



family  
outreach

# ANNUAL REPORT PRESENTATION

FISCAL YEAR  
2022

# BOARD OF DIRECTORS



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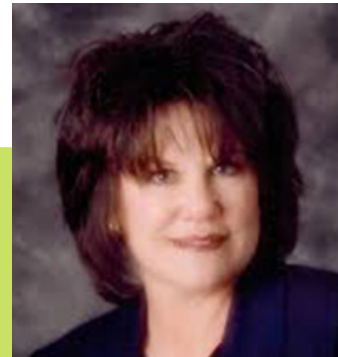
**Kat Patterson**



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**Diana Tavary**



**Rhonda Lindquist**



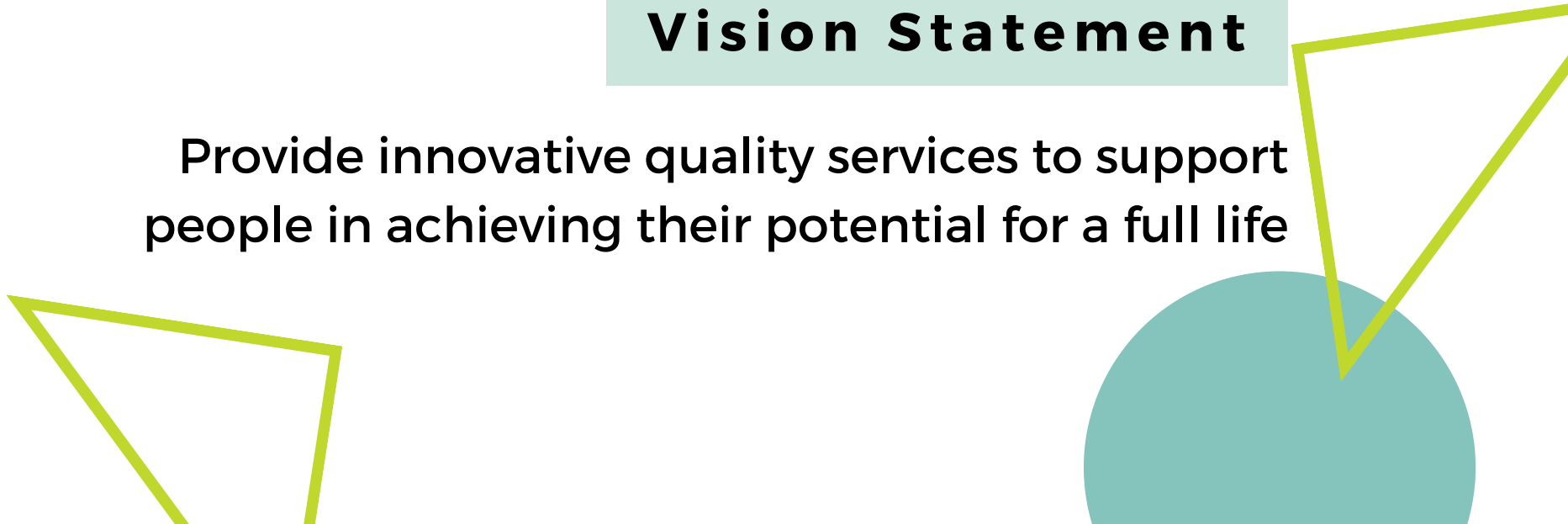
# Mission and Vision

## **Mission Statement**

Empower individuals with disabilities and their families by providing supports for integration into the community

## **Vision Statement**

Provide innovative quality services to support people in achieving their potential for a full life



# Executive Director's Report



**Executive Director**  
**Jackie Mohler**

# Director's Report

I joined as Executive Director of Family Outreach, Inc. in November of 2019 with the ambition to help carry forward the mission of commitment to community services delivering innovative supports across the life span.

These are unprecedented times in the world. A unified voice is now more important than ever to meet the immense challenges those with disabilities are facing today, whilst continuing to address fundamental issues.

