

FY 20

22

STRENGTH IN NUMBERS

Fiscal Year 2022 Annual Report | Service Coordination, Inc.

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Largest Provider of Developmental & Intellectual Disabilities Services in Maryland

Introduction

GREATER THAN THE SUM OF OUR PARTS

We continue to grow. Service Coordination Inc. (SCI) is rapidly expanding, dedicating more time to people and the communities in which they live! Our strength in FY22 is in our numbers, and this year’s numbers not only reflect our work in the region but also the sum of who we are as an organization. Headquartered in Frederick County, we proudly provide Coordination of Community Services (CCS) and Supports Planning Services (SPS) to more than 15,000 people across Maryland, including 14 counties and Baltimore City.

In FY22, we proudly announced the transformation of our Human Resources Department to People and Culture, with a focus on our 4 Centers of Excellence. Our Supports Planning Services program celebrated their 5 year anniversary, and in FY22 transformed over 3,000 lives. Our Coordination of Community Services

program also continued to grow internally while serving more than 12,000 people. Additionally, our award-winning boutique home care and care management agency, Montcordia, averaged a client satisfaction score of 87%.

“.....
**PEOPLE FIRST IS
OUR PROMISE. THIS
IS REFLECTED IN OUR
COMMITMENT TO
OUR COMMUNITY,
THE PEOPLE WE
SUPPORT, AND
OUR SCI TEAM.**

JOHN DUMAS
USMC (Ret) MBA
President and CEO





**% OF PEOPLE
WANT TO
KEEP WORKING
WITH THEIR
SERVICE
COORDINATOR**

Coordination of Community Services

A YEAR IN NUMBERS

SCI's Coordination of Community Services (CCS) program assisted over 12,000 people who received services funded by the Maryland State Developmental Disabilities Administration (DDA) program. We continued to provide excellent case management services, focused on developing our Team Members by giving them more support and more time to do their tasks, and remained a leader in the field. As in previous years, we were solution-based in FY22 and made adjustments to meet our communities' needs. We continued to find meaningful ways to interact with the people we support.

Honored Our Commitment

The CCS program grew exponentially while remaining fiscally strong. This allowed service coordinators to increase their time with the people supported through the program and to share the least restricted and most beneficial resources to meet their individual goals.

Prioritized Community Health

The CCS program continued to safely offer 38,369 in-person and virtual visits. We maintained an adequate supply of personal protective equipment, always

**“...
OUR COMMUNITIES
ARE FOREVER
CHANGED BY THE
COVID-19 PANDEMIC,
BUT THE FABRIC OF
WHO WE ARE AS A
TEAM REMAINS.**

JAMIE STONER
Senior Vice President
Coordination of Community Services

prioritizing the safety of Team Members and the people we support.

Maintained Partnerships

In total, 55 CCS supervisors participated in local and state initiatives including self-direction; Employment First; collaborations with DDA providers, educators and other key stakeholders; membership on county disability commissions; and other disability related initiatives.

Supports Planning Services

ADDING UP TO SOMETHING BIG

SCI’s Supports Planning Services (SPS) program celebrated 5 years of providing home and community-based services to older adults and others with self-care needs. SPS offered quality information and helpful options to address self-care needs for home and community-based services. SPS also helped obtain eligible services based on financial, medical and technical criteria to over 3,000 people in FY22.

Increased Productivity

We improved the SPS Comprehensive Tracker, a tool we use to create detailed visit reports and promote timely, quality activities to the individuals we serve.

Realigned Catchments

We exceeded goals with 89% of people served within a 30-minute drive time from their Supports Planner’s residence. Continued to provide true community-based support while ensuring more people were served in less time.

Elevated Training Curriculum

We provided real-life supports planning experience to new Team Members during their training in their first 6 months. SPS Team Members collaborated with SCI’s Talent Development Team to create over 30 real-life scenario videos.

PERSON-CENTERED PLANS SERVED, ENSURING EACH INDIVIDUAL’S GOALS WERE SUPPORTED

“... I AM IN AWE OF THE HARD WORK, DEDICATION, AND RESILIENCE OF OUR SUPPORTS PLANNING SERVICES TEAM.

LORA HAWKINS
Vice President
Supports Planning Services





**% OF
CLIENTS
WOULD
RECOMMEND
MONTCORDIA
TO A FRIEND**

Montcordia

NOT AVERAGE BY ANY MEANS

Montcordia celebrated another year of delivering first-class care to adults aging at home. The benefits of aging well in a familiar living space — and close to family members and friends — are profound. Our holistic approach to clients focuses on their health, personal care, emotional support, social interactions and familial needs. This is what sets us apart and is the foundation of all we do.

