**Community Investment in Individuals with Disabilities**

***An Agency Self- Assessment Tool to Develop Community Capacity to Support Integrated Services***

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Ohio is building a system that supports people who use waiver-funded home and community-based services (HCBS) to have opportunities to fully access community life through waiver settings in the community, expanded day service options, and assurance of privacy and rights at home. Recognizing that community life is not simply the absence of an institution, the Centers for Medicare & Medicaid Services implemented regulations to ensure that people receiving services and supports through HCBS waivers are assured full opportunity to participate in their community. All state governments are developing plans to comply with federal settings regulations for waiver recipients. Learn more by reading [Ohio's Transition Plan](http://www.healthtransformation.ohio.gov/LinkClick.aspx?fileticket=f8g7SCy4WQ4%3d&tabid=125).

Ohio’s priorities include:

* Person-centered planning. Ohio requires person-centered planning to be used in developing all Individual Service Plans (ISP). ISPs should include outcomes and services and supports that reflect a balance of what is important to and for people.
* Employment. Through Executive Order and Administrative Rule, Ohio has established community employment as the priority service and preferred outcome for working-age adults. Employment must be addressed in every person-centered plan.
* Community. Ohio has established standards to ensure that home and community-based services waivers administered by the Ohio department of developmental disabilities maximize opportunities for enrolled individuals to access the benefits of community living and receive services in the most integrated setting.

Meaningful work has significant benefits for all working age adults, including people with developmental disabilities. People with developmental disabilities have the right to make informed decisions about where they work, and to have opportunities to obtain community jobs that result in greater earnings, better benefits, improved health and enhanced quality of life. In addition, meaningful employment offers individuals with developmental disabilities the opportunity to bolster self-esteem, expand their network of natural supports, make friends, and demonstrate their professional abilities in a public setting. These benefits all contribute to the diversity of our workforce and enrichment of our community.

This is Ohio’s vision: working-age adults…working. And to achieve this, an array of services and supports that help people get jobs, keep jobs, get better jobs, get to and from jobs, and have meaningful lives outside their jobs. Ohio recognizes there are times people don’t or won’t work: people retire, get sick, get fired, quit, have setbacks, and even times when the people supporting them just can’t figure out what kind of job they could do. Services and supports are available during those times as well, to help people understand their options, discover ways to contribute, connect and participate meaningfully in their communities.

***What is the Agency Investment in Individuals with Disability Tool?***

Providers continue to follow the settings suitability rule ([OAC 5123:2-9-02](http://dodd.ohio.gov/RulesLaws/Documents/5123-2-9-02%20Effective%202016-06-01.pdf)) and keep their provider certification up to date with settings locations. Providers may need to make changes to their services to ensure full access to the community for the people they serve. This assessment tool will assist to evaluate your agency in integrated services. This will help your agency in planning to come into compliance with the settings suitability rule.

***What is capacity and investment and why is it important?***

*Capacity* in this tool refers to an organization’s knowledge, skills, resources, and foundational readiness to provide integrated services for individuals with disabilities. Capacity is necessary because service delivery requires wide-ranging knowledge about multiple aspects of both community employment preparation and ongoing CLE.\* Necessary resources are equally as broad-based and require partnerships throughout, and outside of, an organization.

*Investment* refers to the level at which an organization has dedicated resources and the importance placed on developing and maintaining the necessary capacity. Investment implies more than a monetary commitment. Investment also includes the value that an organization places on the future success of the individual. Investment requires organizations to make the commitment central to the daily operations and vision of the agency. The commitment to the outcome of CLE\* and community employment requires determination, regardless of the barriers that may be encountered.

