A private, nonprofit organization with more than 35 years of experience. We provide case management and available resources to the individuals we serve.
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A YEAR OF REINVENTION

With nearly 40 years of hands-on personal and community advocacy, Service Coordination, Inc. (SCI) is a recognized leader of person-centered, quality case management services in Maryland. SCI assists people with intellectual and developmental disabilities by enhancing their relationships, connecting them to valued community resources in ways that respect their dignity and rights, and collaborating with our primary customers and other supporting partners. We began as one of the nation’s first independent case management provider agencies and have since expanded our services and offerings to children, families and older adults.

Fiscal Year 2021 started in the middle of a global pandemic. There was a lot of fear and uncertainty in the world, including the communities supported by SCI. As is the SCI tradition, we pushed through, developing innovative methods for continuing to offer the best possible services for the people we support.

A year into our FY20–FY25 Strategic Plan, SCI’s Board of Directors and Team Members continue working together to advance the organization’s mission, successfully implementing the plan to serve as a management tool. Over the next four years, SCI will continue to provide high-quality case management and related services, strengthen our role as a leader in the field by enhancing relationships with all customers, and collaborate for improvements across various systems.

In FY2021, we proudly announced an initiative developed by the newly formed IDEA (Inclusion, Diversity, Equity & Accessibility) Committee that directly implements our Driving Strategy 3C: Diversity, Equity, and Inclusion. This driving strategy sets to foster, cultivate, and preserve an organizational culture that recognizes the collective sum of the individual differences, life experiences, knowledge, inventiveness, innovation, self expression, unique capabilities, and talent of both our Team Members and the people we support.

As an organization, we also used this time to make both internal and external changes as well as introduce several innovative programs. In the past year, SCI has expanded. In the midst of a pandemic, we were able to restructure, focus on inclusion and diversity, and launch a new service line.

SCI is accredited based on The Standards for Excellence Institute® which promotes the highest standards for ethics, effectiveness, and accountability in nonprofit governance, management, and operations. With our excellent reputation and implementation of our Strategic Plan, SCI will continue to offer the highest quality services while consistently evolving to meet the needs of those we serve.

John Dumas, President and CEO
SCI’s Coordination of Community Services (CCS) has assisted people receiving services funded by the Maryland State Developmental Disabilities Administration (DDA) and people who are applying for DDA services. The role of a CCS, which Service Coordination refers to as a Service Coordinator is to work to enhance relationships with the people we support, connect them to valued resources in their communities in ways that respect their dignity and rights, and collaborate with our primary customers and other supporting partners.

CCS Support

When you work with an SCI Service Coordinator, you will develop individualized strategies to support your unique goals and needs. We provide quality case management services to individuals with:

- Intellectual and/or developmental disabilities across their lifespan
- Traumatic brain injury
- Transitioning youth students
- Court or forensic involvement
- Residence in state hospitals and institutions
- A co-occurring mental health diagnosis

We want to help everyone understand their options and connect them to community resources that support their goals. SCI connects individuals to services such as:

- Respite care and therapy
- Adaptive equipment and assistive technology
- Academic and social needs
- Utilities support and eviction prevention

CCS Highlights for FY21

During the COVID-19 pandemic, CCS provided high-quality support including but not limited to:

- Weekly wellness calls
- Virtual service delivery
- Education and support of people related to COVID-related regulatory relaxation through Maryland’s Appendix K and Waiver Amendment #3.
- Information and support to people regarding access to personal protective equipment, COVID information and testing, and vaccination options.
Brian’s Service Coordinator helped bring out the bright and funny side of him. When Brian’s Community Coordinator first met him, he was very shy and did not want to talk much, so his mother interacted for most visits. “Our visits helped build a relationship to learn about what Brian wanted to do with his life and which support he needed,” said SCI Community Coordinator. Brian was interested in looking for a job to keep him busy during the week and is also involved with Special Olympics, as a phenomenal athlete. To help him access services to support his goals, a Waiver/Medical Assistance application was completed for him by his Community Coordinator.