Family Outreach acts as a leader and catalyst for change in the advancement of independence of those with disabilities. We will keep working with families, individuals and the community to listen and lead, as the world and our systems change.

# Director's Report

It is my pleasure to commend the staff, the board and community for their continued engagement in supporting those with disabilities to thrive.

I look forward to keeping you updated on our progress in support of these goals through our ongoing engagement, and in our future. We must continue to innovate together and never lose sight of the value of people; both the ones we serve, and within Family Outreach.



# 2023 STRATEGIC ROADMAP

EMPOWER INDIVIDUALS WITH DISABILITIES AND THEIR FAMILIES  
THROUGH SUPPORTS FOR INTEGRATION INTO THE COMMUNITY.

Strategy and Objectives		Critical Success Factors	Measurement	Projected	
				Revenue	Expense
Business Office Results – Automation and Efficiency			Total	\$3,987,121	\$4,279,821
Fund Accounting	Automation of Accounting Processes		Early Intervention	\$1,444,845	\$1,206,910
Billing Software	Building Maintenance Process		Support Services	\$1,833,819	\$1,735,467
Early Intervention – Increasing Quality of Services			Applied Behavior Analysis	\$294,417	\$432,262
Part-C 214 Children per Month	FES 156 Clients per Month		Administration	\$414,040	\$905,182
Staffing, On-boarding, and Training	Define the Work Environment		Operating Margin	–6.8%	
Support Services – Quality Staff Providing Quality Services			Staff Headcount	Current	Goal
Maximize Services for Each Client	Legislative Session		Early Intervention	29	36
Staffing in Butte and Bozeman	Internal Communication Strategy		Support Services	66	72
Applied Behavior Analysis – Sustainable Growth and Stabilization			Applied Behavior Analysis	10	14
Maximize Services for Each Client	Legislative Session		Administration	16	16
Staffing in Helena and Bozeman	Internal Communication Strategy		Total	121	138
Human Resources – Employee Growth and Satisfaction					
Training Program (Relias, 360)	Contribution Management				
Recruitment and Onboarding	Employee Retention				
Board Committees – Transition					
Transition Plan	Governance Model				
Fundraising Strategy	Committee Involvement				



## Chief Executive Officer

1. Board of Directors
2. Legislative
3. Annual Budget
4. Develop and implement programs
5. Provide set compensation and benefits

## Business Office

1. Business Office Staff - Selection, hiring and paperwork, training program, performance, timesheet, and expense
2. Payroll
3. Benefits payables
4. Reporting
5. Systems
6. Billing—Accounts Receivable, Account Payable
7. Budget
8. Audits
9. Grants
10. Financials

## EI

1. Program Staff Supervision - Selection, hiring and paperwork, training program, performance development, timesheet, and expenses
2. MSR, Credit Cards
3. Client Count
4. Eligibility
5. Budget – Revenue, Expense, Payroll, Part C cost plans
6. Locations and Cars
7. Billing—Time sheets
8. Compliance
9. Contract Requirements
10. Grants

## SS

1. Program Staff - Selection, hiring and paperwork, training program, performance, timesheet, and expenses
2. MSR, Credit Cards
3. Budget – Revenue, Expense, Payroll
4. Locations and Cars
5. Billing—Time sheets
6. Compliance (meet compliance guidelines)
7. Contract Requirements
8. Grants
9. Cost Plans

## ABA

1. Program Staff - Selection, hiring and paperwork, training program, performance, timesheet, and expenses
2. MSR, Credit Cards
3. Client Count
4. Eligibility
5. Budget – Revenue, Expense, Payroll
6. Locations and Cars
7. Billing—Time sheets
8. Compliance
9. Grants
10. Billing Units
11. Audits

## Human Resources

1. Agency Staff - Selection, hiring and paperwork
2. Performance Management
3. Contribution Management
4. Benefits Administration
5. Reporting
6. Grants
7. Recruitment,
8. On-boarding,
9. General agency training
10. Personnel files



