



CHOICES. CONNECTIONS. COMMUNITIES.

FY16 Annual Report

SERVICE COORDINATION, INC.

A private, nonprofit organization with more than 30 years of experience. We provide case management services to people with disabilities.

ServiceCoord.org





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A message from the Executive Director / CEO



For more than 34 years, Service Coordination, Inc. (SCI) has supported the choices of people with disabilities and worked to identify available resources. We began as one of the nation's first independent case management provider agencies serving people with intellectual and developmental disabilities. We believed then, and maintain our belief, that services should be tailored to meet the desires of people and their choices.

People who receive Case Management in Maryland now have a choice of his or her provider. Choice has always been the foundation of our services and we are excited to support this important decision. We remain dedicated to honoring an individual's options and supporting his or her wants and needs. SCI is a nonprofit case management agency. This means we do not operate to earn a profit, but rather to support community members in need of our services and to fulfill our mission of providing quality support services.

As a nonprofit organization, we are governed by a Board of Directors consisting of a volunteer group of community members. They oversee our organization to ensure that we adhere to this commitment to the community. SCI is the most experienced case management provider in the State of Maryland with more than three decades of experience. We operate by listening to people's wants and needs. We always listen first, support the development of a plan and search for connections that can lead to improving one's quality of life. The dedication of our extremely committed team members and invaluable support from our Board of Directors and community partners make this possible.

Our team members work directly alongside the people we help serve. On average, our staff have 6 years' experience and are highly educated. Our workforce service model includes equipping our team members with the appropriate mobile technology to perform their work anywhere, thus providing greater convenience, accessibility, and flexibility in our services. SCI takes great pride in our level of service for each individual who can benefit from our services.

June 30, 2016 marked the end of our 2013-2016 strategic plan and the beginning of the 2017-2019 campaign. Our first strategic plan for the organization was developed in 2008 as a means to advance a three-year strategic direction. At the conclusion of each interval, it provides us the opportunity to review and update the plan which continues to evolve our organization. Towards this end, we convened a Strategic Planning Taskforce to help in the review and update of the plan including our mission and ten-year vision statement.

We have earned the Maryland Association of Nonprofit Organizations Standards of Excellence Tier II Certification which demonstrates our organization's foundation and management expertise. Our mission, experience, and commitment to honoring an individual's choices help us provide the best case management services. If we can assist or help explain anything regarding the Developmental Disabilities Administration (DDA) choice process, please let us know.

- John Dumas, Executive Director / CEO

2016: THE YEAR IN REVIEW



Development

SCI continues to grow in several key areas. The number of people we support now totals more than 11,700 people. To meet this demand, we have scaled our workforce accordingly and now have nearly 350 team members.

Quality

SCI remains focused on our efforts for continual improvement in quality of services. In 2016, we developed a Comprehensive Quality Review (CQR) system that identifies personal records to be reviewed by a supervisor, and includes a satisfaction survey. Supervisors are required to review all aspects of a Service Coordinator's (SC's) work on a regular basis to ensure that team members are well trained in all job responsibilities and are delivering services that are of very high quality. Through this approach, supervisors provide support, guidance and instruction to staff reinforcing strengths and identifying areas in need of improvement. The CQR assesses the overall quality of the Coordination and Community Services (CCS) service provision and the nature of the SC's work with people, including but not limited to: self-direction, person centeredness, and implementation of service coordination procedures. This broad assessment of quality is accomplished through the following review components:

- Customer Satisfaction Survey
- Visit Verification
- Individual Plan Review
- Monitoring Review
- Data Integrity and Progress Notes Review
- Service Coordinator Competencies Review
- Regulatory Compliance

In the last quarter of FY16 alone; SC's work with over 420 people have been reviewed, including the completion of 265 satisfaction surveys. We have learned a lot through these satisfaction surveys.

The top 3 things that are most important to people served are responsiveness (75%), being connected to resources (62%), and knowing me (53%). Almost 91% of people and families indicated their SC provided what was most important to them.

83% Agreed or strongly agreed that their SC supported their choices about who provides their services.

86% Agreed or strongly agreed their SC treats them how they want to be treated.

91% Agreed or strongly agreed that they want to keep working with their current SC.