Brian’s Community Coordinator also assisted him with Social Security benefits. The team encountered some challenges with the Medicaid Waiver paperwork, but after several denials, Brian was ultimately approved for SSI benefits! With the approval of Social Security benefits, the waiver application was approved, Brian was able to begin accessing services through the DDA. He also began a new job at a coffee shop in Maryland as a greeter and cashier. Since he began working and interacting with customers and co-workers on a regular basis, Brian has become more social and interacts comfortably with people he encounters at work, and in his social life. He has even warmed up to his Community Coordinator and is less reliant on his mom. “It was a long road for Brian to access services but seeing the impact of the support he receives is incredibly meaningful and truly helps Brian to live his best life,” said his SCI Community Coordinator.

Impact Story
BRIAN

Additional updates are as follows:

- Our CCS leaders, in collaboration with the DDA Central Maryland Regional Office and a provider (The Harford Center), were able to identify and register more than 70 people in DDA services and on the DDA waiting list to receive the COVID-19 vaccine.
- Our CCS Team supports the people we serve, providers, and DDA to work toward Go-Live dates for the “Early Adopters” group (targeted DDA providers identified to begin 100% billing in the state’s Long-Term Supports and Services (LTSS) database for services provided). This included targeted collaboration with involved providers and DDA regional offices to ensure Person-Centered Plans contained accurate, current information so that people supported could continue to receive much-needed services as of July 1, 2021.
- SCI, along with other CCS providers, participated in an environmental scan of CCS services led by the National Association of State Directors of Developmental Disabilities Services (NASDDDS). CCS leaders and several CCS providers met separately with NASDDDS to share information around areas of success, opportunities for change, and areas of impact for CCS providers (including but not limited to the Person-Centered Planning process, LTSS, recruitment and retention, and workload management).
- Our CCS program leaders maintained active involvement with the Maryland Association of Community Services (MACS) Public Policy Committee and the Arc Maryland Government Affairs Committee to understand legislative priorities and advocacy work that impacts people SCI serves as well as DDA, Direct Service Providers, and CCS providers.
SCI’s Supports Planning Services (SPS) provide quality information and helpful options to address self-care needs for home and community-based services and assist in obtaining eligible services based on financial, medical, and technical criteria.

**SPS Support**

SCI Supports Planners help those with self-care needs access home and community-based services, including:

- CFC—Community First Choice
- CO—Community Options Waiver
- CPAS—Community Personal Assistance Service
- ICS—Increased Community Services

Under the Supports Planning Services, SCI will assist you in obtaining services for which you are eligible based on financial, medical, and technical criteria, including:

- In-Home Personal Care Assistance
- Nurse Monitoring Visits
- Home-Delivered Meals
- Assistive Technology
- Medical Equipment
- Home Accessibility Adaptations
- Nutritionists/Dieticians
- Moving from a Nursing Home
- Medical Day Care
- Family Training
- Assisted Living
- Senior Centers
- Behavioral Consultation
- Personal Emergency Supports
- Consumer Training

### SPS Highlights for FY21

**SPS WAS ABLE TO SERVE;**

- **2913** people, an increase from last year’s 1911.
- We now have **73** support planners, an increase from last year’s 46.
- SPS now has **nine Supervisors**, an increase from last year’s five.
- We have added a **Program Manager** to our team!

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**Impact Story**

**CAROLYN**

At “77 years young,” Carolyn is a highly intelligent, delightful, and strong woman residing in Temple Hills, Maryland. SCI Supports Planner, Robin, began working with Carolyn in November 2019 on her Community Options (CO) Waiver that she received in August 2019. “I look forward to checking in on Carolyn monthly, monitoring her services, health, and safety, and renewing her annual plan,” said Robin. “It has been and continues to be an honor for me to be the bridge connecting Ms. Carolyn to services, community resources, and helping her to navigate through the CO Waiver process.”

