ANNUAL REPORT PRESENTATION
FISCAL YEAR 2022
BOARD OF DIRECTORS

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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
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.**

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

Operating Margin: **-6.8%**

<table>
<thead>
<tr>
<th>Staff Headcount</th>
<th>Current</th>
<th>Goal</th>
</tr>
</thead>
<tbody>
<tr>
<td>Early Intervention</td>
<td>29</td>
<td>36</td>
</tr>
<tr>
<td>Support Services</td>
<td>66</td>
<td>72</td>
</tr>
<tr>
<td>Applied Behavior Analysis</td>
<td>10</td>
<td>14</td>
</tr>
<tr>
<td>Administration</td>
<td>16</td>
<td>16</td>
</tr>
</tbody>
</table>

Total Staff Headcount: **121**

Goal Staff Headcount: **138**
2023 ACCOUNTABILITY CHART
COMPASSION, COMMITMENT, ETHICAL, TEAM

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
7. Budget
8. Audits
9. Grants
10. Financials

EI
1. Program Staff
   - 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
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
  - EE: 1
  - VR: 6
  - Pre-ETS: 2

- **Bozeman**
  - 0208: 33

- **Helena**
  - 0208: 49
  - EE: 17
  - VR: 17
  - Pre-ETS: 17
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

Total Staff: 60
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.
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

Helena
1 SSS
1 FSC
6.5 FSS
1 AA

Butte
1 SSS
1 FSC
5 FSS
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.
APPLIED BEHAVIOR ANALYSIS

BOZEMAN

HELENA
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
ADMINISTRATION OFFICE
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.
2017 - 2022 Revenues & Expenses Comparison

FY 2016-17: Revenue - $5,325,477
FY 2017-18: Revenue - $4,543,780
FY 2018-19: Revenue - $4,425,066
FY 2019-20: Revenue - $3,994,675
FY 2020-21: Revenue - $4,760,616
FY 22 YTD: Revenue - $3,722,777

Salaries & Benefits:
- FY 2016-17: $4,006,925
- FY 2017-18: $3,724,891
- FY 2018-19: $3,792,261
- FY 2019-20: $3,679,230
- FY 2020-21: $3,273,334
- FY 22 YTD: $3,199,054

Other Expenditures:
- FY 2016-17: $958,534
- FY 2017-18: $967,565
- FY 2018-19: $805,850
- FY 2019-20: $737,896
- FY 2020-21: $717,639
- FY 22 YTD: $627,662

Net Revenue:
- FY 2016-17: $966,927
- FY 2017-18: $3,724,891
- FY 2018-19: $852,805
- FY 2019-20: $4,017,375
- FY 2020-21: $3,787,277
- FY 22 YTD: $3,722,777

FY 2016-17, 2017-18, 2018-19 represent actual numbers from Form 990.
FINANCE DEPT
2021-22 Revenue Percentages

- Social Security Block Grant, $585,766.00, 16%
- Part C, $747,423.00, 20%
- Big Sky Waiver, $8,918.00, 0%
- Grants, $307,631.00, 8%
- Other, $134,906.00, 4%
- ABA, $229,020.00, 6%
- Vocational Rehab, $169,306.00, 5%
- 0208 Waiver, $1,540,636.00, 41%
FY 2023 Goals

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 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.
<table>
<thead>
<tr>
<th>Support Services</th>
<th>Early Intervention</th>
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</thead>
<tbody>
<tr>
<td>74 Active employees</td>
<td>38 Active employees</td>
</tr>
<tr>
<td>24 New hires</td>
<td>21 New hires</td>
</tr>
<tr>
<td>12 Left employment</td>
<td>13 Left employment</td>
</tr>
<tr>
<td>15 Open positions</td>
<td>6 Open positions</td>
</tr>
</tbody>
</table>

**Applies Behavior Analysis**

<table>
<thead>
<tr>
<th>Administration Office</th>
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</thead>
<tbody>
<tr>
<td>26 Active employees</td>
</tr>
<tr>
<td>9 New hires</td>
</tr>
<tr>
<td>8 Left employment</td>
</tr>
<tr>
<td>1 Open position</td>
</tr>
</tbody>
</table>
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
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  
Hopalong 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
Helena Sand and Gravel
Jarred Hanson and The SunsAh406
Montana EyeCare
Mountain Berry Bowls
MT Council on Developmental Disabilities
Outlaw Marketing
Placer Subaru of Helena
Skyre Spin & Sweat
Stonetree Climbing Center
The Painted Pot
The Patent House
Tulip Dental
Vanilla Bean Bakery & Café