

**Adair County SB40 Developmental Disability Board**  
**Executive Director's Report – June 27<sup>th</sup>, 2023**

**Accountability:**

For fiscal year 2023, Property Tax revenue was flat to budget while TCM revenue just missed budget by \$26k, or 98% to plan. This is with June revenue forecasted rather conservatively due to vacations, leaves, etc. Overall, personnel expense was -\$57k / -5% under budget. This was due primarily to vacancy savings and medical leaves.

The agency grant to the Greenwood Center given earlier in the fiscal year was recorded as an Adjusting Journal Entry in June 2023 as recommended by the financial auditors. This expense adjustment against the surplus resulted in a \$109k unbudgeted expense and a projected -\$56k deficit for the year. *Without that unplanned expense, FY23 would have ended with a surplus of +\$54k to plan.*

Expenses significantly over the original budget included Depreciation, Employee Travel, Office Supplies, Marketing/Outreach, Building Maintenance and Legal Consultation. The high cost of fuel contributed to employee travel, while building improvements and replacement of broken/unusable office furniture and supplies contributed to some of those overages. The legal consultation was primarily related to the discussion on funding agency grant requests. While staff training was -\$3k to budget, we did invest \$12k into staff training this fiscal year, much higher than historical averages. This also contributed to the TCM revenue shortfall, but was a great investment into the SB40 Team and highly skilled, top-level staff.

Thirty-three of the thirty-six goals were met of the 2023 Strategic Plan. We are most excited about our success with employment. An audit of the employment status of individuals on our caseload ages 19 – 64 demonstrated that almost half of those individuals are actively engaged in either Supported Employment or competitive, integrated employment. If you add in the 15 individuals in Sheltered Employment, there are over 53% of individuals employed and 13 people currently seeking employment. This is a great demonstration of the tenacity of our individuals to seek employment, the support from community employers to hire them and also proof of the great effort put forward by our Service Coordination team towards employment.

**Infrastructure:**

There are no major infrastructural needs at this time.

**Community Engagement:**

We are working with a dental clinic to bring services to the DDRC for some individuals. The clinic will be mid-August and we hope to have up to twenty individuals sign up for services. So far, we have eight, all from CVA. Enable Dental indicated that they need a minimum of ten individuals to come (from St. Louis area.)

The ATSU I/DD Elective course and standardized patients' program has officially ended as was expected. Lisa Archer with ATSU notified standardized patients via email. Lisa says that the ATSU I/DD Club is active and will continue with the mentoring program. They have 68 student participants who are enthusiastically planning to continue club activities, including the mentoring program. Melissa and Crystal are planning to work with the Club to coordinate volunteer and educational opportunities for the students, and hope that they will be amicable to expanding the club to include TSU nursing students and other related majors.

The Greenwood Center has been announcing that they will begin providing direct services in September. Although TSU has announced it internally and are running promotions on radio, our TCM team will wait to begin referring individuals until we know that the building is ready (still under construction) and the direct staff has been hired. We do know that they are prepared now to bill Medicaid and Private Pay insurance.

The Transition Coalition was able to enroll 27 students into VR's summer employment program for Jr & Sr HS Students. We were very pleased with the participation rate. LOQW and CHS are the vendors. Melissa has the summer career exploration camp ready to launch with 6 students. We wanted more, but that's six more than last year! Crystal has been working with WMMS for the new 'job club' which will be launching in the fall. We have an interested teacher as a sponsor and help from our YBHL, Jason Underwood, who volunteered to help plan and conduct monthly meetings. The Coalition is now planning the Fall Transition Fair scheduled in October.

There have been quite a few organizations or other entities doing needs assessment and 'listening sessions' in recent weeks, and staff have been participating in most. We are discussing partnering with Area Agency on Aging to transport individuals using our van and their funds for a driver to provide some medical transportation. We have also participated in the Regional Planning Council's transportation workgroup for the annual report which must be submitted to draw federal and state funds for public transit in our area. We recommended funding for a volunteer driver network which would recruit, schedule and reimburse volunteers for insurance and mileage.