92% Indicated that they were likely or highly likely to recommend SCI to a friend or colleague.

Launched in April 2014, the SCI Database continues as an integral part of providing high quality services to people. The database ensures SC's have easy access to well-organized and pertinent data for service delivery and assists leadership to monitor the overall quality of services. Throughout 2016, we continued to develop functionality such as automated task reminders and enhanced reporting capabilities. In 2016, we also began development of a Quality Assurance (QA) module in the database to provide real-time performance data on over 20 compliance and quality measures. The QA module's completion is planned for fall 2016.

Mobility

In 2016, SCI continues on an endeavor to better serve the people who count on us for case management with our program to go mobile. Our team members are equipped with technology and training to perform their duties at places that may better meet the needs of those receiving our services. Our services have since become more flexible and more accessible to people we support. Although we retained regional offices throughout areas in the state, our team members are now able to perform the majority of their work anywhere.

Our mobility allows our team members to work directly in the community without the need to travel back to an office. Because this work can now be done directly and immediately, our mobility allows us more time to spend in the community with people we serve and to be more accessible to them.

Service Coordination's Standing Committee

The dedicated members of the SCI Standing Committee have provided an unbiased review of organizational practices this year to include review of and feedback for our submission and handling of incident reports, as well as our QA quarterly reports.

Much effort and careful consideration has been put into the safety and well-being of every person who has required the completion of an incident report due to the occurrence of a reportable incident. Committee members request prompt follow-up action when needed and provide SC's with recommendations that may prevent future occurrence. Through the receipt of the annual Standing Committee training; they have been able to better implement their role which is an asset to our organization and the people we support.

Central Committee Members

Mr. Willie Fields
Mr. Tyrone Washington
Ms. Marlene Hendler
Ms. Tina Wright
Ms. Carmen Logan
Ms. Belva Batts
Ms. Valerie Smith

Western Committee Members

Ms. Sapna Nagabhushan
Mr. Dustin Carr
Ms. Susan Sullivan
Mr. Ron and Pat Kurtz
Ms. Carolyn Roney
Mr. Cliff and Faye Metger
Mr. Daniel Ness
Ms. Jane Bussard

Special thanks to each of our Standing Committee members, as well as the leadership and direction of SCI's facilitators and our team members Chantel Charette and Vanessa Blackner.

Statement of Financial Position & Activities

STATEMENT OF FINANCIAL POSITION		
ASSETS	FY16	FY15
Current Assets	2,061,245	1,028,167
Property and Equipment (net)	590,172	550,673
Other	170,928	163,634
Total Assets	2,822,345	1,742,474

LIABILITIES AND NET ASSETS	FY16	FY15
Total Current Liabilities & Net Assets	2,783,070	3,306,144
Unrestricted-undesignated	39,275	(1,563,670)
Total net assets	39,275	(1,563,670)
Total Liabilities and net assets	2,822,345	1,742,474

STATEMENT OF FINANCIAL ACTIVITIES		
EXPENSES	FY16	FY15
Program expenses	18,680,096	20,380,241
Administrative expenses	1,458,548	1,641,098
Total expenses	20,138,644	22,021,339
Net assets at beginning of year	2,435,295	2,612,421
Net assets at end of year	4,038,242	2,435,295
Change in net assets	1,602,947	(177,126)

FY15: July 1, 2014 – June 30, 2015

FY16: July 1, 2015 – June 30, 2016 (unaudited)

5 Fast Facts about SCI

1. Provide our case management services to people residing in the Central and Western Regions of Maryland and some counties in the Southern Region, as outlined by the DDA.
2. Has more than **34 YEARS** of experience providing case management services.
3. Provides case management services to more than **11,700** Marylanders.
4. Is a 501(c)3 **nonprofit organization**, governed by a volunteer Board of Directors.
5. Operates with a person-centered service delivery model and tailors all services according to an individual's specific wants and needs.



ABOUT US

OUR BACKGROUND

In 1982 The Arc of Frederick County established one of the nation's first independent service coordination initiatives serving people with intellectual and developmental disabilities. The service coordination division was founded on the belief that people with disabilities could benefit from having service coordinators act as brokers within the service delivery system to help ensure that services were tailored to meet people's needs.

