

1994-99 STRATEGIC PLAN WITH COMPLETE LIST OF TACTICS AND TIMELINES DEVELOPED BY SMALLER GROUPS

■ MISSION STATEMENT

The Coalition of Texans with Disabilities is a statewide coalition of individuals and organizations controlled by Texans with disabilities representing cross-disability needs and working together to eliminate all barriers to equal and full participation in life.

■ VISION 1 -- STRONG, EFFECTIVE LEADERS PROVIDE DIRECTION AND SUPPORT AT STATE AND LOCAL LEVELS.

*Strategies:

- A. Investigate the successful leadership development programs of other organizations.

*Tactics

- 12/31/93 Identify other organizations.
- 1/31/94 Contact other organizations. Request copies of leadership development programs.
- 3/31/94 Borrow leadership development person from other organizations (members or not).
- 5/31/94 Evaluate leadership development plans.
- 8/31/94 Write our leadership development plan drawing from theirs.
- 9/31/94 Copyright our plans.
- 11/1/94 Sell leadership development plan to as fundraiser.

B. Identify potential leaders from the membership and community.

*Tactics

- 9/31/93 Contact established leaders to identify new contacts for leadership potential.
- 12/31/93 Get a list of the Board of directors of all CTD member organizations.
- 1/31/94 Establish written contact with boards of directors of member organizations.
- 1/31/94 Develop news release to be inserted in organizations' newsletters.
- 3/31/94 Send out CTD mailing announcing training.
- 6/31/94 Follow-up expressed interest in CTD with personal contact from area CTD board members.
- 6/31/94 Develop contact log for board members to be turned into committee chair.

C. Implement a targeted leadership program for CTD leaders.

*Tactics

- 7/15/94 Establish a pool of prospective trainees.
- 1/31/94 Review leadership development criteria of ARC, UCP, DD Council, etc.
- 3/31/94 Develop criteria for selection of leadership participants.
- 3/31/94 Develop an application incorporating that criteria for leadership training.
- 3/31/94 Sell the benefits of CTD as a cross disability advocacy organization in a cover letter that will accompany application.
- 5/31/94 Disburse applications through mailings, newsletter articles, etc (see if we can get the DD Council or TRC mailing list)
- 7/15/94 Screen applicants RE: criteria.
- 9/15/94 Contact trainees.
- 12/31/94 Gain written commitment from applicants to attend all training and build CTD.

D. Establish Accountability of trainees.

*Tactics

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|---------|---|
| 3/31/94 | Develop specific agreement as part of application for reimbursement of training expenses if trainee does not meet commitment agreement. |
| 1/1/95 | Develop tracking procedure for follow-up commitment of participants. |
| Ongng | Establish on-going communication with area organizations. |
| Ongng | Participants and their organizations will serve as two way information contact point for CTD. |
| Ongng | CTD will obtain a 3 year commitment from leader trainees to serve on CTD Board of Directors, workgroups, and/or projects, etc. |

■ VISION 2 -- CTD HAS STABLE AND DIVERSIFIED FUNDING SOURCES SUFFICIENT TO IMPLEMENT THE MEMBERSHIP'S STRATEGIC PLAN.

*Contradictions

Governmental Deficits
No "Brick and Mortar"/CTD is not a service provider
Not a single issue group
Competition
Fundraising Know-how
Contacts
Apathy/Commitment
Leadership
Imagination

*Strategies:

- A. Adopt a 1994 one year budget at November 1993 Delegates Assembly.
- B. Adopt a strategic budget with 5-year budget needs projections by June 1994. (Earl & Dave)
- C. Implement a Targeted Solicitation Plan.

*Tactics

- 9/15/93 Top Austin Medicaid providers identified.
- 9/15/93 Targeted Solicitation Training program developed with assistance from consultant.
- 9/15/93 Consultant and Director develop dialogue for test targeted solicitation in Austin.
- 9/24/93 Director and 2 members of Strategic Planning Committee conduct test fundraising with three corporations.
- 10/15/93 Top state Medicaid providers identified.
- 10/15/93 Director compiles target fundraiser list for Austin.
- 11/6/93 At least one fundraising leader from each delegate organization committed to participate.
- 11/7/93 Targeted Solicitation Training conducted at Delegates Assembly by Consultant and Director.

