilateral benefits to you and your stakeholders? And always evaluate which could be the impact of stakeholder engagement efforts and are there additional stakeholders to add on because of the changing environment? This is a key part. We will go through these four different steps and hopefully you have seen the slide which has a nice chart you can use and is an example of the great charts in the toolkits that you can access shortly.

>> Let's talk about finding appropriate mix of stakeholders that add value to your business executive. Where can you find them? First you brainstorm was staff. You can consult with organizations that are or have been in similar efforts or that work with populations in the area you work and you can gather ideas from stakeholders including your champions. Let's look specifically at some areas to find stakeholders in particular areas of value. Payers could be those who work with Medicaid, skilled nursing facilities, community health centers, adult day programs, Managed Care Organizations, private insurers, fee-for-service purchasers etc. You have community partners with the Centers for Independent Living, disability advocacy organizations, organizations that represent a specific deafness city group. Erica mentioned earlier that by reaching out to certain stakeholders you can identify particular groups that you before didn't know about that were underserved. At this city groups are one of those that are more likely to be hidden and have less ability to reach you and understand your services. Social service agencies, nonprofits, protection and advocacy, legal aid providers, schools, churches, law enforcement and related businesses are all areas to look for potential stakeholders. And you have utilizer's which are individual users, family members and caregivers, and disability service providers like ARC. And you have government entities like mental health, intellectual and developmental disabilities have advisory councils or be familiar with the leaders and the change agents in the field. Also minority outreach offices, state disability councils, state legislators are great places to look for potential stakeholders.

>> Next you will look at the issue of stakeholder interest and influence. You will have high influences, low influencers, and your high influence [ Indiscernible ] and low interest influencers with high interest. This is a way -- I will go through this chart and it's hard to understand from this. You have high interest high influencers and these are stakeholders who have a lot of influence over your organization and are very interested in your organization. It is vital to understand the viewpoints of these high influencers high interest stakeholders you want to engage, communicate and manage them closely and they are the ones that get consistent updates and receive input as well as be the ones you closely review your environmental scan and goals with. Then you have low influence but high interest stakeholders which are stakeholders that might have a lot of interest but very little real influence. Such stakeholders can be valuable sources of information. They can get you access to information that is relevant to your efforts like filling in the gaps, understanding institutional history of past efforts, helping you understand what organizational changes need to happen and these are great stakeholders to meet with first and each interaction is low risk and informative. You keep the stakeholders informed. On that note, when you are talking about consumer stakeholders, when you do this kind of outreach you have to remember that some individuals with disabilities that we serve need to be provided with reasonable accommodations

to help them get to the table for a complete surveys for example. There is information about that in the toolkit as well as ways to provide, Dacian of people with disabilities -- provide accommodations for people with disabilities. Then you have the high influence low interest stakeholders. These are stakeholders with high power and very low interest and they need to be broadly satisfied. They will pay attention to the fine print of your business needs and stay don't perceive the work you do affects them but they have influence whether your organization will be a success. The goal of your interactions with this type of stakeholder should be to give them the information they need to understand your organization and its objectives and be informed of any concerns so you can address them. Then you have your low influence, low interest stakeholders. These are stakeholders who may be immediately impacted by your work and have very little interest or influence in it. You should be aware who these people in your organization are so you can engage changes in their interest or influence but in general they are not a high priority in your work since they are not interested in what you are doing and aren't in a position to help you you monitor the stakeholders. That is the explanation of the chart and hopefully it makes more sense and it's a great way of thinking through where to put resources and efforts.

>> The next slide is a guide to help you identify those who you want on your team. Your high interest, high influence stakeholders in mind consider the specific ways in which they help your organization meet its objectives. For example are they connected to a payer? Do they show a specific gap like to understand how to utilize or manage data? Do they have a resounding strength like respect in the community or being a great storyteller organizational history? It takes time and resources to manage stakeholders. You have to make sure your staff is on board, your board is on board, and everyone has prioritized stakeholder outreach and the high influence/low influence chart will help assign resources appropriately.

