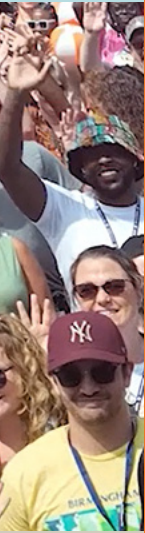


**Our Mission Is Our Bond**

# **Celebrating Differences, Strengthening Communities.**

**Fiscal Year 2023 Annual Report**



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## INTRODUCTION

### Message from the CEO

At Service Coordination, Inc. (SCI) our mission is not just a statement – it is a life-changing journey we take alongside the people we support. From the beginning, we committed to a Person-Centered approach that has remarkably impacted countless lives, leading to empowering transformations and triumphs within communities across Washington, D.C., Maryland, and Virginia.

With our mission as our bond, we work by putting the person supported at the forefront. Through strategic expansion and strengthened partnerships with community leaders like Governor Moore, Lieutenant Governor Miller, and Secretary Beatty, we have elevated our ability to make a difference. We have retained and

attracted over 600 skilled Team Members, nurturing their growth with education and development opportunities. Our dedication has positively impacted more than 15,000 lives in our community, earning us prestigious accolades, including multiple Top Workplace Awards for excellence in the Nonprofit Industry and our Purpose and Culture, as well as the esteemed Best of Bethesda Awards for our exceptional services.

Moving forward, we will continue to serve as advocates, collaborators, connectors to resources, and guides so that each person can become the architect of their own life. Communities are at their best when unique strengths and contributions are valued, and all people have opportunities to thrive.





Photo: Eric Stocklin/Baltimore Sun Media



## ABOUT US

# Foundation for Unity

## Our Mission

Service Coordination, Inc. provides quality case management and other related 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.

## Our 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.



## Shared Leadership

A dynamic and interactive process where multiple Team Members engage in leadership, characterized by collaborative decision-making and shared responsibility for outcomes. [LEARN MORE.](#)



## Core Operating Values

**PEOPLE COME FIRST** — Show respect and honor for *ALL* people and all aspects of their lives, in words and actions, keeping people at the center of what we do.

**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 collaborative 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 and collaborative partnerships 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 this knowledge and our expertise, we provide solutions, resources, connections, linkages, and other related services to make dreams a reality.





## CHARLIE

Charlie is an independent, strong-minded gentleman who is unafraid to ask for help. Adriana, his Supports Planner is always ready to answer the call, and Charlie received the vision care he desperately needed without financial stress. [LEARN MORE.](#)



## OUR IMPACT

# Strengthening Communities

*At Service Coordination, Inc. we empower people of all ages to actively participate in decisions that shape their lives. With a commitment to providing access to valuable resources and services within their communities, SCI has emerged as a leading provider in Maryland, boasting over 40 years of hands-on personal and community advocacy.*

*We have impacted thousands of lives by focusing on people, their individual needs and goals, and delivering transformative services to help them achieve their vision of an ideal life.*

*At SCI, we believe our communities are stronger when all people are included and valued by society. We are dedicated to inclusion, diversity, equity, and accessibility as we work to create a world where everyone belongs.*

*This philosophy extends to both those we serve and our team. We firmly recognize that our future lies in our team. Effecting change in policies, systems, services, and lives requires unwavering commitment, dedication, and passion. Thus, our People-First culture becomes the cornerstone of our success.*

*This collaborative spirit empowers us to uphold our values, drive solutions, overcome obstacles and navigate intricate systems. Our remarkable ability to foster connections and collaborate enables us to forge relationships that raise awareness and drive life-altering transformations.*

*Together, SCI and its community are building a world where everyone belongs, differences are celebrated, and all people can pursue their ideal life.*



## HEMAKSHIBEN

Hemakshiben is a 69-year-old woman who lives in Owings Mills, Md., with her family. Unfortunately, she developed Parkinson’s Disease, a stroke, and a pulmonary embolism edema. To be sure her specific needs were cared for, Supports Planner Robin began developing a plan of service that addressed Hemakshiben’s needs to thrive at home. [LEARN MORE.](#)