# SUPPORT SERVICES



# SUPPORT SERVICES

## Overview

- Fiscal Year 2022 started off with challenges. We were still in the middle of the pandemic, but by the end we started to see some recovery. We have been able to stabilize our Helena and Butte locations and hire a fully devoted support services staff in Bozeman.
- We promoted a Supported Employment Specialist to run the pre-Education Transition Services (pre-ETS) program as a program developer.
- We maintained Individual Living Specialists (ILS) in each office with minimal turnover.
- With all the struggles throughout the year, the support services team was still able to provide over 45,000 hours of service, an increase of nearly 2,000 hours from the previous year.

# SUPPORT SERVICES

Clients served in FY 2022

## Butte

**0208**  
25

**VR**  
6

**EE**  
1

**Pre-ETS**  
2

## Helena

**0208**  
49

**VR**  
17

**EE**  
17

**Pre-ETS**  
17

## Bozeman

**0208**  
33

# SUPPORT SERVICES

Helena, Butte and Bozeman areas served by:

**45 Direct Service Providers**

**7 Individual Living Specialists**

**3 Supported Employment Specialists**

**2 Supported Employment Developers**

**1 Program Manager**

**1 Support Services Supervisor**

**1 Program Assistant**

**60  
Total  
Staff**



# SUPPORT SERVICES

## FY 2023 Goals

### 01 **Recruiting and Retaining Staff**

- We will be looking at adding a supervisory position in our Butte office for expanding services in the area.

### 02 **Streamline Billing**

- We will be examining the billing processes for our Supported Employment program and streamlining so there is little to no duplication.

### 03 **More Referrals!**

- On going dedication with stakeholders to obtain new referrals.
- 
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# EARLY INTERVENTION



# EARLY INTERVENTION

## Overview

- The Early Intervention department experienced 100% turnover in their management team in May 2022. A new Program Manager and three new Support Services Supervisors were hired in the following months. They have since begun implementing new procedures structuring the services provided under Part C, Family Education and Support, Targeted Case Management, and Big Sky Waiver programs.
- With support from human resources, the Early Intervention team has hired and trained many new Family Support Specialists since their start date in May. The orientation process was rewritten to include a weeklong training provided by supervisors and a mentorship program with veteran staff.



# EARLY INTERVENTION

## Overview

- The Bozeman office hired both a part-time Program Assistant and a part-time Administrative Assistant. This support has provided much relief to other positions and an equal distribution of responsibilities.
- Early Intervention continues to benefit from many grant partnerships receiving approximately \$15,000 per year. The program expanded its donation efforts to receive around \$6000 in the last year. The program will continue to expand these two financial resources.
- The program has been working closely with the state's Part C Coordinators to evaluate and improve our processes. This partnership has developed into a great support for the new management team as they grow the program and refine practices.

# EARLY INTERVENTION

Clients served ending FY 2022

## Bozeman

Part C 93

FES 48

TCM 5

Total

146

## Butte

Part C 75

FES 51

Total

126

## Helena

Part C 98

FES 48

TCM 2

BSW 4

PSP 4

Total

156

# EARLY INTERVENTION

## Staff

### Bozeman

1 PM

1 AA

1 PA

1 SSS

1 FSC

5 FSS

### Butte

1 SSS

1 FSC

5 FSS

### Helena

1 SSS

1 FSC

6.5 FSS

1 AA



# EARLY INTERVENTION

## FY 2023 Goals


### 01 **Staff Retention**

- The EI program will focus on retaining and developing quality staff.

### 02 **Increase Client Base**

- EI will find innovative ways to provide quality early intervention services to Part C and FES families.