The monthly Spotlight Awards are going well and recipients seem to really appreciate the recognition. Media has been great in responding to our announcements. We've had a lot of press and social media comments this month related to our funding practices. One of the outcomes of that is that our website traffic is up 49% in the last month, with 85% being new visitors. New visitors are staying onsite an average of 5 minutes (up 3 minutes), with the home page and the funding page being the most popular pages. On social media, Facebook followers are now at an all-time high. We boosted the Facebook post about our funding policies, which referred people to our website for more information. After boosting, that post reached almost 1,600 people with 2,697 impressions and 565 engagements. These analytics can assure us that we were able to share information and education about our services and supports *very broadly* across our community.

### **Talent & Leadership:**

Our part-time administrative assistant, Tricia Mulanix, has accepted a position with the library at TSU. We are happy for her success but will miss her. Recruiting has begun to replace that vacancy. Mat Stephens started as a Service Coordinator the first of June. He comes to us from Kirksville schools where he was a Special Education Teacher. He's off to a great start!

All staff who will need access to ConnecXion, DMH's new case management software, enrolled for the 'in-person' training in September. MACDDS has strongly encouraged the division to change this to a virtual training to minimize associated costs and lost billing time. Meanwhile, we are set for in-person unless something changes. We still have one SC who is on medical leave and our newest SC has not started billing yet. We are also encouraging all staff to get their vacations in over the summer, before Fall ConnecXion transition starts.

### **State of Disability Issues:**

The Governor is still reviewing the Budget and other bills passed during the session. It is anticipated that he will not veto SB190, and the expectation is that county agencies will have to band together to file legal action to prevent the implementation of this poorly worded bill. MACDDS is reviewing whether to participate in the lawsuit and impact isn't expected to at least FY25 (if counties pass a measure).