## DOUGLAS

Douglas and his mother, who live together in Howard County through the Housing Choice Voucher Program, discovered they were facing eviction and needed help. Service Coordinator Sean and Supervisor Alison supported the pair. They provided them with several alternative housing options, revised his Person-Centered Plan, and worked together to explore long-term housing solutions. [LEARN MORE.](#)



## MARIE

Marie has many distinct qualities. She is small in stature but grand in personality. Her Supports Planner, Tina, was determined to help her thrive. When they met, Marie was unhappily living in a nursing home. She desperately wanted to be back at home and independent. Tina and Marie’s daughter worked tirelessly to get Marie back home. This included updating Marie’s plan of service and medical information and urgently resubmitting it to Maryland Department of Health. She was approved for the Community Options Waiver program and is doing well at home. [LEARN MORE.](#)



# Fostering Inclusivity

*The Coordination of Community Services (CCS) program was the first program offered at SCI. Originating with seven Service Coordinators supporting 173 people, tremendous growth over the last 40 years has led to serving 14 counties across Maryland and Baltimore City. In FY23 more than 400 Team Members supported over 12,000 community members with intellectual and developmental disabilities.*

**Cornerstones of Success**

Person-Centered planning tools and principles guide the CCS program in meaningful conversations with people served and families. By advocating alongside the person supported, elevating their voice, and collaborating with other members of their support systems, Team Members ensure access to the resources needed to thrive.