Launched Recognition Program

Montcordia launched a Care Partner of the Month program to recognize the efforts of the Care Team and celebrate their hard work.

Developed Training Programs

Montcordia developed and began delivering personal care training for Team Members.

Supported Advancement Opportunities

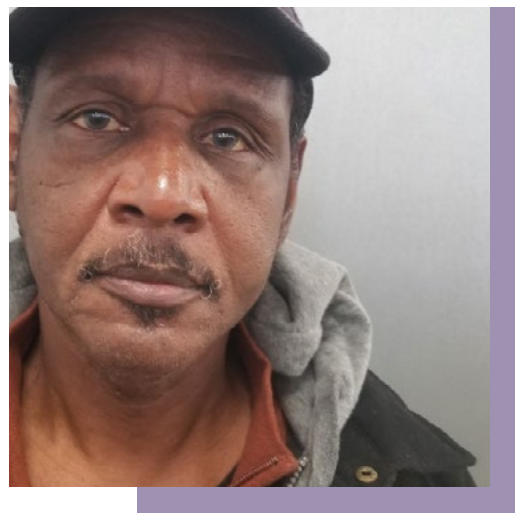
Montcordia began providing personal care training for Team Members to equip them for advancement to Personal Care Partner roles and further help them meet clients' needs.

“...
**OUR CLIENTS
WON'T LET JUST
ANYONE IN THEIR
HOMES, SO WE GO
THE EXTRA MILE TO
EARN THEIR TRUST.
THAT'S WHY WE
ONLY HIRE THE TOP
1% OF APPLICANTS.**
”

REBEKAH GOETZ
Vice President
Montcordia

OUR IMPACT

AN EXPONENTIAL DIFFERENCE



1

KENNETH

SCI Supports Planner, Aysia, began working with Kenneth to help him secure **1 PLACE OF HIS OWN**. After he moved in, Aysia helped him to gain approval to receive the following services through the Community First Choice Program: Mom's Meals, personal assistance, Personal Emergency Response System and nurse monitoring.

[READ THE STORY](#)

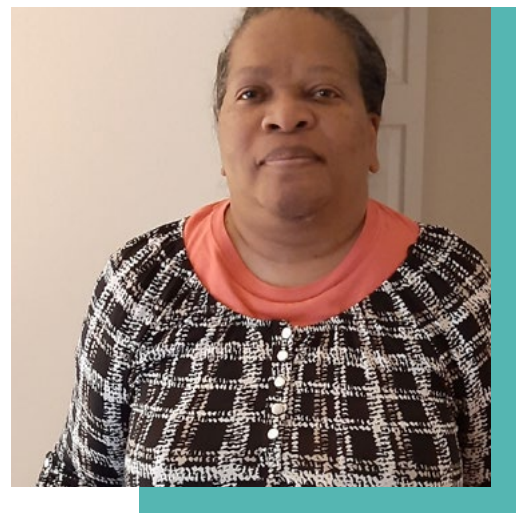


5

MARY ANN

A typical day for Mary Ann and her Montcordia Companion Partner Rebekka may include grocery shopping, picking up prescriptions, window shopping in downtown Bethesda, grabbing a cappuccino and going to the library. "We love to plan activities together and look forward to getting annuals at American Plant," says Rebekka. Mary Ann stays engaged in over **5 ACTIVITIES** a week while remaining independent.

[READ THE STORY](#)



7

MADORA

Madora's SCI Supports Planner, Angel, connected her to the 3 services for employment opportunities, financial resources and housing options that best fit her needs. Angel also made sure that Madora had 4 people to assist her, including herself, a psychiatric rehabilitation program case manager, a housing coordinator and a representative from Maryland's Division of Rehabilitation Services for a **TOTAL OF 7 BENEFITS**, including supports and services.

[READ THE STORY](#)

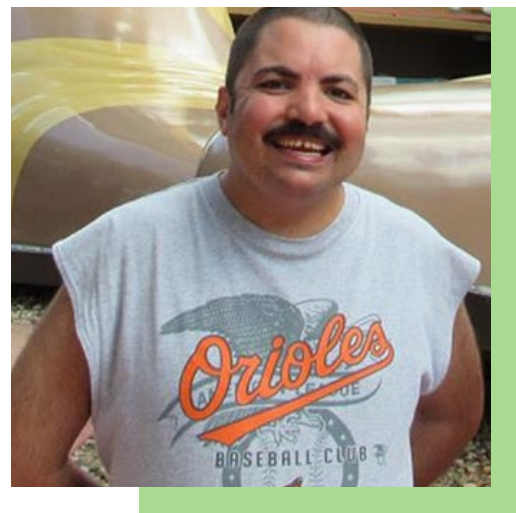


45

AMBER

Amber had her wish come true when she entered her **45TH BIRTHDAY PARTY** with a walker! This was a huge accomplishment for her after experiencing a life-changing car accident. She was proud to share her achievement with family and friends and was grateful to her SCI Supports Planner, Brandi, for providing her with the services that made it possible.