>> The next step after identifying stakeholders is planning. For each stakeholder/champion you have to develop a different planet for each one you have to clearly define how they will add value and how you would like them to participate in your work. For example, do you plan to receive feedback from stakeholders just once in a survey and never again or do you want them to participate in ongoing meetings or be available for questions or help you reach out to funders? It's up to you to identify meaningful ways for the stakeholder to contribute to the work and outcomes and to be creative and ask them directly first how they think they can help you and then offer other examples. Meaningful interaction is clearly defined with expectations of work and allow you to engage and allow stakeholders to feel heard and respected. If they don't have meaningful outcomes and understanding, they could possibly feel rejected and you will lose their interest. You want to define how you want them to participate, you want to identify meaningful interactions, and for the champions where you put more resources you want to ask them how they specifically help your organization meet its objectives. That is the planning stage.

>> On the next slide we go to engagement. The toolkit has extensive information about different ways of engaging. The most common method results with surveys, focus groups, one-on-one discussions and surveys are a great way to gather general information about people's perspectives. You have to have resources to be able to collect surveys and organize the data and know how to use them in a meaningful way. There are focus groups that allow you to dive deeper into issues. You have to know who you are reaching out to them potentially have multiple focus groups to identify if you will have it by geographic area or interest area and within your champions you will probably want to have a lot of one-on-one discussions. What should you share? You want to share what you learn during the environmental scan

and the results of your SWOT analysis and most importantly to keep stakeholders engaged, you want to repeatedly ask them what services are you missing? What services differentiate your agency? Do they see things differently from you? Allow them to talk and get a different perspective. Can they see things you could do differently that would enhance your services? What would they advise? A lot of open-ended questions to keep them interested. That is the engagement process.

>> And the toolkit on the slide has different examples of questions based on whether they are payers or community partners, utilizer's or services and this slide goes back to the point we made earlier which is when you develop a plan you want to customize the plan to the role that you were hoping that the stakeholder can provide. With payers you want to ask about their needs, gaps in services and ways you can explore how to fill the gaps. Asked them about their expectations. With community partners you want to ask about common challenges and goals and what you want is your outcome. Also what are areas of collaboration and identify how they helping you can improve services and be a win-win for both parties. The utilizer's of services should be asked what they like to see in your organization and give them ideas to help see how things could be changed realistically. Asked them about their concerns and if there are areas of concern you are insured how to fix tell them that directly and asked them to keep those issues in mind and continue to keep thinking how they -- how you can fix their concern. Don't speak down to anyone with a concern. Tell them you will keep an open mind and as services and environments change you will revisit it. Follow up on questions and issues but don't make promises you can't keep. With government entities, some of the things you can ask them to do our review proposals, contracts, you can ask them to put out guidance documents that advance your ability to provide services and asked them to help brainstorm strategies to remove barriers. Ask them what they see as the gaps in clarity. This has been a basic overview of how stakeholders can contribute to your product and service. It involves ongoing effort and each year you probably want to go through and assess on the next slide -- on the next slide you can do the evaluation of where your objectives are.

>> What are your new objectives? How has the environment changed so that you had to develop new objectives? How can you increase the people you are serving by reaching out to different populations? Those are the kind of questions. Who are the low and high influences and are they different from what you expected? What actions created by in a what were barriers to stakeholder engagement? Did you seek partner ideas for change and improvement? What are you going to do to get even more information from your stakeholders? This is what you should go through and evaluate on a yearly basis. I will let Erica take it away from here.

>> Thank you, Elizabeth. Next slide please.

>> As a review either developing a plan, if you anticipate change for the organization, taking the time to think through your vision, completing an environmental scan and a SWOT analysis and identifying the those you want at the table will prepare you for development and implementation of a strong strategic plan.

>> Over the next several months we will continue the discussion on what it takes for community organizations to develop a plan that will help sustain a further develop businesses. Plan curriculum through early spring includes looking at successful organizational change while maintaining omission, developing relationships with potential payers and community partners, understanding and maximizing your financial position, articulating your business days, and negotiating and contracting. Inks again,

Elizabeth, for this piece of the presentation and we have time to review some questions that have come in through the comment box.

>> For basic housekeeping pieces, yes the slides a recording of the webinar will be available on the business acumen website and we will show you that link shortly but essentially it's the same place where you registered for the webinar. That is where you will find all the materials.

>> One question that came in is what suggestions do you have to engage those that are skeptical? Would you like to lead with that question or would you prefer that I do?