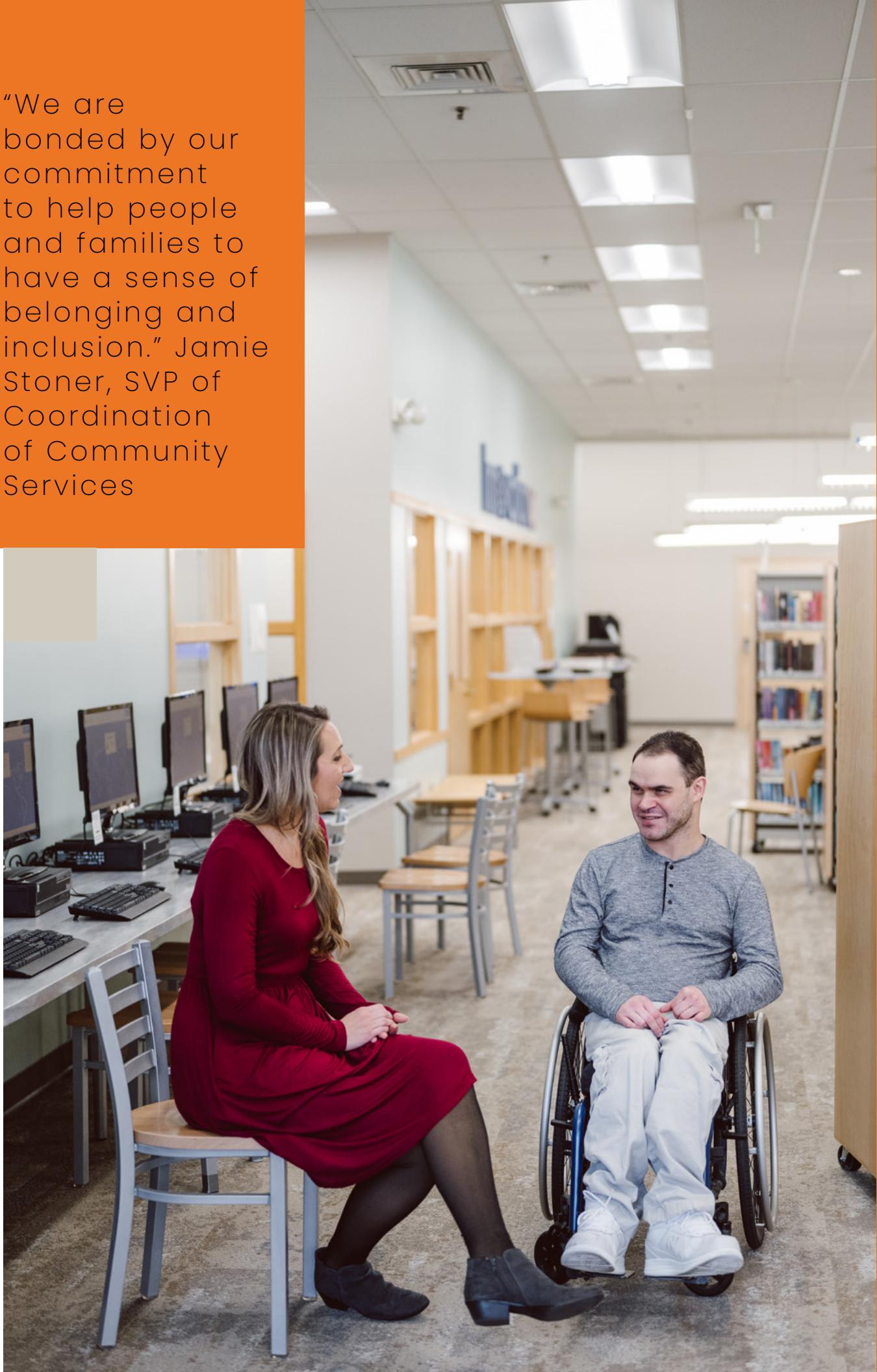
**Supported Communities**

The CCS program also performs educational outreach within communities, including information sessions at resource fairs, self-advocacy conferences, and universities across Maryland. Programs focused on supporting families of students exiting the school system to prepare them for navigating adult service programs are also a vital community resource. The CCS team helps to ease what can be an overwhelming process for students and families by providing educational resources and aids to outline a roadmap during this transitional period.

**Removed Barriers**

SCI Team Members listen carefully to the people they support, as they share their hopes and dreams, and navigate systems masterfully to make possibilities a reality. With knowledge and navigational expertise, the CCS program provides solutions, resources, and connections to remove barriers. This fiscal year, thousands of people were connected to critical resources to help them find meaningful and competitive employment, access powerful technology, participate in social and recreational activities, and access transportation and community events that aligned with their interests and needs.

“We are bonded by our commitment to help people and families to have a sense of belonging and inclusion.” Jamie Stoner, SVP of Coordination of Community Services





# Collaborating for Stronger Communities

*The Supports Planning Services (SPS) program originated in 2017 with one program manager, one supervisor and three supports planners supporting over 300 people. Now comprised of over 100 talented Supports Planners, each Team Member plays a vital role in directly supporting individuals applying for and enrolling in home health and community-based services. In FY23, the SPS program expanded by over 56 Team Members and more than 3600+ people served, increasing service reach and capacity across Maryland.*

**Enhanced the Community**

The SPS Team has helped hundreds of people transition from nursing homes to homes within the community. As well as coordinated in home supports and services to thousands of people to prevent nursing home admission.

**Bonded by Experience**

The SPS Team Member Workgroup was created to enhance the entire life cycle of a Team Member’s recruitment, onboarding, development, and retention. This holistic approach ensures that each Team Member experience reflects respect, opportunity, empowerment, safety, and connection to the SCI mission, vision, and values.

**Strengthened Relationships**

The SPS program leveraged cross-departmental collaboration opportunities across the organization to enhance operational efficiency, resulting in recruiting top talent, streamlining processes, and increasing impact. The SPS program also launched a quarterly Leadership Track Session, facilitating professional development discussions and solutions. This initiative creates an interactive forum for sharing and receiving mentorship, support with goal setting, and leadership guidance, in addition to a New Supervisor Training Program.



“SCI’s collaborative approach fosters cross-departmental innovation, supporting exceptional case management services within communities.”  
Lora Hawkins, VP of Supports Planning Services



# Nurturing Understanding

Montcordia offers Concierge Companion Care and Aging Life Care Management services to older adults and their families throughout Maryland, Northern Virginia, and the District of Columbia. Services are designed to deliver highly customized, comprehensive care founded on trust and professionalism.

**Founded on Trust**

Montcordia’s mission is to deliver a superior level of highly customized, comprehensive care, founded on trust and professionalism. This year, Montcordia strategically focused on its specialization in concierge companionship and Aging Life Care Management, resulting in sustained expansion. Addressing this market void has yielded a positive impact on the people we serve.

