



Performance Analysis/ Program Evaluation

2019-2020 Management Report

August 2020

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This annual Outcomes Management Report reflects the efforts of Caldwell Opportunities, Inc. clients, staff, board, families, guardians, residential supports, referral sources and subcontractors to give their best in supporting persons with disabilities and their families.

Caldwell Opportunities has provided the following services: Adult Developmental and Vocational Program, Long Term Community Supports, and Innovations Day Supports during the fiscal year 2019-2020. All program participants do not receive all services; services are received based on individual need, strengths, abilities and preferences.

The following information provides a review of program performance in each program area. Program performance is measured by specific objective, which include outcomes and benefits of services, efficiency measures, and consumer satisfaction measures. The results of this report will be utilized by the Board of Directors, staff consumer representatives, and referral sources in program planning, structuring and review for continue appropriateness of services for person served.

Management Report results will be shared with the COI Board of Directors and available to referral sources and stakeholders by request.



Caldwell Opportunities, Inc is a CARF-accredited organization

Caldwell Opportunities, Inc. seeks accreditation in the following services:

- Organizational Employment Services
- Community Integration

I. BUSINESS FUNCTION

Performance Goals and Results for Fiscal Year 2019-2020

A. FINANCIAL NEEDS AND PLANS TO SECURE FUNDS

- GOAL 1** Develop a budget with sufficient identifiable funding to provide for the programs financial needs for FY 2019-2020. Provide adequate insurance, protect the company's assets, and provide services to meet the company's mission.
- RESULTS** This budget was developed and ended the FY 2019-2020 with a fund balance of \$993,742.74 which is more than 30 months operating expenses.
- GOAL 2** Monitor financials for unusual trends. Make necessary cuts in expenditures to offset any significant reductions in revenue. Adjust spending incrementally to support growth if necessary. Seek board guidance in lieu of any trends that would lead to a significant risk or reward situation.
- RESULTS** No unusual trends were identified. Our Board is always informed of negative trends or unusual opportunities.
- GOAL 3** In order to maintain financial security and to achieve safest maximum benefit from financial assets COI will open Certificate of Deposit Account Registry Services (CDARS) accounts in tiered accounts.
- RESULTS** The goal was not achieved due to the COVID 19 pandemic. Concerns about the lack of revenue led COI to decide to post-pone this goal until post-pandemic.
- GOAL 4** Target grants and donations at \$45,000 or greater.
- RESULTS** This goal was met. Grant/donations came in at \$172,723.33. This is considerable higher than previous years due to pandemic contributions such as Hardship grants and federal Paycheck Protection Program.

REVIEW OF PROGRAMS:

1. DEMOGRAPHICS
2. SATISFACTION SURVEY
3. PROGRAM EVALUATION

REVIEW OF PROGRAMS

ADULT DEVELOPMENTAL VOCATIONAL PROGRAM (ADVP)

DEMOGRAPHICS/ADVP		
FY 2019-2020		
<i>The ADVP program supported 10 persons during the 2019-20 year.</i>		
6-17	0	0%
18-40	2	20%
41-65	7	70%
66-85	1	10%
86+	0	0%
I/DD	10	100%
Acquired Brain Injury	2	20%
Mental Disorders	1	10%
Physical Disorders	6	60%
Hearing Impairments	3	30%
Visual Impairments	3	30%
Diabetic	1	10%
Dementia	1	10%
Other	0	0%
Male	4	40%
Female	6	60%
White	7	70%
Black	3	30%
Other	0	0%

ADVP CONSUMER SATISFACTION SURVEY:

A Total of Consumers Surveyed: 10

RESULTS:



Written Comments:

- None

PROGRAM EVALUATION/ADVP FY 2019-2020

Effectiveness Outcome(s): Consistent Attendance at or above 90% -

Result: Target Not Met

Analysis: ADVP attendance rate was 89% which did not meet the target. The attendance percentage is based July 1, 2019 through March 22, 2020 because COI was closed due to the COVID 19 pandemic.