11-12/94 Austin fundraising leaders conduct ten fundraising meetings with targeted providers and other corporations.

Ongng Delegate fundraising leaders and CTD Director conduct local fundraising meetings with targets.

D. Implement a CTD Marketing Plan to enhance fundraising effort.

E. Implement with consultant support a 5-year joint state-local special events fundraising plan.

VISION 3 -- CTD'S MEMBERS COMMUNICATE AND SHARE NEEDS, GOALS AND HUMAN RESOURCES.

* Contradictions

Language Barriers
Cultural Barriers
Funds/Staff/Volunteers
Leadership
Membership Commitment

Note: Our assumption is that board subcommittees and established workgroups will work to facilitate completion of goals on schedule.

*Strategies

A. Implement organizational systems to promote effective information sharing.

*Tactics

11/94

Build and implement a phone network to provide as many people as possible information necessary to facilitate action on immediate issues. Announce at 93 Delegates Assembly; Phase in development; Complete by 11/94.

Identify contact lists for primary and secondary leaders in key areas of the state that includes as many legislative districts as possible.

Primary and secondary leaders will in turn be responsible for developing local contact lists.

Individuals in the phone network will each be responsible for calling five individuals. If phone tree is not working, replace weak links.

11/93

CTD member organizations place CTD information in newsletters/mail-outs and vice versa.

Phone through membership list to identify who has regular publications, and who is willing to submit articles to CTD and/or print CTD articles in their newsletters. Establish key contacts.

Establish deadlines for submitting articles/receiving articles.

Send a fax alert/notice that includes a request for articles, contact names, deadlines, and calendar of local disability rights events.

7/94

1-800 line for phone and fax access to office.

Research cost.

Research available funds (PASTF grant?), Kathy Gallagher of SW Bell, U.S. Sprint, Carolyn Linan on PUC advisory committee.

Establish upon receipt of funds.

Members communicate and educate through newsletters and workshops. (Note: Group members felt that the communication and education through newsletters was previously addressed. We were not sure what the reference to workshops meant specifically. David felt it was most likely a reference to trainings that would be facilitated by CTD in outreach efforts to local communities on issues such as ADA, PAS, IDEA, legislative issues, and "how-to's." Such trainings could fit under our vision as a part of the "staffing" of an organizational communication system, but would probably be more appropriate under another vision.)

11/94

Publish another convention program or resource guide that lists CTD organizations, key contacts, phone numbers, primary issues, and organizational goals/purposes.

- B. Adapt communication systems to outreach to target groups. Develop information in Spanish. Newsletters in Spanish on tape. Brochures in Spanish.

*Tactics

8/1/93

Research places to donate translation services or write a grant to translate material.

- 11/94 Identify number and location of Spanish speaking constituents.
- 2/95 Identify materials most requested by Spanish speakers. Determine what materials could be the most beneficial. What medium can be used to convey the material?
- 11/95 Identify strategic places to place brochures.
- 11/95 Produce materials in Spanish and distribute.

C. Develop state and local level leadership to "staff" organizational communication system.

*Tactics

- 2/94 Establish standard "operating procedures" to guide the local leaders in their efforts.
- 2/94 Identify two leaders from each member organization to serve as liasons to CTD.
- 2/94 Call each individual member organization and receive recommendations.
- 2/94 Identify one local leader/organizer to serve as CTD on-site organizer.
- 11/94 Local leaders begin to hold cross-disability strategy meetings on issues and communicate between organizations. Share media contacts, ideas, etc.

Organizations communicate through teleconferences. (For example, the same kind of system employed by the President's Committee to identify needs and primary issues of organizations across Texas.)

Staff Information and Referral Person on basic issues/ legislative lines.

Research available resources including the possibility of a student intern, VISTA volunteer programs, volunteer programs for older citizens, grants, etc.

Write a grant, or do corporate fundraising.