***What sections does the Community Investment in Individuals with Disabilities (CIID) include?***

* Investment Priorities: Areas that should be addressed to build capacity and investment are identified. The tool has seven priority areas that include:

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| 1. *Leadership* | 1. *Interagency Collaboration and Partnership* | |
| 1. *Strategic Goals and Operating Policies* | 1. *Services and Service Innovation* |
| 1. *Financing and Contracting Methods* | 1. *Performance Measurement and Data Management* |
| 1. *Training and Technical Assistance* |  |

* Priority Statements and Evidence: Each section includes statements that describe activities, priorities, or ways of functioning that create investment within in an agency. Groups discuss how they view their agency’s capacity related to each of these priority area statements. Examples of what the agency has done to operationalize each statement can be documented in the area of the document labeled “evidence”.
* Priority Statement Implementation Rating: After discussion, the group determines a rating for the statement. A 1 – 4 rating scale allows the group to identify where the agency currently functions. The rating may reflect that the item is not in place at this time, is in place but minimally effective, in in place but needs review or in place and effective. The total rating of all statements in a section is calculated and documented in that section.
* Priority for Change Rating: In addition to the rating of implementation, the team will also decide if this statement is a high, medium, or low priority for action or intervention. Some low rated items are also low priority as there may be other actions that need to be in place before addressing this target. Some high rated item may become a high priority as well because they can be addressed quickly and crate momentum for further change.
* Resources/Needs: During and after completing each of the priority area discussions, the team can record the resources or assets that currently exist within the agency that address each global priority area. These may be people, practices, collaborations, materials, etc. In addition, the team can identify needs that would allow the agency to improve the investment in the corresponding priority area.
  + Score Table: The scores are graphed in order to quickly view where the global strengths and needs exist. Teams may identify patterns that cause them to re-examine the items or may validate the general discussions of the group.
  + Action Plan: Finally, the action plan template allows the team to select several priority areas that require action.

***How was the CIID developed?***

The CIID emerged as a tool developed by a multi-agency group of transition and employment leaders that helped identify and develop the content and format of the tool. The target areas in the CIID were identified when leaders in transition and employment across Ohio identified the need for agency collaboration, cooperation, communication, expertise in EBP, and resources as essential to successful transition to employment. The absence of these components was also reflected in other work groups as barriers to CLE\* supports and community employment. Experts in the field recognize the need for regional or local community investment in order to implement individual services. The resulting tool addresses these important needs and offers guidance in creating action steps to improve the commitment and investment in an agency’s ability to support individuals with disabilities to reach successful community employment. This tool has been revised to assess capacity and investment to integrated services.

***How is the CIID completed?***

This tool is most effective when completed collaboratively by a group of people from a single agency. Discussion with resulting consensus of how the agency is performing related to each priority area guides the group to identify both strengths and areas needing improvement. The team can also use the information from the tool to prioritize the most critical areas to address and to develop an action plan for improvement.

Directions for Use

1. TEAM. Identify a team from the agency that includes people of different roles, different viewpoints and different experiences in order that agency assessment will be complete and comprehensive. The “final” completed document is intended to represent consensus of the agency. Team members may choose to complete to tool individually from their own perspective and then meet as a group and come to consensus on one response. Or the team could meet as a group and complete together. In either situation, the tool is NOT intended to be a numerical average of multiple responses.
2. TIME TO COMPLETE. This will be affected by size of team, method for completing, amount of discussion needed to come to consensus. Overall, all 7 areas are designed to be reviewed in one hour (less than 10 minutes per Indicator area) with discussion and consensus building this may increase the process to several hours.
3. RECORDER. Identify a recorder that will be able to document the discussion and the collective decisions on ratings and evidence
4. FACILITATOR. It is recommended that one person be identified as the facilitator to the process. This person introduces the process and helps move the process along. In some cases, especially if it is a large group, a person with experience facilitating may be necessary in order that the group does not get stuck on one particular issue or item. The facilitator can help the group move through the items in a way that encourages participation and prevents fatigue with the process.
5. REVIEW. Review the general profile at the end. After the tool is complete, the team should review the profile. Identify areas that stand out as strong and can be used as foundational to a transition action plan. Identify areas of challenge or weakness that will require strategic development. Gain consensus from the group that the profile is reasonably accurate
6. CREATE A PLANNING PROCESS. Finally, discuss how the group will move forward on making a plan of action. Who will be included? How and when will the group meet to plan? Where will this occur?

Before beginning the Self-Assessment process, as a team discuss the following questions and develop statements that clearly articulate the mission/vision. If there is no agreed upon answer to these questions, an action plan should include the development of mission and vision statements.

