



Purpose of the Annual Trend Analysis

Core Services is committed to a formal, ongoing process of continuous quality improvement to advance the quality of person-centered supports, ensure compliance with applicable federal and state regulations, monitor the presence of Basic Assurances on both an individual and organization level and increase the presence of outcomes in people's lives. Data is collected to help the organization and stakeholders understand what change ideas are beneficial and which need refinement to reach intended outcomes. The collection of data is continuously evolving. The goal is to turn data into information and information into insightful opportunities.

Dates used for Analysis of Data

Calendar year 2023

Inclusion Criteria

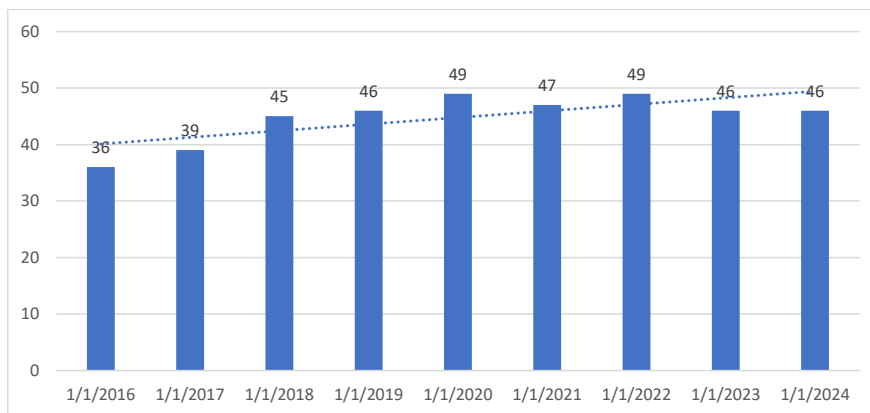
| | Page # |
|---|---------------|
| Number of People Supported | 2-3 |
| Agency Revenue | 3 |
| Employment – People Supported | 3-6 |
| Enabling Technology | 6-9 |
| Concern Resolution Activity | 9-11 |
| Stakeholder Satisfaction Surveys | 11-18 |
| • Family | 11-13 |
| • ISC | 13 |
| • Employee | 13-18 |
| Person Supported Council | 18 |
| Rights | 18-20 |
| • Human Rights Cooperative | 19 |
| • # People with Rights Removed by Court | 19 |
| • POM DATA - Rights | 20 |
| Personal Outcome Measures Data | 20-25 |
| Self-Advocate Mentors | 25 |
| Basic Assurance Monitoring | 25-26 |
| Basic Assurance Probing Questions | 26-27 |
| Facilitated Person Centered Planning Meetings | 27-28 |
| Community Membership | 28-30 |
| Health and Safety | 30-43 |
| • Medication Variances | 30-36 |
| • Falls | 36-38 |
| • Reportable Incidents | 39-43 |
| DSP Retention and Recruitment | 43-58 |

2023 TREND ANALYSIS

| | |
|------------------------------------|-------|
| • New Hire | 43-45 |
| • Terminations | 46 |
| • Tenure | 46-47 |
| • Historical DSP Wages | 47 |
| • DSP Turnover | 47 |
| • Overtime Rates | 48-50 |
| • Position Vacancy Rate | 50 |
| • Credentialed Employees | 51 |
| • New Hire Surveys | 52-53 |
| • Mentor Program | 54 |
| • Stay Survey | 54-55 |
| • Employee Safety | 55 |
| • PCT and POM training | 56-57 |
| • Employee of the Month winners | 57 |
| Core Council | 58-59 |
| “My Concern” Survey | 59-60 |
| Pre-Employment Transition Services | 60 |
| MAPs | 60-61 |
| ACCESS ETSU Partnership | 61 |
| Motor Pool | 61-62 |
| Advocacy | 62 |
| Awards | 62-63 |
| Certifications | 63 |
| Presentations and Consultations | 63-64 |
| Board and Council Membership | 64 |
| Beneficial Change Ideas | 63-65 |

Number of People Supported

As of 12/31/2023 that agency is supporting 46 people consistent with 46 people supported in 2022. There were three deaths in 2023 – Mack, Brad and Vickie. Four new people began receiving support at Core Services in 2023 – GB, AH, BT and ZM.



2023 TREND ANALYSIS

The 46 people supported receive funding through the following sources:

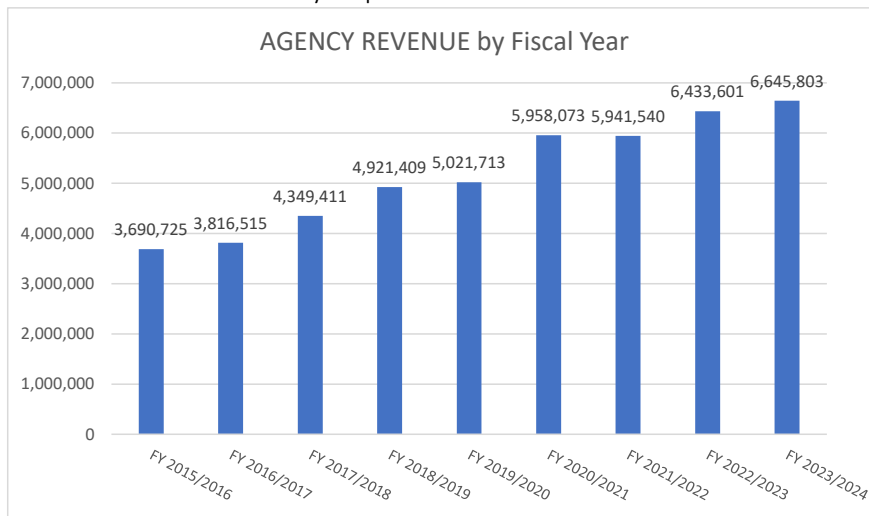
- ECF Choices – 4 (9%)
- Self-Determination – 5 (11%)
- Statewide/CAC Waiver – 37 (80%)

The population supported by Core Services is aging as demonstrated by the following statistics:

- >30 – 4 (9%)
- 30-40 – 8 (17%)
- 41-50 – 4 (9%)
- 51-60 – 12 (26%)
- 61-70 – 11 (24%)
- 71+ - 7 (15%)

Agency Revenue

Agency revenue has significantly increased on an annual basis. Projected annual revenue for FY 2023/2024 is \$6,645,803 compared to FY 2022/2023 actual revenue of \$6,433,601. This represents a 74% increase in revenue over a 9-year span.

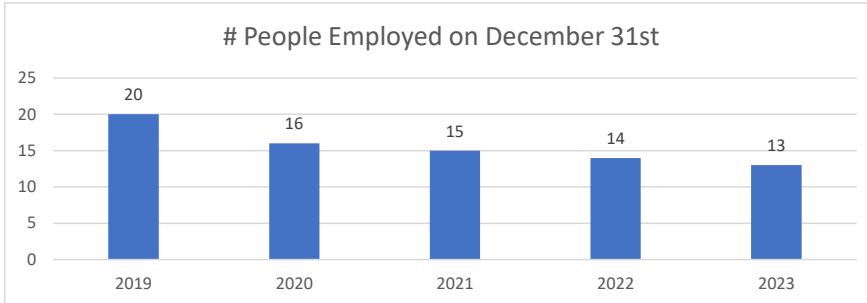


EMPLOYMENT

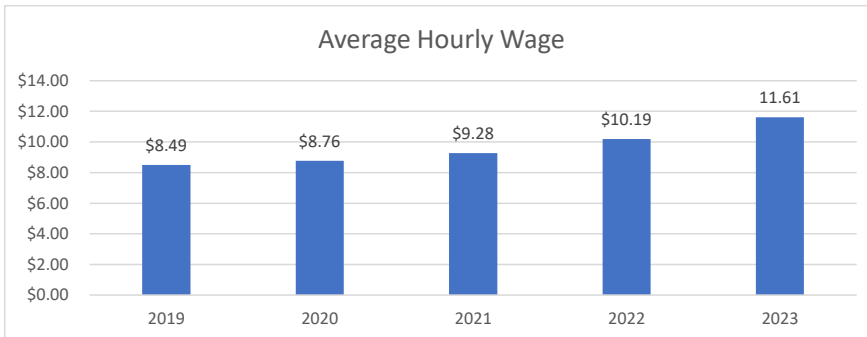
Employment for people supported was significantly impacted during and following the pandemic. On 12/31/2019, 20 people held jobs or 41% of all people supported. On 12/31/2023, 13 people hold jobs or 28% of people supported. A significant decline in the number of people working has been noted post pandemic. The number of people deciding not to work has increased over the past 3 years. Age is likely a factor in people deciding to retire. The average age of people who held jobs in 2023 was 47. The

2023 TREND ANALYSIS

youngest person employed was 26 and the oldest person employed age 74. 50% of the people currently holding jobs are over the age of 50.

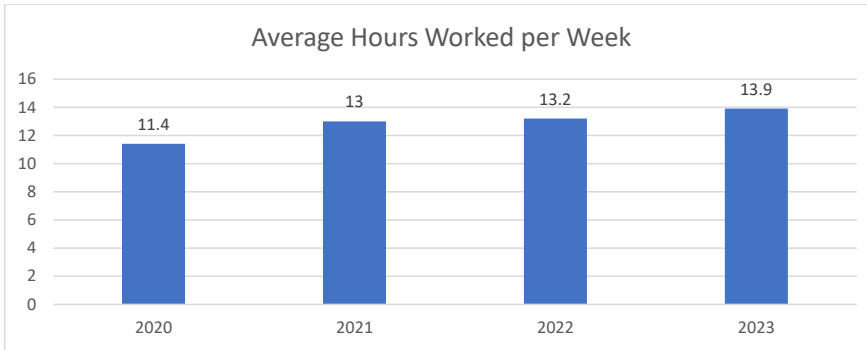


The average hourly wage of people employed has steadily increased. The average wage earned in 2023 was \$11.61/hour. This is up from the average wage earned in 2022 of \$10.19/hour. In addition, over half of the people employed, (8), qualified for employee bonuses. The average bonus earned in 2023 was \$352.86. This is down from the average bonus received in 2022, \$886.38. The highest hourly wage earned in 2022 was \$14.98/hour. The lowest wage earned in 2022 was \$8.00/hour.



The average number of hours worked per week has remained stable with the average work week for 2023 at 13.9 hours/week. This is up from 2022 at 13.2 hours/week.

2023 TREND ANALYSIS



The average tenure on the job was 4.5 years, up from 3.6 years in 2023 and includes the following break-down:

| | 2022 | 2023 |
|-----------|------|------|
| 5+ Years | 29% | 46% |
| 3-5 Years | 36% | 38% |
| 1-3 Years | 29% | 8.5% |
| < 1 Year | 6% | 7.5% |

Below are employment statistics for people supported by Core Services. Employers include 4 different Lowes Home Improvement stores, a McDonald's locations, 2 Taco Bell locations, 3 Food City locations and an Ingles store.

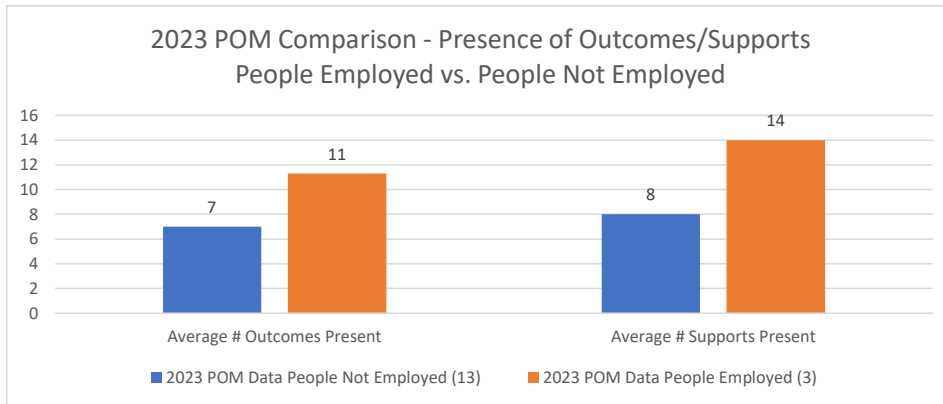
Commented [SA1]:

| Person | Employer | Rate of Pay | Average Hours per Week | Date of Hire | 2023 Bonuses | Years of Tenure | Age of Employee |
|--------|-----------|-------------|------------------------|--------------|--------------|-----------------|-----------------|
| H | LOWES | 14.66 | 9 | 2/4/2020 | \$730 | 3.8 | 26 |
| P | FOOD CITY | 8.75 | 16 | 11/10/2017 | \$75 | 6.1 | 32 |
| W | LOWES | 14.98 | 16 | 12/15/2021 | \$970 | 2 | 33 |
| P | LOWES | 14.98 | 15 | 8/25/2020 | \$730 | 3.3 | 37 |
| S | TACO BELL | 9.00 | 6 | 3/12/2017 | | 6.7 | 40 |
| B | INGLES | 8.00 | 9 | 11/14/2018 | \$75.00 | 5 | 41 |
| L | LOWES | 13.98 | 14 | 3/30/2020 | \$730 | 3.7 | 53 |
| E | TACO BELL | 11.02 | 13 | 5/17/2017 | | 6.5 | 56 |
| C | FOOD CITY | 9.00 | 25 | 12/8/2018 | \$75.00 | 5 | 62 |
| C | FOOD CITY | 8.45 | 11 | 12/13/2019 | \$75.00 | 4 | 64 |
| L | LOWES | 14.95 | 2 | 3/2/2019 | \$730 | 4.7 | 65 |
| S | MCDONALDS | 9.50 | 20 | 4/12/2017 | | 6.6 | 74 |
| H | LOWES | 13.66 | 25 | 5/27/2023 | \$397.25 | 0,7 | 33 |

Employment and POM Data

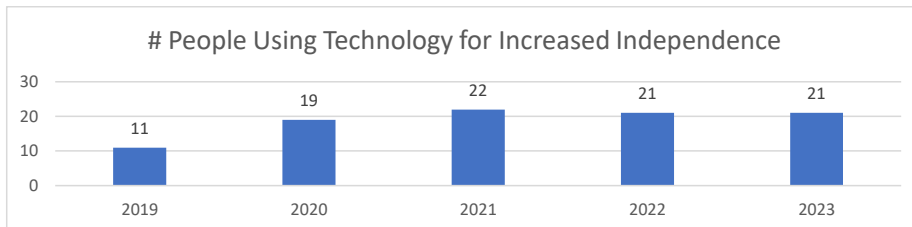
The agency goal is to complete a Personal Outcome Measure interview every 18-24 months on people supported by Core Services. There were Personal Outcome Measure interviews completed with 16 people in 2023. This sample of 16 represents 35% of people supported by the agency. Three of the 16 (or 19% of the sample) are competitively employed. **2023 POM data indicates that people who are employed are 62% more likely than those who are not employed, to have outcomes present in their lives, and 64% more likely to have supports for outcomes present in their lives.**

This data is consistent with 2022 data that indicated that people who are employed are 54% more likely than those who are not employed, to have outcomes present in their lives, and 50% more likely to have supports for outcomes present in their lives.