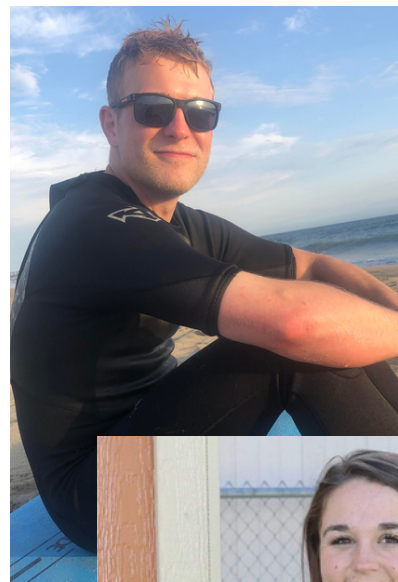
### 03 **Community Outreach**

- The program will widen its scope of community engagement by attending events and meetings with a variety of organizations and individuals throughout our region.
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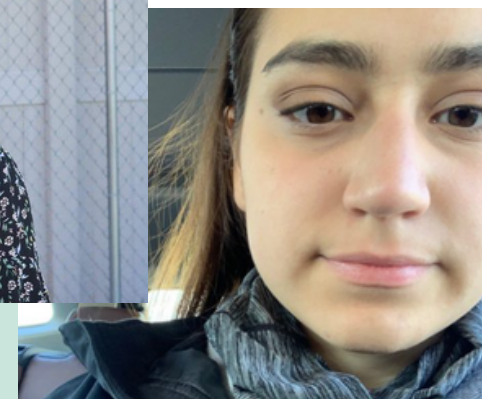
# APPLIED BEHAVIOR ANALYSIS



**BOZEMAN**



**HELENA**



# APPLIED BEHAVIOR ANALYSIS

## Overview

- Significant changes occurred in the ABA Services program at the onset of fiscal year 2022. By the middle of August 2021, the ABA services had four staff members resign: the ABA services manager/BCBA, another BCBA, and two RBTs. All were based out of the Bozeman office.
- Existing members of the ABA team moved into open positions helping stabilize the program. Both compliance specialists passed their BCBA examinations at the beginning of the fiscal year. One is currently an LBA in Helena and the other is the ABA Services Manager/LBA out of Bozeman. One of Bozeman's RBTs became a compliance specialist with a program-wide focus as opposed to remaining location-specific. There has been only one staff resignation since September 2021.

# APPLIED BEHAVIOR ANALYSIS

Clients served in FY 2022

Bozeman

20

Helena

24



# APPLIED BEHAVIOR ANALYSIS

Helena and Bozeman areas served by:

**1 ABA Services Manager**

**3 BCBA/LBA**

**1 Compliance Specialist**

**2 Student Interns**

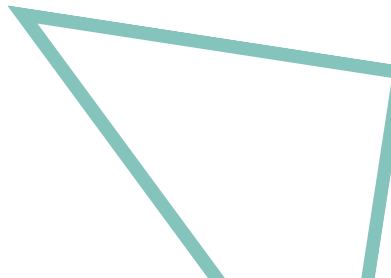
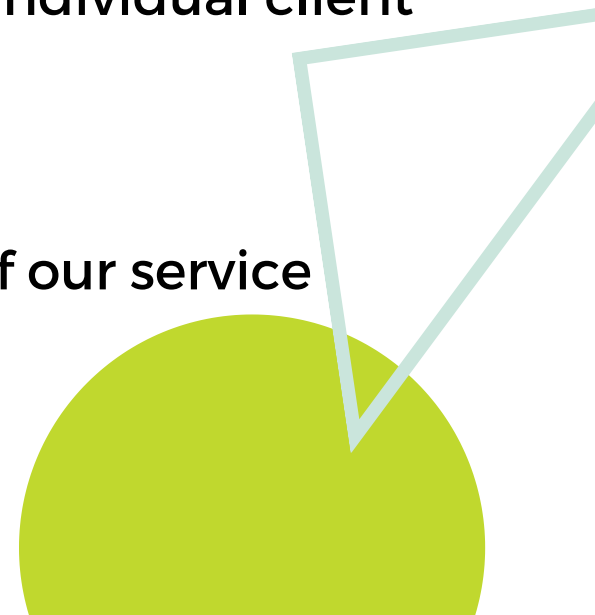
**7 RBT**