**Strengthened by Alignment**

Montcordia strengthened the SCL mission and vision by increasing reach, customized services and expanding regional impact. Rated highly by persons served during Customer Satisfaction surveys, Montcordia received a score of 90.7% during FY23 and a 95.5% satisfaction rate for a Care Partner Satisfaction score. The program also experienced a high sales close ratio of 56%, an impressive achievement for the team.

**Best of the Best**

Montcordia has been acknowledged with multiple awards for its outstanding performance in the industry, highlighting its thought leadership throughout FY23. Showcased on the recently optimized website, some accolades include Best of Bethesda Award: Readers’ Pick, Finalist, Best in Home Health Care Provider, 2023.



“The Montcordia team creates meaningful opportunities to enhance the quality of life for older adults, within their local communities.”  
Rebekah Goetz, VP, Montcordia





STRATEGY

Bridging Differences

*In FY23, we continued our focus on strategy to guide SCI's long-term direction. This work includes developing, overseeing, and guiding the organization's strategic plan and external strategic initiatives, along with exploring, forming, and evaluating SCI's long-term business development plans.*



"I love Service Coordination because it's the best chance for the state to be effective at its work. They know what it means to get the job done; and as a state government, that's what we need." Wes Moore, Governor of the State of Maryland



Many of Firsts

Kelby Brick, Esq., CDI, was hired to become SCI's first EVP and Chief Strategy Officer. Upon arrival, he took responsibility for implementing processes to establish infrastructure and a framework for a strategic approach across the organization. A government affairs division was established enhancing vital relationships with local, state, and federal public officials.

Pivotal Progress

Since the division's development, state officials have participated in key SCI events, including Governor Wes Moore, Lt. Governor Aruna Miller, and Maryland Department of Disabilities Secretary Carol Beatty.

Strategic Commitment

The new 2024-2026 SCI Strategic Plan was developed as a cross-functional process involving representatives from departments across the organization to ensure that the Strategic Plan reflected our commitment to our mission, vision, core values, and core competencies while taking the organization to the next level.



GOVERNMENT  
RELATIONS

*In FY23, the government relations team tackled intricate state and federal issues to empower the communities served. Strategically positioning SCI before legislators and the executive branch will enhance our ability to educate, advocate, and assist the people we support to thrive in their communities.*

United by the  
Community

Since establishing the government relations division, notable achievements have included internal best practices in legislative communications and unprecedented support from Maryland’s Lieutenant Governor Aruna Miller and Governor Wes Moore. Secretary of Disabilities Carol Beatty graced the annual Team Member celebration, and further collaborations with Deputy Secretary of Disabilities Lisa Balcastro are being developed.

Celebrated Milestones

The inaugural launch of a legislative agenda was the cornerstone of SCI’s priority to better assist individuals and their families. The agenda

encompassed vital areas such as choice and control, the state budget and rates, long-term Medicaid, and the enactment of the End the Wait Act.

Strengthened Advocacy

In FY23, SCI submitted its first-ever earmark request to U.S. Senators Van Hollen and Ben Cardin and publicly testified to the U.S. Senate Select Committee on Aging.

A comprehensive plan showcased the depth of SCI advocacy initiatives and ongoing work to formalize a process to invite stakeholders as keynote speakers for SCI events, fostering an inclusive and collaborative approach within advocacy efforts.



SEE THE VIDEO

Building Bonds



SEE THE VIDEO

“Our focus is ensuring that the individuals we serve can succeed within SCI and in their communities. We are on the right track, and I am excited about what is to come!” Kelby Brick, EVP and Chief Strategy Officer





# Embracing All

*The People and Culture team is comprised of four Centers of Excellence: Team Member Experience, Talent Development, Inclusion, Diversity, Equity, and Accessibility (IDEA), and Team Member Operations. Additionally, we embrace a new Leadership Philosophy, embodying essential elements for developing high-performing teams, supporting a positive Team Member Journey, providing Total Rewards solutions, and fostering continuous learning and an inclusive culture throughout.*

**Bonded by the Mission**

SCI Team Members work in the community, side-by-side with people and their families, advocating for their choices and creating plans that align with their individual goals. This work is both transformative and enriching as the organization continues to grow. In FY23, the People and Culture team conducted over 2,000 prescreen interviews with applicants and attended 33 college career events and 14 hiring fairs, resulting in 379 positions filled.