ENABLING TECHNOLOGY

Core Services has adopted a “Technology First” philosophy and continues to expand the use of technology to both promote independence and support people in living their preferred lifestyle. By participating in a state project as an Enabling Technology Transformation agency, people who have elected to use technology support are able to choose when and where they want paid supports. In 2023, 21 people (47% of people supported) were able to increase independence through the use of enabling technology.



Other uses of Enabling Technology include:

2023 TREND ANALYSIS

- 17 people participate in self-administration of medications with the use of a medication dispenser
- 37 people use smart devices
- 11 people have reduced DSP supports and/or can spend time home alone with the use of remote supports.

Of the 11 people who have reduced DSP supports and/or can spend time home alone with the use of remote supports there has been a combined reduction in DSP hours of 729 hours a week at an estimated weekly savings of \$17,277 or \$898,404 a year.

| Person | Description of Technology | # of Reduced DSP Hours/Weekly | Length of Time Using Technology Supports |
|--------------|--|-------------------------------|--|
| CL | Independent Living | 114 | 5yrs, 8 months |
| BP | Independent Living | 110 | 5 years, 2 months |
| WS | Independent Living | 98 | 5 years, 2 months |
| MM | Independent Living | 84 | 4 yrs 7 months |
| LW | Independent Living, Environmental Controls | 15 | 4 years 7 months |
| JW | Independent Living | 138 | 2 years, 9 months |
| SC | Independent Living, Employment Support | 15 | 1 year, 11 months |
| AE | Independent Living, Employment Support | 76 | 4 years, 6 months |
| RP | Independent Living, Employment Support | 64 | 4 years, 6 months |
| JH | Semi-Independent Living | 15 | 4 years |
| TOTAL | | 729 | |

Weekly Cost Savings as a Result of Reduction in Paid Supports



Enabling Technology and Medication Variances

There were 180 Medication errors in 2023 involving 36 different individuals. There are 8 people supported by the agency that use technology for significantly reduced DSP support hours. There were medication variances on four (4) of these 8 people for a total of 11 variances. Based on data from 2022 self-administration was more closely monitored in 2023 to assure that the agency was addressing variances including near misses on the people who are self-administering. Adjustments were made to address missed doses. There were no medication variances rising to the level of reportable for people supported by technology. The average number of medication variances per person for the entire agency in 2023 was 3.91. The average number of medication variances for the 8 people with reduced DSP supports was 1.3 variances per person. This is consistent with data from 2020 and 2021 where there were less medication errors for people using technology supports.

Enabling Technology and Reportable Incidents

There were 60 reportable incidents involving 27 different people at the agency in 2023. There were 82 Reportable Events in 2022 involving 38 different people. Of the 60 reportable incidents there were 7 reportable incidents involving people using a combination of remote and DSP supports. The group of 8 people who use technology supports for increased independence represent 17.4% of all people supported but only account for 12% of reportable incidents.

The 7 reportable incidents involving people using technology supports included:

- A minor motor vehicle accident – no injuries or medical care
- A fall with a scraped knee – reportable medical
- An abscessed buttock and trip to Urgent Care – Reportable Medical
- Four calls to 911 (police) for behavior concerns

There were no reports of abuse, neglect or exploitation for anyone with reduced paid supports. Combine this with the fact that people with reduced paid supports make up 17.4% of all people supported yet only make up 12% of the reportable incidents for 2023, the conclusion can be drawn that the new support model is in fact safer than the traditional model of support.

Similar findings were supported from 2022 data. People with reduced paid supports made up 21% of people supported in 2022, but accounted for only 10% of reportable incidents. There were no reports of abuse, neglect or exploitation for anyone with reduced paid supports.

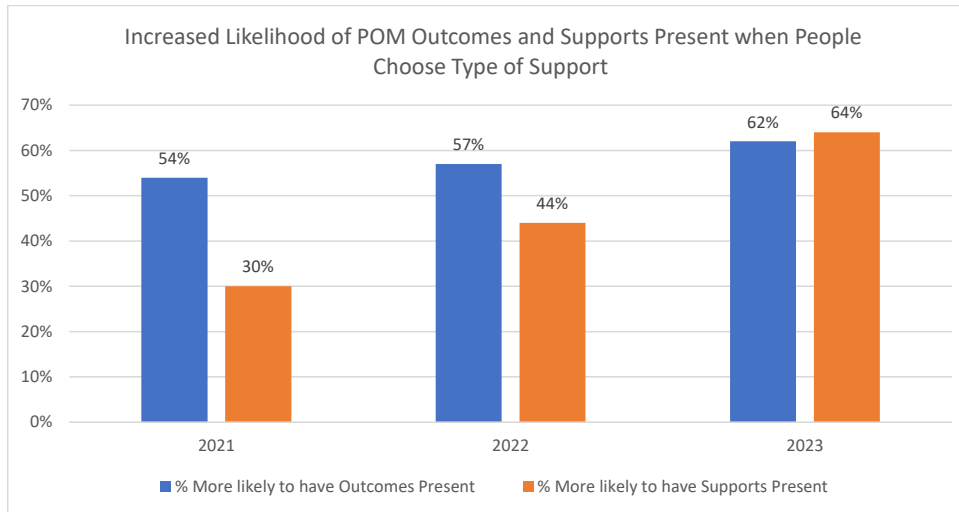
Enabling Technology and POM Data

Of the people supported in 2023 with a combination of paid support and remote supports, 3 people received POM interviews during 2023. This data was compared to the 13 people who received a POM interview in 2023 who do NOT have reduced paid supports. **From this sample, people who are able to choose a combination of supports (paid supports and remote supports) are 62% more likely, then those who are not, to have outcomes present in their life. People who are able to choose a combination of supports (paid supports and remote supports) are 64% more likely, then those who are not, to have support for outcomes present in their life.** This is consistent with samples conducted in 2022 and 2023 where similar findings occurred.

2023 TREND ANALYSIS

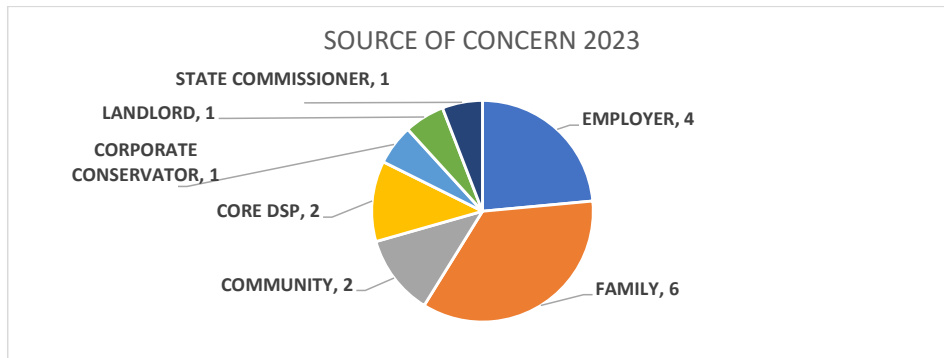
These findings are consistent with 2023 Employment and POM data. People in the 2023 POM sample who used technology as a type of support, also hold a job. The additional income afforded by a job makes a more independent lifestyle affordable.

A general conclusion can be made that people involved in the enabling technology program have a much higher presence of personal outcomes and supports for those outcomes than people using traditional support.



CONCERN RESOLUTION ACTIVITY

There were 17 concerns reported in 2023 compared to 20 concerns recorded and addressed in 2022. This is up considerably from 9 concerns recorded in 2021.



2023 TREND ANALYSIS

The highest number of concerns were received from family (6) 35% of concerns, followed by employers (4) 24% of concerns. Three of the employer complaints involved the work performance and/or behavior of the person supported, the actual employee. One complaint was about excessive cell phone use by the Core Services job coach. There were two complaints from anonymous people in the community that were concerned about the tone of DSP with the people supported. This was used as a training opportunity to talk about the importance of perceptions. There were no significant trends related to concerns and all concerns were satisfactorily resolved for all involved parties.

STAKEHOLDER SATISFACTION SURVEYS

Satisfaction surveys are completed annually for major stakeholder groups.

FAMILY/CONSERVATOR

In 2023 surveys were sent to 28 family/conservators and 16 responses were received, or a 57% response rate. This year electronic surveys were abandoned for a more traditional approach of a paper survey. During the prior two years there was a much smaller response rate using an electronic format. This year 31% of respondents identified as family, 46% as conservators/family, 15% Corporate Conservator and 8% as friend.

| QUESTION | 2021 RATING | 2022 RATING | 2023 RATING |
|---|---|--|---|
| 1. How well does Core Services meet the needs of your person? | Excellent 81.25% Good 18.75% | Excellent 70% Good 30% | Excellent 87.5% Good 12.5% |
| 2. I rate the quality of supports being provided to my person as: | Excellent 81.25% Good 18.75% | Excellent 66.67% Good 22.22% | Excellent 87.5% Good 12.5% |
| 3. The management of my individuals' finances are: | Excellent 68.75% Good 25% Adequate 6.25% | Excellent 100% | Excellent 81.25% Good 12.5% |
| 4. The amount/quality of communication I receive from agency supervisors and management is: | Excellent 50% Good 25% Adequate 25% | Excellent 22.22% Good 33.33% Adequate 22.22% Needs Improvement 22.22% | Excellent 43.75% Good 56.25% |
| 5. The amount/quality of communication that I receive from staff that work with my person is: | Excellent 50% Good 25% Adequate 12.5% Needs Improvement 12.5% | Excellent 11.11% Good 33.33% Adequate 33% Need Improvement 33.33% | Excellent 56.25% Good 37.5% Adequate 6.25% |
| 6. The amount/quality of communication I receive from the nursing department is: | Excellent 25% Good 31.25% Adequate 18.75% Not Enough Information 25% | Excellent 33% Good 44.44% Needs Improvement 11.11% | Excellent 37.5% Good 50% Not Enough Information 12.5% |
| 7. The quality of medical oversight my person receives is: | Excellent 68.75% Good 18.75% Not Enough Information 12.5% | Excellent 55.56% Good 44.44% | Excellent 56.25% Good 25% Adequate 6.25% |
| 8. The level of professionalism and knowledge of support staff in the home is: | Excellent 75% Good 18.75% Adequate 6.25% | Excellent 44.44% Good 44.44% Adequate 11.11% | Excellent 62.5% Good 31.25% Not Enough Information 7.6% |

2023 TREND ANALYSIS

| | | | |
|--|--|---|---|
| 9. I know who to contact regarding my concerns and when I voice a concern my concern is heard and action is taken: | Excellent 68.75 Good 18.75% Adequate 12.5% | Excellent 33.33% Good 44.44% Adequate 11.11% Needs Improvement 11.11% | Excellent 62.5% Good 37.5% |
| 10. The Complaint/Conflict Resolution process in place at Core Services is: | Excellent 56.25% Good 25% Not Enough Information 18.75% | Excellent 37.5% Good 37.5% Not Enough Information 25%. | Excellent 25% Good 31.25% Not Enough Information 43.75% |
| 11. The effectiveness of Core Services as an advocate to ensure rights and choices for people supported is: | Excellent 75% Good 25% | Excellent 77.78% Good 22.22%. | Excellent 87.5% Good 6.25% Adequate 6.25% |
| 12. The timeliness and quality of communication when a significant event or emergency occurs is: | Excellent 62.5% Good 25% Needs Improvement 6.25% Not Enough Information 6.25% | Excellent 66.67% Good 33.33%. (2021: Excellent 62.5% | Excellent 56.25% Good 31.25% Adequate 6.25% Not Enough Information 6.25% |
| 13. My overall satisfaction with services and supports is: | Excellent 75% Good 18.75% Adequate 6.25% | Excellent 44.4% Good 55.56%. | Excellent 87.5% Good 12.5% |
| 15. Core has a positive image in the community: | Excellent 75% Good 18.75% Adequate 6.25% Neither Agree or Disagree 11.11%. | Excellent 66.67% Good 22.22% | Excellent 87.5% Good 6.25% Adequate 6.25% |
| 14. I would recommend Core to my family and friends as a good provider and/or employer: | Excellent 81.25% Good 12.5% Adequate 6.25% | Excellent 66.67% Agree 33.33% | Excellent 87.5% Good 12.5% |

There was a slight decline in satisfaction ratings on the following items:

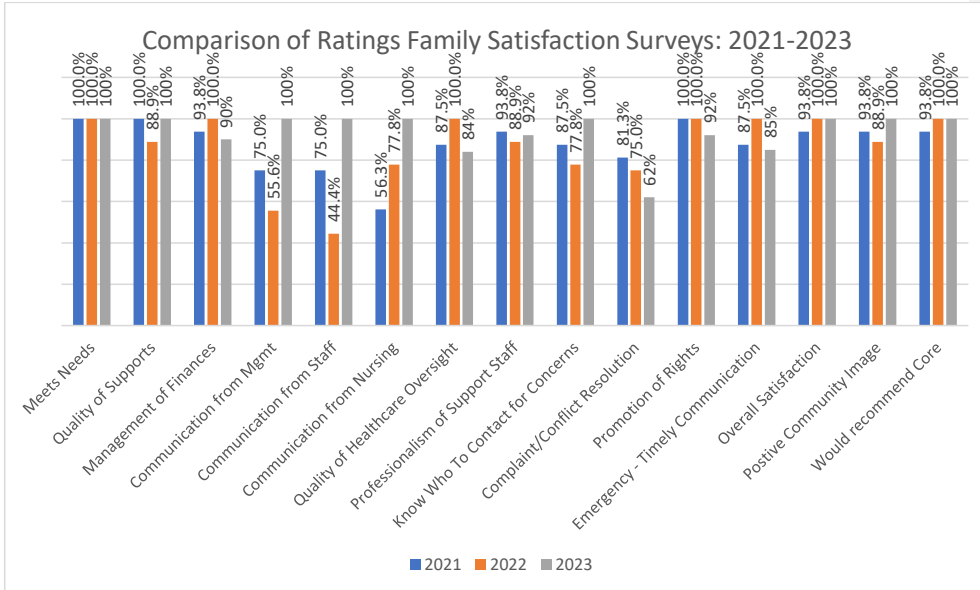
- Management of Finances
- Complaint/Conflict Resolution
- Timeliness of Communication when Emergency Arises

There was significant improvement in ratings on these items:

- How well Core meets the needs of person
- Quality of supports
- Amount/quality of communication that I receive from staff
- How well does Core Services meet the needs of person?
- Know who to contact with concern
- Overall satisfaction with services and supports
- Positive image in the community

Satisfaction ratings from family remain consistent in recent years. Communication remains a top opportunity for improvement. Noteworthy is the fact that 87.5% of family rated their overall satisfaction with the agency as “excellent”, with the remaining 12.5% rating overall satisfaction as “good”.

