



Annual Grant Planning Meeting  
March 11-12, 2019

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### Agenda

- Presentation of Staff Recommended 2019 Plan and Grant Forecast
- Discussion/Revision to Plan
- Today's Grant Recommendations




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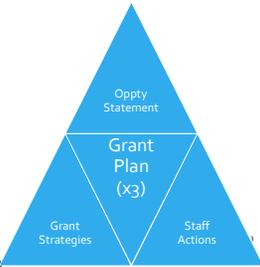
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The Recommended Grant Plan consists of plans in each giving area consisting of three elements

- An **Opportunity Statement** which describes the overall goal for giving in the giving area
- A set of **Grant Strategies** that will guide grantmaking to achieve the Opportunity
- A set of **Staff Actions** that will advance achievement of the Opportunity



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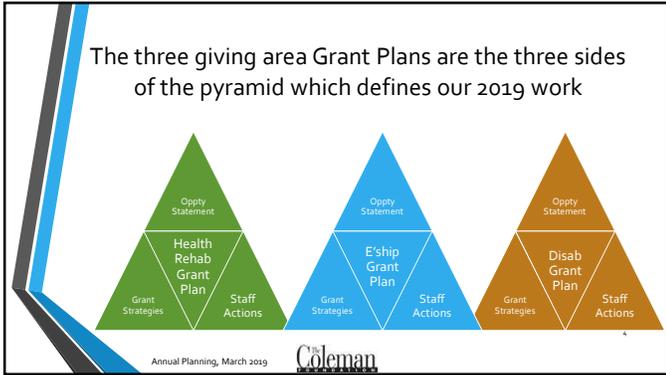
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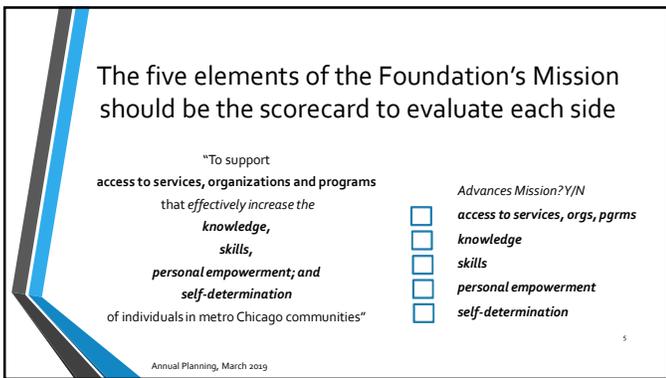
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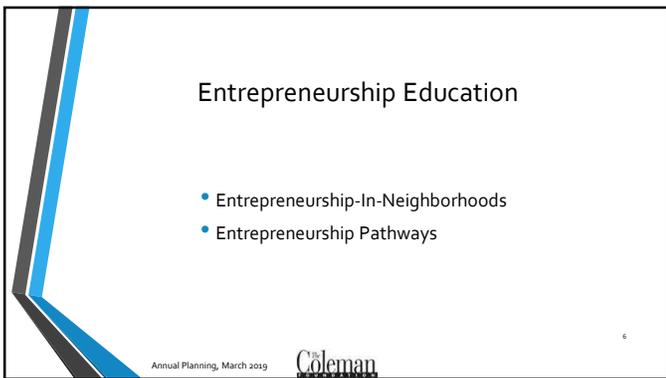
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Entrepreneurship-in-Neighborhoods

## Entrepreneurship-in-Neighborhoods (EIN)

“This is a unique and urgent moment for leaders and stakeholders in the city to consider the supportive roles they can play to improve ecosystem coordination, promote inclusive growth, and enable emerging entrepreneurs to grow and flourish.”