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| What is the Agency’s Mission, Vision and Focus for individuals with developmental disabilities related to integrated services? |  |
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| Is there a regional network, council or other collaborative entity? If so, what is this group’s Mission / Vision and shared purpose for the individuals with developmental disabilities related to integrated services? |  |

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| **Rating Scale: (circle one)**  **1 = not in place**  **2 = in place minimally effective**  **3 = in place, needs review**  **4 = in place, effective** | | | | **Priority Area**  *Leadership*  *Leadership at all levels of the organization is committed to CLE\* and competitive, integrated employment for individuals with Intellectual and Developmental Disabilities.* | **Evidence**  *Include descriptions or location of evidence to support the priority area statement* | **Priority for Change** |
| 1 | 2 | 3 | 4 | *1. Leadership sends consistent messaging that CLE\* should be supported in each person’s life. (Please evaluate based on mission/vision statement and policies/procedures.)* |  | ☐ Low  ☐ Medium  ☐ High |
| 1 | 2 | 3 | 4 | *2. Leadership sends consistent messaging that competitive, integrated employment should be supported in each person’s life. (Please evaluate based on mission/vision statement and policies/procedures.)* |  | ☐ Low  ☐ Medium  ☐ High |
| 1 | 2 | 3 | 4 | *3. Leadership demonstrates that the involvement and support of people served, families, and caregivers is a critical resource to CLE.\** |  | ☐ Low  ☐ Medium  ☐ High |
| 1 | 2 | 3 | 4 | *4. Leadership demonstrates that the involvement and support of people served, families, and caregivers is a critical resource to competitive, integrated employment outcomes.* |  | ☐ Low  ☐ Medium  ☐ High |
| 1 | 2 | 3 | 4 | *5. Leadership empowers personnel including Direct Support Professionals to demonstrate and support the values embedded in person-centered planning.* |  | ☐ Low  ☐ Medium  ☐ High |
| 1 | 2 | 3 | 4 | *6.* *Leadership has engaged with persons served, families and caregivers* |  | ☐ Low  ☐ Medium  ☐ High |
| 1 | 2 | 3 | 4 | *7.* *Leadership has created specific opportunities for families to provide insight and feedback regarding CLE and Competitive Integrated Employment resources* |  | ☐ Low  ☐ Medium  ☐ High |
|  |  |  |  | **Grand Total *Leadership*** | ***Team Consensus of Priority Rating*** | ☐ Low  ☐ Medium  ☐ High |

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| **Rating Scale: (circle one)**  **1 = not in place**  **2 = in place minimally effective**  **3 = in place, needs review**  **4 = in place, effective** | | | | **Priority Area**  *Strategic Goals and Operating Policies*  *CLE\* and competitive, integrated employment are identified as the preferred outcome in policy and is supported by service goals and practices.* | **Evidence**  *Include descriptions or location of evidence to support the priority area statement* | **Priority for Change** |
| 1 | 2 | 3 | 4 | *1. The organization has policies around CLE,\* or supporting people with IDD to access and participate in their communities outside of employment as part of a meaningful day.* |  | ☐ Low  ☐ Medium  ☐ High |
| 1 | 2 | 3 | 4 | *2. The organization has policies around competitive, integrated employment as part of a full life.* |  | ☐ Low  ☐ Medium  ☐ High |
| 1 | 2 | 3 | 4 | *3. Policies require person-centered planning and are clearly reflected in practices* |  | ☐ Low  ☐ Medium  ☐ High |
| 1 | 2 | 3 | 4 | *4. The organization uses practices that help individuals and their families/caregivers see beyond “programs” and understand what services will help them meet their personal outcomes.* |  | ☐ Low  ☐ Medium  ☐ High |
| 1 | 2 | 3 | 4 | *5. The organization has a strategic plan that is continuously monitored and updated.* |  | ☐ Low  ☐ Medium  ☐ High |
| 1 | 2 | 3 | 4 | *6.* *The organization engages with persons served, families, and caregivers when developing the strategic plan.* |  | ☐ Low  ☐ Medium  ☐ High |
| 1 | 2 | 3 | 4 | *7. The organization has engaged with local business partners regarding developing policies around CLE and competitive integrated employment.* |  | ☐ Low  ☐ Medium  ☐ High |
|  |  |  |  | **Grand Total *Strategic Goals and Operating Policies*** | ***Team Consensus of Priority Rating*** | ☐ Low  ☐ Medium  ☐ High |