2023 TREND ANALYSIS



INDEPENDENT SUPPORT COORDINATORS

For the past three years feedback from ISC’s is they are not allowed to complete provider satisfaction surveys.

EMPLOYEES

Satisfaction surveys by employees are completed a minimum of once per year. In 2019 an electronic format was used for the first time (Survey Monkey) that allowed 100% anonymity. This has significantly improved the response rate from the days of paper surveys. This year, 2023, there were 47 responses from 80 Direct Support Professionals for a 59% response rate. In 2022 there were 54 responses from contact with 89 employees or a 61% response rate.

- 2021 - 84 completed surveys, 80% response rate
- 2020 - 72 completed surveys, 68% response rate
- 2019 - 80 completed surveys, 67% response rate

A sliding scale rating system was used with the following sliding scale - 1 = STRONGLY DISAGREE and 100 = STRONGLY AGREE.

Q1. I was hired prior (before) January 2023

| Answer Choices | Responses | |
|-----------------|-----------|-----------|
| Yes | 82.98% | 39 |
| No | 17.02% | 8 |
| Answered | | 47 |

2023 TREND ANALYSIS

Skipped 0

Q2. The hiring process was professional, timely and effective?

| Answer Choices | Average Number | Total Number | Responses |
|----------------|----------------|--------------|-------------------|
| (no label) | 84.875 | 679 | 100.00% |
| | | | Answered 8 |
| | | | Skipped 39 |

Q3. The training I received was helpful in starting my job?

| Answer Choices | Average Number | Total Number | Responses |
|----------------|----------------|--------------|-------------------|
| (no label) | 86 | 688 | 100.00% |
| | | | Answered 8 |
| | | | Skipped 39 |

Q4. My experience with my mentor has been helpful and supportive.

| Answer Choices | Average Number | Total Number | Responses |
|----------------|----------------|--------------|-------------------|
| (no label) | 62.5 | 500 | 100.00% |
| | | | Answered 8 |
| | | | Skipped 39 |

Q5. I have the freedom to accomplish tasks and do my job.

| Answer Choices | Average Number | Total Number | Responses |
|----------------|----------------|--------------|--------------------|
| (no label) | 88.4680851 | 4158 | 100.00% |
| | | | Answered 47 |
| | | | Skipped 0 |

Q6. My work gives me a feeling of personal accomplishment.

| Answer Choices | Average Number | Total Number | Responses |
|----------------|----------------|--------------|--------------------|
| (no label) | 92.9574468 | 4369 | 100.00% |
| | | | Answered 47 |
| | | | Skipped 0 |

Q7. I have the tools, training and resources to do my job well.

| Answer Choices | Average Number | Total Number | Responses |
|----------------|----------------|--------------|--------------------|
| (no label) | 91.4255319 | 4297 | 100.00% |
| | | | Answered 47 |
| | | | Skipped 0 |

Q8. On my job, I have clearly defined expectations and job requirements.

| Answer Choices | Average Number | Total Number | Responses |
|----------------|----------------|--------------|--------------------|
| (no label) | 91.2553191 | 4289 | 100.00% |
| | | | Answered 47 |
| | | | Skipped 0 |

Q9. It is easy to get help when I need it.

| Answer Choices | Average Number | Total Number | Responses |
|----------------|----------------|--------------|-----------|
|----------------|----------------|--------------|-----------|

2023 TREND ANALYSIS

| | | | | |
|------------|------------|------|---------|-----------------|
| (no label) | 81.6170213 | 3836 | 100.00% | 47 |
| | | | | Answered |
| | | | | 47 |
| | | | | Skipped |
| | | | | 0 |

Q10. I am comfortable expressing concerns and offering suggestions.

| Answer Choices | Average Number | Total Number | Responses | |
|----------------|----------------|--------------|-----------|-----------------|
| (no label) | 79.8723404 | 3754 | 100.00% | 47 |
| | | | | Answered |
| | | | | 47 |
| | | | | Skipped |
| | | | | 0 |

Q11. My supervisor actively listens and in disagreements attempts to thoroughly understand the other persons position.

| Answer Choices | Average Number | Total Number | Responses | |
|----------------|----------------|--------------|-----------|-----------------|
| (no label) | 80.5106383 | 3784 | 100.00% | 47 |
| | | | | Answered |
| | | | | 47 |
| | | | | Skipped |
| | | | | 0 |

Q12. The medical department listens to my concerns and I receive timely responses to my questions.

| Answer Choices | Average Number | Total Number | Responses | |
|----------------|----------------|--------------|-----------|-----------------|
| (no label) | 88.7659574 | 4172 | 100.00% | 47 |
| | | | | Answered |
| | | | | 47 |
| | | | | Skipped |
| | | | | 0 |

Q13. I am satisfied with the amount of contact/support I receive from the medical department.

| Answer Choices | Average Number | Total Number | Responses | |
|----------------|----------------|--------------|-----------|-----------------|
| (no label) | 87.0212766 | 4090 | 100.00% | 47 |
| | | | | Answered |
| | | | | 47 |
| | | | | Skipped |
| | | | | 0 |

Q14. The personal funds department listens to my concerns and I receive timely responses to my questions.

| Answer Choices | Average Number | Total Number | Responses | |
|----------------|----------------|--------------|-----------|-----------------|
| (no label) | 88.6382979 | 4166 | 100.00% | 47 |
| | | | | Answered |
| | | | | 47 |
| | | | | Skipped |
| | | | | 0 |

Q15. I am satisfied with the amount of contact/support I receive from the personal funds department.

| Answer Choices | Average Number | Total Number | Responses | |
|----------------|----------------|--------------|-----------|-----------------|
| (no label) | 90.9787234 | 4276 | 100.00% | 47 |
| | | | | Answered |
| | | | | 47 |
| | | | | Skipped |
| | | | | 0 |

Q16. Overall, I believe that I am valued and treated with respect by the Core Management team.

| Answer Choices | Average Number | Total Number | Responses | |
|----------------|----------------|--------------|-----------|-----------------|
| (no label) | 87.1914894 | 4098 | 100.00% | 47 |
| | | | | Answered |
| | | | | 47 |

2023 TREND ANALYSIS

Skipped 0

Q17. Core keeps employees informed in a manner easy to understand.

| Answer Choices | Average Number | Total Number | Responses | |
|----------------|----------------|--------------|-----------------|-----------|
| (no label) | 79.3191489 | 3728 | 100.00% | 47 |
| | | | Answered | 47 |
| | | | Skipped | 0 |

Q18. Core offers opportunities to give input and feedback on important issues.

| Answer Choices | Average Number | Total Number | Responses | |
|----------------|----------------|--------------|-----------------|-----------|
| (no label) | 89.7234043 | 4217 | 100.00% | 47 |
| | | | Answered | 47 |
| | | | Skipped | 0 |

Q19. I have the opportunity to be involved in decisions that affect the agency and people I support.

| Answer Choices | Average Number | Total Number | Responses | |
|----------------|----------------|--------------|-----------------|-----------|
| (no label) | 83.1914894 | 3910 | 100.00% | 47 |
| | | | Answered | 47 |
| | | | Skipped | 0 |

Q20. The agency as a whole tries to be fair and do the right things for people supported and employees.

| Answer Choices | Average Number | Total Number | Responses | |
|----------------|----------------|--------------|-----------------|-----------|
| (no label) | 87 | 4089 | 100.00% | 47 |
| | | | Answered | 47 |
| | | | Skipped | 0 |

Q21. Core provides a safe, healthy and person-centered environment for the individuals and employees.

| Answer Choices | Average Number | Total Number | Responses | |
|----------------|----------------|--------------|-----------------|-----------|
| (no label) | 89.3829787 | 4201 | 100.00% | 47 |
| | | | Answered | 47 |
| | | | Skipped | 0 |

Q22. I am rewarded for the quality of my efforts.

| Answer Choices | Average Number | Total Number | Responses | |
|----------------|----------------|--------------|-----------------|-----------|
| (no label) | 86.106383 | 4047 | 100.00% | 47 |
| | | | Answered | 47 |
| | | | Skipped | 0 |

Q23. Core has a positive image in the community.

| Answer Choices | Average Number | Total Number | Responses | |
|----------------|----------------|--------------|-----------------|-----------|
| (no label) | 92.5531915 | 4350 | 100.00% | 47 |
| | | | Answered | 47 |
| | | | Skipped | 0 |

Q24. There are opportunities for professional growth and advancement at Core.

2023 TREND ANALYSIS

| Answer Choices | Average Number | Total Number | Responses |
|----------------|----------------|--------------|--------------------|
| (no label) | 83.5957447 | 3929 | 100.00% |
| | | | Answered 47 |
| | | | Skipped 0 |

Q25. Employees get along with each other. There is harmony among the staff. Gossip is not an issue.

| Answer Choices | Average Number | Total Number | Responses |
|----------------|----------------|--------------|--------------------|
| (no label) | 67.212766 | 3159 | 100.00% |
| | | | Answered 47 |
| | | | Skipped 0 |

Q26. I would recommend Core to my family and friends as a good employer.

| Answer Choices | Average Number | Total Number | Responses |
|----------------|----------------|--------------|--------------------|
| (no label) | 91.4893617 | 4300 | 100.00% |
| | | | Answered 47 |
| | | | Skipped 0 |

Q27. I am comfortable with Practical Health and have received sufficient training.

| Answer Choices | Average Number | Total Number | Responses |
|----------------|----------------|--------------|--------------------|
| (no label) | 92.3617021 | 4341 | 100.00% |
| | | | Answered 47 |
| | | | Skipped 0 |

Q28. Overall I am satisfied with my job.

| Answer Choices | Average Number | Total Number | Responses |
|----------------|----------------|--------------|--------------------|
| (no label) | 91.6595745 | 4308 | 100.00% |
| | | | Answered 47 |
| | | | Skipped 0 |

Q29. I see myself still employed at Core Services in one year.

| Answer Choices | Average Number | Total Number | Responses |
|----------------|----------------|--------------|--------------------|
| (no label) | 94.9574468 | 4463 | 100.00% |
| | | | Answered 47 |
| | | | Skipped 0 |

Overall Employees seem to have a high degree of satisfaction. This correlates with retention/turnover data for both 2022 and 2023. The average rating on ***I still see myself employed at Core Services in one year*** was 95, up from 91.76 in 2022 with most employees strongly agreeing with this statement. The average rating on ***Overall, I am satisfied with my job*** was 92, up from a score of 88 in 2022.

The only ratings below 80% were:

- **Employees get along with each other. There is harmony among the staff. Gossip is not an issue.** This has been recognized as a long-standing opportunity for improvement. A

2023 TREND ANALYSIS

Communications Professor from a local college is working with management and DSPs on communication skills.

- **My experience with my mentor has been helpful and supportive.** Plans are to hold a focus group with mentees to see where the mentor program can be improved.



PERSON SUPPORTED COUNCIL

The person supported council was established in March 2022. The concept was to bring together a group of self-advocates to give feedback regarding company events and policies. The group meets quarterly. Each meeting was facilitated by a volunteer who is independent from employment at Core.

This year the Person Supported Council developed lists of summer activities and holiday activities they wanted to see happen. They requested and received a float to decorate and ride on in the 2023 Johnson City Christmas parade. They completed an “Exploring Decision Making” matrix and discussed ways that well-meaning supporters frequently make choices for them.

RIGHTS

Counting rights restrictions has become a less valid metric since there are currently no rights restrictions in place agency wide. This is with the exception of psychotropic drugs. Drug restrictions are reviewed at the agency PRERT meetings.

| | Total # People Supported | Total # Restrictions | Average # or Restrictions per person |
|--------------|--------------------------|----------------------|--------------------------------------|
| April 2016 | 37 | 98 | 2.65 |
| April 2017 | 42 | 58 | 1.38 |
| April 2018 | 42 | 57 | 1.36 |
| April 2019 | 46 | 47 | 1.02 |
| January 2020 | 49 | 22 | .5 |
| January 2021 | 47 | 3 | .06 |
| January 2022 | 49 | 2 | .05 |

2023 TREND ANALYSIS

| | | | |
|--------------|----|---|-----|
| January 2023 | 46 | 1 | .02 |
| January 2024 | 46 | 0 | 0 |

HUMAN RIGHTS COOPERATIVE

In 2022 Core Services formed the Human Rights Cooperative. The vision behind this group was to bring together a cooperative of provider agencies and other like-minded individuals who are in some phase of CQL accreditation and are interested in the promotion of rights. The traditional Human Rights Committee is typically focused on the removal of rights. The goal of the cooperative is to identify and remedy practices (often promoted and sanctioned by regulatory bodies) that restrict rights. To date the group had 5 virtual meetings involving a dozen agencies, including agencies in New York and Arkansas. Plans are to regroup in 2024.

PEOPLE WITH RIGHTS REMOVED BY COURT

Of the 46 people supported by Core Services on 12/31/2022, 17 are considered legally competent and 29 have had rights removed by the court. Of the 27 people considered legally incompetent, 7 have Corporate Conservators. When compared to the prior three years, people who are legally competent is trending up slightly. This is because of the 4 new people accepted for support in 2023, three had their rights removed by a court. Three people passed away in 2023 and all three were considered competent.

A trend was observed during 2022 and 2023 where the local hospitals would not accept the consent of people who were legally competent to make their own decisions. In several instances this delayed needed care including hospice care for someone who was terminally ill. As a result the agency identified a legal limbo list. This list is comprised of people who have had their rights removed by a court but their conservator(s) have passed away, as well as people who are viewed as incompetent by the local healthcare conglomerate and their consent is not accepted for medical procedures. During 2023 a relationship was developed with a local attorney specializing in conservatorship and trust. Through this relationship, JP was assisted in a court appointed conservator to replace relatives who passed away. Three other individuals, DD, MB and TH were assisted in appointing medical power of attorney.

| | # People Supported | Legally Competent | Rights Legally Removed |
|------|--------------------|-------------------|------------------------|
| 2019 | 48 | 38% | 62% |
| 2020 | 49 | 39% | 61% |
| 2021 | 49 | 39% | 61% |
| 2022 | 46 | 41% | 59% |
| 2023 | 46 | 37% | 63% |

POM Data and Rights

There was a slight increase in the presence of POM 5 – Rights from 13.33% in 2022 to 25% in 2023. The same increase applied to supports in place for POM 5. This continues to be a challenging outcome attributed to several factors including the pandemic and activities being dictated by conservators. Another finding of POM data is that people need more education on

2023 TREND ANALYSIS

rights. Ongoing efforts through house meetings, POM interviews and focus groups will hopefully address that need but will need ongoing effort and attention.