**10 Total Staff**



# APPLIED BEHAVIOR ANALYSIS

## FY 2023 Goals

- 01** Increase workforce by one LBA in each Bozeman and Helena
  - 02** Transition to the tier model of services in the Helena office
  - 03** Maximize authorization utilization for each individual client
  - 04** Maximize utilization of student interns
  - 05** Increase public awareness and availability of our service
- 
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# ADMINISTRATION OFFICE



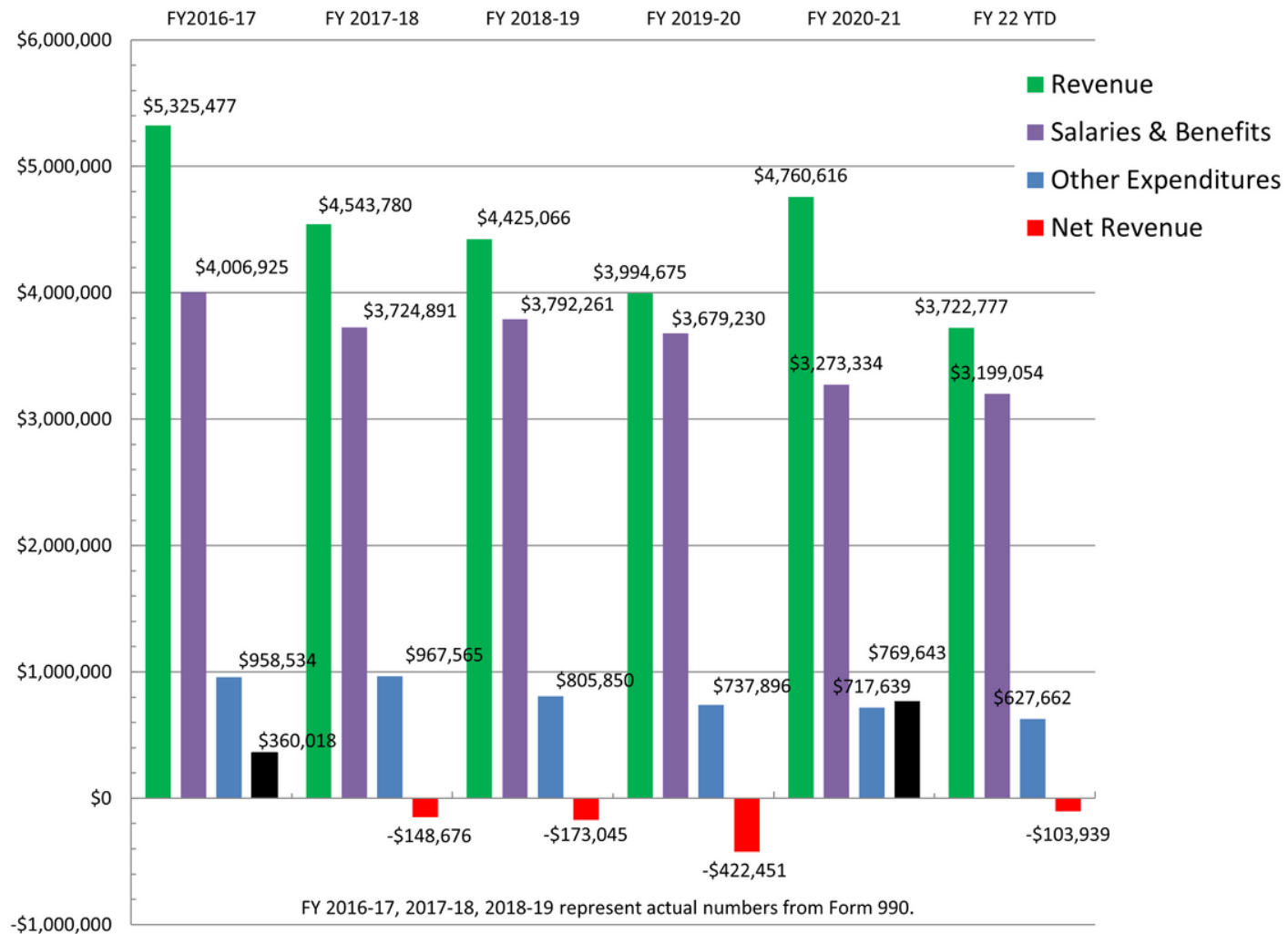
# FINANCE DEPT

## Overview

- As with the rest of the agency, we were challenged in the last year by staff turnover. With the solidifying of a dedicated team, we have developed a workable process flow to enable the business office to run with a leaner staffing profile.
- We successfully implemented the Abila Timesheet Module.
- An Endowment Fund was set up and we began the process along with the Board to develop a fundraising strategy.