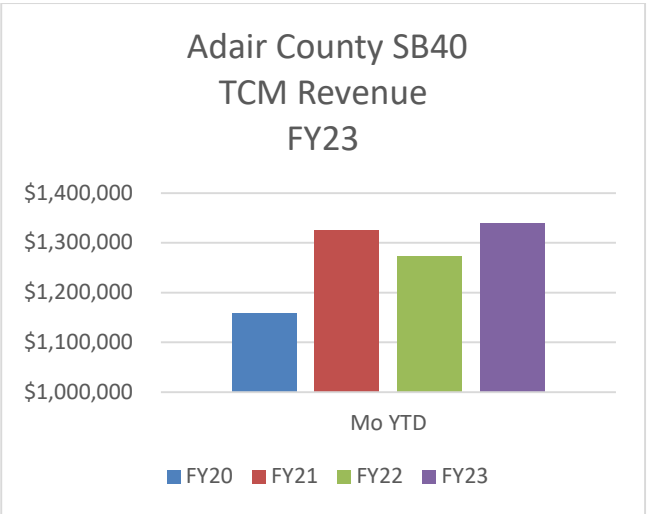
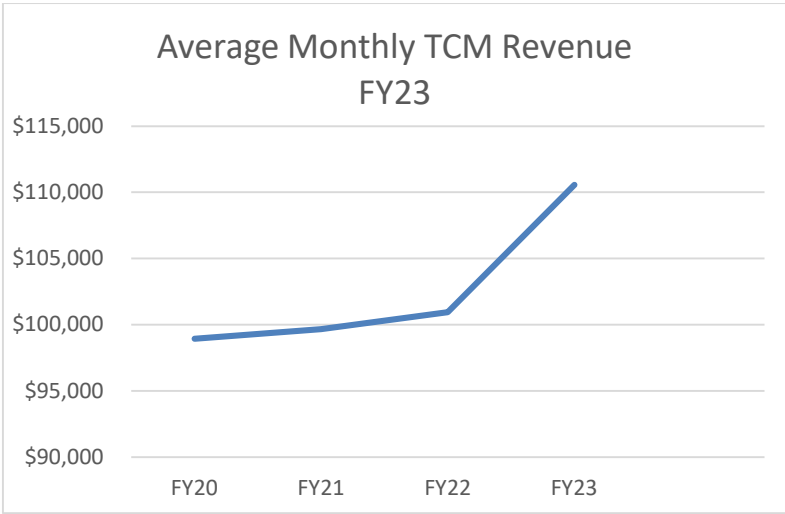
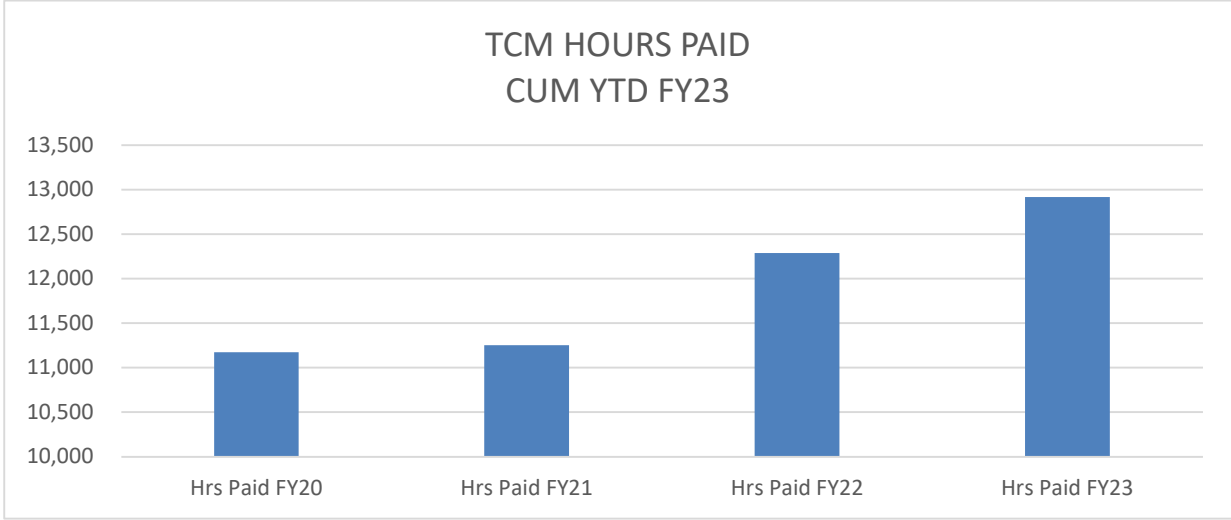
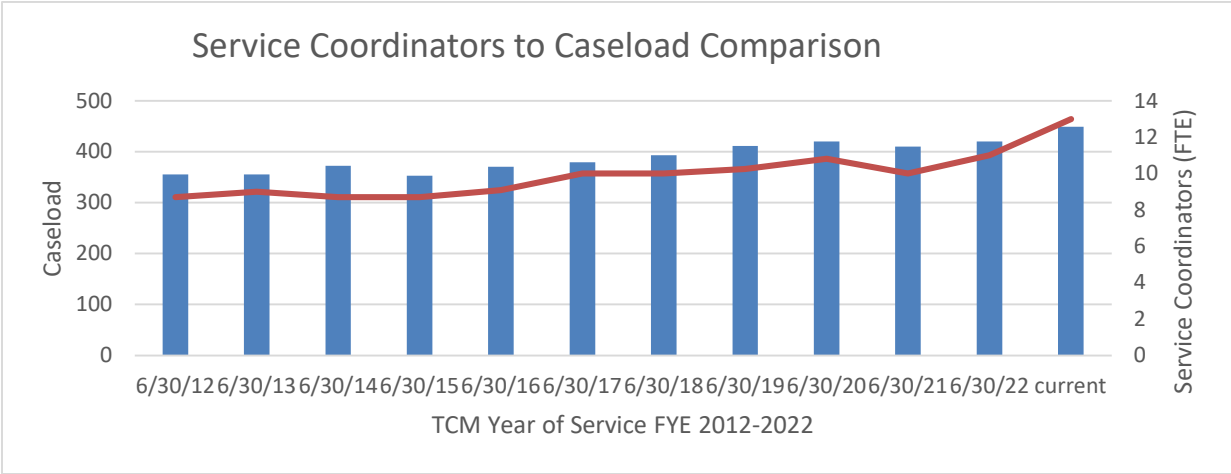
Meanwhile, MACDDS leadership has taken a list of concerns, challenges and recommendations to DMH's Division of Developmental Disabilities. It is strongly worded corrective action requested for poorly organized MAAS Assessments, HRST Assessments and the ConnecXions Case Management System. *The memo also includes demands for DMH to include a TCM rate increase in the FY25 Budget recommendations to the Governor. They requested the 18+% increase calculated based upon the Mercer Wage Study last fall.* If we get that 18%, I am anticipating that will be the last increase for about five years. DMH must include the recommendation in the budget submitted to the Governor *this fall* to assure it gets to legislators during the upcoming session.

