



STRATEGIC PLAN – PLANNING PERIOD 2019 - 2021

EXECUTIVE SUMMARY

The Able Trust develops the organization's strategic direction using a three year planning period. This strategic plan covers the 2019 – 2021 calendar years. The strategies as developed are extensively dependent on state laws, as the organization operates under Florida Statutes as a Direct Service Organization (DSO) of the Florida Department of Vocational Rehabilitation/Department of Education. The Board has much discretion within the statutory direction, which directs the organization to raise funds from various sources, to receive, hold and manage property (which would include investments), and to make expenditures for the benefit of rehabilitation programs approved by the Board of Directors. The statute further expands the discretion of the Board, authorizing expenditures to organizations, agencies, associations, individuals, and basically to any organization or Foundation operated for charitable, educational or scientific purposes – generally to any 501(c)(3) entity that addresses rehabilitation issues, be that funding of programs, education of key leaders and businesses, research, communications, and the development of its own internal programs, among other options.

Members of the Able Trust Board, Ambassadors and staff met on June 21 and September 20 to analyze data, the current environment and the resources of the organization to consider its direction for the next planning period. The June 21 session included a facilitated session on fundraising. Many ideas and concepts were brought to those sessions. The Board further reviewed the first draft of the executive summary at its December 2018 meeting. In this process, the following six areas were identified as strategic for The Able Trust for the planning period of calendar years 2019 – 2021. The Executive Summary of the Strategic Plan is presented below, with data and analysis in the sections that follow.

Strategy One: Sustainability of the organization: Critical to all future planning is the taking of actions that will assure the continuation of operations. Since the current Florida statutes call for the organization to cease operations in October of 2019, legislative action is necessary during the 2019 Florida legislative session to eliminate the sunset date. It is imperative that the sunset issue be resolved before October, thus the primary strategy of The Able Trust for the planning period is the dedication of resources to working with state legislators to allow the organization to continue its operations and the mission. For 2019, this means effective communications with legislators, including outcomes data and individual employment successes to help pass legislation removing the sunset language from the statutes. A full legislative team, along with Board members, Ambassadors and staff will continue their work in informing and building relationships with the legislative decision-makers, to assure passage of legislation to assure legal sustainability.

Strategy Two: Continuation of programs directed at youth and young adults: The Able Trust's High School High Tech (HSHT) program continues as the signature youth program of the organization, successfully serving Florida High School students with disabilities for 19 years. It is a program

producing excellent outcomes, is respected and supported by DVR/DOE and the communities it serves, and should be continued at 43 sites in the 40 counties where the program was available in 2018. In addition, The Able Trust should fully fund one new start-up program during school year 2019-2020 from its grant budget. The program will continue using the five national HSHT guideposts and a sixth communications guidepost, designed by The Able Trust. The Able Trust should also launch the first of its Leadership Academy programs for young workers with disabilities who wish to add to their employability (soft) skills to enhance their hard skills, to enable them to bring greater value to their employers and to increase their own satisfaction in their career pursuits. The curriculum for the Academy will be developed in 2019, with one training conducted by year end. This training will be targeted at young adults, early in their careers. Results of the 2019 Academy will guide continuation into future years.

Strategy 3: Work Experiences: Research, both formal and informal has clearly shown that work experiences – internships, mentoring, apprenticeships, job shadowing, part time seasonal work, etc. – are significant in identifying the most effective route to career decisions and a career path for all workers. Florida’s business and education leaders are identifying work experiences as the most important education activities for job and career goals. The Able Trust knows this is especially true for people with disabilities, who have additional challenges gaining entry into the world of work. All of the programs of The Able Trust that encourage and create work experiences should continue into the next planning period. This includes growing the effective Disability Employment Awareness Month (DEAM) program, continuing the emphasis on work experiences in the HSHT program, and prioritizing providing grants to organizations that include work experiences in their activities which assist their program participants in identifying a job and career path.

Strategy 4: Grant Program: The Able Trust has been known as a source of grant funding for employment and rehabilitation programs that serve Floridians with disabilities, and statutes require the continuation of such activity. Grants should continue to be offered in three categories: multi-year strategic grants, annual HSHT grants, and grants to other nonprofit organizations for education, communications and research purposes. An analysis of employment outcomes for the past four years for the funded rehabilitation organizations indicates that the multi-year grants produce a significantly larger number of employed participants than the general annual grants. In addition, the cost per individual employed for the longer term grants is far less. The Able Trust will increase its long term strategic grant support to two or three awards in FY 2020, and will add one funded HSHT program in FY 2020. The emphasis on longer term, larger grants will continue into years two and three of the planning period provided outcomes continue to support the strategy and funding remains available. Each funded workforce program must provide workforce experiences to at least 50% of the program participants, and clearly recognize The Able Trust as a champion funding organization in their promotional materials and in their communities.

Grants to non-profit organizations for education, communications and research purposes will continue to be budgeted for each year of the planning period. This will satisfy the statutory requirements for encouraging public and private support to enhance the employment of Floridians with disabilities, and use of funds to perform planning, research and policy development.

Strategy 5: Communications & Research: These two strategic areas are very closely connected, and must be considered together. The Able Trust has a charge to use some of its resources to provide for “education, communication and research purposes” Communications require good data to be effective, and the data must be supported and credible, which requires research that is statistically significant. Research will include completion of the longitudinal study of Able Trust grantee programs and the effectiveness of their activities in the first half of 2019, with results used in communications and program design. A statewide study of business leader perceptions on the hiring of people with disabilities will be scheduled for year 2 or 3 of the planning period. Three key audiences will be targets of Able Trust communications and research results; state policy-makers and their staff; Florida business leaders; and those policy-makers at the federal level that affect opportunities for workers with disabilities. In addition, the Able Trust will continue to maintain a public presence through public radio spots in the Florida major media markets, through publicity generated by grant awards, and through an effective use of print and social media.

During the first half of 2019, a formal communications plan for The Able Trust Alumni Association will be developed and implemented.

Strategy 6: Fundraising and Development: Since 2017 The Able Trust has adjusted its operations to comply with changes to its governing statutes, which affected its fundraising and development functions. The organization was required to account for private and public funds separately, while complying with ethical and legal obligations to assure that donor funds are used per donor requests. Private donations will continue to be directed to a non-profit entity with a similar mission to assure use as private donors direct, with donor-directed funds available to The Able Trust via a grant request process.

Per an analysis of past fundraising efforts, a restructure of the fundraising function is indicated. During calendar year 2019, fundraising will be directed to obtaining financial support for specific programs and activities. A consultant or fundraising entity will be hired to assist in the fundraising activities. During 2019, fundraising will be analyzed and a plan for years 2020 and 2021 will be developed, which will include an analysis of the ability to secure major endowments, and address the solicitation of donations from individuals and businesses.

Guiding Principles

In the process of developing and implementing the strategic direction of The Able Trust for the planning period 2019 - 2021, the following three questions will guide tactical decisions, as they did in the implementation of the 2016 - 2018 plan.

- I. How does this activity and use of our resources advance our mission – our litmus test? (How can The Able Trust be “Disproportionately Influential”?)
- II. Is this investment of our resources an investment in the change we desire? (Catalytic Philanthropy)
- III. Does this activity promote The Able Trust as a key player in Florida in a greater national movement of equal opportunities for successful employment for all people with disabilities?