**Transformed Team Member Lives**

Dedicated to nurturing Team Member growth, holistic

well-being, and success, the People and Culture team facilitated over 150 compensation-based incentives, new supervisor training courses, custom training workshops, educational opportunities, and growth in inclusion, diversity, equity, and accessibility initiatives through the IDEA Committee.

**Strengthened the Work-life Promise**

SCI prioritized reinforcing a balanced work culture for all Team Members. SCI continues to provide a community based mobile workforce united by a shared vision of making a difference in the lives of people we support.

“During this incredible year, we have grown considerably, and Team Member engagement is higher than ever.” Carolyn Roberts, EVP, Chief People and Culture Officer







## MARKETING AND COMMUNICATIONS

# From Awareness to Action

*The Marketing and Communications (MarCom) team collaborates across the organization to showcase SCI's unique value to people and families throughout the state by uplifting the transformative mission, telling the story of the life-changing impact, and illuminating pathways to receiving support.*

### Enhanced Visibility and Reputation

Marketing and Communications dramatically increased organizational visibility by initiating and executing the Top Workplaces Program. This endeavor garnered positive regional and national exposure, bolstering SCI's brand reputation. The success of this enterprise improved SCI's ability to attract new Team Members and laid the foundation for the employer brand campaign.

### Amplified Reach and Community Connections

MarCom developed and executed a content plan that elevated the quality, quantity, and frequency of SCI brand content across all channels. From social media to newsletters, blogs, and direct emails, SCI's platforms consistently

featured impactful stories highlighting our contributions to the people and the community we serve. The strategic efforts have yielded substantial results, including a significant increase in website traffic, heightened social media engagement and a boost in our weekly community digital newsletter, SCI Connect.

### Unified Brand Image

Through an ongoing process of evaluating and updating marketing projects, collateral, and events as requests are received, MarCom has succeeded in revamping, reenvisioning, and replacing outdated SCI materials. This approach continually enhances the overall appearance and consistency of SCI's materials while improving our brand recognition, strengthening the identity of SCI.

"It has been a remarkable year of building meaningful connections, increasing awareness of SCI impact, and partnering for progress in the communities we serve." Kandice Ferrell, VP of Marketing and Communications



INFORMATION TECHNOLOGY

“The role of IT is central to driving the SCI mission and ensuring continued impact in the communities we serve.” John LeMay, VP of Information Technology

Beyond Barriers

*The Information Technology (IT) department is instrumental in ensuring that operations are secure and efficient. Implementing innovative technology solutions enhances SCI’s ability to serve in a rapidly evolving digital world, increases productivity, and supports leveraging new technological advancements.*

Improved Support

This year, strategic technological investments led to notable IT infrastructure growth, enhancing efficiency and better support for remote and in-office work. Outcomes have included Team Members with heightened connectivity and productivity regardless of their remote office location.

Strengthened Accessibility

For those supported by SCI within communities, IT advancements have resulted in more reliable and accessible services. By implementing new tools and platforms that improve the user experience and ensure data security and privacy, SCI teams have fortified trust and confidence in services.

Celebrated Innovation

An organizational shift towards digital solutions has facilitated an agile response system, ensuring high-quality services. Adaptability has been key to success in FY23, positioning SCI well for future growth and innovation.





# Working Together for Good

Newly established in FY23, the Enterprise Project Management (EPM) division is responsible for establishing and implementing project management designed to drive the successful implementation of solutions within the Service Coordination, Inc. Strategic Plan. Enterprise solutions integrate workflow processes, data, and efficiencies across multiple interrelated organizational business units and work to build formalized project management processes.

### Bridged the Gap with Technology

The EPM division used standardized templates, visible dashboards, and a portfolio of project management tools to optimize project capacity, leverage shared leadership decision-making, and increase our delivery rigor.

### Innovation with a Purpose

The EPM team outlined new project summary statements that included success criteria, project scope, capacity, and cost estimation when assessing proposed spending for new projects.

### Built New Skills

The EMP division created new roles to recruit additional Team Members to build technical capacity and bench strength experience in solution architecture, requirements gathering, design, and implementation.