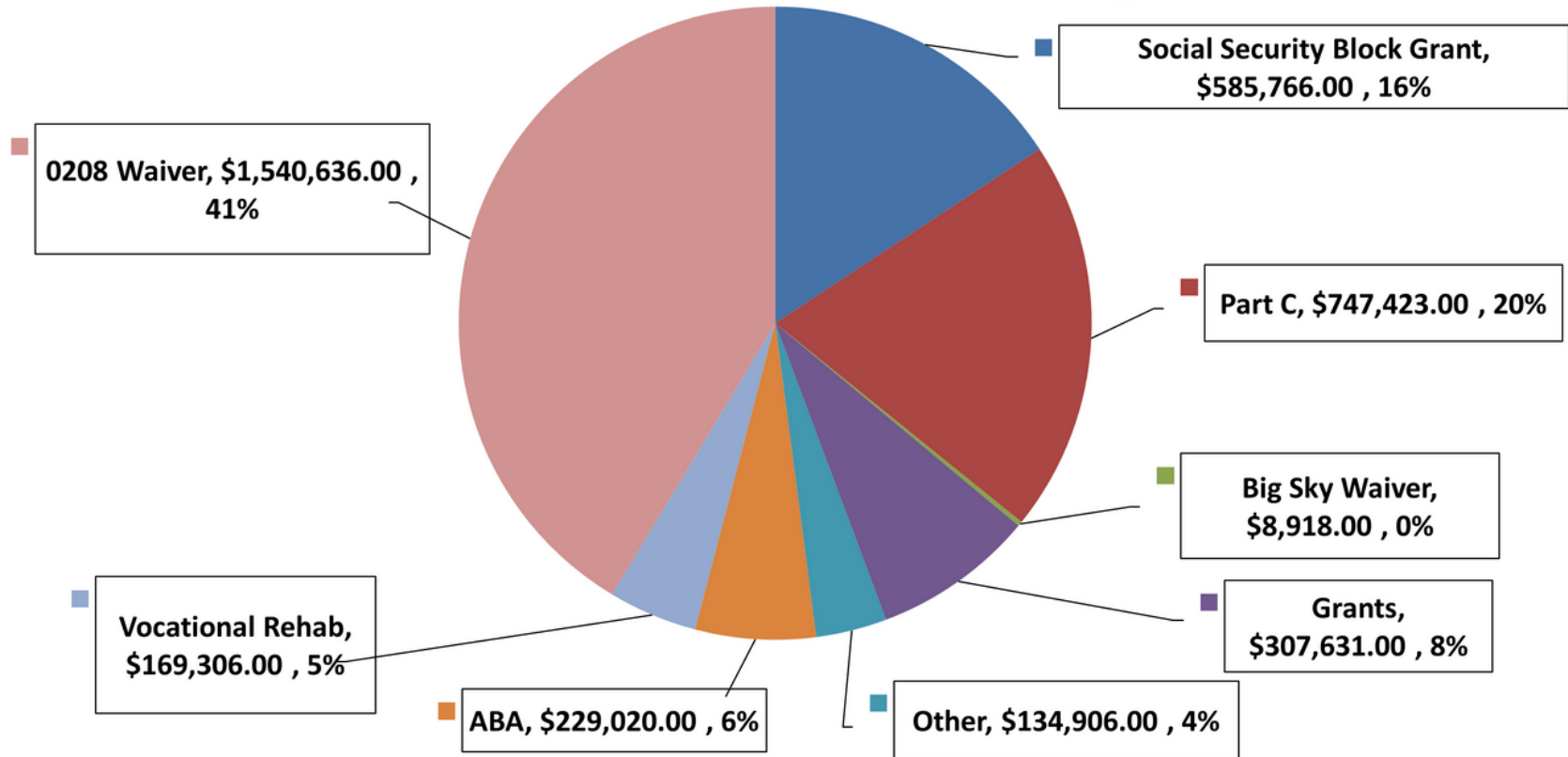
# FINANCE DEPT

## 2017 - 2022 Revenues & Expenses Comparison



# FINANCE DEPT

## 2021-22 Revenue Percentages



# ADMINISTRATION OFFICE

## FY 2023 Goals

### Finance Department

- 01 Automation of accounting processes, billing, and expense tracking.  
  
Develop a building maintenance system to ensure our building assets are better environments for our staff and will improve their value over the years.
- 02
- 03 Set up a more detailed fund accounting to provide the Board, Executive Director, and Program Managers with a detailed and timely picture of our revenue and expenses.



ADMINISTRATION OFFICE

# HUMAN RESOURCES

**FY 2022  
Staff  
Turnover**

Support Services 16.2%

Early Intervention 34.2%

Applied Behavior Analysis 28.6%

Administration Office 30.8%

**Family  
Outreach  
Average  
29.9%**

30

# HUMAN RESOURCES

## Number of Staff FY 2022

### Support Services

74 Active employees  
24 New hires  
12 Left employment  
15 Open positions

### Early Intervention

38 Active employees  
21 New hires  
13 Left employment  
6 Open positions

### Applies Behavior Analysis

14 Active employees  
3 New hires  
4 Left employment  
3 Open positions

### Administration Office

26 Active employees  
9 New hires  
8 Left employment  
1 Open position

# HUMAN RESOURCES


## Contribution Management

- Create, implement, and train all employees on a reward contribution program.
- Train Program Managers to effectively implement Contribution Management with all employees.