Corrective Action Plan: Program Director will continue to work with families and clients to increase their attendance.

Efficiency Outcome(s): Staff Retention- 90% of staff retained beyond probationary period

Result: Target Met

Analysis: Staff Retention of 100% of 2019-20.

Service Access Outcome(s): All individuals have a designated primary care practice.

Result: Target Met

Analysis: All identified clients have a designated primary care practice.

Stakeholder Input/Satisfaction Outcome(s) - Person Served: Client Outcome(s): 95% Positive Satisfaction Rating.

Result: Target Met

Analysis: Clients surveyed at 100% Positive Rating

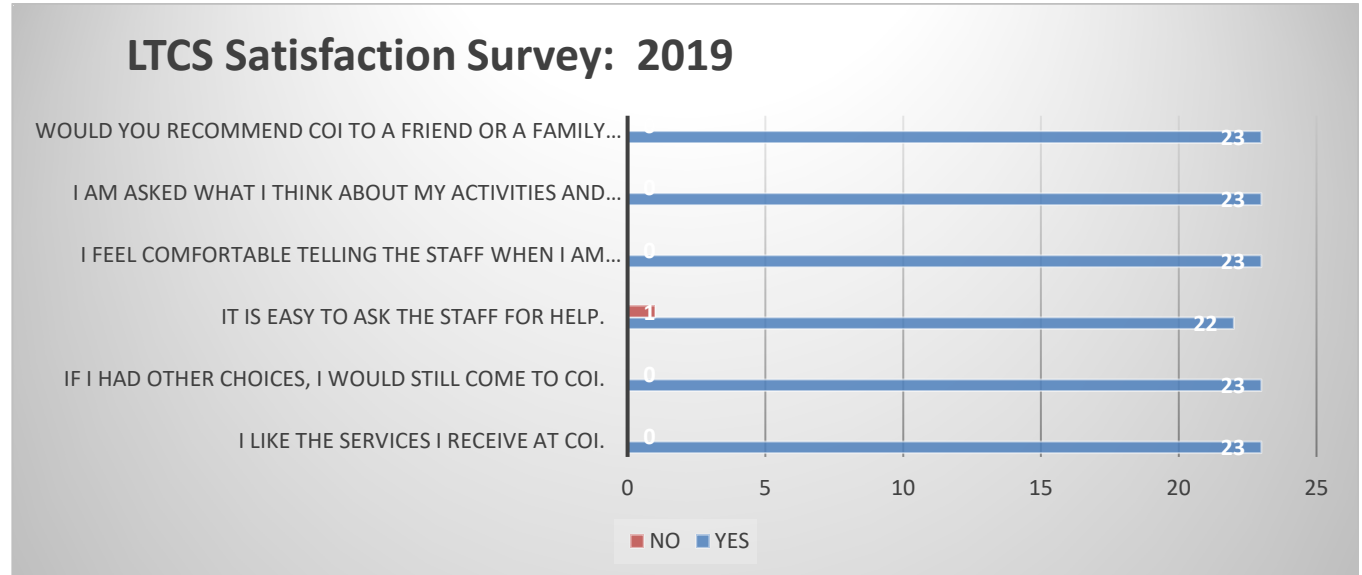
REVIEW OF PROGRAMS
LONG TERM COMMUNITY SUPPORTS (LTCS)

DEMOGRAPHICS / LONG TERM COMMUNITY SUPPORTS		
FY 2019-2020		
<i>The Long Term Community Supports (LTCS) program supported 26 persons during the 2019-20 year.</i>		
6-17	0	0%
18-40	14	56%
41-65	11	12%
66-85	0	0%
86+		
I/DD	26	100%
Acquired Brain Injury	0	0%
Mental Disorders	4	15%
Physical Disorders	11	11%
Hearing Impairments	2	8%
Visual Impairments	8	31%
Diabetic	5	19%
Dementia	0	0%
Other	0	0%
Male	16	62%
Female	10	38%
White	25	96%
Black	1	4%
Other	0	0%