As a reminder, the TCM rate has not increased since 2015. Meanwhile, a recent analysis of service authorizations input into CIMOR shows that our TCM team secured authorizations totaling \$27.6 **million** in the last 12 months just for the 440+ individuals in the five-county area that we serve. This is 99% Medicaid services and does **not** include Autism shared services. These are services that must be initiated through a support plan and then monitored throughout the year by the Service Coordinators, making changes and adaptations to assure that supports are quality driven, meaningful, necessary and meets DMH/Medicaid requirements. All in addition to assuring the health, welfare and overall safety of everyone we work with. This takes a degreed professional to provide this level of service and our legislators need to be aware of and show tangible appreciation for the value of their work.

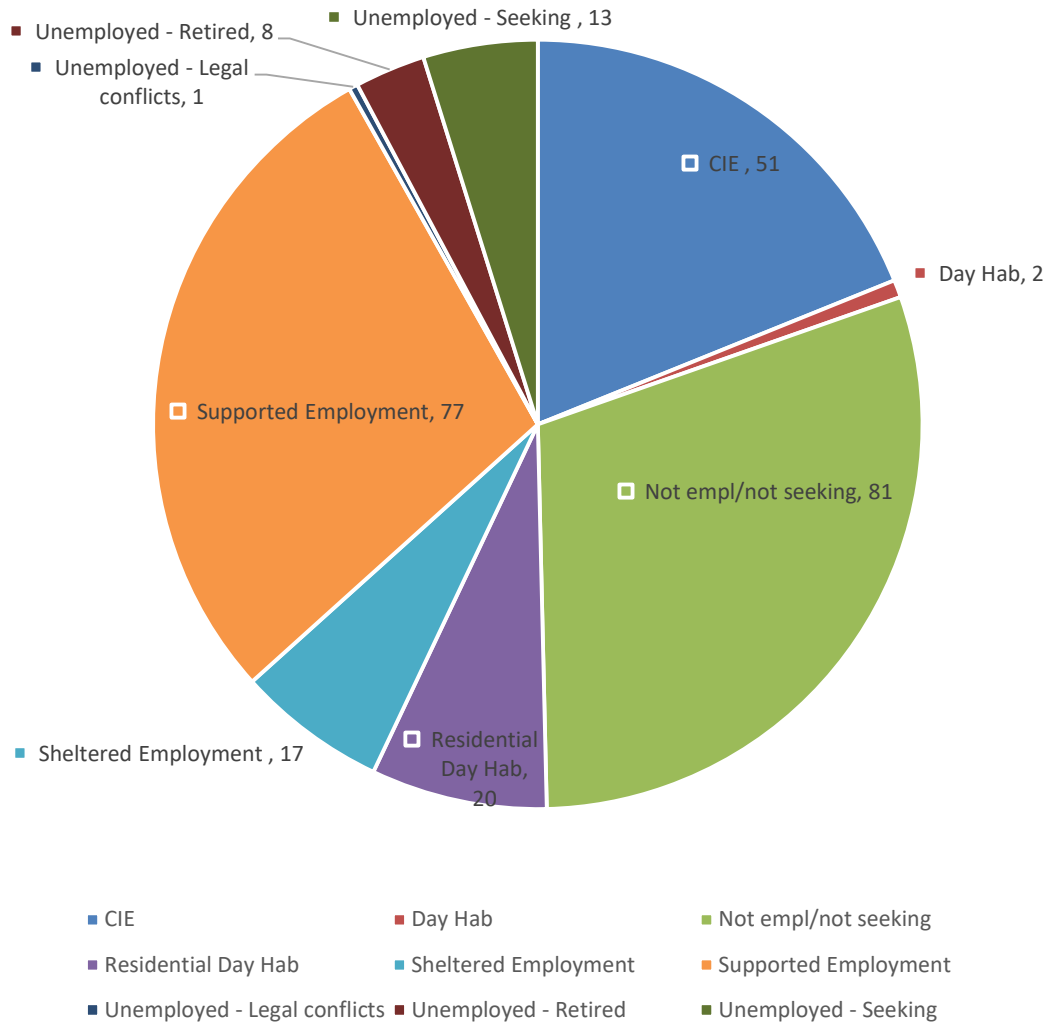
Reference: attached Board Dashboard, illustrative charts and graphs and the updated Strategic Plan tracker.