“Integrating workflow processes is essential and can have varying degrees of complexity, coordination, criteria, capacity, and experience required for successful execution.”  
Sheila Schanck, Enterprise Project Management Director





“We are dedicated to ensuring that services meet vital community needs through a person-first lens and align with key policies and proper oversight to keep programs running smoothly.” JaNee Deline, VP President of Operations

## QUALITY SYSTEMS

# Collaborative Initiatives

*The Quality Systems (QS) department leverages Total Quality Management (TQM), maintaining high standards in every aspect of operations using seven management principles. This process aids in removing errors, improving customer satisfaction, and enhancing Team Member training.*

### **Celebrated Growth**

In FY23, program growth included the addition of new leadership with a Vice President of Quality and a Vice President of Operations, driving strategic objectives for infrastructure development.

### **Strengthened Needs**

The Quality Systems team conducted a departmental needs assessment to evaluate the needs and guide the development of a departmental strategic plan. Quality Systems continues to grow procedures, best practices, and tools to automate the work of Support Planners, Service Coordinators and the Montcordia team.

### **Bonded by Shared Leadership**

The team enlisted the expertise of a partner to plan and execute a vital data-gathering tool, SCL's Customer Satisfaction Survey. This science-based method provides critical insights into the needs of people supported that assist team development of targeted strategies.





“The distinctive ingredient at SCL is its people, both those behind the scenes and those delivering services.”  
Eric Silverman, EVP and Chief Financial Officer



FINANCIAL STATEMENT

Growth for Good

The Finance Department manages the organizational funding, budgeting, and assets. A Statement of Financial Position is published each year detailing financial activities for that fiscal year. Statements for the previous and current fiscal years, which ended on June 30, 2022, and June 30, 2023, respectively, are given below. Statements include information regarding assets, liabilities, and net assets, as well as annual revenue, expenses, and changes in net assets, each demonstrating the overall strength of our financial standing.

| STATEMENT OF FINANCIAL POSITION | FY22       | FY23       |
|---------------------------------|------------|------------|
| Assets                          |            |            |
| Current Assets                  | 17,371,703 | 20,102,696 |
| PP&E (Net)                      | 1,356,925  | 1,966,398  |
| Other                           | 387,988    | 1,513,325  |
| TOTAL ASSETS                    | 19,116,616 | 23,582,419 |

|                                  |            |            |
|----------------------------------|------------|------------|
| Liabilities and Net Assets       |            |            |
| Total Liabilities                | 8,200,705  | 12,249,509 |
| Unrestricted                     | 10,915,911 | 11,332,910 |
| TOTAL LIABILITIES AND NET ASSETS | 19,116,616 | 23,582,419 |

| STATEMENT OF FINANCIAL ACTIVITIES | FY22       | FY23       |
|-----------------------------------|------------|------------|
| Revenue                           |            |            |
| Total Revenue                     | 63,487,564 | 71,629,429 |
| Expenses                          |            |            |
| Program Expenses                  | 50,061,638 | 59,077,495 |
| Administrative Expenses           | 6,410,850  | 12,388,690 |
| TOTAL EXPENSES                    | 56,472,488 | 71,466,185 |

|                              |            |            |
|------------------------------|------------|------------|
| Change in Net Assets         | 6,706,292  | 416,999    |
| Net Assets at Year Beginning | 4,209,622  | 10,915,914 |
| Net Assets at Year End       | 10,915,911 | 11,332,913 |



# Together We Thrive

Together, we form an unstoppable, transformative team that extends far beyond ourselves. We drive transformational change by putting people first and creating pathways to choices, connections, and community. We thank our Team, community partners, and the people we support who all contribute their unique spark, creating a powerful energy that breaks down barriers and opens minds.



**BOARD OF DIRECTORS:**

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- Cheryl Steinbacher** | Chair – Compensation Committee
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- Marlene Hendler** | Director
- Jody Luttrell** | Director
- Erin Montgomery** | Director
- Julie Vishnyakov** | Director

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Chief People & Culture Officer  
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- Kelby Brick, Esq., CDI**  
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Chief Strategy Officer  
kelby.brick@sc-inc.org

\*Leaders who also serve on the Board of Directors.



**COMMUNITY PARTNERS:**







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