Establish if resources become available.

11/97

Have three Staff members serving as communication persons/organizers to coordinate efforts of member organizations and develop cross-disability cooperative action on issues.

Research available resources. This could be filled by student intern, VISTA.

Establish if funds are available.

11/97

Satellite "town meetings" on disability issues on public access TV.

11/97

Statewide action on a major issue.

ON VOLUNTEERS:

1. Talk to former staff administering the program. Was it a pain? What did it entail? How much time did it take up to supervise?
2. Find out the "kinks".
3. Identify potential folks to provide necessary supervision. (i.e. Master's Degree level folks)

ON MEMBERSHIP DRIVE:

- Make sure it is separate from the newsletter.

™ VISION 4 -- CTD IS RECOGNIZED AS THE MOST INFLUENTIAL ADVOCACY FORCE FOR TEXANS WITH DISABILITIES.

*Contradictions:

Leadership
Recognition
Membership
Competition from Others
Issue Conflicts
Money
Time
Multiple Priorities
Non-Involvement in Elections

*Strategies

A. Create an advocacy committee to do the work.

*Tactics

11/93	CTD Board appoint an Advocacy Workgroup representative of the membership of CTD.
Ongng	Workgroup meet regularly to plan, work on and evaluate progress on the platform, implementing the platform, advocacy training, evaluation, and communication of successes.
Ongng	Workgroup develop an action plan for each tactic in each strategy.
Qrtly	Workgroup reports activities to the Board quarterly, and to the Delegates Assembly annually.

B. Adopt an advocacy platform of three (3) critical, long term, cross-disability, statewide issues.

*Tactics

1/94	Create or find a survey on advocacy issues for the CTD membership (including review of past issues.)
2/94	Find out agency and other policy maker time-frames for implementing key service programs.
2/94	Adjust CTD time frames to jibe with those of agencies and other policy influencers.

- Ongng Monitor state agency, and other decision makers activities (like: rule-making, program development, legislative interim studies, etc.)
- 3/94 Survey CTD membership to identify issues into a proposed platform for CTD Board Approval.
- 4/94 Select and prioritize issues into a proposed platform for CTD Board approval.
- 4-5/94 Send out proposed platform to membership after CTD Board approval.
- Ongng Communicate with and educate membership through newsletter, workshops, etc. on identified issues.
- 6/94 Delegates adopt advocacy platform at Annual Assembly.
- 10/94 Develop plan for dealing with short term, specific issues.

C. Organize systems and implement the advocacy platform.

*Tactics

- 1/94 Schedule the CTD Annual Convention and Delegates Assembly for June 1994.
- 2/94 Develop advocacy timelines that anticipate critical events (like: legislative session, elections, agency administration of key programs, historic dates, etc.)
- Ongng Communicate with and educate membership through newsletter, workshops, etc. on identified issues.
- 2/94 Identify decision makers.
- 3/94 Formulate means of influencing decision makers (you visit their place, and they visit yours, etc...)
- 5/94 Establish statewide, fast acting, communications networks to involve all interested membership (like: telephone tree, postcard alerts, member group contact person, etc...)

- 5/94 Develop system to ensure messages move through the network.
- 6/94 Schedule four activities CTD membership can take part in to promote the CTD platform.
- 7/94 Review and refine systems and timelines for involving membership and implementing platform.

D. Train public policy advocates.

*Tactics

- 2/94 Identify advocates from around Texas (look for diversity: minority, sex, economic, etc.)
- 3/94 Get two year commitment from all trainees that they will be effective contact persons for CTD in their communities, and invite them to training.
- 6/94 Develop training on platform issues.
- 6/94 Develop training on platform implementation process.
- 6/94 Develop training on public policy processes (like: state agency rule making, legislative, judicial, etc...)
- 9/94 Schedule and conduct training for a minimum of 20 people per year.

E. Assess success in relation to achieving advocacy vision and where we were before.

*Tactics

- 5/94 Committee sets bench marks for evaluating effectiveness in furthering the CTD platform and achieving the advocacy vision, like:
 - passed legislation that helps our goals; blocked legislation against our goals; policies, rules & programs that promote goals; CTD membership feels their involvement; etc...
 and evaluate progress by these benchmarks.