-- Assessing Chicago's Small Business Ecosystem  
CRF USA and next street, January 2019

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Entrepreneurship-in-Neighborhoods

## In 2017 and 2018, CFI laid the groundwork for a major effort to address this opportunity

- Transition of entrepreneurship funding from university/academic to neighborhood contexts
  - Development of Entrepreneurship-In-Neighborhood strategies
  - Awarding of ~\$1.5MM in awards to first round of grantees
- Plans for collaboration with funders (Chicago Community Trust, Polk Brothers Foundation, JPMorgan Chase, others)
  - Participation in Small- and Mid-sized Business Ecosystem Project
- Mike Morris book creating shared language to organize joint efforts

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Entrepreneurship-in-Neighborhoods

## Transition of entrepreneurship funding from university/academic to neighborhood contexts

- Development of Entrepreneurship-In-Neighborhood strategies
  - Strategy 1: Support Individual Business Service Organizations (BSOs)
  - Strategy 2: Develop and Enhance Networks of BSOs
  - Strategy 3: Build Neighborhood Entrepreneurial Pathway Ecosystem
- Awarding of ~\$1.5MM in awards to first round of grantees
  - Strategy 1: Sunshine Enterprises, Chicago Urban League, Greater Southwest Development Corp, etc.
  - Strategy 2: Experiential Classroom workshop for 8 BSO staff; LISC Financial Opportunity Center link
  - Strategy 3: FamilyFarmed link to neighborhood BSOs; Bethel New Life Technology Program







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Entrepreneurship-in-Neighborhoods

## Plans for collaboration with other funders

- Shared goals to support entrepreneurs of color and female entrepreneurs in low income communities
- Year-long effort to research needs of small- and mid-sized businesses in low-income neighborhoods
- Development of multiple work teams advancing recommendations addressing entrepreneurship education/support and capital access
- Possible joint RFP for BSO support
- Other funders involved/aware – Pritzker Traubert Family Foundation, MacArthur Foundation, CIBC

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Entrepreneurship-in-Neighborhoods

Copyright Material

MICHAEL H. MORRIS  
SUSANA C. SANTOS  
XAVIER NEUMEYER

Poverty and Entrepreneurship

## The Mike Morris book is creating a shared language to organize joint efforts

- We have shared book with 60+ stakeholders (grantees, funders, others)
- Convening informal discussions and anticipate formal events around concepts in the book
  - "Five Literacies of the Entrepreneur"
  - "SPODER"
  - "Context-Person-Venture"

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Entrepreneurship-in-Neighborhoods

## "CPV" Framework is critical for understanding

- This framework has great resonance in Chicago neighborhoods and with other funders
- CFI's historical efforts, focused at "Person" level, will not be sufficient to effect change in Chicago neighborhoods with greater needs
- "EIN" may need to transition to "CPV" or, minimally, collaborate with others working at "Context" and "Person" levels

Figure 13.1 Focusing Policies and Programs at Three Levels

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Entrepreneurship-in-Neighborhoods

## The EIN Opportunity Statement builds on our Entrepreneurship In Neighborhoods work

**Opportunity Statement:** "To advance entrepreneurship as a solution to poverty in Chicago"

*Advances Mission? Y/N*

- access to services, orgs, pgms
- knowledge
- skills
- personal empowerment
- self-determination

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Entrepreneurship-in-Neighborhoods

## EIN Grant Strategies deployed in 2018 remain unchanged for 2019 work

- Strategy 1: Support Individual Business Service Organizations (BSOs)
- Strategy 2: Develop and Enhance **Networks** of BSOs
- Strategy 3: Build Neighborhood Entrepreneurial **Pathway** Ecosystem

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Entrepreneurship-in-Neighborhoods

## Staff Actions in 2019 focus on collaboration and cultural competence

- Action 1: Manage Foundation's participation with other funders in complex **collaborative** work
- Action 2: Develop **cultural competence** for understanding new neighborhoods and needs in order to discern appropriate funding actions having local legitimacy