[READ THE STORY](#)



2

BRIAN

Brian was looking for a job to keep himself busy during the week. To support Brian's goals, his SCI Service Coordinator assisted with the paperwork and job application. He helped Brian get approved for Social Security benefits that Brian's mom had been **TRYING TO SECURE FOR 2 YEARS**. "It was a long road, but the impact of the support Brian received has truly helped him live his best life," said his SCI Service Coordinator.

[READ THE STORY](#)

“.....

**AS WE BUILD,
WE HAVE AN
OPPORTUNITY
TO CREATE A
CULTURE THAT
ENGAGES AND
ATTRACTS
TALENTED PEOPLE.**

CAROLYN ROBERTS
Executive Vice President
Chief People and Culture Officer

”

People & Culture

SIMPLE MATH

1

**TEAM MEMBER
EXPERIENCE**

2

**TALENT
DEVELOPMENT**

3

**IDEA: INCLUSION,
DIVERSITY, EQUITY &
ACCESSIBILITY**

4

**TEAM MEMBER
OPERATIONS**

In FY22, SCI's Human Resources Department transformed into People & Culture with 4 Centers of Excellence. This shift allowed us to focus more on the internal team and represented a substantial investment in the SCI Team Member experience. While never losing sight of our commitment to the people we serve, each Center of Excellence represents an essential element required to build a strong team from within.

Invested in our Team Members

We enhanced SCI's Total Rewards to provide a competitive program that increased Team Member retention and engagement, while providing high value to our Team Members and their families. Compensation enhancements included increased mileage reimbursement, competitive pay, bonuses for new Team Members, an enhanced Team Member referral bonus, and premium benefits.

Doubled Extensive Training

We doubled the capacity of the SPS and CCS New Team Member Training program, resulting in a total of over 50 days of training each month.

Reinforced Commitment to Culture

We hired an Inclusion, Diversity, Equity and Accessibility (IDEA) Manager to develop and execute creative strategies, programs and policies that foster the organization's diversity goals.



**% OF TEAM
(A WORLD CLASS
AMOUNT!) SAYS
SCI IS A GREAT
PLACE TO WORK**



“...
**WHEN WE
PROVIDE SUPPORT
TO OUR TEAM,
WE PROVIDE
SUPPORT TO
THE PEOPLE WE
SERVE.**
”

MATTHEW JONES
Information Technology Director

**% OF PEOPLE SAY THE
SERVICES PROVIDED BY
SCI ARE ALWAYS VALUABLE**

Information Technology

PRIME NUMBERS

As a fully remote organization, the Information Technology (IT) Department ensures all systems are efficient and working correctly through support, troubleshooting and enhancements. Their technical assistance allows Team Members to operate remotely while supporting the people in their communities.

Provided State-Of-The-Art Equipment

IT successfully upgraded the cell phones of more than 600 SCI Team Members, which increased their efficiency and ability to communicate with each other and the people we serve. They also provided various 24-hour access guides to support Team Members with equipment setup. IT did it all without interrupting services to the community that included remotely submitting paperwork, recording and providing details of visits.

Guaranteed Reliable Support

IT diligently responded to over 8,000 help requests from Team Members, enabling them to serve over 15,000 people as seamlessly as possible. They answered 99.7% of IT tickets within 4 hours.

Customized Internal Communications

IT facilitated the creation of internal department pages on SCI's SharePoint platform SCoUT, which helps to educate Team Members and supports them with the tools necessary for providing quality services.



**% OF
PEOPLE SAY
THEIR ANNUAL
PLAN CONTAINS
THINGS THAT ARE
IMPORTANT
TO THEM**

Marketing & Communications

ESSENTIAL TO THE EQUATION

The Marketing & Communications Department focuses on promoting SCI's purpose and mission to the public with the goal of raising awareness, educating the community, and broadening our network. This department serves the entire organization. It comprises 9 units that position SCI as the premier provider of resources and services.

“.....”

**I AM SO PROUD OF
HOW OUR WORK
TO ELEVATE THE SCI
BRANDS ENABLES
US TO IMPACT THE
LIVES OF EVEN
MORE PEOPLE IN
THE COMMUNITY.**

KICHEKO DRIGGINS
Marketing & Communications Director

”

Increased Awareness

We developed and executed communications plans and marketing materials for the SCI and Montcordia brands. Messaging ran across a range of media including radio, direct mail, print ads and 6 digital media platforms.