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| **Rating Scale: (circle one)**  **1 = not in place**  **2 = in place minimally effective**  **3 = in place, needs review**  **4 = in place, effective** | | | | **Priority Area**  *Financing and Contracting Methods*  *Financing and contracting methods support CLE\* and competitive, integrated employment outcomes.* | **Evidence**  *Include descriptions or location of evidence to support the priority area statement* | **Priority for Change** |
| 1 | 2 | 3 | 4 | *1. The organization provides an array of services available through multiple funding streams that support CLE\** |  | ☐ Low  ☐ Medium  ☐ High |
| 1 | 2 | 3 | 4 | *2. The organization provides an array of services available through multiple funding streams that support competitive, integrated employment.* |  | ☐ Low  ☐ Medium  ☐ High |
| 1 | 2 | 3 | 4 | *3. The organization's strategic plan outlines strategies to increase utilization of braided funding.* |  | ☐ Low  ☐ Medium  ☐ High |
| 1 | 2 | 3 | 4 | *4. The organization has modified financial planning and contracting methods to support individualized services that prioritize CLE\** |  | ☐ Low  ☐ Medium  ☐ High |
| 1 | 2 | 3 | 4 | *5. The organization has modified financial planning and contracting methods to support individualized services that prioritize competitive, integrated employment.* |  | ☐ Low  ☐ Medium  ☐ High |
| 1 | 2 | 3 | 4 | *6. The organization engages persons served, families, and caregivers to better understand all resources available to support needs* |  | ☐ Low  ☐ Medium  ☐ High |
| 1 | 2 | 3 | 4 | *7. The organizations strategic plan specifically outlines marketing and communication strategies to engage community businesses.* |  | ☐ Low  ☐ Medium  ☐ High |
|  |  |  |  | **Grand Total *for Financing and Contracting Methods*** | ***Team Consensus of Priority Rating*** | ☐ Low  ☐ Medium  ☐ High |

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| **Rating Scale: (circle one)**  **1 = not in place**  **2 = in place minimally effective**  **3 = in place, needs review**  **4 = in place, effective** | | | | **Priority Area**  *Training and Technical Assistance*  *Investment in training emphasizes an expectation for CLE\* and competitive, integrated employment across all job categories.* | **Evidence**  *Include descriptions or location of evidence to support the Priority Area Statement* | **Priority for Change** |
| 1 | 2 | 3 | 4 | *1. The organization sets priorities for training and TA to support people in pursuing CLE\* outcomes.* |  | ☐ Low  ☐ Medium  ☐ High |
| 1 | 2 | 3 | 4 | *2. The organization sets priorities for training and TA to support people in pursuing competitive, integrated employment outcomes* |  | ☐ Low  ☐ Medium  ☐ High |
| 1 | 2 | 3 | 4 | *3. Personnel receive training on how to support people in pursuing CLE\** |  | ☐ Low  ☐ Medium  ☐ High |
| 1 | 2 | 3 | 4 | *4. Personnel receive training on how to support people in pursuing competitive, integrated employment.* |  | ☐ Low  ☐ Medium  ☐ High |
| 1 | 2 | 3 | 4 | *5. Organization staff receive training and tools to provide education and support to see CLE\* as attainable and desirable outcomes.* |  | ☐ Low  ☐ Medium  ☐ High |
| 1 | 2 | 3 | 4 | *6. Organization staff receive training and tools to provide education and support competitive, integrated employment as attainable and desirable outcomes.* |  | ☐ Low  ☐ Medium  ☐ High |
| 1 | 2 | 3 | 4 | *7. Individuals/families/caregivers are provided with education and support to see CLE\* as attainable and desirable outcomes.* |  | ☐ Low  ☐ Medium  ☐ High |
| 1 | 2 | 3 | 4 | *8. Individuals/families/caregivers are provided with education and support to see competitive, integrated employment as attainable and desirable outcomes.* |  | ☐ Low  ☐ Medium  ☐ High |
| 1 | 2 | 3 | 4 | *9. Personnel receive training on the evolution of services from institutional to community-based, and the life outcomes of people as a result.* |  | ☐ Low  ☐ Medium  ☐ High |
| 1 | 2 | 3 | 4 | *10. There are specific priorities for engaging families in developing the outcomes desired of the training and technical assistance.* |  | ☐ Low  ☐ Medium  ☐ High |
|  |  |  |  | **Grand Total *Training and Technical Assistance*** | ***Team Consensus of Priority Rating*** | ☐ Low  ☐ Medium  ☐ High |