# ADMINISTRATION OFFICE

## FY 2023 Goals

### Human Resources

- 
- 01 Increase Recruitment & Retention
  - 02 Refine Onboarding process for all programs
  - 03 Increase training opportunities and tracking for all programs



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# Thank You to our Donors

Blue Cross Blue Shield  
Elizabeth Doering Foundation  
Gilhousen Family Foundation  
Give Big Gallatin Valley  
Greater Helena Gives  
Helena Area Community Foundation  
Hopa Mountain StoryMakers

Hope in the Holidays  
MT Army National Guard  
Otto Bremer Foundation  
Town Pump  
United Way of Butte and Anaconda  
United Way of the Lewis & Clark Area

Family Outreach is celebrating 45 years of dedicated service to the developmentally disabled community of southwestern Montana.



We wish to recognize the following local businesses and groups who have supported us in our 45th Anniversary Celebration:

# Thank You 45th Anniversary Celebration Sponsors



1889 Coffee House  
 Anderson ZurMuehlen  
 Big Dipper Ice Cream  
 Big Sky Auto Glass  
 Big Sky Plumbing and Heating  
 Boulder Hot Springs  
 Brewhouse Pub & Grill  
 Capital City Health Club  
 Cheddar's Gourmet Grilled Cheese  
 Child Care Connections  
 Cinemark  
 Cohesion Dance Project  
 Communication & Management Services  
 Dermawerx Custom Tattoo Montana

ExplorationWorks  
 First Interstate Bank  
 Gold Leaf Physical Therapy  
 Good Samaritan Ministries  
 Hard Rock Road Building & Utilities  
 Harrington Pepsi of Helena  
 Helena College  
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