LTCS CONSUMER SATISFACTION SURVEY:

A Total of Consumers Surveyed: 23

RESULTS:



Written Comments:

- **It's a great place to work and a really great staff**
- **You guys do a good job!**
- **Can I recommend my brother come here.**

PROGRAM EVALUATION/LONG TERM COMMUNITY SUPPORTS 2019-20

Effectiveness Outcome(s): Assure client safety during service-reduce the total of level 1 incidents by 15% for the year.

Result: Target Met

Analysis: The number of Level I incidents was 43% lower than 2018-19 year; however, this is not a full analysis because due to the COVID 19 pandemic COI was closed for clients from March 23, 2019 until July 20, 2019.

Efficiency Outcome(s): Staff Retention- 90% of staff retained beyond probationary period

Result: Target Met

Analysis: Staff Retention of 100% of 2019-20.

Service Access Outcome(s): All individuals have a designated primary care practice.

Result: Target Not Met

Analysis: 2 clients have been identified as not having a designated primary care practice.

Corrective Action Plan: Program Director will continue to work with families to identify and enroll in a primary care practice. Referrals to other community services such as Medicaid transportation will be made if necessary.

Stakeholder Input/Satisfaction Outcome(s) - Person Served: Client Outcome(s): 95% Positive Satisfaction Rating.

Result: Target Met

Analysis: Clients surveyed at 99% Positive Rating

REVIEW OF PROGRAMS
INNOVATIONS DAY SUPPORTS

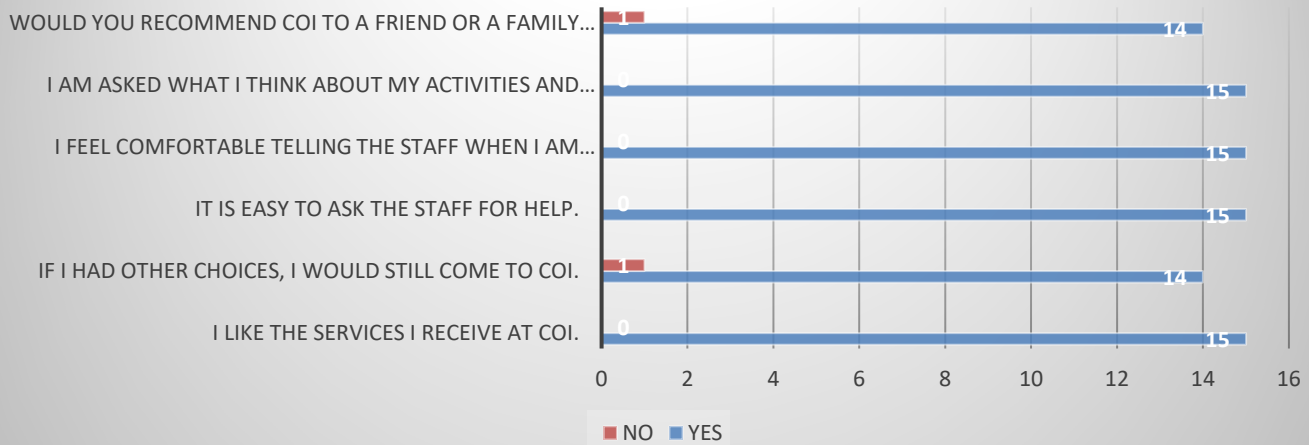
DEMOGRAPHICS / INNOVATIONS DAY SUPPORTS		
FY 2019-2020		
<i>The Innovations Day Supports program supported 17 persons during the 2019-20 year.</i>		
6-17	0	0%
18-40	10	59%
41-65	5	29%
66-85	3	18%
86+		
I/DD	17	100%
Acquired Brain Injury	1	6%
Mental Disorders	6	35%
Physical Disorders	5	29%
Hearing Impairments	3	18%
Visual Impairments	9	53%
Diabetic	0	0%
Dementia	2	12%
Other	0	0%
Male	8	47%
Female	9	53%
White	15	88%
Black	2	12%
Other	0	0%