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| **Rating Scale: (circle one)**  **1 = not in place**  **2 = in place minimally effective**  **3 = in place, needs review**  **4 = in place, effective** | | | | **Priority Area**  *Interagency Collaboration and Partnership*  *Building relationships with advocates, families, businesses, civic groups, key state and local agency partners and removing barriers to CLE\* and integrated employment supports.* | **Evidence**  *Include descriptions or location of evidence to support the Priority Area Statement* | **Priority for Change** |
| 1 | 2 | 3 | 4 | *1. Individuals/families/caregivers are involved in identifying and leveraging their connections and networks to support access to CLE\* opportunities.* |  | ☐ Low  ☐ Medium  ☐ High |
| 1 | 2 | 3 | 4 | *2. Individuals/families/caregivers are involved in identifying and leveraging their connections and networks to support access to competitive, integrated employment opportunities.* |  | ☐ Low  ☐ Medium  ☐ High |
| 1 | 2 | 3 | 4 | *3. There is regular communication and collaboration with local partners. (Examples: local businesses, schools, human service organizations, faith-based organizations, clubs, social groups, etc.)* |  | ☐ Low  ☐ Medium  ☐ High |
| 1 | 2 | 3 | 4 | *4. Local partnerships exist beyond the disability service system, i.e connections with Ohio Means Jobs, Chambers of Commerce, volunteer organizations, etc.* |  | ☐ Low  ☐ Medium  ☐ High |
| 1 | 2 | 3 | 4 | *5.* *The organization supports families, i.e. initiatives, policies, projects, or systems activities across the lifespan* |  | ☐ Low  ☐ Medium  ☐ High |
| 1 | 2 | 3 | 4 | *6. The organization has specific policies and procedures for engaging both families and local business partners.* |  | ☐ Low  ☐ Medium  ☐ High |
|  |  |  |  | **Grand Total *for Interagency Collaboration and Partnership*** | ***Team Consensus of Priority Rating*** | ☐ Low  ☐ Medium  ☐ High |

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| **Rating Scale: (circle one)**  **1 = not in place**  **2 = in place minimally effective**  **3 = in place, needs review**  **4 = in place, effective** | | | | **Priority Area**  *Services and Service Innovation*  *Service definitions and support strategies provide CLE\* supports and competitive, integrated employment supports to all individuals with developmental disabilities regardless of the intensity of their needs.* | **Evidence**  *Include descriptions or location of evidence to support the Priority Area Statement* | **Priority for Change** |
| 1 | 2 | 3 | 4 | *1. The organization has a system in place to support individualized services that prioritize CLE\* regardless of intensity of need* |  | ☐ Low  ☐ Medium  ☐ High |
| 1 | 2 | 3 | 4 | *2. The organization has a system in place to support individualized services that prioritize competitive, integrated employment regardless of intensity of need* |  | ☐ Low  ☐ Medium  ☐ High |
| 1 | 2 | 3 | 4 | *3. The organization engages with individuals served families, and caregivers to ensure individualized services and support strategies that prioritize CLE\* supports regardless of intensity of needs* |  | ☐ Low  ☐ Medium  ☐ High |
| 1 | 2 | 3 | 4 | *4. The organization engages with individuals served families, and caregivers to ensure individualized services and support strategies that prioritize competitive integrated employment supports regardless of intensity of needs* |  | ☐ Low  ☐ Medium  ☐ High |
| 1 | 2 | 3 | 4 | 1. *The organization has a system in place to improve business engagement.* |  | ☐ Low  ☐ Medium  ☐ High |
|  |  |  |  | **Grand Total *for Services and Service Innovation*** | ***Team Consensus of Priority Rating*** | ☐ Low  ☐ Medium  ☐ High |