Thanks to Robin’s continued assistance and support, Carolyn is safer, happier, and healthier with CO Waiver services in place. “I have a positive way of knowing that I have Robin and she will give me good recommendations,” said Carolyn. “She knows that I am trying to remain an independent senior as long as possible. I count my many blessings with all my infirmities.”
The Montcordia Advantage

WHAT MAKES MONTCORDIA DIFFERENT?

■ **SELECTIVE:** We employ less than 1% of applicants

■ **EXPERTS:** Care Team has 1500% more training than other agencies

■ **TAILORED:** Live life your way with the assistance of a professional team

FROM ONE OF OUR CLIENTS

“Prior to using Montcordia, I couldn’t do the things I needed to do without worrying about my husband home alone. My care partner has a natural gift to anticipate my husband’s needs, and addresses them immediately.”

— Jill G., wife of client
True to our tradition, Service Coordination Inc. continues to advocate for the humanity of all people in our organization—and through our daily work with the community. We stand against all forms of racism and recognize it has no place in our community, country, and world. For nearly 40 years, SCI has served a diverse community of people across Maryland. Our core values demonstrate that. We have long believed in an inclusive society, where people live free from discrimination. The IDEA committee (Inclusion, Diversity, Equity, & Accessibility) started in October 2020 to foster, cultivate, and preserve an organizational culture that recognizes the collective sum of the individual life experiences, knowledge, unique capabilities, and talent of both our Team Members and the people we support.

Since its debut, the IDEA Committee has partnered with consultants who conducted an internal survey and will continue to develop a 3-year IDEA Enhancement Plan. IDEA initiatives include developing the Response to the Mistreatment of Team Members Procedure to provide guidance on how to handle harassment, discrimination, and retaliation in the workplace and in the community. In addition, through the work of the IDEA committee, SCI now offers Team Members the opportunity to add preferred pronouns and phonetic name spelling to their email signatures. The IDEA Committee utilizes the Driving Strategy 3C to implement a comprehensive diversity, equity, and inclusion development plan. They also provide various resources for SCI Team Members such as articles, podcasts, events, and self-care education—and, most importantly, a safe space to communicate and express concerns around race, inclusion, and advocacy.

FY2021 Achievements

- Internal IDEA Survey
- The addition of Driving Strategy 3C: Diversity, Equity, and Inclusion to SCI’s Strategic Plan
- Developed Mistreatment of Team Members Procedure in response to feedback from Team Members
- Promoting an inclusive workplace by introducing a preferred pronouns and phonetic name spelling feature to their email signatures
- IDEA Enhancement Plan

New Driving Strategy 3C: Diversity, Equity, and Inclusion

Foster, cultivate, and preserve an organizational culture that recognizes the collective sum of the individual differences, life experiences, knowledge, inventiveness, innovation, self-expression, unique capabilities, and talent of both our team members and the people we support represents a significant part of our culture, our reputation, and our organization’s achievement.
QUALITY ASSURANCE

CQR

SCI employs a Comprehensive Quality Review (CQR) process which includes verification of documented activities for at least one person served per Case Manager per month; a thorough review of the note’s content and quality; and a thorough review of that person’s record, person-centered plan, monitoring, services received for the last full quarter, and the completion of the satisfaction survey.

People are selected for review as part of a random sample stratified by a Case Manager. This sampling methodology ensures the results of the year’s CQR can be generalized to the total population of people served with a confidence level of >98%. Through this two-pronged approach, supervisors provide support, guidance, and instruction to Team Members, reinforcing strengths and identifying areas of improvement in both the technical and personal aspects of their work.

The CQR assesses the overall quality of the case management service provision and the nature of their work with people served, including but not limited to self-direction, person-centeredness, and implementation of SCI procedures.