INNOVATIONS DAY SUPPORT CONSUMER SATISFACTION SURVEY

A Total of Consumers Surveyed: 14

RESULTS:

Innovation Satisfaction Survey: 2019



Written Comments:

- I like this workshop

PROGRAM EVALUATION/INNOVATIONS DAY SUPPORTS FY 2016-2017

Effectiveness Outcome(s): Assure client safety during service-reduce the total number of level 1 incidents that occur in Section 5/Plastic area of the work floor by 15% for the year.

Result: Target Met

Analysis: The number of Level I incidents that occur in Section 5/Plastic area of the work floor was 40% lower than 2018-19 year; however, this is not a full analysis because due to the COVID 19 pandemic COI was closed for clients from March 23, 2019 until July 20, 2019.

Efficiency Outcome(s): Staff Retention- 90% of staff retained beyond probationary period

Result: Target Met

Analysis: Staff Retention of 100% of 2019-20.

Service Access Outcome(s): All individuals have a designated primary care practice.

Result: Target Met/Target Not Met

Analysis: All clients were identified to have a primary care practice.

Corrective Action Plan: If applicable

Stakeholder Input/Satisfaction Outcome(s) - Person Served: Client Outcome(s): 95% Positive Satisfaction Rating.

Result: Target Met

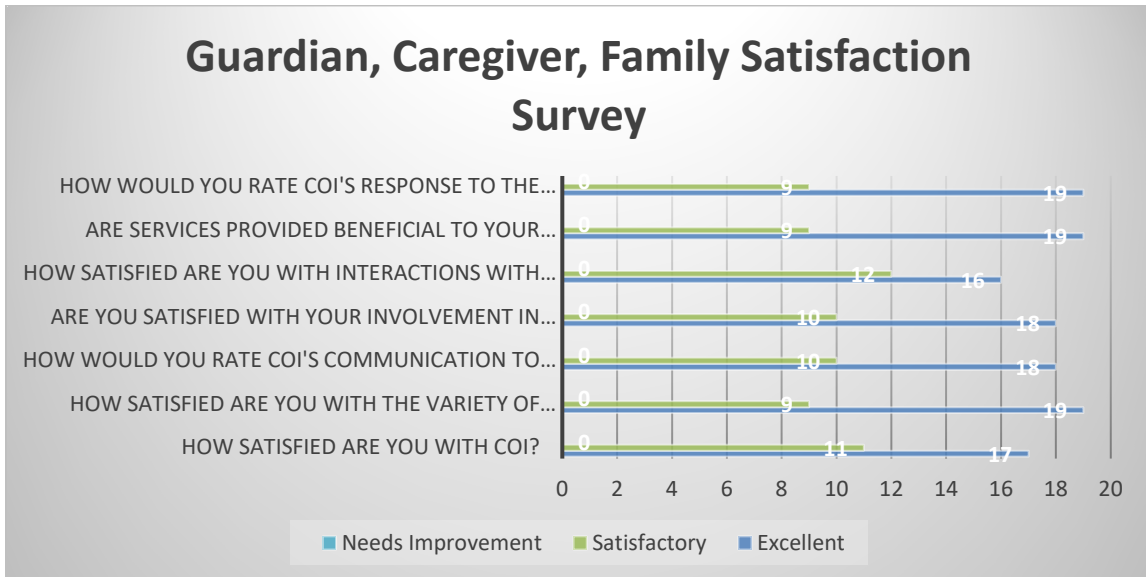
Analysis: Clients surveyed at 98% Positive Rating

II. SATISFACTION FOR STAKEHOLDERS

GUARDIAN, CAREGIVER, FAMILY /NEEDS ANALYSIS AND SATISFACTION SURVEY:

A Total of 28 Surveys were returned:

RESULTS:



Written Comments:

- **Just want to say how thankful I am that *** love her job and all the people she works with, thank God for COI!**
- **Most beneficial, COI has an important role in everyday life. Meets different people, works and socializes. An all-around great place.**

REFERRAL SOURCE SATISFACTION SURVEYS:

A Total of 4 Surveys were returned:

RESULTS:

Written Comments:

- **I am grateful for COI's service to our community; I hope we can work together more in the future**
- **All of the clients that you support for ASM seem to be very satisfied with your services, they enjoy working and going to class. I have been familiar with your services for many years and feel that COI does a great job in supporting each client in any needs they have**
- **Thanks for all you do!**

SUBCONTRACT/NEEDS ANALYSIS AND SATISFACTION SURVEY:

A Total of 6 Surveys were returned:

RESULTS:



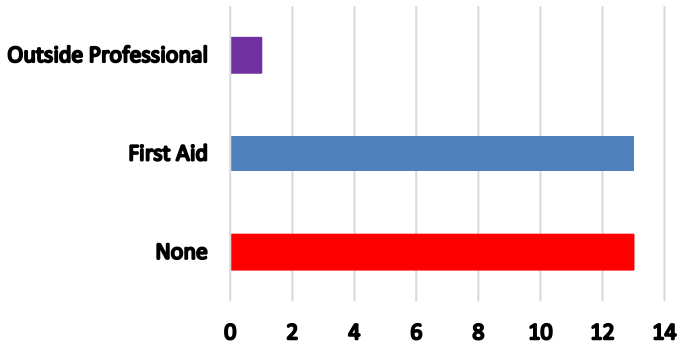
Written Comments:

- **It is a pleasure to work with everyone there**
- **Laura and her group always do an amazing job for habitat**
- **Thanks for all you do**

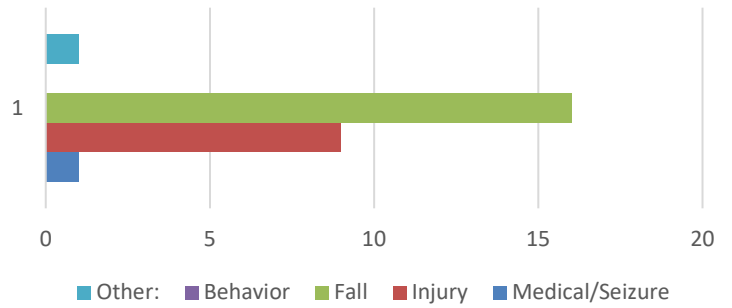
III. SAFETY REPORT AND ACCIDENT ANALYSIS FY 2019-2020

Total of 27 Incident Reports: 26 Level I; 1 Level III

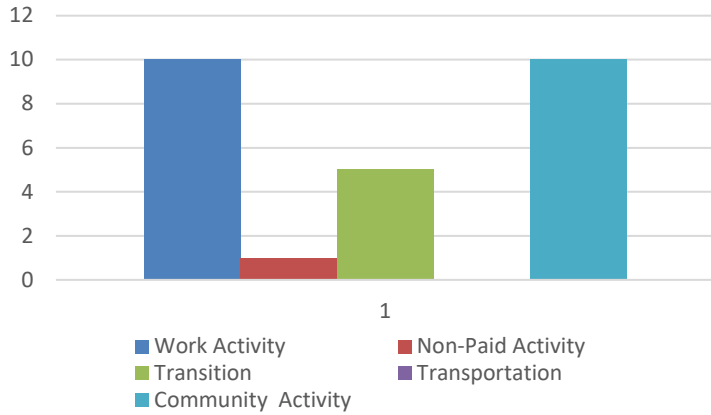
Treatment 2019-20



Type of Incident 2019-20



Activity Engaged In: 2019-20



Work Related 2019-20