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| **Rating Scale: (circle one)**  **1 = not in place**  **2 = in place minimally effective**  **3 = in place, needs review**  **4 = in place, effective** | | | | **Priority Area**  *Performance Measurement and Data Management*  *Comprehensive data systems are used to measure progress, benchmark performance, and document outcomes on key indicators across CLE\* and competitive, integrated employment.* | **Evidence**  *Include descriptions or location of evidence to support the Priority Area Statement* | **Priority for Change** |
| 1 | 2 | 3 | 4 | *1. Organization has set yearly benchmarks to increase CLE\* outcomes for persons served.* |  | ☐ Low  ☐ Medium  ☐ High |
| 1 | 2 | 3 | 4 | *2. Organization has set yearly benchmarks to increase competitive, integrated employment outcomes for persons served.* |  | ☐ Low  ☐ Medium  ☐ High |
| 1 | 2 | 3 | 4 | *3. Organization has a way to collect the data to track progress towards benchmarks.* |  | ☐ Low  ☐ Medium  ☐ High |
| 1 | 2 | 3 | 4 | *4. Organization engages with individuals served families, and caregivers to develop benchmarks and shared information related to progress towards benchmarks* |  | ☐ Low  ☐ Medium  ☐ High |
| 1 | 2 | 3 | 4 | *5. The organization has a system in place to gather relevant business engagement data to improve CLE and competitive integrated employment.* |  | ☐ Low  ☐ Medium  ☐ High |
|  |  |  |  | **Grand Total *for Performance Measurement and Data Management*** | ***Team Consensus of Priority Rating*** | ☐ Low  ☐ Medium  ☐ High |

As the team discusses each indicator, make note of identified resources that exist in the community as well as the resources needed.

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| **Priority Area** | **Currently Available Resources/Assets to Assist in Improving this Priority Area** | **Resource Needs Related to Improving this Priority Area** |
| 1. *Leadership* |  |  |
| 1. *Strategic Goals and Operating Policies* |  |  |
| 1. *Financing and Contracting Methods* |  |  |
| 1. *Training and Technical Assistance* |  |  |
| 1. *Interagency Collaboration and Partnership* |  |  |
| 1. *Service and Service Innovation* |  |  |
| 1. *Performance Measurement and Data Management* |  |  |

**Sample Score Table**

**D.\_\_\_\_10\_\_\_\_\_ Training and Technical Assistance**

**E.\_\_\_23\_\_\_\_\_\_ Interagency Collaboration and Partnership**

**F.\_\_\_\_\_12\_\_\_\_ Service and Service Innovation**

**Enter Grand Total for each Indicator.**

**A. \_\_\_\_15\_\_\_Leadership**

**B.\_\_\_18\_\_\_\_ Strategic Goals and Operating Policies**

**C.\_\_\_28\_\_\_\_Financing and Contracting Methods**

**G.\_\_\_\_24\_\_\_\_\_ Performance Measurement and Data Management**

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**Score Table**

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| **A. \_\_\_\_\_\_**  **Leadership** | **C \_\_\_\_\_\_\_**  **Financing and Contracting Methods** | **E. \_\_\_\_\_\_\_\_\_**  **Interagency Collaboration and Partnership** | **G. \_\_\_\_\_\_\_\_\_**  **Performance Measurement and Data Management** |
| **B. \_\_\_\_\_\_\_**  **Strategic Goals and Operating Policies** | **D. \_\_\_\_\_\_\_\_\_**  **Training and Technical Assistance** | **F. \_\_\_\_\_\_\_\_\_**  **Service and Service Innovation** |  |

**Enter Grand Total for each Indicator.**

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**Action Plan Template**

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| **Priority Area/Statement**  ***Including Current Rating and Evidence*** | **Desired Rating/Change**  ***How will the status of the Priority Area change after action plan?*** | **Objective**  ***What do we want to achieve? Example: What will be developed or how will current practices, policies, knowledge, skills change?*** | **Action Steps**  ***What specific activities need to occur to achieve the outcome?*** | **Timeline/Person Responsible**  ***Who and When*** |
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