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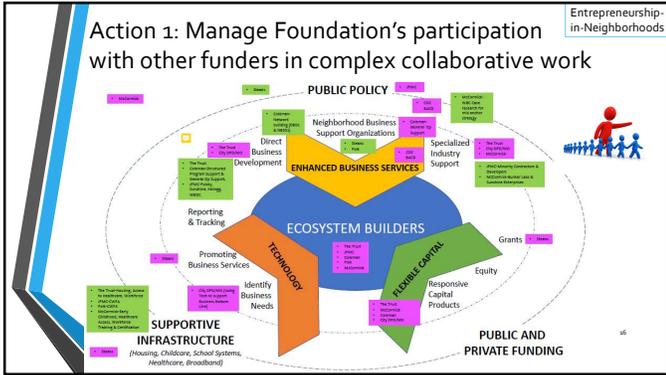
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**Action 2: Develop cultural competence to discern appropriate funding actions having local legitimacy**

Entrepreneurship-in-Neighborhoods

- Engage in Diversity, Equity and Inclusion education (board and staff) to obtain skillsets necessary to understand beneficiaries and grantees in low-income, minority communities – a key part of "Context"
- Enable and maintain the type of active, working relationships with grantees that is part of the CFI way

Coleman

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**EIN Grant Plan**

Entrepreneurship-in-Neighborhoods

- Leverage 40 years of experience funding entrepreneurship education – our core philanthropic competence
- CFI's unique and informed perspective is needed by a collaboration of major funders who share our goals
- Aligns with our mission to increase skills, knowledge, personal empowerment and self-determination of Chicagoans in most need
- Chicago faces dire financial and social prospects if this opportunity is not eventually met

+ BSOs + Networks + Pathways

+ Collaborate + Cultural competence

E'ship as solution to poverty in Chicago

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Entrepreneurship Pathways

## Pathways Program Update...

### SEA Annual Conference 2019



CHICAGO

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### SEA Annual Conference 2019

**Attendance Overview**

- Total: 325
- Schools: 32 Colleges / 1 High Schools
- Students: 176+
- Non-artists: 25+

**Juried Art Competition**

- Individual entries: 24
- Pieces of art: 66
- Pieces selected for competition: 20

**Idea Pitch Competition for Creatives**

- Entrees: 13
- Schools represented: 8
- Amount Awarded: \$3,000



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Entrepreneurship Pathways

## The Pathways Opportunity Statement ...

**Opportunity Statement:**

“To empower emerging entrepreneurs to develop real world skills and connect to the ecosystem”

	Advances Mission? Y/N
<input checked="" type="checkbox"/> access to services, orgs, pgms	✓
<input checked="" type="checkbox"/> knowledge	✓
<input checked="" type="checkbox"/> skills	✓
<input checked="" type="checkbox"/> personal empowerment	✓
<input checked="" type="checkbox"/> self-determination	✓

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## Pathways Grant Strategies



- Strategy 1: Connect emerging entrepreneurs to the ecosystem
- Strategy 2: Foster and support pathway programs

**Grants Awarded in support of Entrepreneurship Pathways continue in 2019**  
 Self-employment in the Arts SEA, Future Founders, INCubatoredu, Entrepreneurship Law Clinic at Northwestern, and other law clinics

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## Entrepreneurship Grant Forecast

Strategy	Approved to Date	Planned for Rest of Year	2019 TOTAL
Entrepreneurship-In-Neighborhoods	\$70	\$2,361	2,431
Pathways	<u>269</u>	<u>100</u>	<u>369</u>
<b>TOTAL</b>	<b>\$339</b>	<b>\$2,440</b>	<b>\$2,800</b>

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## Health and Rehabilitation

“Models of team work are needed, which can be efficiently implemented in various settings and are adaptable to specific features and flow of patient care.

Physicians and health care professionals need to be trained to work in teams whose central member is the patient.

Ultimately, patient-centeredness should be considered a priority, and a precondition of our health care system.

... A 2020 Vision of Patient-Centered Primary Care  
Commonwealth Fund, etal

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Building on decades of relationships with grantees, in 2014, CFI made a major effort to leverage those relationships and improve service delivery for supportive oncology.

Efforts have laid the foundation for programs that focus on patient centered care and can be applied to various patient populations.