Satisfaction Survey

The satisfaction survey is a tool to understand the voice of the customer, and better understand customer satisfaction through the customer’s experience. Specifically, the Net Promoter Score (NPS) question—“How likely is it that you would recommend SCI to a friend or colleague?”—is a widely utilized method to track satisfaction and customer loyalty to the services that SCI provides. The scoring ranges from –100 to 100. The industry standard rates 0–30 as Good, 31–69 as Great, and 70–100 as Excellent.

For FY21 the organization NPS (including CCS and SPS programs) was 71.31. Additionally, 78.51% of respondents are promoters of the organization. The following is an excerpt from specific satisfaction survey questions:

**RESPONSIVENESS**

79%

Promoters who have their Case Manager (CM) return their call or email within one business day.

94%

Promoters who state that when their CM says they will do something, it is done when they said they would do it, or well before they said they would.

**ANNUAL PLAN**

83%

Promoters who state their annual plan always contains what is important to them.

**OVERALL SATISFACTION**

87%

Promoters who state that the services SCI provides are always valuable.

92%

Promoters who want to keep working with their CM.

*Responded “always” to the satisfaction survey question.
Virtual Workforce

This past year has been a learning experience for SCI. As one of the first organizations in Maryland to implement a fully remote workforce, SCI saw first-hand how beneficial this was. The pandemic affirmed our long-standing commitment of investing in technology to enhance our delivery of services. As the largest provider of community resources to diverse communities, we were able to continue services when stay-at-home mandates were ordered in Maryland. SCI’s planners and service coordinators worked with people we support virtually, using video conferencing to maintain services and access to resources. SCI also began weekly check-ins and phone calls with people we support, a practice that was subsequently recommended by the Maryland Developmental Disabilities Administration (DDA) to increase check-ins and phone calls. All of these measures aimed to increase services and care. In addition, SCI closely followed the guidelines outlined by the Centers for Disease Control and Prevention (CDC) and the Maryland Department of Health (MDH), making certain our procedures matched or surpassed their recommendations.

SCI continues to offer a mobile workforce and technological capabilities which allow us to serve in the following counties: Allegany, Anne Arundel, Baltimore City, Baltimore, Charles, Calvert, Carroll, Frederick, Garrett, Harford, Howard, Montgomery, Prince George’s, St. Mary’s, and Washington.

“We are a mobile workforce! Our Service Coordinators, and Supports Planners and live and work in the communities they serve.”

Together, Raymond and his SCI Supports Planner, Shernice encountered several dilemmas. But with her determination and his bubbly personality, they met each challenge with a solution. Shernica revised the Plan of Service with Raymond to support him in his daughter’s home. This plan for community living was approved and included the following to best support Raymond: personal assistance, home-delivered meals, medical day care, and nursing monitoring. Raymond was very thankful for Shernica’s continued help! Although they faced many difficulties, Shernica was committed to doing all that she could for Raymond. “I learned that it helps to build a good working relationship to ensure best practices are followed, in the best interests of the people we serve,” said Shernica.
Julian is happier these days.
He is living on his own and able to manage his care thanks to his SCI Supports Planner, Kimberly. With the help of Kimberly, Julian was able to utilize the Community Options (CO) Waiver to receive transition services, which covered the cost of groceries upon his discharge to his apartment. Kimberly was also able to assist with coordinating services by using a mixture of both Medicaid and non-Medicaid services such as: obtaining medical supplies, groceries, researching thrifty options for household items, obtaining physical therapy sessions, acquiring a rollating walker and shower chair, and coordinating edits to his bathroom. Kimberly also worked with Julian and his brother to apply for three housing vouchers and provided information on local food pantries, low-income Internet and discounted computers, low-income dental clinic applications, and home-delivered meal options during the pandemic including Food and Friends and Meals on Wheels. Now that he has returned to the community with the CO Waiver, Julian is able to make choices about his life, his schedule, and his medical treatments. With Kimberly's support and the CO Waiver services, Julian has improved his quality of life by becoming more mobile and independent.