<b>Adair County SB40 Dashboard</b>		<b>FYE 6/2023</b>	
<b><u>Variance to Budget</u></b>	<b><u>Actual FY22</u></b>	<b><u>Pacing YTD</u></b>	
Property Tax Revenue vs Budget	\$ 68,209	\$ 237	
TCM Revenue vs Budget	\$ (89,158)	\$ (25,989)	
Personnel Expense vs Budget	\$ (90,078)	\$ (57,807)	
Program Direct Expense vs Budget	\$ 7,952	\$ 62,902	*Includes \$109k for Greenwood Center AJE, -\$46k excl
In-Direct Expense vs Budget	\$ 48,234	\$ 44,824	
Surplus/Deficit YTD	\$ 59,396	\$ (56,518)	*Includes \$109k for Greenwood Center AJE, +\$54k excl
<b><u>Targeted Case Management</u></b>	<b><u>Actual FY22</u></b>	<b><u>FYE 6/2023</u></b>	
Current Caseload	420	449	
Number of Service Coordinators <i>working</i>	10.5	11	* 1 SC on leave, 1 SC in Orientation
Avg TCM Logged Billable Hours/ Mo	1,070	1164	
Avg TCM PAID Billable Hours/ Mo	1,024	1082	
Avg Non-Medicaid (Unpaid 'Billable' Hours)/Mo	46	61	
Budgeted Billable Hours/Mo	1,096	1,097	
Average Billable Hours per SC	102	98	
Budgeted Log Hours per SC	104	91	
Actual Caseload Per SC	40	41	
Goal Caseload Per SC	35	35	
Actual Hours per Person Served	2.55	2.59	
Goal Hours per Person Served	3.00	3.00	
Actual Average Billable Hours Per Day Per SC	n/a	4.9	
Goal Average Billable Hours Per Day Per SC	n/a	5.6	
<b><u>Partnership for Hope Grants</u></b>	<b><u>YTD</u></b>	<b><u>FYE 6/2023</u></b>	
Total Annualized PfH Approved	76,727	56,604	
Total Actual YTD PfH Expense	29,386	33264	
Total Actual PfH Expense Last Year	36,702	29386	
# of Participants	51	38	
Cash Reserves	520,342	599,662	
<b><u>Personnel</u></b>	<b><u>YTD</u></b>	<b><u>FYE 6/2023</u></b>	
Total Budgeted Personnel (FT)	20	20	
Total Budgeted Personnel (PT)	1	4	
Total Actual Personnel (FT)	19.0	21	
Total Actual Personnel (PT)	3.0	3	
Total Budgeted SCs	12	12	
Total Actual SCs	11	13	* 1 SC on leave, 1 SC in Orientation
<b><u>Community Learning Center</u></b>	<b><u>YTD</u></b>	<b><u>FYE 6/2023</u></b>	
CLC Direct Program Expense	6,802		
CLC Staff Actual	1.5	1.5	
CLC Staff Budgeted	1.0	1.5	

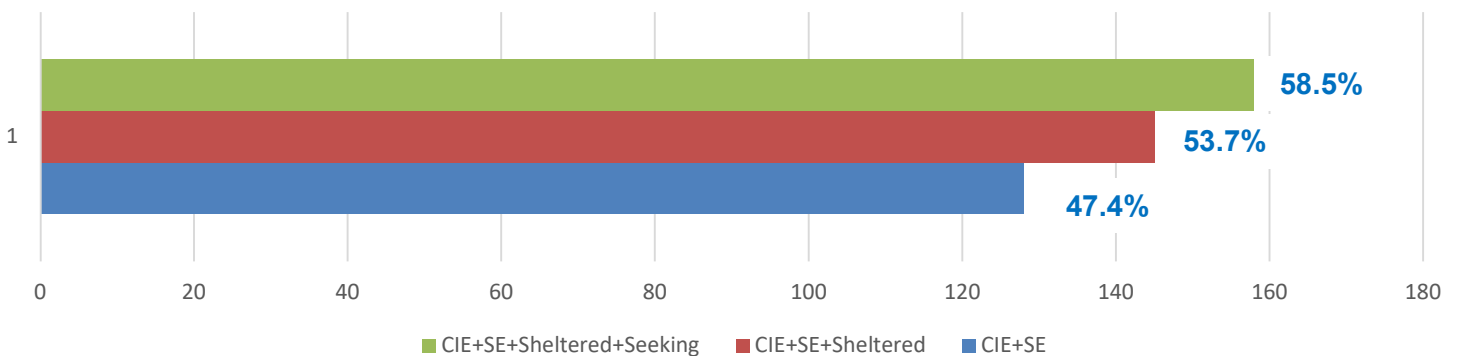
**YTD Surplus Pacing includes \$109k Greenwood Center AJE**