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### Health and Rehabilitation Opportunity Statement

**Opportunity Statement:** "Supporting patient engagement and patient centered care lead to better outcomes..."

<input checked="" type="checkbox"/>	<i>access to services, orgs, pgrms</i>
<input checked="" type="checkbox"/>	<i>knowledge</i>
<input checked="" type="checkbox"/>	<i>skills</i>
<input checked="" type="checkbox"/>	<i>personal empowerment</i>
<input checked="" type="checkbox"/>	<i>self-determination</i>

*Advances Mission? Y/N*

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### Grant Strategies...

- Strategy 1: Support delivery of comprehensive, **patient centered care**.
- Strategy 2: Support collaborations, which **integrate** clinical care with community resources and service providers.
- Strategy 3: Support **education** efforts for patients and healthcare professionals.
- Strategy 4: Support clear **communication** of care and treatment options.

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### Staff Actions ...

- Action 1: Manage and oversee CSOC and Coleman 4R Patient Care Sequences for Cancer and Supportive Care, including measurement of financial impact
- Action 2: Leverage learnings from CSOC adults and CSOC pediatrics to address gaps for Adolescents & Young Adults (AYAs) ages 15-39
- Action 3: Expand learnings from Coleman Supportive Oncology Collaborative and apply to other health areas

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- Leverage four decades of supporting cancer care and learnings from the field.
- Apply learnings from supportive oncology collaboration to other areas of patient care.
- To improve outcomes, patient centered care should be a priority, along with access to care.
- Aligns with overall mission to increase skills, knowledge, personal empowerment and self-determination of patients in metro Chicago area.

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### Coleman Supportive Oncology Collaborative Symposium at Mercy Hospital Jan 24<sup>th</sup>

#### CSOC Wrap up

- 170 healthcare providers shared insights from collaborative work
- Physicians, researchers, nurses, social workers, administrators and development staff
- [Toolkit](#) unveiled and now available

#### 4R Patient Care Sequences for Cancer and Supportive Care Kick off

- Panel presentation by implementors of 4R and local pilot
- Next phase for Collaborative institutions

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The Supportive Oncology Collaborative

## Coleman Supportive Oncology Collaborative Communications

- Media Placements
  - WTTW – Chicago Tonight
  - Crain's Chicago Business
  - Five in process - Oncology Business Management, Oncology Times, WBEZ Radio
- Access to CSOC tools/resources granted
  - Seven outside Chicago, including American Cancer Society, U of Michigan Med Center, Ohio Health, Kaiser Permanente
- Forefront
  - Submitted article for newsletter, developing webinar about collaboration, and live CSOC panel presentation at Forefront.

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## Health and Rehabilitation Concept

Mount Sinai Current




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### Health and Rehabilitation Concept

Mount Sinai Capital Campaign to Redesign ED




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### Health/Rehab Grant Forecast

Strategy	Approved to Date	Planned for Rest of Year	2019 TOTAL
1,2,3, & 4	\$776	\$545	\$1,321
Planning in process	---	529	529
<b>TOTAL</b>	<b>\$776</b>	<b>\$1,074</b>	<b>\$1,850</b>

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### Developmental Disabilities

1. \$65+ billion was spent on I/DD services by federal, state, county, and local governments
2. 10 states have moved their services for the I/DD population into managed care
3. From 2013 to 2015, institutional spending fell over 11%—with a reduction in placement of individuals with I/DD in facilities with more than 16 individuals
4. 70% of individuals with I/DD live with a family member, 16% live alone, and 14% live in a supervised residential facility
5. 24% of family caregivers are over the age of 60

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## Developmental Disabilities

What do these “facts” tell you about the market for services for individuals with intellectual/developmental disabilities (I/DD)? They paint a picture of a **changing, and challenging, market**. Managed care is coming to an I/DD landscape that is **moving from institutional service delivery to community-based models**—at a time when many natural caregivers are aging out.

The executives of provider organizations serving this consumer population will need **new administrative competencies** in admissions and finance, in revenue cycle management processes, in marketing, and in payer contracting and referral development strategies. But beyond administrative infrastructure, there is also the need for a **fundamental redesign of service delivery** capabilities.