- 6/94 Survey membership for feedback on platform and process at bull session at the convention. (repeat in June 1995 for more complete picture, and then annually thereafter.)
- 7/94 Compare committee's assessment with membership's.
- 1995 Survey network membership about their involvement.
- 1995 Analyze results and refine process in response and as needed.

F. Communicate our successes!

Communicate to CTD membership:

*Tactics

- Ongng PUBLISH NEWSLETTER ON REGULAR BASIS WITH STORIES PROMOTING CTD'S WORK.
- Ongng Nominate CTD for advocacy awards and other recognition by member organizations.
- 5/94 Develop CTD advocacy resume/portfolio to be used by communications, membership and other committees to promote CTD's success, leadership and effectiveness.
- 5/94 Produce annual report of CTD's advocacy accomplishments.
- 10/94 Recognize those individuals and groups who have helped CTD's advocacy.

Communicate to disability community:

- 3/94 Develop or find list of member group and other disability newsletters (include fax and phone numbers, addresses, contact people, and deadlines)
- Mthly Send out to disability newsletters monthly column/press release on CTD;s positions and victories, ways for folks to get involved.
- Ongng Nominate CTD for advocacy awards and recognition by other disability groups.

Communicate to general public:

- 3/94 Develop or get statewide list of general public media (fax and phone numbers, addresses, and contact people) to communicate CTD's positions and victories (check with TRC and other sources before starting list from scratch.)
- Ongng Nominate CTD for advocacy awards and other recognition by other advocacy groups.
- 5/94 Develop CTD advocacy resume/portfolio to be used by communications, membership and other committees to promote CTD's success, leadership and effectiveness.
- 12/94 Send out at least four press releases on CTD advocacy efforts to general media list.

Communicate to decision makers and key players:

- 4/94 "Fickle Finger of Fate"/Disability Dodos Awards on April Fools Day for those who have worked against CTD goals.
- 11/94 Christmas/Thanksgiving party, with press release, to thank decision makers and other key players who have helped CTD achieve advocacy goals. DO NOT INVITE THOSE WHO HAVE NOT HELPED! (Could by October for elections.)

■ VISION 4 -- ALL PROGRESSIVE GROUPS CONTROLLED BY PEOPLE WITH DISABILITIES ARE MEMBERS

*Strategies:

- A. Identify member and non-member organizations that are 51% controlled by persons with disabilities, including outreach into minority and low-income groups.

*Tactics

8/93

With annual membership dues renewal include a survey about the composition of governing boards which are 51% people with disabilities. Survey will include questions regarding: (a) percentages of ethnic members and low-income members; (b) number of dues paying members; and, (c) number of clients.

7/93

Request a list of non-profit organizations serving persons with disabilities in Texas from the Secretary of State.

9/93

Current board members will identify and collect data on potential member organizations in their residential geographic area.

1/94

Newly elected board members will identify and collect data on potential member organizations in their residential geographic area.

1/94

Approach Southwestern Bell Telephone for a computerized list of organizations in their service delivery area working with or serving citizens who are disabled.

- B. Develop a Recruitment Plan.

*Tactics

5/94

Develop materials to market CTD which defines benefits of membership, has a clear, focused message.

Define leadership roles and opportunities.

Train existing leaders on recruiting leaders and members.

- C. Propose to 1993 Delegates an individual member dues increase and a dues structure for organization members based on budget.

■ NEXT STEPS

1. Completion and refinement of visions, strategies, tactics and timelines.
2. Development of 1st year action plan.
3. Development of "Plan-Based" Budget.
4. Manpower Assignments
5. Implementation Process for Succeeding Years and Evaluations

■ UNRESOLVED ISSUES

During the strategic planning retreat it became obvious that some long-standing unresolved issues exist. Part of the strategic plan is to deal with these issues by referring them for decision by the CTD Delegates via development of Resolutions by a Resolutions Committee.