# Adair County SB40 TCM Caseloads Employment Status Ages 19-64



## Adair County SB40 TCM Services Type of Employment Ages 19-64



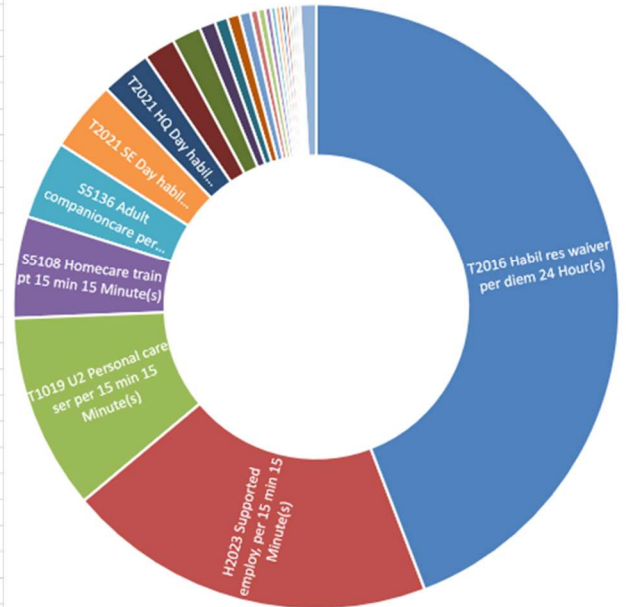
Total Cases Ages 19-64 = 270 individuals