-- Sarah C. Threnhauser, Open Minds, July 2018

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## Educational forum for CEOs, CFOs, board chairs of I/DD organizations

- Led by Institute on Public Policy for People with Disabilities
- Launch of a collaborative effort to explore/identify new models
- March 27-28 in Alsip, IL (south suburbs)

**Emerging Payor and Business Models in IDD Services**

**March 27-28 in Alsip, IL**

The event will bring together 100 leaders from across Illinois to learn about and discuss emerging trends in IDD payor arrangements, including managed care, capitated and population-based care models and more. The event includes a panel discussion with experts in subject matter experts from across the country. This will allow for questions and insights. The event is a premier IDD opportunity to connect with influential organizations in Illinois by using the power of the Illinois IDD Center. [www.illinoisiddcenter.org](http://www.illinoisiddcenter.org) for more information and to register for the event.

**Wednesday, March 27**

8:00 - 8:30 Registration

8:30 - 9:00 Welcome  
 8:30 - 9:00 Keynote: CEO, Institute on Public Policy for People with Disabilities

9:00 - 10:00 National Event in State IDD Systems  
 9:00 - 10:00 State's New Payor Model for Services, Andrew, NACADD

10:00 - 10:30 Break

10:30 - 12:00 An Executive's Company Perspective on IDD Services  
 10:30 - 12:00 Eliot Spitzer, Business Development Director, Autism

12:00 - 1:30 Lunch

1:30 - 2:45 Keynote: Acting Director, Division of Developmental Disabilities  
 1:30 - 2:45 Christopher A. De Leo, Director of Managed Long-Term Care and Self-Directed

2:45 - 4:00 Case Studies: Identifying and Implementing Innovative Models of Service Delivery  
 2:45 - 4:00 Q&A with Speakers, Wrap Up

**Thursday, March 28**

8:00 - 8:30 Welcome  
 8:00 - 8:30 Bill Conroy, CEO, Illinois IDD Center

8:30 - 10:00 Keynote: Executive with Managed Care for IDD Services  
 8:30 - 10:00 David Chaffin, CEO, Care Provider Association

10:00 - 10:30 An Overview of the New York Care Coordination Organization Model  
 10:00 - 10:30 Jill Hays, CEO, Care Coordination Organization

10:30 - 11:00 How Illinois Agency Provider Organizations Work with MCOs  
 10:30 - 11:00 David Conroy, Executive Director, Care Coordination Organization

11:00 - 12:00 Lunch

12:00 - 1:00 Closing in a New Landscape: Essential Competencies for IDD Executives and the  
 12:00 - 1:00 Christopher A. De Leo, Director of Managed Long-Term Care and Self-Directed

1:00 - 1:30 Q&A with Speakers, Wrap Up

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## CFI's 6th Giving Tuesday program reached new heights

	# Nonprofits	\$ Raised (000s)	Donors (000s)	\$ Raised Per Org (000s)	Matching Grants (000s)	Raised:Match Ratio
2013	19	\$ 611	2.1	\$ 32	\$ 331	\$ 1.85
2014	41	\$ 861	4.3	\$ 21	\$ 330	\$ 2.61
2015	48	\$ 1,207	5.2	\$ 25	\$ 588	\$ 2.05
2016	53	\$ 1,738	6.5	\$ 33	\$ 519	\$ 3.35
2017	70	\$ 1,999	9.6	\$ 29	\$ 516	\$ 3.88
2018	66	\$ 2,073	6.7	\$ 31	\$ 551	\$ 3.76
<b>6-Year TOTAL</b>		<b>\$ 8,489</b>	<b>34.4</b>		<b>\$ 2,834</b>	<b>\$ 3.00</b>



- 2013 Dollar-for-dollar match of online donations up to \$20,000 per nonprofit
- 2014 Dollar-for-dollar match of online donations from NEW donors up to \$15,000 per nonprofit
- 2015 Match increased donations from individuals made online up to a cap per nonprofit
- 2016\* Same as 2015 with additional research opportunity led by Texas A&M, USC economists
- 2017\* Partial match at three giving tiers (\$25, \$100, \$500); early window with associated research study
- 2017\* Research initiatives on donor behavior (9 organizations in '16, 26 in '17)
- 2018 Partial match at one of two giving tiers (\$175, \$1250) during November 1-27