>> I will lead because I think I came up with an example that just popped into my head. My advice is there are many ways and Erica will go through many but the one I have is to bring in an example or a person who can speak to how the change similar to what you are planning to implement worked for you. What I am thinking of is an individual that I met who had always provided sheltered workshop services and have been doing so successfully for a decade. They decided because of the way the funding was switching and some changes in the environment like people with disabilities he served and talk to that he would switch to an organization that provide supported employment and customized employment in integrated settings. As soon as he suggested this, family members he worked with for decades were pressuring him why he was doing this and why can't he do both and it won't be the best for family members. This individual decided that education would be the tool to address the skeptics. He reached out to individuals that he didn't know beforehand what had read articles and gone to conferences about agencies that had switched to a competitive employment model. He contacted those folks and said would you be willing to in this case the individual did a conference call but there are other ways you can bring in an example of a person who represents change. Some thoughts might be if they are local, having a party of the people you serve in asking this individual to be a speaker. You could create a YouTube video if your services are nationwide and explaining why the change and have a person a test why you worked for their organization. You could create an article in your newsletter. When they are skeptical, one other thing to do is to say we will go slowly and incorporate stakeholder input. I wanted to share that example.

>> Thank you. What I would add is going back to that initial statement that change is hard, particularly people don't feel as if they have control over the situation which is part of Elizabeth's example. With the change and particularly as you engage different stakeholders and champions, it's not just about selling your position. It's really about communicating and understanding what the concerns are. Someone who is skeptical likely have some concerns. Taking the time to both educate on why the change is coming and also being open to listening about what the concerns are. There might be something new and there you hadn't thought of that you might want to address. Or the concerns might be resolved through the sharing of information. Either way I would say slowing down and taking the time to communicate. You sometimes need to listen in order to be heard. Really pulling the people into the fold and spending time with them, explaining and listening.

>> Similar to some human dynamics, we have a question that is how do we control the egos of the high influencers? I will lead with this and then I will ask Elizabeth to add anything that I may miss. This one is tricky in that there are always different role -- different personality characteristics and you are inviting people to push you in a way that's not a part of your current circle. If you invite someone that pushes you may have differences of opinion and so forth. How do you manage those? If something is perceived as an ego, we have to recognize that some of the ego might be the presentation of information that they

really want to share. In particular using high influence, high-interest people they want your organization to succeed. I don't think it's something that needs to be controlled but it is something you need to balance. You need to be able to have honest conversations with them and everyone else in your group about communication and expectations and how you will work together, share, and agree on outcomes you will obtain. You want to maximize the use of your high influence, high-interest people. Listening to them and also sharing your objectives will help you get to the right place. The big part of it is to build bridges and help people from different organizations with different goals in mind find common ground. This ties nicely into that. Elizabeth, is there anything you might want to add?

>> I completely agree with what you said. When I read the question, I think the egos of the high influencers, one of the dangers and you are saying to avoid this which is right but how it often plays out is this person has an ego and they are high influence over their viewpoint gets deferred to. I agree with Erica you don't want to [ Indiscernible ] that viewpoint but some ways you can balance it but as Erica said you can think about some reasonable modifications to how you access information from your stakeholders. For example, if the person is very vocal in a meeting or focus group for example and other people don't speak up because this person has influence an ego and says things like that is final, then you want to have alternatives such as no votes will be taken for the first time at a meeting. Or all issues will be presented in one meeting and voted on at another. This is actually a strategy we use for folks with cognitive disabilities. In that situation it allows the individual to reach out to someone to help understand the meaning of the potential boat and to review documents and not have to come up with a decision on the fly. It works as well when you have big egos and big influencers. By delaying the boat until the next meeting you allow those who are quiet or don't have big egos to contact you with information. This is an example of another way -- before anything goes out you can say things will go out for review so if one viewpoint has been written down in a meeting but there is a chance to review it, maybe other folks can speak up during the review. It's not a perfect solution but allows you to do what Erica said which is not squelch the person but listen to all viewpoints.

>> That is excellent advice and a good point. You are balancing an individual perspective with group dynamics as the voice of all. That is an excellent recommendation.

>> We have another question about do you evaluate your stakeholders and if so how so? I will hand the tree to you, Elizabeth.

>> We did talk about evaluation before and I think when you evaluate, your goal is going to be to determine whether you had your goals met. Then it doesn't become a personal thing about stakeholders but becomes a practical issue. If this person is a great friend and they speak a lot and are easy to keep in touch with, but do they really provide gaps in the services which need to be filled? I think you need to be evaluating and if you have folks you really like and don't want -- and you want to keep them involved, then evaluate them and say we will keep them on but we have to add this person with expertise in technology that the managed care company uses or this person who might have expertise in writing press releases for example. You always have to evaluate your stakeholders.