# By Service Code/Type

Date Range 6/1/22-5/31/23

Service Code	Authorized	% Auth
T2016 Habil res waiver per diem 24 Hour(s)	\$ 12,214,073	44.2%
H2023 Supported employ, per 15 min 15 Minute(s)	\$ 5,461,668	19.8%
T1019 U2 Personal care ser per 15 min 15 Minute(s)	\$ 2,890,843	10.5%
S5108 Homecare train pt 15 min 15 Minute(s)	\$ 1,512,195	5.5%
S5136 Adult companioncare per diem 24 Hour(s)	\$ 1,159,246	4.2%
T2021 SE Day habil waiver per 15 min 15 Minute(s)	\$ 1,045,885	3.8%
T2021 HQ Day habil waiver per 15 min 15 Minute(s)	\$ 736,393	2.7%
T1019 Personal care ser per 15 min 15 Minute(s)	\$ 463,329	1.7%
A9999 GT Dme supply or accessory, nos 1 Unit(s)	\$ 427,169	1.5%
T2029 Special med equip, noswaiver 1 Unit(s)	\$ 235,589	0.9%
T2003 HE N-et; encounter/trip 1 Per Trip	\$ 190,172	0.7%
T2001 N-et; patient attend/escort 1 Month	\$ 179,829	0.7%
T1002 TD RN SERVICES UP TO 15 MINUTES 15 Minute(s)	\$ 166,423	0.6%
T2001 HQ N-et; patient attend/escort 1 Month	\$ 110,479	0.4%
T1003 TE Lpn/lvn services up to 15min 15 Minute(s)	\$ 105,814	0.4%
S5108 HQ Homecare train pt 15 min 15 Minute(s)	\$ 85,923	0.3%
T2021 HQ-SE Day habil waiver per 15 min 15 Minute(s)	\$ 70,591	0.3%
T1019 HQ Personal care ser per 15 min 15 Minute(s)	\$ 65,562	0.2%
890000 Transportation, Ind per month 1 Month	\$ 58,699	0.2%
T1019 SC Personal care ser per 15 min 15 Minute(s)	\$ 56,845	0.2%
890050 Transportation, Amb, Lg Grp 1 Month	\$ 48,973	0.2%
T2041 Support broker waiver/15 min 15 Minute(s)	\$ 44,295	0.2%
358001 Family Resource Services 15 Minute(s)	\$ 42,864	0.2%
A0110 Nonemergency transport bus 1 Per Trip	\$ 39,275	0.1%
A0110 HE Nonemergency transport bus 1 Per Trip	\$ 35,578	0.1%
52A00H Community Inclusion Individual 15 Minute(s)	\$ 30,240	0.1%
T1002 RN SERVICES UP TO 15 MINUTES 15 Minute(s)	\$ 26,693	0.1%
52100H Home Skills Development - Non Waiver 15 Minute(s)	\$ 22,655	0.1%
15100H Social Skills Group 15 Minute(s)	\$ 15,408	0.1%
S5170 Homedelivered prepared meal 1 Unit(s)	\$ 14,443	0.1%
A9999 UB Dme supply or accessory, nos 1 Unit(s)	\$ 14,434	0.1%
H0038 Self-help/peer svc per 15min 15 Minute(s)	\$ 14,174	0.1%
A9999 UC Dme supply or accessory, nos 1 Unit(s)	\$ 12,932	0.0%
99499 Unlisted e&m service 1 Month	\$ 9,600	0.0%
52002H Off Site Day Hab Ind 15 Minute(s)	\$ 7,133	0.0%
S5165 Home modifications per serv 1 Unit(s)	\$ 6,795	0.0%
T2002 HE N-et; per diem 1 Per Trip	\$ 6,584	0.0%
S5125 Attendant care service /15m 15 Minute(s)	\$ 6,183	0.0%
S5151 Unskilled respitecare /diem 1 Day	\$ 6,000	0.0%
T2019 Habil sup empl waiver 15min 15 Minute(s)	\$ 4,668	0.0%
891102 Contractor Travel per consumer 1 Rolling Mile	\$ 4,025	0.0%
H0038 SE Self-help/peer svc per 15min 15 Minute(s)	\$ 1,713	0.0%
T2003 N-et; encounter/trip 1 Per Trip	\$ 1,016	0.0%
G9007 U2 Mccd, sch team conf 15 Minute(s)	\$ 564	0.0%
A9999 UA Dme supply or accessory, nos 1 Unit(s)	\$ 327	0.0%
52070A Autism Shared Unit Contract Services 1 Unit(s)*	\$ 121	0.0%
	\$ 27,653,415	100.0%

ADAIR COUNTY SB40  
Service Authorizations  
12 Month History (5/31/23)

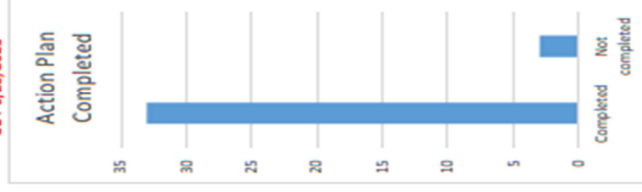


\*Autism Services are input as "\$1" in order to authorize access to Missouri's Autism Services program. It does not represent cost of those services.