SCI TEAM

Since branching off from The Arc of Frederick County in 2006, we have strengthened our operations and solidified our position as leaders in the disabilities space—and we are far from finished! We continue to challenge ourselves through our innovative operations, stellar programs, and the unwavering compassion and commitment of our Team Members. With a well-thought-out Strategic Plan, SCI continued to expand through the pandemic, when so many other companies faltered. SCI’s continuous growth spurt prompted a restructure within our organization in order to take decisive steps forward.

Connecting people to customized resources that provide value and offer community are at the heart of our services. We see this daily through the work of our Team Members. Therefore, the goal of the restructure is to align the roles, culture, and organization closer to the SCI Vision while expanding. These changes will position us closer to our identity within the organization and the community. This means titles that we have been accustomed to using for years will change, allowing the growth and space for additional talent. Current operational groups like our Board of Directors, Executive Leadership Team, and Senior Leadership Team will transform, ensuring we are more effective, inclusive, and efficient. We are also adding new roles that will help us strengthen our work, including positions for IDEA (Inclusion, Diversity, Equity, & Accessibility), Legal, Governance, Strategy, and People and Culture.
OUR TALENTED TEAM

SCI Team Members

Our Team Members are highly qualified. A bachelor’s degree or higher is a requirement for case managers, supervisors, and many operational positions. Educational backgrounds often include psychology, sociology, family studies, social work, education, special education, social sciences, counseling, communications, and human resources. All Team Members share a common purpose of working hard each and every day to make a difference!

SCI would like to thank our Team Members for their continued dedication and commitment to making a positive difference in the lives of so many across the state every day, amid a pandemic. **Over the past fiscal year, SCI has added 196 new Team Members and had an annual retention rate of 77.61%.**
Team Member Training & Resources

SCI understands the impact and importance of supporting the learning and growth of all Team Members. Continuing our effort to support and retain qualified, engaged, and productive Team Members, SCI has created a Training Team that includes a Training Manager and five Training Specialists to deliver New Team Member Training and ongoing professional development.

Our Training Team delivers New Team Member Training and ongoing professional development through our in-house Training Specialists and our partnerships with online providers NonprofitReady.org and Open Future Learning. NonprofitReady.org is an online learning platform that offers customized curriculum and free training to support career and professional development for nonprofit teams. With Open Future Learning, we prepare our Team Members in the DDA Program to better support the people they serve, covering a broad range of subject areas while remaining dedicated to the field of disabilities.

“Corey’s mom thanked the team for working hard and not giving up on her son.”

Impact Story Highlight:

SCI’s Supports Planner was assigned to assist Corey in July of 2020 and made it her duty to address his needs. Corey was located at a short-term Rehabilitation and Nursing Care Center in Baltimore, Maryland, and wanted to return home with his family. Unfortunately, his mother did not have the space where she resided with her daughter in Howard County. After weighing all his options for the Community Options Waiver, Corey made the decision to move into an assisted living facility. His Supports Planner, Antoinette was made aware that the location needed to be wheelchair accessible and have an aide available to take Corey to dialysis three days a week. Antoinette was able to find a solution that worked for everyone. Corey’s mom told Antoinette that she was happy her son had someone to help him every step of the way. She also thanked the team for working hard and not giving up.
STATEMENT OF FINANCIAL POSITION & ACTIVITIES

SCI’s Statement of Financial Position as of June 30, 2020 and 2021 and the Statement of Financial Activities for the years ended June 30, 2020 and 2021 are below. These Statements include information regarding our assets, liabilities, and net assets as well as the annual revenue, expenses and change in net assets for the years then ended, illustrating the overall strength of our financial standing.