PERSONAL OUTCOME MEASURES DATA

During 2021 two additional Core employees earned certification as POM interviewers, but decided to let their certification lapse during 2023. A goal was established to complete three certified POM interviews a month. This goal was not achieved in 2023 and was determined to be overly ambitious. The goal was adjusted to one POM a month. There were 16 POM interviews conducted in 2023 and 15 POM interviews conducted in 2022.

As people have returned to a more typical schedule following the pandemic the presence of Personal Outcomes has increased. There has been significant increases in the presence of the following POM's:

- POM 8 – Use Environment
- POM 9 – Integrated Environment
- POM 10 – Interact
- POM 11 – Participate
- POM 13 – Friends
- POM 14 – Intimate Relationships

Agency staff are adjusting to the role of supporters vs. caretakers. Increases in the presence of these outcomes perhaps suggest progress in supporting people to find their place to fill a meaningful role in the greater community.

| Outcome Present | 2020 POM (37 Interviews) | 2021 POM (29 Interviews) | 2022 POM (15 Interviews) | 2023 POM (16 Interviews) |
|---|--------------------------------|-----------------------------|-----------------------------|-----------------------------|
| POM01 - Safe - Outcome Present | 62.16% | 48.28% | 26.67% | 50.00% |
| POM02 - Abuse - Outcome Present | 18.92% | 17.24% | 0.00% | 12.50% |
| POM03 - Health - Best Outcome Present | 59.46% | 55.17% | 6.67% | 56.25% |
| POM04 - Continuity and Security - Outcome Present | 13.51% | 3.45% | 0.00% | 0.00% |
| POM05 - Rights - Outcome Present | 27.03% | 17.24% | 13.33% | 25.00% |
| POM06 - Treated Fairly - Outcome Present | 45.95% | 41.38% | 13.33% | 43.75% |
| POM07 - Respect - Outcome Present | 18.92% | 20.69% | 0.00% | 18.75% |
| POM08 - Use Environment - Outcome Present | 29.73% | 41.38% | 40.00% | 56.25% |

2023 TREND ANALYSIS

| | | | | |
|--|--------|--------|--------|---------|
| POM09 - Integrated - Outcome Present | 43.24% | 37.93% | 60.00% | 100.00% |
| POM10 - Interact - Outcome Present | 27.03% | 44.83% | 46.67% | 87.50% |
| POM11 - Participate - Outcome Present | 18.92% | 17.24% | 20.00% | 68.75% |
| POM12 - Natural Supports - Outcome Present | 8.11% | 10.34% | 0.00% | 12.50% |
| POM13 - Friends - Outcome Present | 21.62% | 27.59% | 13.33% | 37.50% |
| POM14 - Intimate Relationships - Outcome Present | 32.43% | 24.14% | 13.33% | 50.00% |
| POM15 - Decide Share Info - Outcome Present | 5.41% | 6.90% | 0.00% | 0.00% |
| POM16 - Social Roles - Outcome Present | 48.65% | 51.72% | 13.33% | 37.50% |
| POM17 - Choose Live - Outcome Present | 32.43% | 24.14% | 6.67% | 12.50% |
| POM18 - Choose Work - Outcome Present | 51.35% | 41.38% | 26.67% | 43.75% |
| POM19 - Choose Services - Outcome Present | 2.70% | 0.00% | 0.00% | 0.00% |
| POM20 - Choose Goals - Outcome Present | 72.97% | 68.97% | 33.33% | 43.75% |
| POM21 - Realize Goals - Outcome Present | 83.78% | 72.41% | 66.67% | 68.75% |

Comparing data on supports for personal outcomes. Strong areas included:

- POM 1 – Safe
- POM 9 – Integrated
- POM 10 – Interact
- POM 11 – Participate
- POM 12- Natural Supports
- POM 21 – Realize Goals

2023 TREND ANALYSIS

Opportunities for improvement include:

- POM 2 – Abuse
- POM 4 – Continuity
- POM 6 – Treated Fairly
- POM 15 – Share Information
- POM 17- Choose Live
- POM 19 – Choose Services

| Supports in Place | 2020 POM (37 Interviews) | 2021 POM (29 Interviews) | 2022 POM (15 Interviews) | 2023 POM (16 Interviews) |
|---|--------------------------|--------------------------|--------------------------|--------------------------|
| POM01 - Safe - Supports In Place | 97.30% | 86.21% | 53.33% | 81.25% |
| POM02 - Abuse - Supports In Place | 27.03% | 31.03% | 13.33% | 12.50% |
| POM03 - Health - Supports In Place | 75.68% | 68.97% | 40.00% | 62.50% |
| POM04 - Continuity and Security - Supports | 72.97% | 41.38% | 6.67% | 18.75% |
| POM05 - Rights - Supports In Place | 37.84% | 31.03% | 13.33% | 25.00% |
| POM06 - Treated Fairly - Supports In Place | 48.65% | 37.93% | 13.33% | 25.00% |
| POM07 - Respect - Supports In Place | 45.95% | 58.62% | 20.00% | 37.50% |
| POM08 - Use Environment - Supports In Place | 75.68% | 62.07% | 53.33% | 50.00% |
| POM09 - Integrated - Supports In Place | 64.86% | 51.72% | 60.00% | 100.00% |
| POM10 - Interact - Supports In Place | 59.46% | 58.62% | 46.67% | 93.75% |
| POM11 - Participate - Supports In Place | 64.86% | 37.93% | 20.00% | 75.00% |

2023 TREND ANALYSIS

| | | | | |
|--|--------|--------|--------|--------|
| POM12 - Natural Supports - Supports In Place | 91.89% | 72.41% | 53.33% | 87.50% |
| POM13 - Friends - Supports In Place | 67.57% | 65.52% | 20.00% | 56.25% |
| POM14 - Intimate Relationships - Supports In Place | 72.97% | 55.17% | 13.33% | 43.75% |
| POM15 - Decide Share Info - Supports In Place | 8.11% | 6.90% | 0.00% | 6.25% |
| POM16 - Social Roles - Supports In Place | 54.05% | 51.72% | 20.00% | 37.50% |
| POM17 - Choose Live - Supports In Place | 51.35% | 44.83% | 13.33% | 18.75% |
| POM18 - Choose Work - Supports In Place | 56.76% | 51.72% | 26.67% | 37.50% |
| POM19 - Choose Services - Supports In Place | 0.00% | 0.00% | 0.00% | 0.00% |
| POM20 - Choose Goals - Supports In Place | 67.57% | 62.07% | 26.67% | 37.50% |
| POM21 - Realize Goals - Supports In Place | 81.08% | 68.97% | 60.00% | 68.75% |

There is an ongoing need to ensure people have education, experience and exposure. Working on ways to introduce the 3 E's as it pertains to Social Roles, Friends and Employment, will help build social capital and support people in creating new relationships, which in turn could help with building natural supports and more friends. Club and group membership are an opportunity for 2024 as well as continuing to educate people on ANEM.

Specific observations and opportunities:

ANEM

- Many people need education, particularly about exploitation
- Some people have past experiences and trauma they still deal with

Continuity and Security

- There are many changes people have no control over, such as DSP staffing

2023 TREND ANALYSIS

Rights

- More education needs to occur on conservatorships and the limits of such

Respect

- The little R is present (every day respect) but the BIG R is not – challenging people to be the best they can be

Natural Supports

- People consistently express the desire for more

Decide to Share Information

- Need ongoing education

Choose Services

- People need education on what services are provided and what other options are

Choose Goals

- People may have goals but they are not always being worked on

Direct Support Professional Personal Outcome Workshop Feedback for the Organization

An agency goal is for all employees to be trained on Personal Outcome Measures by participating in a 4-day personal outcome measures workshop. At the completion of the workshop employees are asked to highlight what POM's they believe the agency does well, as well as agency opportunities for improvement. In 2023 there were 13 completed evaluations. In 2022 there were 19 completed evaluations. Below are findings from 2023 data that includes 13 completed feedback forms per employee assessment of how the agency is doing supporting POMs. Employees rated the three POM's that they considered a strength for Core Services and the three POM's they believe Core Services can improve on.

| | STRENGTH | OPPORTUNITY |
|--|----------|-------------|
| 1. People are safe | 8 | 0 |
| 2. People are free from abuse and neglect | 1 | 0 |
| 3. People have best possible health | 3 | 1 |
| 4. People experience continuity and security | 0 | 1 |
| 5. People exercise rights | 1 | 2 |
| 6. People are treated fairly | 1 | 0 |
| 7. People are respected | 1 | 1 |
| 8. People use their environments | 3 | 1 |
| 9. People live in integrated environments | 3 | 1 |
| 10. People interact with members of community | 2 | 0 |
| 11. People participate in the life of the community | 1 | 1 |
| 12. People are connected to natural support network | 1 | 0 |
| 13. People have friends | 2 | 4 |
| 14. People have intimate relationships | 0 | 1 |
| 15. People decide when to share personal information | 0 | 2 |
| 16. People perform different social roles | 0 | 1 |
| 17. People choose where and with whom they live | 1 | 5 |
| 18. People choose where they work | 1 | 2 |
| 19. People choose services | 0 | 2 |
| 20. People Choose Goals | 2 | 2 |
| 21. People Realize Goals | 2 | 3 |

EMPLOYEE IDENTIFIED AGENCY STRENGTHS

Employees that completed the POM class in 2023 believe agency strengths in supporting POM's includes the following POMs:

- POM 1 – Safe
- POM 3- Health
- POM 8 – People Use Environment
- POM 9 – Integrated Environment

EMPLOYEE IDENTIFIED AGENCY OPPORTUNITIES FOR IMPROVEMENT

Employees that completed the POM class in 2023 believe agency could improve in supporting POM's includes the following POMs:

- POM 13 – People Have Friends
- POM 17 – People Choose Live
- POM 21 - People Realize Goals

Similarities between actual 2023 POM data and employee assessments of the agencies performance on POMs are consistent. POM data reveals that supports for both POM 1 and POM 9 are support strengths for the agency. POM 17 – People Choose Where they Live was also identified in 2023 POM data as an opportunity for improvement.

SELF-ADVOCATE MENTORS

During 2023 two people supported participated in Advocacy in Motion, AiMs Mentor Training. Alex Head and Joe Watterson are now Self-Advocate Mentors and can help as trainers during AiMs Training.

BASIC ASSURANCE MONITORING

JOB AID: HOUSE MEETINGS

Beginning in 2021 a Basic Assurance Job Aid tool has been used to measure the presence of basic assurances on an individual level and agency level. In 2023 the tool was used twice at House Meetings. House meetings are held by the program supervisor and attended by person(s) supported and all DSPs assigned to the home. The tool proved useful in identifying the absence of basic assurances as well as restrictions that were not sanctioned by the agency and in most instances unknown to management. Awareness of issues allowed an opportunity for both education and removal of restriction(s) by the Core Leadership team. The most important lesson learned was this is an area that requires ongoing monitoring. Restrictions are often imposed in the home by well-meaning staff and can seemingly be implemented and adopted without management awareness.

2023 Findings:

- Restrictions are still occurring restricting where people sit in the car
- Many people now reporting knowing how to access medical supports 72%

Significant improvements were noted on issues identified as needing improvement in 2022.

- Most if not all people reporting keys to their bedroom and ability to lock bathroom
- Less staff-imposed restrictions on food and drink

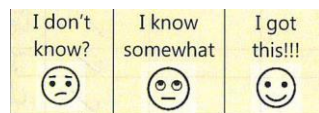
In 2022 the most common findings included:

- People reporting that they did not have a key to the house and/or bedroom – 31%
- Food and drink restrictions – 16%
- People not choosing their own health providers -70%
- People not involved in making and keeping health appointments- 46%
- People not understanding their medical and medication histories – 61%
- People not understanding how to access medical emergency services – 46%

BASIC ASSURANCES PROBING QUESTIONS

As part of the annual pre-planning, rights assessment process, a series of probing questions are used as a tool to evaluate the ability to exercise rights. This information is compared to other metrics collected.

Eleven people participated in a probing question interview during 2023. This was typically scheduled either before or after a Personal Outcome Measures interview. The interview was comprised of approximately 50 probing questions designed to initiate discussion about people's knowledge of their rights and ability to exercise such rights. People use a smiley face scale to rate responses to each question. For example, to the question: "What are staff writing when you see them on a phone or tablet". Possible answers include:



Areas where people need more exposure, education, experience include the following that included a "I don't know response":

- What is a friend? - 55% "I don't know"
- What medications do you take? -73% "I don't know"
- What is voting? -64% "I don't know"
- What is a conservator? -64% "I don't know"
- What is a Natural Support? – 55% "I don't know"
- What is an ISP Meeting? -45% "I don't know"
- What information is kept about me? –55% "I don't know"
- What is a decision? –64% "I don't know"
- What is mistreatment? – 36% "I don't know"
- What is exploitation? - 82% "I don't know"

FACILITATED PERSON CENTERED PLANNING MEETINGS

Facilitated person centered planning meetings are a great way to effectively listen to each person, change their support based on what is learned, work in effective partnerships with others to help people achieve life goals. The person with the disability is central to the process and is asked what kind of life they want to live, where they want to live and with whom. Underlying the process is the recognition that people with disabilities deserve the opportunity to make decisions about their own lives so they can lead lives of purpose and meaning.

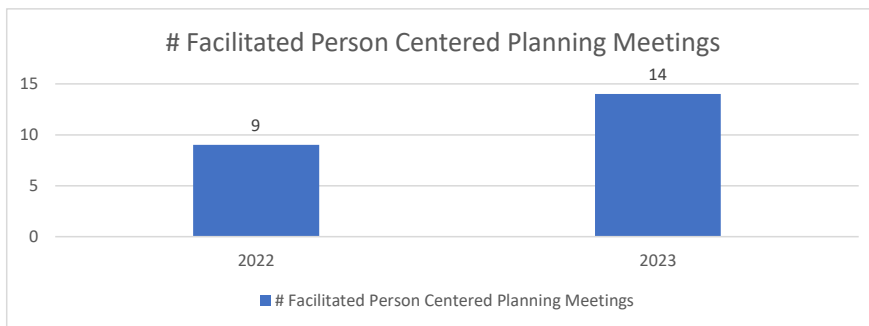
The annual Individual Support Plan process has been a concern for several years. Meetings are driven by Independent Support Coordinators and the person typically does not have an active role in their own planning. During the pandemic meetings started being conducted virtually, resulting in the person even further removed from planning and directing their own meeting. An agency plan was put into place to hold facilitated PCP meetings with anyone wanting a change (i.e. a job), a major vacation, a desire for more independence or someone expressing dissatisfaction with any area of their life. A goal is to include facilitation for the PCT meeting through the TN DIDD Person-Centered unit in order to include the input of an outside person. Family, staff and others are invited to participate in the PCP meetings. Information is later shared during annual planning.