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**The Disabilities Opportunity Statement**

**Opportunity Statement:**

"Support the transition of organizations to a future state of care"

*Advances Mission? Y/N*

- access to services, orgs, pgms*
- knowledge*
- skills*
- personal empowerment*
- self-determination*

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**Some of our proposed Grant Strategies are familiar and some are new**

- Strategy 1: Fund efforts to **transition** existing programs to new models responsive to emerging client needs and to future payment and service delivery models
- Strategy 2: Fund **collaborative** programs which include multiple grantees
- Strategy 3: Fund efforts to increase individual **philanthropic** support
- Strategy 4: Fund efforts to improve delivery of services, i.e. education

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**Staff Actions** include embracing an opportunistic funding outlook to enable grantee transitions

- Action 1: Transition from focus on vocational/residential programs to explore opportunities to fund organizational transition (programs, other)
- Action 2: Disengage from monthly participation in Intersect for Ability

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Support organization transition to future state of care

**Disabilities Grant Plan**

+Transition  
+Collaboration  
+Philanthropy

+Less engagement  
+Opportunistic

- Leverage knowledge gain from Disabilities Impact Plan
- Respond to emerging new issues and approaches
- Allocate staff resources appropriately in light of competing priorities

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### Disabilities Grant Forecast

Strategy	Approved to Date	Planned for Rest of Year	2019 TOTAL
Transitions	\$400	\$715	\$1,115
Collaboration	--	200	200
Philanthropy	385	150	535
<b>TOTAL</b>	<b>\$785</b>	<b>\$1,065</b>	<b>\$1,850</b>

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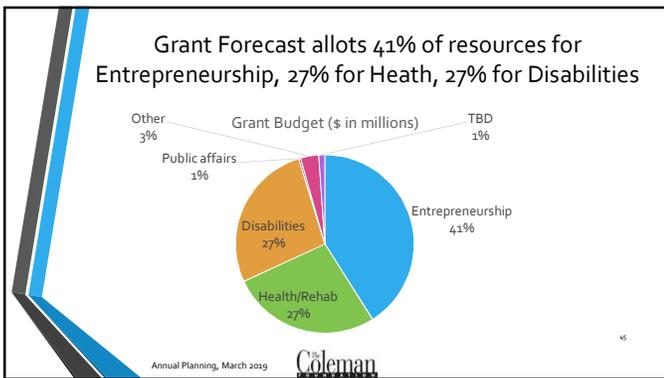
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After today, rest of year grants would be 57%  
Entrepreneurship, 24% Health/Rehab

Program Area	Forecast	Approved to date	Today's Recos	Rest of Year	ROY % of Total
Entrepreneurship	\$2,800,000	\$339,175	\$60,000	\$2,400,825	57%
Health/Rehab	1,850,000	776,425	70,000	1,003,575	24%
Disabilities	1,850,000	785,200	487,500	577,300	14%
Other	225,000	74,000	--	151,000	4%
Public Affairs	25,000	16,134	--	9,350	--
TBD	75,000	--	--	75,000	2%
2019 TOTAL	\$6,825,000	\$1,990,934	\$617,500	\$4,217,050	100%

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Today's Grant Recommendations

- Entrepreneurship
  - Chicago Horticultural Society (Windy City Harvest)
  - INCubatoredu Block Funding (Multiple High Schools TBD)
- Health and Rehabilitation
  - Northwestern University (EPEC Program)
- Disabilities
  - Designs for Dignity (Group Home Renewal Initiative, Phase II)
  - Easterseals Joliet Region, Inc. (Access to Children's Allied Health Services)
  - UCP Seguin of Greater Chicago (Infintec)

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Windy City Harvest Program  
Recommended amount: \$120,000