>> I agree. I think you are on point as far as a heart of your evaluation of the feedback you have received and how that compares to the outcomes of work you did as well is identifying gaps, duplication and it might be gaps in the type of organization or a representative you have. It could potentially be a gap within an organization. If you had a healthcare representative but the person at the table wasn't able to speak to the issue you needed then maybe you need someone from a different department or someone

with the different expertise to provide that perspective. Definitely look at what your goals were and whether or not the stakeholder you brought to the table helped you achieve them. If they didn't, how do you modify your panel?

>> Another one along the stakeholder and champion line is how involved should our board be with the stakeholders and champions? Elizabeth, I will give that back to you again.

>> I think boards should be very involved. I know this isn't what the CEO would suggest but in many cases the board to be driving the change or could be trying to slow down the change. You want to provide as much information as you can to the board so whichever side they are on you are developing more common ground. Sometimes with change you are going to have significant staff leave because they don't agree with the change, and you will have turmoil in your organization sometimes would change because people just don't like change. I found board members can often be an additional voice to a CEO to help people navigate the change and keep things calm. If you have a fear of keeping things calm that you don't need the board for that but you can use them for the good cop/bad cop. Boards can be brought in and be very useful particularly at times at the table. Often it's the board that drives the change in it it might not be the CEO wanting it so the CEO might leave the organization and then you really need the board. Those are my thoughts.

>> That's excellent. I agree and I think that's come up more recently in some conversations as part of the Business Acumen Center is pulling in people that need to drive or agree to the change overall. I don't have anything to add and I think you covered that question very nicely.

>> The next question is can you comment on the fact that CEOs have other CBO competitors but for-profit competitors as well and does that create additional consideration? I will start this one. I think overall when you look at your competitor analysis as part of the environmental [ Indiscernible ] and employ that into your SWOT analysis might be additional strengths that you see from them and how you approach your evaluation of them will be the same. Your strategies to address both sets may be different. For example a for-profit organization may have more resources like simplified administrative support hosted at a corporate office and may be able to keep their costs lower. You would need to look at that and how that impacts your organization and your strategic plan when you look at what your niche is and how you plan to sustain your services. How you approach them in the environmental scan and the SWOT analysis would be overall the same but the findings would just be different. Elizabeth?

>> I completely agree with that. It's about framing your niche and using stakeholders to help differentiate your value. Maybe originally you look at the pros and cons of both organizations. You reach out to stakeholders to help find differentiation. I can see for-profit companies you would have to deal with the culture of the organization differently with a hierarchy. And Erica, I recall there's a big part of the toolkit we have a had a chance to go into but understanding the culture of the organization is discussed and I think somewhat getting at this question is the culture of the nonprofit, we serve everyone, we don't worry about finding the right code for billing because our goal is to not turn anyone away, or is the culture we have to have everything billed right and we have to protect our resources and those kind of things. Is the culture that it can take two weeks to get a meeting or is the culture you can just walk in? These are sometimes differences you have to evaluate for any organization and it might come to a had more wind you talk about nonprofit -- and it might come to a head more when you talk about nonprofit versus for-profit.

>> The last question are any thoughts of using logic models to establish objectives, outcomes and goals? That question takes us into the next stage. What we talked about today is gathering information you need in order to build your strategic plan or your business plan and definitely using the information that you find to create a logic model that helps drive your work is good. You identify the problems or goals you want to obtain for your organization and then identify outcomes. What are your long-term objectives, outcomes, what do you want to accomplish in the short term and what do you want to do midrange? From there use the information you have gathered to create your plan. Look at what your assumptions are and what resources you need or have in order to accomplish your work. Also what activities you will do and outputs that will help you obtain those goals or outcomes. Definitely any time you can use structured mechanism to help drive your work will help keep the plan itself on track and will ensure that those who are a part of it or monitoring it will be a part of the clerestory line and understand what it is to be done and where you are in progression. Are you on track or off-track and do you need to modify your approach at all? Any time you use a structured mechanism to drive your work, you should do it. The -- you have anything to add?

>> No. That's everything.

>> All right. With that if you go to the next slide please.

>> I want to thank everyone again for joining us for today's webinar. I want to thank Elizabeth in particular for being my co-presenter today. We have been happy to do this and the slides and the transcript and recordings will all be available at the website shown here. Also there will be an evaluation survey you can take and once it's posted we will show where you can sign up for the next webinar. Thank you again and thanks for the questions. Have a great day.

>> [ Event concluded ]