During 2023 there were 14 facilitated Person-Centered Planning meetings held with 12 people. Follow up meetings were held for two people during 2023.

During 2022 nine (9) people (20% of people supported) had person centered planning meetings facilitated by the TN DIDD PCP unit.

Information learned during these meetings, combined with Personal Outcome Measure interviews revealed valuable information that is used in annual planning.

The number of people going through the PCP process will continue to be tracked as a metric.



COMMUNITY MEMBERSHIP

Promoting meaningful community membership is an ongoing opportunity for improvement. Two important ways people can be members of their community include employment, recreation and worship. There are 18 people, or 39% of people supported residentially, who attend the church(s) of their choice. This includes 7 different places of worship. How a person wants to participate in the community is up to them. The agency tries to support ideas for community inclusion through exposure and education. Select DSP are paid additional \$ on the hour to plan and find activities and distribute the information agency wide so people can decide how they want to participate.

In addition to church and employment other types of regular, ongoing membership include the following participation and number of people:

- Special Olympics – 1
- Bowling Leagues – 1
- Bowling – 7
- Movie Club – 8
- Horse Stable - 2
- Red Hat Society – 8
- Book Club -13
- Golf Club – 5
- Meals on Wheels – 4
- Gym Membership – 1
- Exercise Class – 10
- I-Can Adaptable Fitness – 17

Trips and Special Events

During 2023 people were supported to go on vacations, attend events and visit theme parks. Day trips included the following:

- Hatfield and McCoy Dinner Theater – 10 people
- 26 trips to Dollywood
- Soaky Mountain Water Park – 9 people
- World Wrestling Entertainment WWE – 1 person
- Concerts (Casting Crows, Boyz to Men) – 2 people
- Casino – 2 trips
- Bristol NASCAR Race – 2 people

2023 TREND ANALYSIS

- Bryson City, NC, Polar Express Train Ride – 15 people
- Soaky Mountain Water Park – 9 people

Vacation Trips in 2024

- Atlanta Braves – 5 people
- Disney World – 2 people
- Gordonsville, VA – 3 people
- Memphis, Graceland – 1 person
- Myrtle Beach – 4 people
- Nashville – 7 people
- North Carolina cabin rental – 4 people
- Pittsburg, PA – 2 people
- Puerto Rico – 1 person
- St. Augustine, Florida – 1 person
- Tent camping on Viking Mountain – 8 people
- Tybee Island – 4 people

During 2023, 19 people enjoyed a vacation that involved travel and overnight stays. Destinations included Atlanta, Orlando, Washington DC, Memphis, North Carolina, Pittsburg PA, Puerto Rico, St. Augustine, Viking Mountain and Tybee Island.

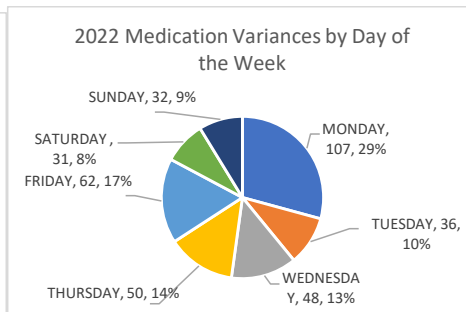
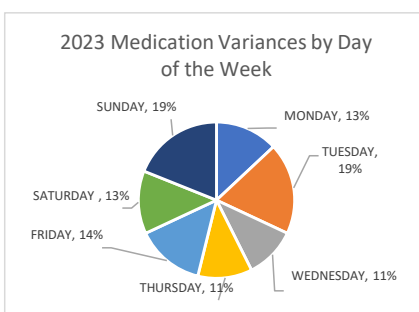
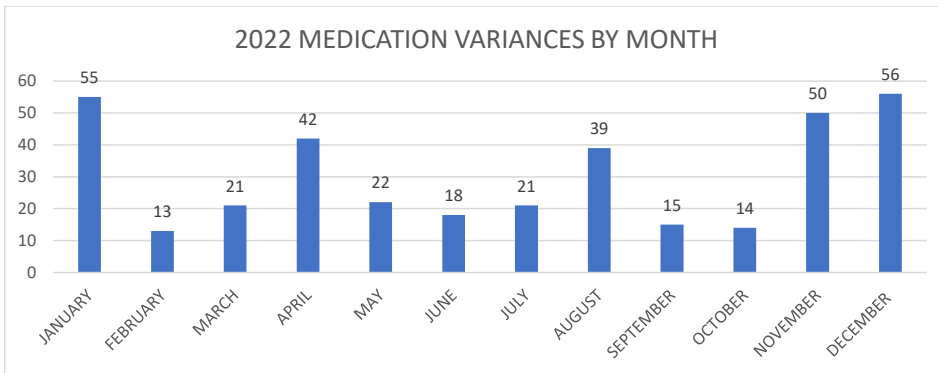
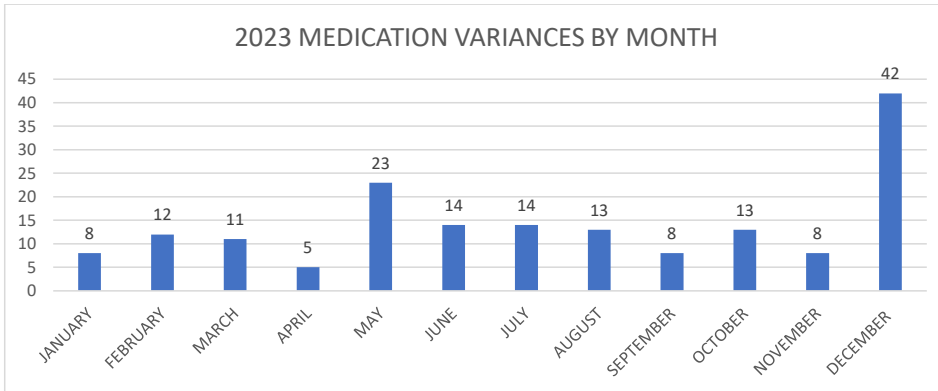
There were 11 people who did not attend a vacation, event or theme park in 2023. Special attention will be given to these 11 people in 2024 to assure their voices are heard.

| Person | Jan | Feb | Mar | Apr | May | June | July | August | Sept | Oct | Nov | Dec |
|--------|-----|-----|-----------|-------------------------------|-----------------|-----------------------|----------------------|-----------|---|----------------|----------------|-----------------------------|
| SA | | | | | | | | | | | | |
| WA | | | | Dollywood | Dollywood | Dollywood | Camping | Dollywood | Dollywood Cabin | NC | Myrtle Beach 1 | Polar Express |
| CB | | | Aquarium | | Gordonsville VA | | Camping | | | | | Myrtle Beach |
| JB | | | | | | | | | | St. Augustine | | |
| BB | | | | | | | | | | | | |
| GB | | | | | | | | | | | | |
| SC | | | | Hatfield & McCoy | | | Tybee Island | | | | | Polar Express |
| AC | | | | | | | | | | | | |
| MC | | | | Hatfield & McCoy | | | | | | | | |
| ID | | | | | | | | | | | | |
| WD | | | | | | | | | | | | |
| ED | | | | | | | Tybee Island | | | | | Polar Express |
| ME | | | | | | | | | | | | |
| AE | | | | Hatfield & McCoy Dollywood | | Cabin Disney World | Soaky Mtn | | Pittsburg NADS | | Nashville | Polar Express |
| JE | | | Aquarium | | Gordonsville VA | | | | | | | Myrtle Beach |
| DF | | | Nashville | Hatfield & McCoy Dollywood | Dollywood | Dollywood | Soaky Mtn Camping | Dollywood | NC Cabin Atlanta Braves Dollywood | | | WWE Event1 Polar Express |
| JH | | | | | | | Soaky Mtn | | | | | |
| TH | | | | Hatfield & McCoy | | | | | | | | |
| AH | | | | | | | Camping | | | | | |
| PH | | | | | Nashville Mega | | Soaky Mtn | | | | | Puerto Rico 1 |
| JH | | | | | | | | | | | | |
| DH | | | | Hatfield & McCoy | | | | | | | | Polar Express |
| JH | | | | | | | | | | | | |
| PL | | | | | | | | | | | | |
| CL | | | | | | Atlanta Braves | Camping Mtn | Soaky | | Atlanta Braves | | Nashville Tech |

2023 TREND ANALYSIS

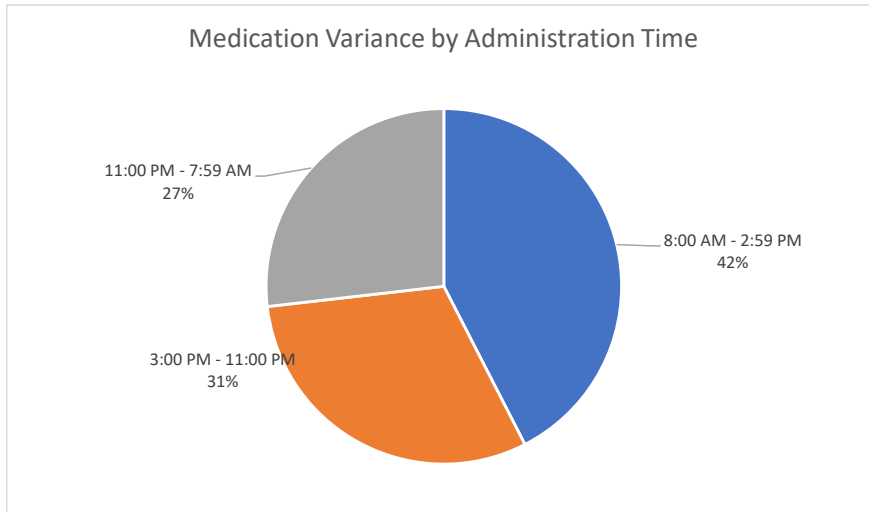
There were 368 medication variances in 2022. There were 592 medication variances in 2021.

The following includes medication variance statistics:



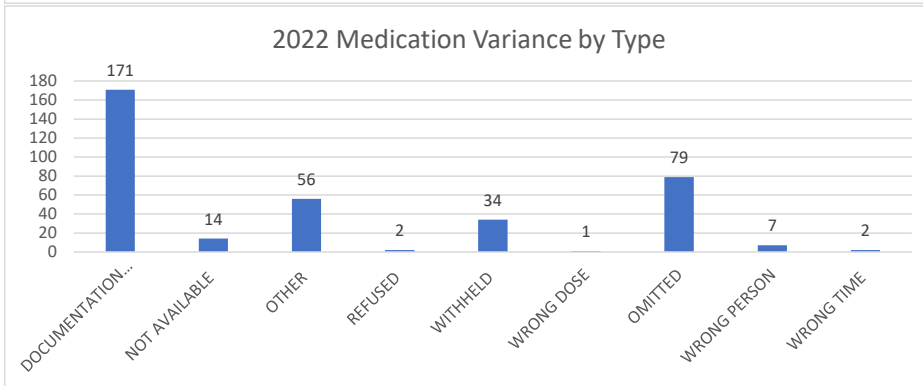
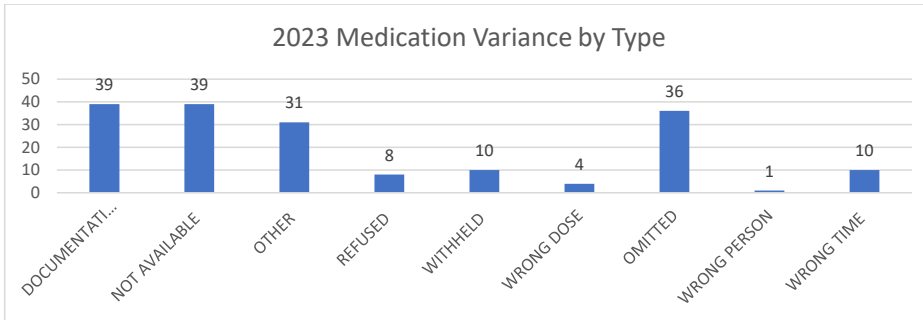
23% of Medication Variances occur at the 8:00 AM Medication Administration time. This may be an indication that more emphasis on shift change procedures is needed. This is also the administration

time when people typically take the most medications. Most medication variances can be expected to occur during the day hours 8AM to 3 PM.



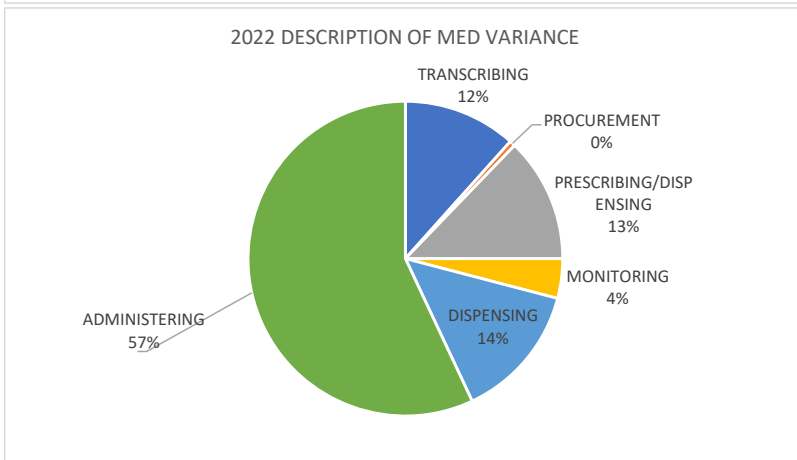
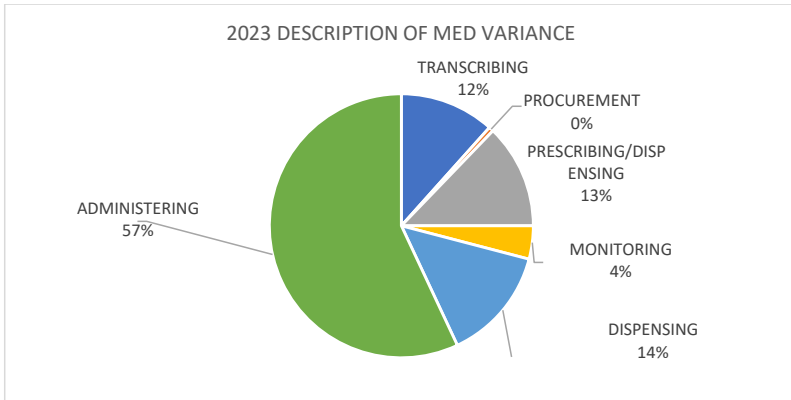
Documentation errors account for 21% of all medication errors, followed by omitted dose at 20% of all medication errors. These are consistent findings for several years in a row.