Connected with Community

SCI Connect, our weekly e-newsletter we send to the people we support, grew by 29%. Stories that garnered the most interest included impact stories, CCS and SPS Team Member spotlights, and various SCI blog posts.

Expanded SCI's Network

We increased website traffic by 42% and social media visibility by 23.5% using original content. We continued our work around Talent Acquisition to increase visitors to our careers and about us pages.

Quality Systems

7 FUNDAMENTAL PRINCIPLES

SCI's Quality Systems Department uses Total Quality Management (TQM), a system based on the idea that Team Members commit to maintaining high standards in every aspect of operations using 7 management principles. With this as our guide, we detect and remove errors, improve customer service and further support Team Member training.



Introduced Quality Committees

Quality Systems successfully launched two new committees: the CCS and SPS Quality Committees. These committees ensure the people we serve in each program receive quality, compliant services from SCI.

Improved Oversight and Developed Metrics

Quality Systems participated in bi-weekly workgroups where we collaborated with the Maryland Department of Health, Developmental Disabilities Administration, and other partners to enhance and improve service delivery by the Developmental Disabilities Administration in Maryland.

Developed Procedures and Best Practices

Quality Systems facilitated focus groups with both SCI Supports Planners and Service Coordinators to understand two main ideas: (1) How they organize and prioritize their work, and (2) How they build relationships with the people we support and our providers.

OF LIVES IMPACTED BY SCI PROGRAMS IN FY22

15,000+

“ QUALITY SYSTEMS IS COMMITTED TO ELEVATING THE QUALITY OF ALL SCI PROGRAMS AND PROCEDURES. WE ARE A TEAM OF EXPERTS WORKING TO IMPROVE SYSTEMS WITH A METHOD BASED ON FUNDAMENTAL PRINCIPLES.

KRISTEN RYAN
Quality Systems Director

% OF PEOPLE
SAY THEIR
SERVICE
COORDINATOR
RETURNS CALLS
OR EMAILS
WITHIN 2 DAYS



SCI’s Finance Department is responsible for acquiring and managing the organization’s funds and for budgeting the use of various assets.

Each year, the Finance Department publishes a statement of financial activities for that fiscal year. Statements for the previous and current fiscal years, which ended on June 30, 2021, and June 30, 2022, respectively, are given to the right. These statements include information about our assets, liabilities, and net assets, as well as annual revenue, expenses, and changes in net assets. Each statement demonstrates the overall strength of our financial standing.

Finance & Financial Statement

NUMBERS DON’T LIE

STATEMENT OF FINANCIAL POSITION	FY21	FY22
Assets		
Current Assets	17,324,163	17,371,703
PP&E (Net)	1,392,083	1,356,925
Other	440,544	387,988
TOTAL ASSETS	19,156,790	19,116,616
Liabilities & Net Assets		
Total Liabilities	14,947,171	8,200,706
Unrestricted	4,209,619	10,915,911
TOTAL LIABILITIES & NET ASSETS	19,156,790	19,116,616
STATEMENT OF FINANCIAL ACTIVITIES	FY21	FY22
Revenue		
TOTAL REVENUE	52,115,526	57,147,094
Expenses		
Program Expenses	42,208,257	44,418,696
Administrative & Supporting Expenses	8,844,101	12,053,792
TOTAL EXPENSES	51,052,358	56,472,488
Other Income & Expenses	42,624	6,031,686
CHANGE IN NET ASSETS	1,105,792	6,706,292
Net Assets at Year Beginning	3,103,827	4,209,619
Net Assets at Year End	4,209,619	10,915,910

Leadership

THE X FACTOR

Based in Maryland, SCI is a non-profit organization that helps people of all ages to:

- Take an active role in choices that affect their lives.
- Gain access to valuable resources and services in their community.

With decades of hands-on personal and community advocacy, SCI is the largest provider of case management services in Maryland, assisting residents in the southern, central and western regions. We began as one of the nation’s first independent case management initiatives. SCI supports older adults and individuals with disabilities, mental health diagnoses and medically complex cases, in addition to other needs.

The featured statistics in this report for Service Coordination, Inc. and Montcordia are reported from the FY22 Service Coordination, Inc. Satisfaction Survey and the FY22 Net Promoter Score.

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:

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USMC (Ret) MBA
President and CEO
jdumas@sc-inc.org

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Executive Vice President
Chief Program Officer
taleshire@sc-inc.org

Karen Chapin
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Ajaye Pope
Executive Vice President
Chief Operations Officer
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Carolyn Roberts
Executive Vice President
Chief People & Culture Officer
croberts@sc-inc.org



% OF PEOPLE SAY
IF THEIR SERVICE
COORDINATOR
SAID THEY WILL DO
SOMETHING, THEY
KEPT THEIR WORD



PARTNERS:



FY



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