Adair County SB40 Strategic Action Plan Goal	Action Step	Delegated To	Assigned Date	Due Date	Completed
KRA1: At least 1 Self-Advocates Group meet monthly	CLC - Schedule Parent Social Group (Sibling)	Melissa	7/1/22	6/30/23	TRUE
KRA1: Quarterly Educational Program	Ex: STIR, CIRCLES, Life Course	Melissa	7/1/22	6/30/23	TRUE
KRA1: Assess CLC programming to needs monthly	Review Program Calendar monthly	Melissa/Crystal	7/1/22	6/30/23	TRUE
KRA1: TCM DMH/CMS Audits yield no major concerns	Pre-Audit review	Dana/Sean/Susan/Lana	7/1/22	6/30/23	TRUE
KRA1: 85% of Tiered Support Benchmark Goals Monthly	Maintain Benchmark Tracker of PBS Goals	A-Team	7/1/22	6/30/23	TRUE
KRA1: Agency maintain positive working relations with schools, CD, DHSS	Attend monthly CASSP, SOC & IEPs as needed	ED/DSC/ADSC	7/1/22	6/30/23	TRUE
KRA1: Agency Grants promote the Mission of the Agency	Advocacy, Inclusion, Resources	Board of Directors/ED	7/1/22	6/30/23	TRUE
KRA1: Agency Surveys Program Participants for Feedback	TCM Satisfaction Surveys	Tiffany	7/1/22	6/30/23	TRUE
	CLC Program Evaluations	Melissa	7/1/22	6/30/23	TRUE
KRA2: Agency is Employer of Choice	Competitive wages based upon annual wage studies	Crystal	7/1/22	6/30/23	TRUE
KRA2: Agency Codifies HR Processes into policy	Development and Distribution of Employee Handbook	Admin Team	7/1/22	6/30/23	TRUE
KRA2: Agency Promotes Performance Recognition Program	360 Employee Relations Committee defines program	Tiffany	7/1/22	6/30/23	TRUE
KRA3: Independent Annual Financial Audit	Satisfactory Audit with no findings	Julie	7/1/22	6/30/23	TRUE
KRA3: Individual Funding Grants support mission	Prioritization of funding Assistive Technology that will reduce dependency on paid supports	UR Committee	7/1/22	6/30/23	TRUE
KRA3: Agency Grants support "Employment First" DMH Project	35% Working Age Individuals have Competitive/Integrated Employment (as of 06.23 19% CIE, 29% SE for a total of 47.4%)	Board of Directors/ED	7/1/22	6/30/23	FALSE
KRA3: Increase Fundraising through Adair DD Link for programs	Agency facilitates Transition Coalition planning group	Melissa/Crystal	7/1/22	6/30/23	TRUE
KRA4: Equal & Equitable Services to Individuals regardless of funding	Promote QR Code to solicit donations	Melissa/Crystal	7/1/22	6/30/23	FALSE
KRA4: Programming Promotes Positive Behavioral Supports	Provide CRC services for Non-Medicaid Caseload	DSC/ADSC	7/1/22	6/30/23	TRUE
KRA4: Agency maintains positive working relationship with Service Providers	All SCs are trained in Tools of Choice	DSC/ADSC/QAS	7/1/22	6/30/23	TRUE
	CLC provides MANDT Training for Provider Staff	Melissa	7/1/22	6/30/23	TRUE
	Agency hosts annual DSP recognition		7/1/22	6/30/23	TRUE
KRA4: Agency maintains positive working relationship with community stakeholders	Agency participates in monthly SOC/Interagency planning group	Crystal/Susan/Melissa	7/1/22	6/30/23	TRUE
KRA4: Agency conducts annual needs assessment	Agency collaborates with ATSU/TSU programs	Melissa/Crystal	7/1/22	6/30/23	TRUE
KRA5: Agency advocates for people w/IDD with elected officials and governmental contacts	Agency maintains NEMOResources.org website	Admin Team	7/1/22	6/30/23	TRUE
KRA5: Agency leverages taxpayer dollars for federal/state funding	Agency identifies unmet needs of people with IDD in service area	Admin Team/Melissa	7/1/22	6/30/23	TRUE
	Agency actively involved with MACDDS Legislative Committee	Crystal	7/1/22	6/30/23	TRUE
	Agency provides funding for Partnership for Hope for up to 51 people	UR Committee	7/1/22	6/30/23	TRUE
KRA6: Agency facilitates communication between community contacts	Agency Hosts monthly coffee chats with local professionals impacting the lives of people that we serve	DSC/ADSC	7/1/22	6/30/23	TRUE
	Agency Participates in community events to promote services	Melissa/Crystal	7/1/22	6/30/23	TRUE
KRA6: Media Connections	Distributes monthly newsletters, calendars & Occasional press releases	Melissa/Crystal	7/1/22	6/30/23	TRUE
KRA6: Agency completes presentations and interactions with local groups & organizations	Agency maintains a "Speaker's Bureau" to do community presentations	Crystal	7/1/22	6/30/23	FALSE
	Agency facilitates Community Engagement Conference	Melissa/Crystal	7/1/22	6/30/23	TRUE
KRA6: Agency facilitates multiple signature events that promote inclusion and advocacy and/or links resources.	Agency hosts Annual Spotlight Awards	Admin Team	7/1/22	6/30/23	TRUE
	Agency actively promotes March Developmental Disability Awareness Month	Crystal	7/1/22	6/30/23	TRUE
	Agency participates in annual NEMO Connect event	Crystal	7/1/22	6/30/23	TRUE

EOY 6/23/2023



Action Plan Completed	36
Not completed	3