2023 TREND ANALYSIS



57% of all medication errors IN 2023 were as a result of errors while *administering* medications.

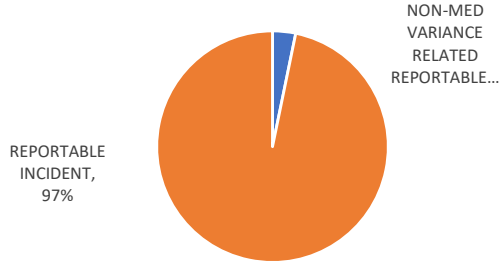
2023 TREND ANALYSIS



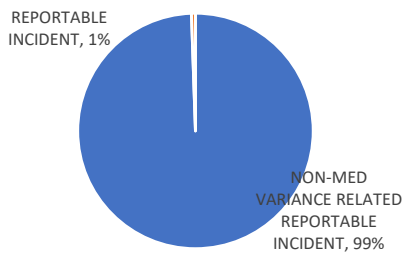
Only 1% of medication errors were considered reportable incidents and all involved people receiving the wrong persons meds. This required a trip to the emergency room for monitoring only.

2023 TREND ANALYSIS

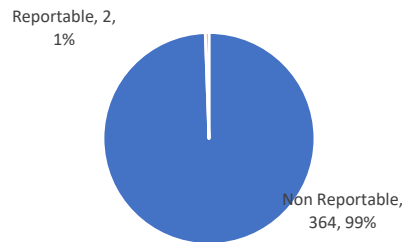
2023 Reportable Medication Variances



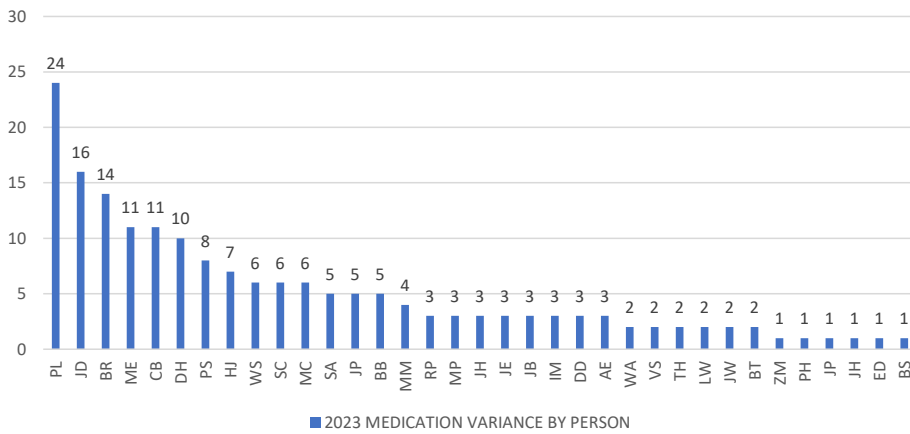
2023 Reportable Medication Variances



2022 REPORTABLE MEDICATION VARIANCES

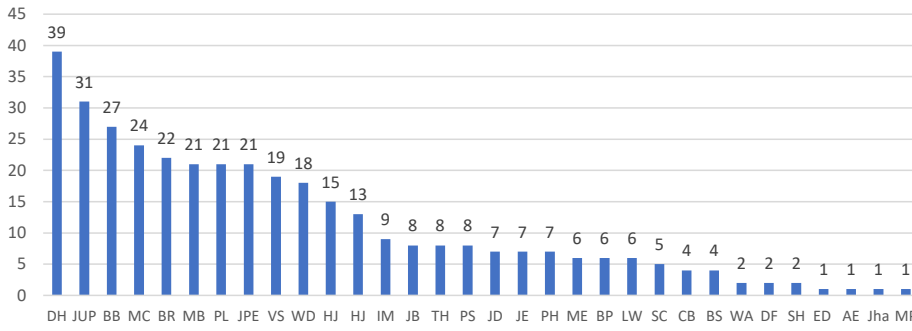


2023 MEDICATION VARIANCE BY PERSON



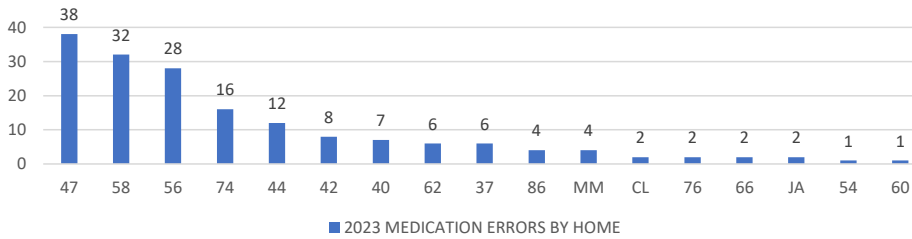
2023 TREND ANALYSIS

2022 MEDICATION VARIANCES BY PERSON

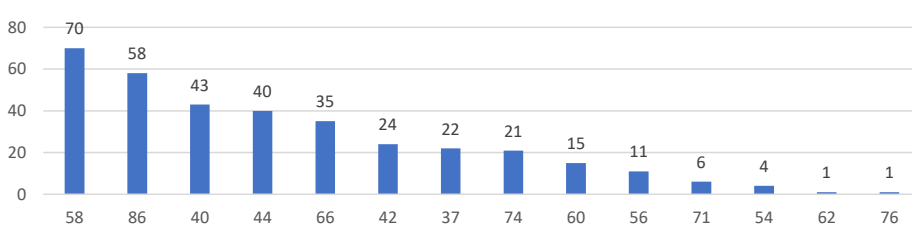


In 2023 54% of all medication variances occurred at 3 homes (47, 58, and 56). In 2022 57% of all medication variances occurred in 4 homes (58, 86, 40, 44). The only similarity between 2023 and 2022 data is House 58 where people supported have complex medical needs.

2023 MEDICATION ERRORS BY HOME



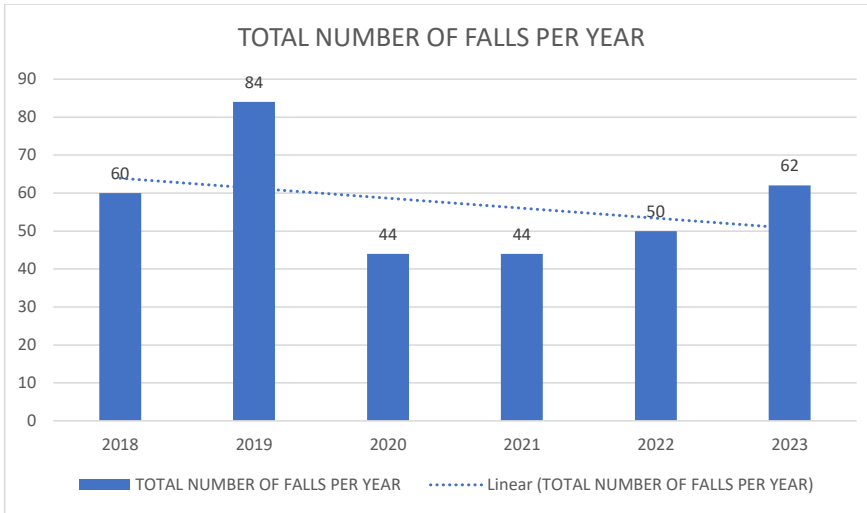
2022 MEDICATION VARIANCES BY HOME



FALLS

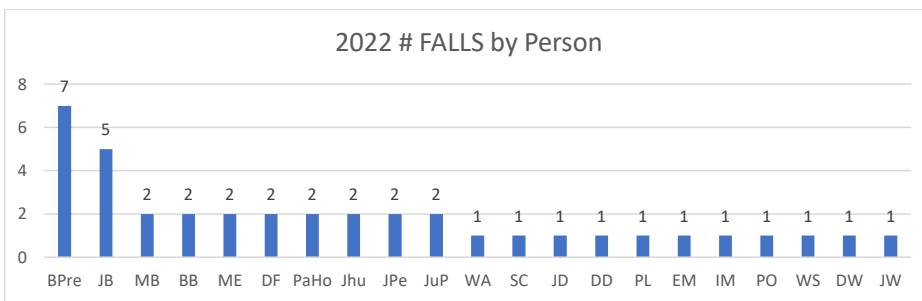
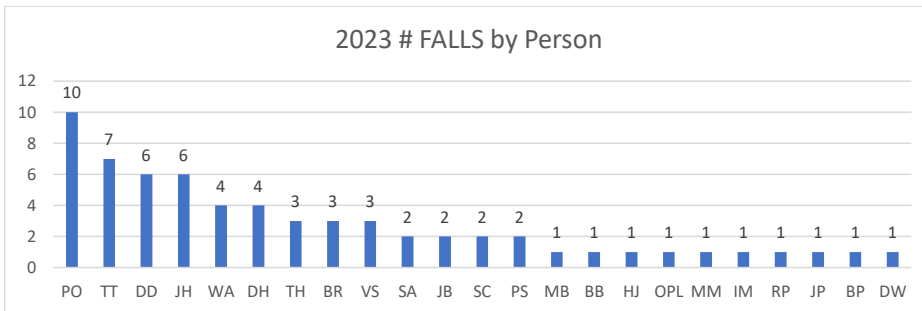
There were 62 falls documented in 2023 involving 33 people. This compares to 50 falls documented in 2022. A comparison of the total number of falls per year is trending down.

2023 TREND ANALYSIS



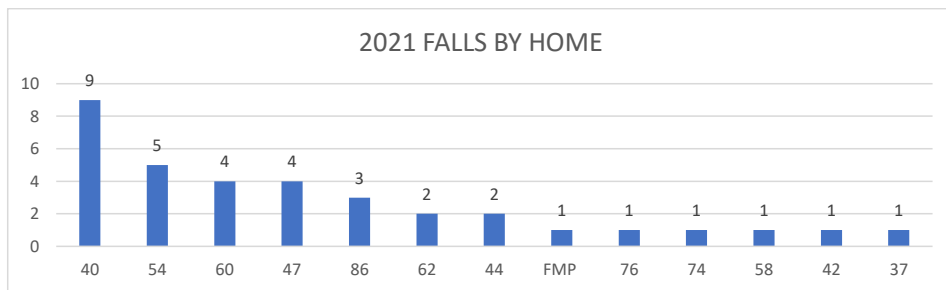
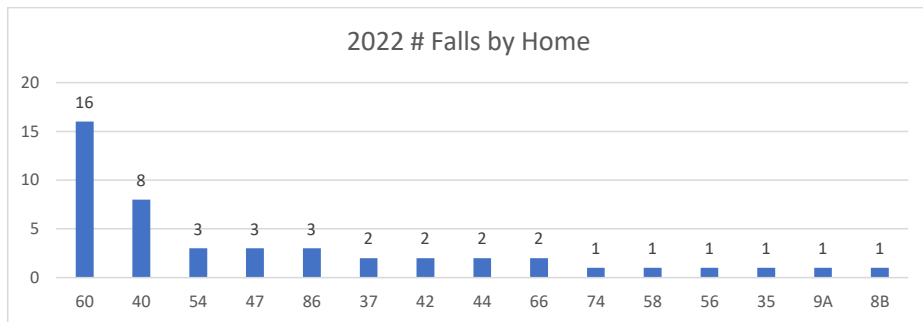
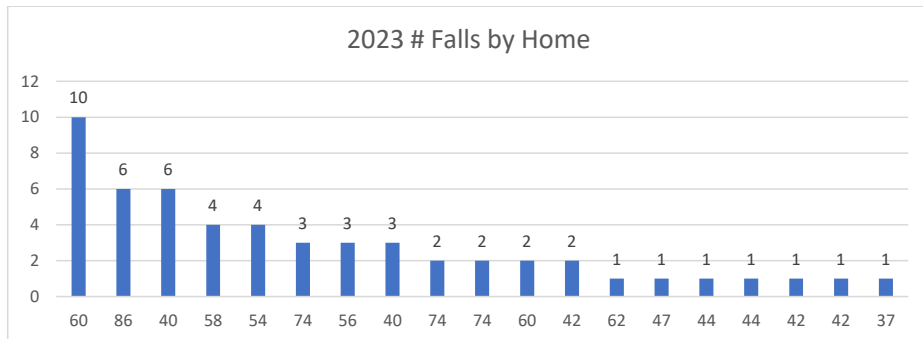
27 falls met criteria of “reportable” because the person sustained at least a minor injury such as an abrasion. 42% of the total documented 2023 falls met “reportable” criteria. Of the 27 reportable falls there were several serious injuries including a fractured wrist and a laceration requiring stitches.

There were no similarities between the people having the highest number of falls in 2023 and 2022.



2023 TREND ANALYSIS

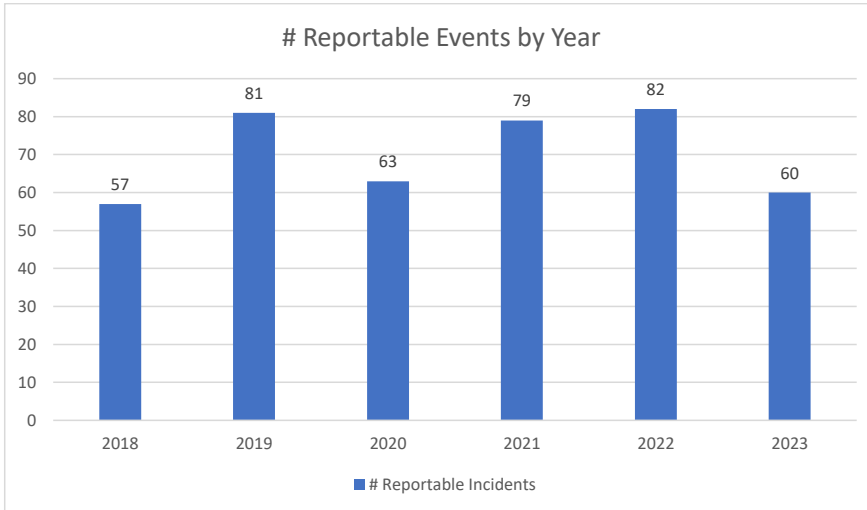
House 60 continues to be the home with the most number of falls. In 2022 one individual had 9 falls. This year the same individual had 10 falls. The falls for this one individual are suspected to be related to behavior and typically involve sliding to the floor with no injuries. This individual is also participating in Vestibular Balance Therapy sessions as a preventative strategy. House 40 for two years has had a high number of falls. Two individuals whose falls are included on this list from House 40 unfortunately passed away in 2023.