The initiative began with seven service coordinators who served 173 people. In the 20 plus years since the initiative was created, the service coordination division expanded into 10 counties across Maryland and Baltimore City.

In 2005, SCI was established as an independent nonprofit organization and spun off from the Arc of Frederick County. The spinoff was necessary due to the tremendous growth the agency experienced and the need to have one organization focused on providing service coordination for so many people. SCI formed a new board of directors, adopted new bylaws and began operations as an independent organization on January 1, 2006.

SCI preserved the skilled staff leadership, the staff of service coordinators, an effective approach to coordinating services, the relationship with the DDA, and the founding belief about the role and value of service coordination for people with intellectual and developmental disabilities.

OUR ROLE IN THE COMMUNITY

SCI is a nonprofit organization in Maryland that supports people of all ages with intellectual and developmental disabilities to make choices affecting their lives and to access resources and services in their community.

SCI is currently the largest case management agency in Maryland and serves more than 11,700 people with intellectual and developmental disabilities. This accounts for over 50% of people who receive services. We also employ over 280 SC's in 2 regions in Maryland. Staff are highly qualified, with 92% having a Bachelor's degree or higher, and on average 6 years experience. SCI is also unique due to our community-based and technological capabilities which allow us to work from virtually anywhere in the communities in which we serve people.

At SCI, we believe that every person has the right to be treated with respect and dignity and to make choices that affect his/her life. We believe people come first and to support this philosophy we show respect and honor for all people through our words and actions. We believe it is our responsibility to drive solutions by seeking out opportunities and navigating systems to make possibilities a reality, we build connections that encourage strong relationships, and raise awareness in communities to appreciate the similarities and unique gifts of each person we serve.

SCI is a nonprofit organization governed by our Board of Directors:

BOARD MEMBERS:

Carl Hildebrand, President
Randi K. Bocanegra, Vice President
William V. Stack, Treasurer
Teresa M. Berman, Secretary
Cynthia McKane-Wagester, Director
Marlene Hendler, Director
Eric Zimmerman, Director
Judith Simms, Director
Paula Blue, Director
Michelle Wright, Director
Jordan Edgley, Director
Allen Kampf, Director

AREAS OF EXPERTISE:

Financial
Legal
Financial
Legal, Healthcare
Advocacy
Self-Advocacy
Self-Advocacy
Advocacy *
Advocacy *
Advocacy *
Special Education
Financial

* *Family member of individual supported by SCI.*

OUR MISSION

SCI provides quality case management services by helping people understand what their choices are and connecting them to resources in their communities in ways that respect their dignity and rights.

MEANING BEHIND THE MISSION

Choices, Connections and Communities: We welcome all people who can benefit from our services. We help people understand options in a dignified and respectful way. We provide quality information and helpful options that can guide people to resources of their choice, ultimately supporting their decisions to connect to available services.

2026 VISION

People experience the quality of life they choose. They are connected to an array of quality supports and services that are tailored to each of their unique wants and needs. People are valued in and by their communities.

CORE OPERATING VALUES

Our core operating values guide the way in which our board members, team members and volunteers want the community to experience our organization. We want to be known as resourceful, educated, and respectful. We want to demonstrate daily excellence by embracing and living out these core operating values in the way we work.

- **People come first** – Show respect and honor for ALL people in words and actions.
- **We drive solutions** – Persistently seek opportunities and overcome obstacles. Navigate systems masterfully to make possibilities a reality.
- **We build connections** – Because relationships are the foundation of our work, we share strong working relationships with each other and with those outside our organization.
- **We educate** – Raise awareness in communities to appreciate the similarities and unique gifts of each person. Explore choices with people we support.

CORE COMPETENCIES

RELATIONSHIPS - At SCI we operate with an understanding that it is primarily through effective relationships that we are able to achieve positive change on the individual and systems levels.

NAVIGATIONAL EXPERTISE - At SCI we listen closely to people telling us their dreams and goals. With that knowledge and our expertise, we provide resources, connections and linkages to make dreams a reality.