- Advancing entrepreneurship as a solution to poverty in Chicago
  - Strengths
    - Mature program with structured, multi-level curriculum and offerings for entrepreneurs as they advance (apprenticeship, courses, incubator)
    - Strong program leadership and partners (LCHC) which give local legitimacy
  - Weaknesses
    - Access to land for growing remains a barrier to entrepreneurial success
    - Program leadership had recent health challenges but in recovery now
  - Why Fund
    - Advances 2019 Plan Strategy 3 to build neighborhood entrepreneurial pathway ecosystem, here in local food production

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**Pathways Program**



BY UNCHARTED LEARNING

**11,400**  
student entrepreneurs have developed businesses

**150**  
teachers facilitating team-based, experiential learning rooted in community partnerships

**2,400**  
volunteers have supported students on their entrepreneurial journeys

**122** schools in **18** states are providing an authentic entrepreneurial experience with incubator.edu

WGN Coverage at 1871  
<https://vimeo.com/282568062>




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**INCubator.edu High School E Pathway**  
Recommended Block Funding: \$100,000 (8-10 schools)



BY UNCHARTED LEARNING

Academic Year	Number of Schools/Grant Amount	Award
2015-2016	11 (various grant amounts)	\$265,000
2016-2017	5 (\$20,000)	\$100,000
2017-2018	9 (7 at \$15,000; 2 at \$10,000)	\$125,000
2018-2019	6 (between \$7,000 - \$25,000)	\$115,000
2019-2020	t/b/d	
<b>Total</b>	<b>31 schools</b>	<b>\$605,000</b>




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**Northwestern University**  
Recommended amount: \$134,000



Education in Palliative and End of Life Care (EPEC)

**Strengths**

- Cited in Institute of Medicine (IOM) report as a key palliative care educational effort.
- Disseminated to over 150,000 health care professionals and over 20 publications.
- Involvement of expert faculty produces an evidence-based curriculum

**Weaknesses**

- EPEC lacks revenue to update training, which impacts program revenue.

**Why Fund**

- EPEC, model training program, which is needed to help fill the workforce shortage. Builds on local palliative care training.

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**Designs for Dignity Group Home Renewal II**  
 Recommended amount: \$252,500



- Supporting collaborative effort to improve residential environments
  - Strengths
    - Phase I of Group Home Renewal Initiative confirmed value of CILA upgrades
    - This Phase II informed by lessons learned to be more streamlined and efficient effort to deliver meaningful impact for agencies and residents
  - Weaknesses
    - Phase II process remains experimental and may not eliminate all process issues
    - Unclear that resident participation will be increased beyond modest level achieved in Phase I
  - Why Fund
    - Phase I saw six homes transformed through \$200K pro bono service time and materials donations. Phase II would be more efficient effort to improve 24-26 homes based on lessons learned

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**Easterseals Joliet Region, Inc.**  
 Recommended amount: \$172,500



- Supporting transition to new payor models
  - Strengths
    - Established organization has delivered on four prior grants
    - Organization serves broad geography with essential diagnostic and therapeutic services
    - Opportunity to address challenges of payor interactions through Navigator position
  - Weaknesses
    - Sustainability dependent upon success of Navigator in improving payment processing via allied health payors
  - Why Fund
    - Advances 2019 Plan Strategy 1 to fund efforts to transition existing programs to new models responsive to future payment and service delivery models

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**UCP Seguin of Greater Chicago Infnitec**  
 Recommended amount: \$250,300



- Supporting transition to collaborative education models
  - Strengths
    - Established solution enabling efficient DSP and other training
    - Growth from 6 agencies in 2014 to 39 today
    - Trusted consultants identified to perform work
    - Technical outcomes identified to transition content
  - Weaknesses
    - Future technical innovations will ultimately render this upgrade obsolete
    - Longer-term business plan for Infnitec needed and related project with UIC MBAs is beginning
  - Why Fund
    - Advances Impact Plan strategy to fund improvements for direct care staffing. Aligns with 2019 Plan Strategy 1 to fund efforts to transition existing programs to new models responsive to future payment and service delivery models

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