2023 TREND ANALYSIS

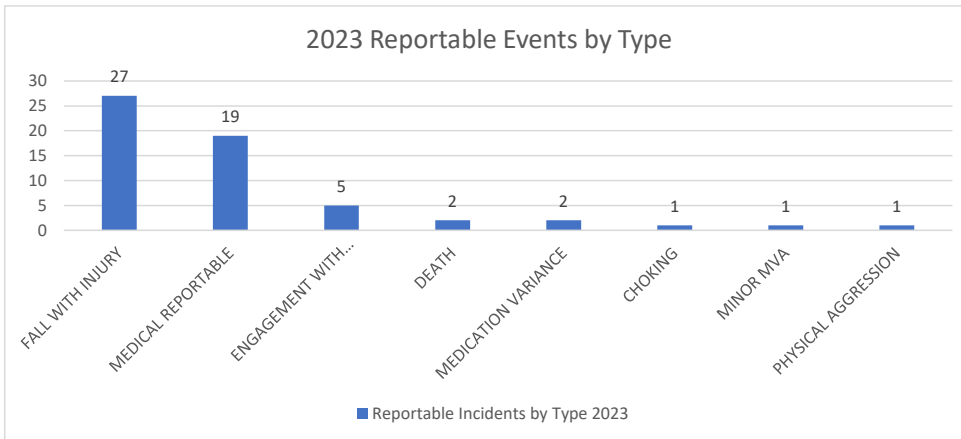
REPORTABLE EVENTS

There were 60 reportable events in 2023 compared with 82 reportable events in 2022. This is comparable to prior years with no noteworthy trends.



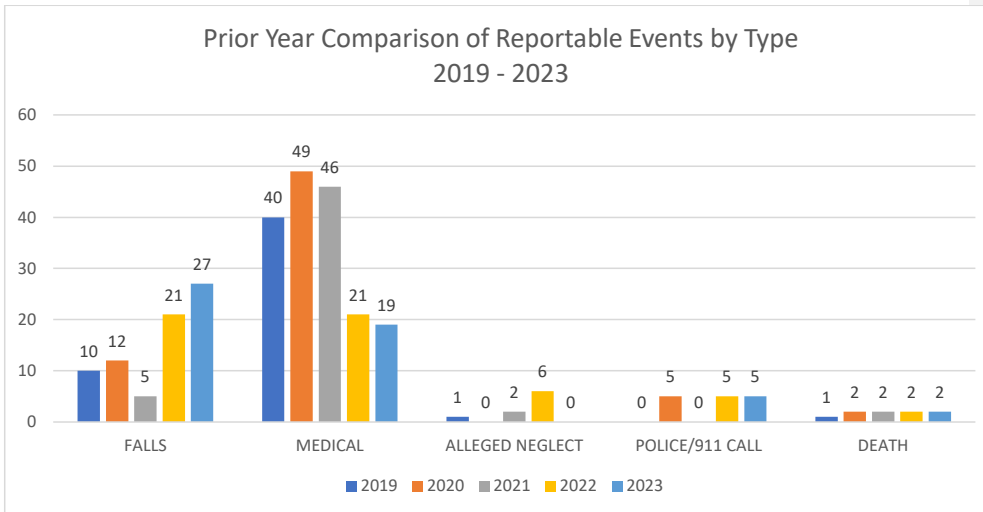
The highest number of reportable events involved reportable falls with 27 falls or 47% of all reportables. This is followed by Reportable Medical with 19 incidents for 33% of all reportable incidents.

2022 data revealed reportable medical at 26% (21 events), falls 26% (21 reportable falls), positive COVID 20% (16). There were two reportable events of neglect involving staff sleeping that affected 6 different people accounting for the 6 reportable events of neglect. There were no incidents of neglect in 2023.

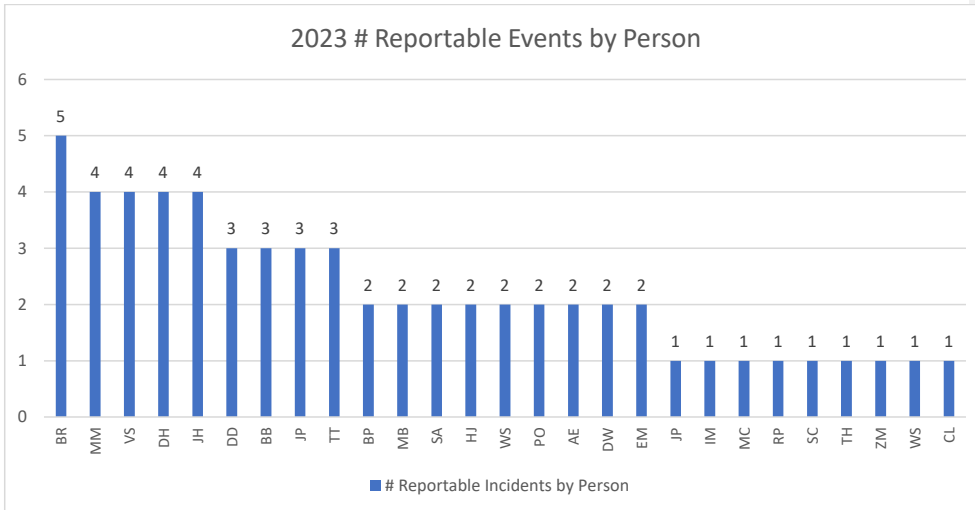


2023 TREND ANALYSIS

A comparison of reportable events for prior year's show some inconsistencies based on changes in reporting. Any fall that results in any type of minor injury such as a minor scrape is now reported and is subsequently the highest type of reportable incident.

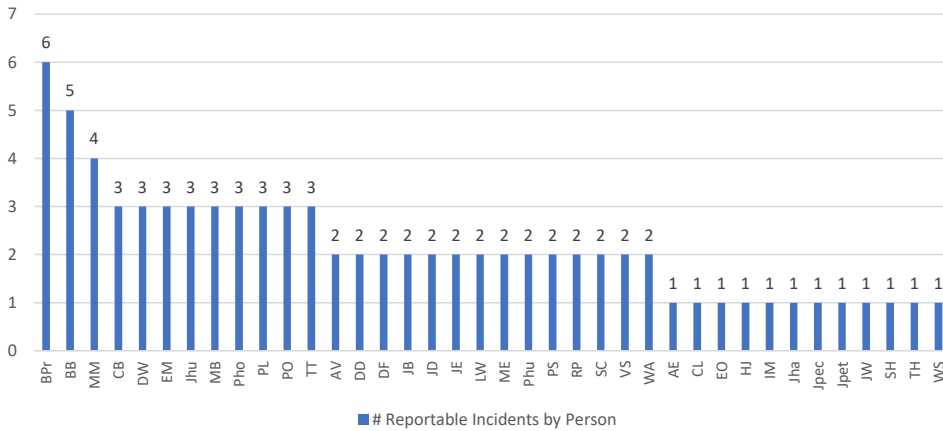


During 2022 38 people had reportable events. The people with the most reportable events for the year were **not** the same people that made the top of the list in previous years. As is consistent with previous years people who experienced significant medical issues typically make the top of the annual list, due to reportable medical events.



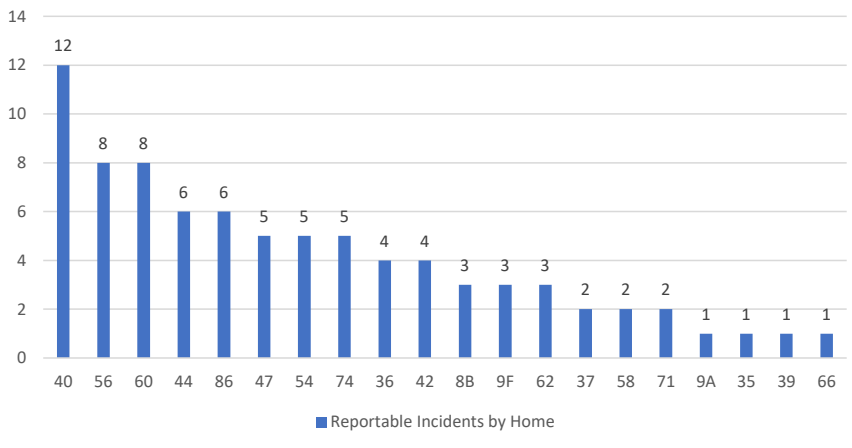
2023 TREND ANALYSIS

2022 # Reportable Events by Person



40% of all reportable events occurred in 5 homes, 56, 36, 40, 58 and 86. Homes 56, 40 and 86 have made the list for the highest number of reportable incidents for two years in a row.

2023 Reportable Events by Home



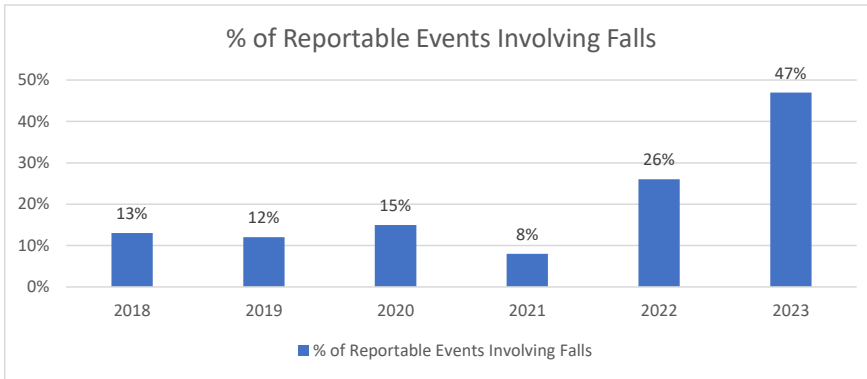
Homes with the most reportable events by year:

| YEAR | HOMES WITH THE HIGHEST NUMBER OF REPORTABLE EVENTS |
|------|--|
| 2019 | 86, 47, 60, |
| 2020 | 56, 42, 83 |

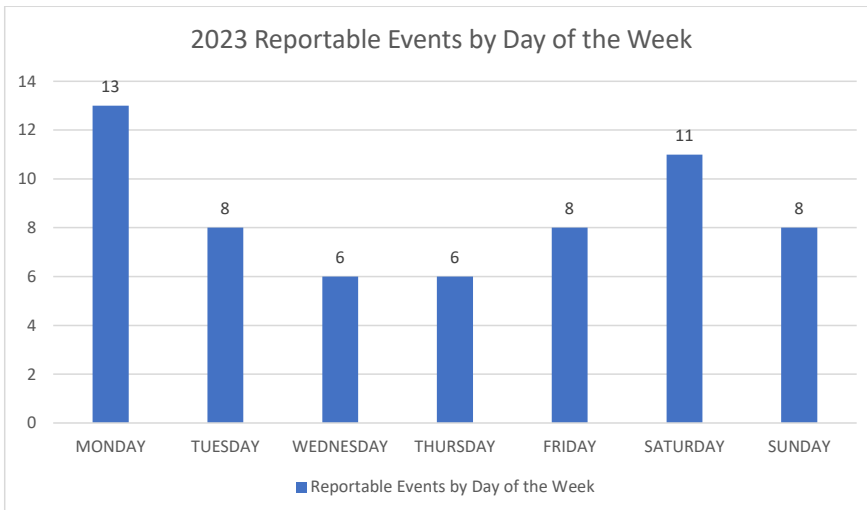
2023 TREND ANALYSIS

| | |
|------|--------------------|
| 2021 | 37, 62, 88 |
| 2022 | 56, 40, 60 |
| 2023 | 86, 56, 40, 36, 58 |

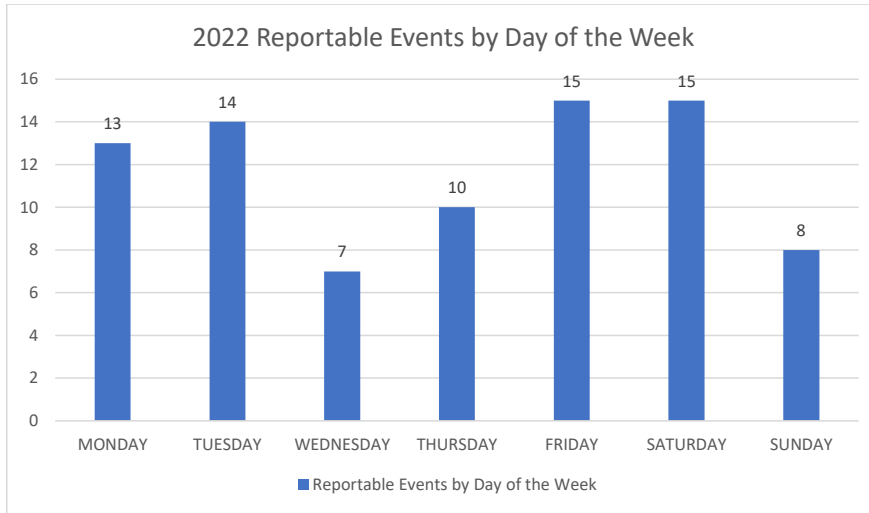
Reportable Events that involve falls is up significantly from prior years. Prior to 2022 falls with minor injuries (scrapes or abrasions) were not considered reportable events.



Weekends, Friday, Saturday, Sunday, Monday are when almost half of all reportable events occur.



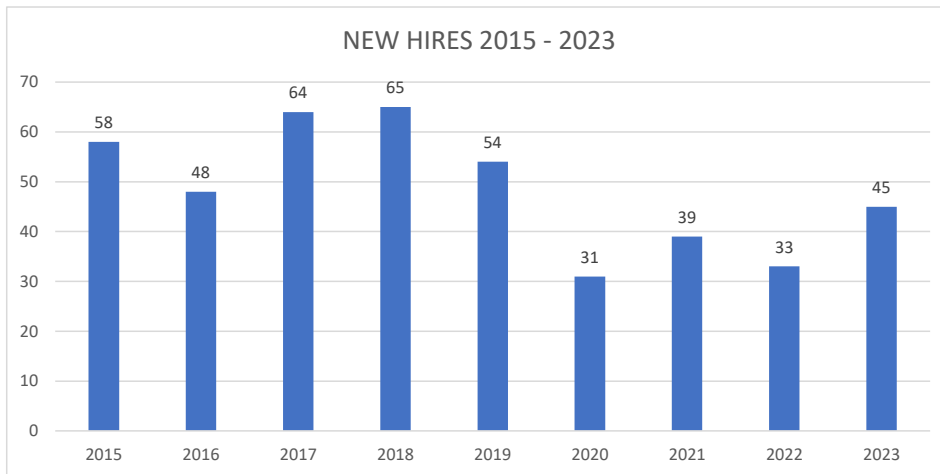
2023 TREND ANALYSIS



DSP RETENTION AND RECRUITMENT

NEW HIRES

There were 162 DSP applicants during 2023. Of those 162 applicants, 45 Direct Support Professionals were hired in 2023 – 28% of all applicants. 2022 data revealed 202 applicants, 33 job offers, resulting in 16% of applicants being offered a job. With this data we can assume that with every 10 applications you might expect to hire 1-2 people. A relatively low DSP vacancy rate has allowed hiring to be very selective. Of the 45 DSPs hired in 2023, 25 remain employed as of 12/31/2023, a 55% retention rate. Of the 33 DSP hired during 2022, 21 remained employed on 12/31/2022, a 63% retention rate.