THEORY OF ACTION

The following principles and beliefs guide the development of our programs and operations:

- It takes great expertise to find resources and to connect people to them. Success results from the quality of abundant creativity and resourcefulness.
- Positive working relationships reflect the commitment that we have to each other, the organization and the people we support. Solid relationships are built upon trust and mutual respect.
- As a mobile workforce based in the communities of the people we serve; we focus our abilities to affect positive change in systems and within communities.
- All people should be able to make choices that affect their life. Our role is to help people discover and explore possibilities, weighing the value of all available options.
- With an increased understanding of people with differences comes appreciation of the value all people bring to their communities.
- As a strength-based, person-centered organization, we engage the people we support, their families, our staff, and others in making decisions, developing processes, and creating the structures that support the highest quality case management services.

OUR SERVICES



We provide quality information and helpful options that can guide people to resources of their choice, ultimately supporting their decisions to connect to available resources. We provide our services to people residing in the Southern, Central and Western Regions of Maryland, as outlined by the DDA.

Case Management

SCI provides case management services often referred to as Coordination of Community Services (CCS), also known as resource coordination and service coordination.

- People with intellectual and/or developmental disabilities
- Youth in transition
- Forensic population
- People in state hospitals
- Mental health population

Service Categories

SCI provides case management services for multiple DDA services categories:

WAITING LIST: SCI provides support to people on the DDA waiting list. The DDA Waiting List is comprised of adults and children with intellectual and developmental disabilities who are waiting for funding from DDA to obtain community based services. Waiting List includes services to youth and their families as they transition from school into adulthood. Waiting List categories include:

CRISIS RESOLUTION: The highest priority level is reserved for people in emergent circumstances who require immediate intervention, or will require it shortly. Often, the situations that meet this category's criteria arise suddenly (e.g., the death of a caregiver). Crisis Resolution is for people who are:

- Homeless or will be homeless within 30 days
- Victims of abuse or neglect
- At serious risk of causing physical harm to others
- Living with a caregiver who is unable to provide adequate care due to the caregiver's impaired health

CRISIS PREVENTION: This category is for people with an urgent need who are in deteriorating circumstances that put them in danger of meeting one or more Crisis Resolution criteria within 1 year. Crisis Prevention priority also includes people who have caregivers over age 65. Because age alone is not always a good predictor of the need for services; priority recommendations and determinations should address risk for the Crisis Resolution category within a year when that is the case, as well as the age of the caregiver. The Crisis Prevention category is also appropriate in situations where less intense intervention or support, provided sooner, might delay or eliminate the need for a more extensive service in the future.

CURRENT REQUEST: The Current Request priority is the lowest level of priorities. There are no crisis implications associated with current request; however, there is an expectation that the individual has an actual need for DDA funding. The test for this category; "Would the person take the service today, if it was offered today, or is there an anticipated event within the next three years, such as exiting school, retirement of caregiver, ageing out of children's residential placements?" This category is not for people who simply want to be identified for planning purposes as potential service recipients.

COMPREHENSIVE ASSESSMENT: Comprehensive assessments are completed for DDA to make a determination about one's eligibility for available services.

TRANSITION SERVICE: SCI provides services to people transitioning to the community from institutions.

COMMUNITY COORDINATION: SCI provides assistance with coordinating community services to match an individual's wants and needs. Some of these include: employment, housing, recreation, social, and more.

For more information about our services, visit our website: **ServiceCoord.org**

SUCCESS STORIES

Our values in action...

Our team members have recently provided assistance in the following ways:

Found and secured housing.

Secured Adult Medical Day Care services.

Registered assistance to participate in events with the Special Olympics.

Obtained money to purchase clothing.

Assisted people to get approved for partial retirement.

Acquired funding for many people's dental needs.

Gained funding for therapy lessons.

Connections to substance abuse programs to get treatment.

Helped acquire funding to purchase baby monitors with cameras.

Identified and coordinated building of accessible ramps for homes.

Guided a family to secure a grant for an assistive communication device.

Obtained Low Intensity Support Services money to help provide things such as:

- Baby supplies, including diapers and food
- Respite care
- Help with utilities
- Assistance with transportation



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SERVICE COORDINATION

For more information about Service Coordination, please visit our website:

ServiceCoord.org



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