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<thead>
<tr>
<th>STATEMENT OF FINANCIAL POSITION</th>
<th>FY20</th>
<th>FY21</th>
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<tbody>
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<td>Assets</td>
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<tr>
<td>Current Assets</td>
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<td>PP&amp;E (Net)</td>
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<td>Other</td>
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<td>Total Assets</td>
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<td>$19,156,790</td>
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<tr>
<th>Liabilities and Net Assets</th>
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<tr>
<td>Total Liabilities</td>
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<td>Net Assets</td>
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<td>Temporarily Restricted</td>
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<tr>
<td>Unrestricted</td>
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<tr>
<td>Total Net Assets</td>
<td>3,103,827</td>
<td>4,209,619</td>
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<tr>
<td>Total Liabilities and Net Assets</td>
<td>$15,487,137</td>
<td>$19,156,790</td>
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<th>STATEMENT OF FINANCIAL ACTIVITIES</th>
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<th>FY21</th>
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<tbody>
<tr>
<td>Revenue</td>
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<tr>
<td>Total Revenue</td>
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<td>Expenses</td>
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<td>Program Expenses</td>
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<td>Net Assets at Beginning of Year</td>
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<tr>
<td>Net Assets at End of Year</td>
<td>3,103,827</td>
<td>4,209,619</td>
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</table>
SCI is governed by a Board of Directors consisting of a volunteer group of community members. Each Board Member brings the integral skills and passion required to oversee our organization and ensure that we adhere to our mission and commitment to our community. Our Team Members work directly alongside the people we help serve. On average, our Team Members have seven years’ experience and are highly educated. They are part of a mobile workforce that can perform their work from anywhere in their communities, thus providing greater convenience, accessibility, and flexibility in our services.

BOARD OF DIRECTORS:
- **Bill Stack**, Chair
- **Vlady Gorny**, Vice Chair
- **John Halley**, Chair – Audit and Risk Committee
- **Cheryl Steinbacher**, Chair – Compensation Committee
- **Marlene Hendler**, Director
- **Allen Kampf**, Director
- **Jody Luttrell**, Director
- **Kelly Mason**, Director
- **Eric Zimmerman**, Director

EXECUTIVE LEADERSHIP:
- **John Dumas**, USMC (Ret) MBA, President and CEO
  jdumas@sc-inc.org
- **Tenneille Aleshire**, Executive Vice President, Chief Program Officer
  taleshire@sc-inc.org
- **Karen Chapin**, Chief of Staff
  kchapin@sc-inc.org
- **Gerri Hammond**, Executive Vice President, Chief Financial Officer
  gerri.hammond@sc-inc.org
- **Mindy Propst**, Executive Vice President, Chief Operating Officer
  mpropst@sc-inc.org
- **Carolyn Roberts**, Executive Vice President, Chief People & Culture Officer
  croberts@sc-inc.org
SCI is a nonprofit organization in Maryland that supports people of all ages to make choices affecting their lives and to access resources and services in their community. With nearly 40 years of hands-on personal and community advocacy, SCI is the largest provider serving the needs of the population we support in the State of Maryland. We began as one of the nation’s first independent case management initiatives serving older adults, those with disabilities, those with mental health diagnoses, those with medically complex needs, and others.

With our fully mobile workforce, we work in areas of the state that are most convenient and important to you, including your work or home. We provide our case management services to individuals residing in the Southern, Central, and Western Regions of Maryland.

WESTERN AND SOUTHERN REGION HEADQUARTERS
5283 Corporate Drive, Suite 103
Frederick, MD 21703
301-663-8044, 888-240-6835
Fax: 301-663-9609

CENTRAL REGIONAL OFFICE
9 Park Center Court, Suite 301
Owings Mills, MD 21117
410-235-8110
Fax: 410-235-9475

Email: info@sc-inc.org
Web: servicecoord.org

facebook.com/ServiceCoordination
twitter.com/servicecoord
linkedin.com/company/service-coordination-inc