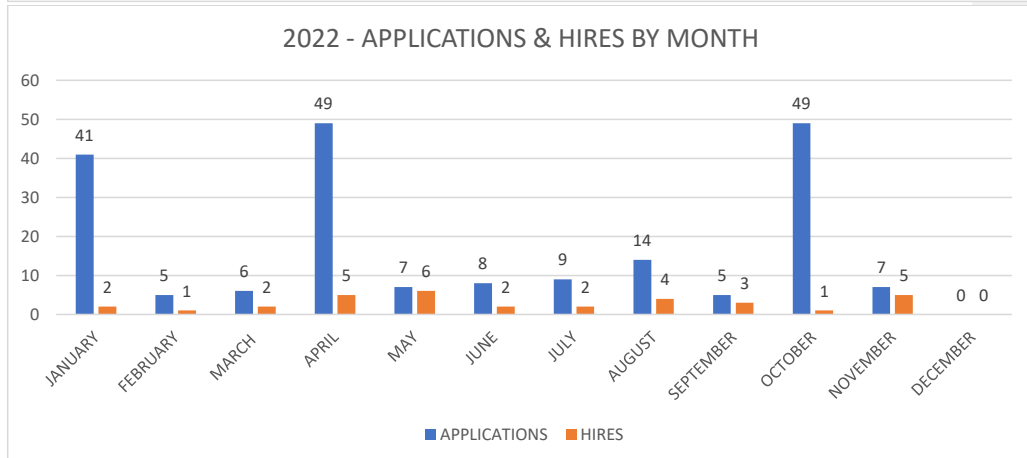
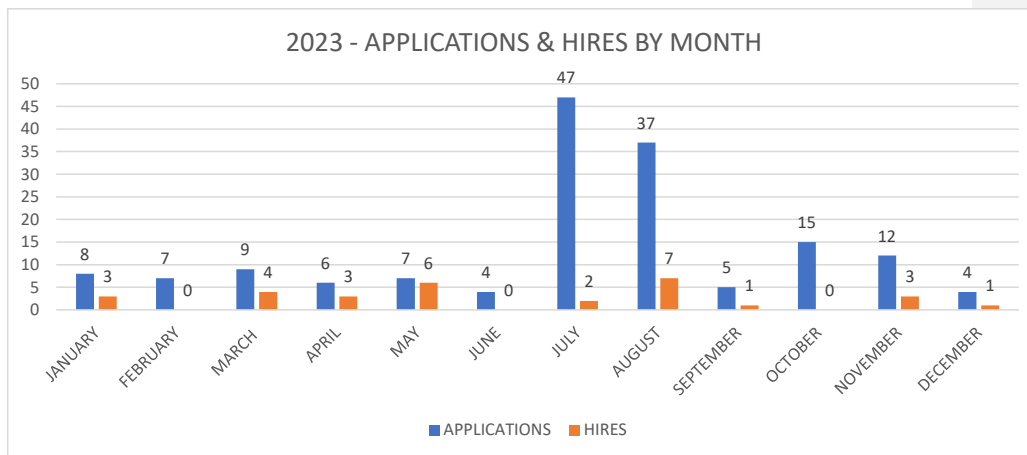


2023 TREND ANALYSIS

Of the 201 applicants in 2023 the following statistics apply:

- Applicants identified as 74% female, 26% male
- 62% of applicants had prior DSP experience
- Referral Source
 - 90% Internet (Facebook, Indeed)
 - 10% Employee Referral

Sporadic advertising throughout the year on Indeed and Facebook resulted in heavy applications during some months. These months also produced an unusually high number of unproductive applications.



Application numbers seem to be more affected by advertising, than by any seasonal trends. In 2023 Facebook and Indeed ads were used to advertise for positions. Historically January, April, July and

2023 TREND ANALYSIS

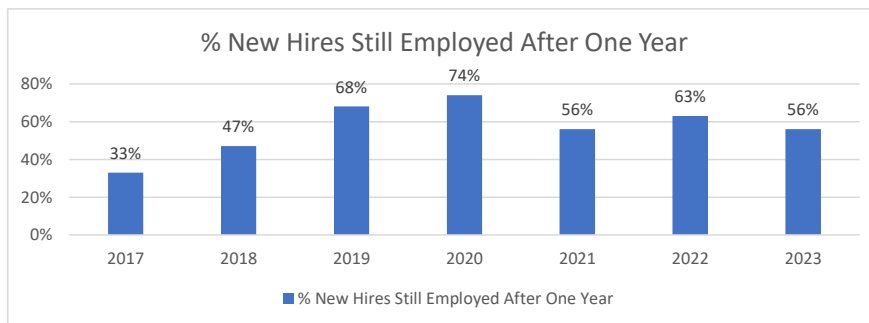
October have produced the highest volume of applications. Ads were posted to social media on the dates below. There were no relatable trends between advertising and actual hires.

2/23/2023
 7/25/2023
 7/28/2023
 10/23/2023
 10/31/2023
 11/30/2023

Employment Applications by Month

| | 2019 | 2020 | 2021 | 2022 | 2023 |
|-----------------|------|------|------|------|------|
| JANUARY | 20 | 18 | 2 | 41 | 8 |
| FEBRUARY | 17 | 7 | 4 | 5 | 7 |
| MARCH | 15 | 14 | 7 | 6 | 9 |
| APRIL | 11 | 8 | 26 | 49 | 6 |
| MAY | 11 | 11 | 15 | 7 | 7 |
| JUNE | 15 | 8 | 29 | 8 | 4 |
| JULY | 35 | 14 | 34 | 9 | 47 |
| AUGUST | 13 | 4 | 3 | 14 | 37 |
| SEPTEMBER | 14 | 14 | 0 | 5 | 5 |
| OCTOBER | 10 | 19 | 6 | 49 | 16 |
| NOVEMBER | 10 | 11 | 55 | 7 | 12 |
| DECEMBER | 12 | 0 | 32 | 0 | 4 |

45 employees were hired in 2023. Of those 45 employees, 25 remain employed or 56% of 2023 hires. Twenty-one (21) or 63% of employees hired in 2022 are still employed. Twenty-two (22) or 56% of employees hired in 2021 were still employed at the end of the year. Much work is left to be done in employee retention but these statistics indicate the new onboarding procedures in place are making a positive impact.

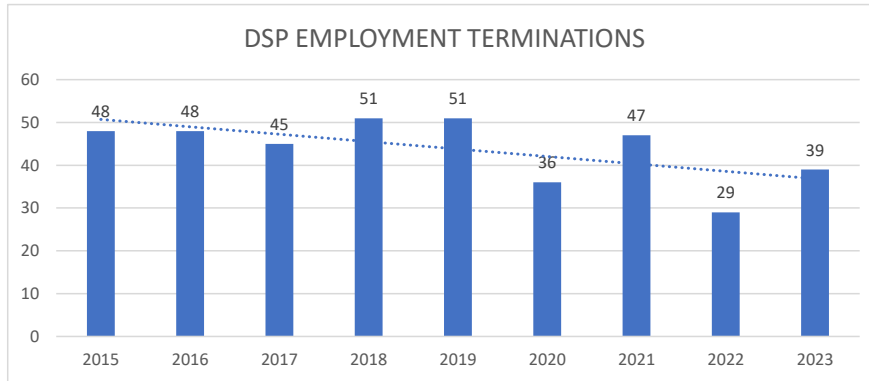


2023 TREND ANALYSIS

In 2021 the practice of surveying new employees to determine their employee experience to date. On a sliding scale rating, 0="AWFUL", 100="CLOSE TO PERFECT" employees were asked to rate their overall experience with hiring. The average rating in 2023 was 93, up from 88 in 2022. Onboarding procedures do seem to be having a positive effect on the employee experience.

TERMINATIONS

There were 39 DSP terminations in 2023. There were 29 DSP terminations in 2022.

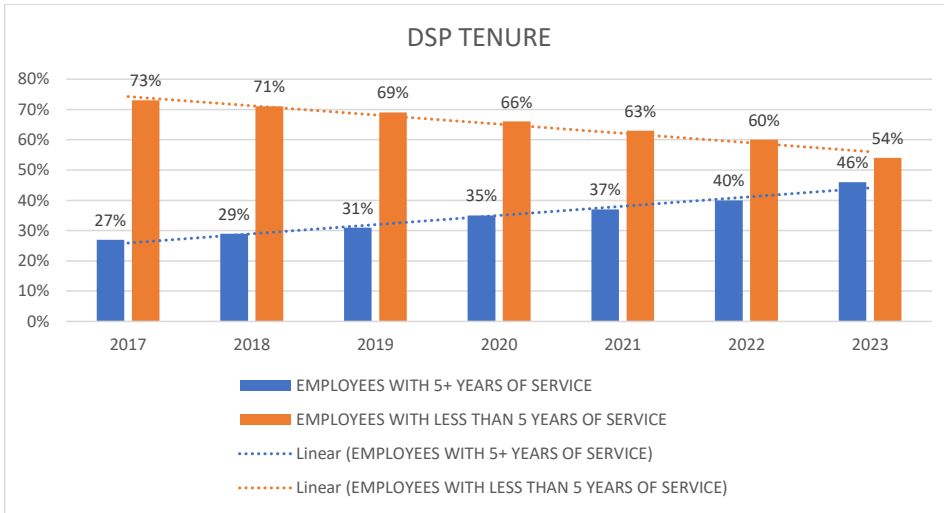


DSP TENURE

Overall, long term employees are trending up over the past six (6) years and employees who leave with less than a year of service are trending down. The average tenure for a DSP at Core Services as of 12/31/2023 was 6.65 years. The number of employees in the 5+ years of tenure is consistently trending up.

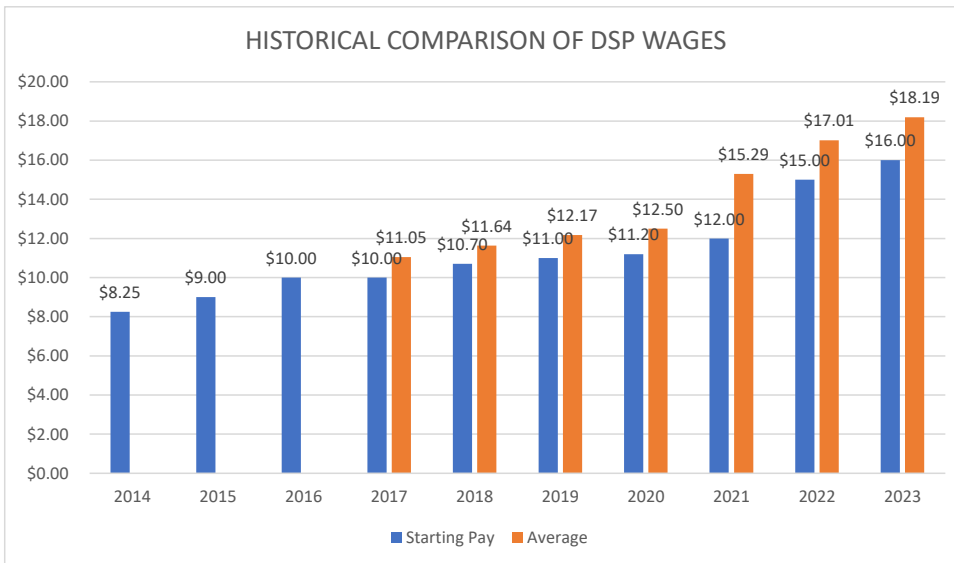
| # Years of Employment with Core Services | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 |
|--|--------|--------|--------|------|------|------|------|
| 10+ Years | 16.52% | 15.08% | 15.38% | 16% | 20% | 22% | 26% |
| 5-10 Years | 10.43% | 13.49% | 15.38% | 19% | 17% | 18% | 20% |
| 1-5 Years | 36.52% | 42.86% | 47.86% | 38% | 37% | 36% | 31% |
| Less than 1 year | 36.52% | 28.57% | 21.37% | 28% | 26% | 24% | 23% |

2023 TREND ANALYSIS



HISTORICAL DSP WAGES

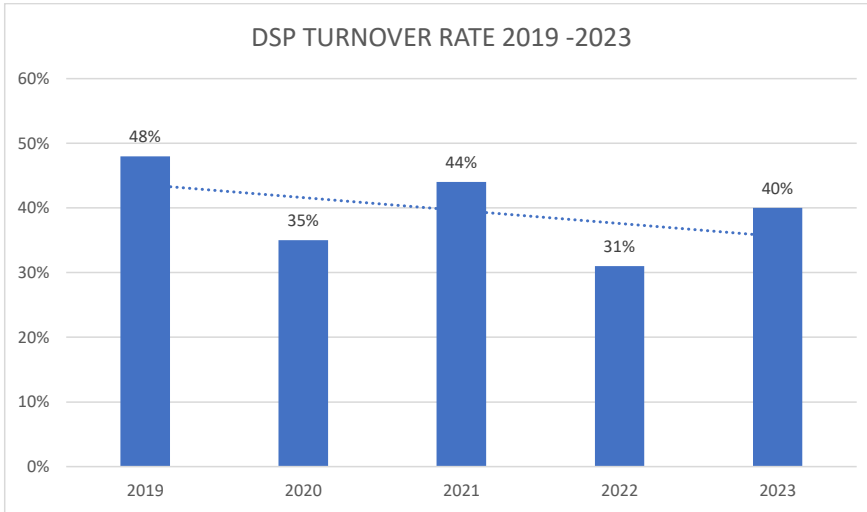
DSP wages have increased 82% since 2014 rising from a starting pay of \$8.25 in 2014 to a starting pay of \$16.00 in 2023. The agency has benefited from provider rate increases for 2 years in a row and this increase has been passed along in employee wages.



2023 TREND ANALYSIS

DSP TURNOVER

DSP turnover was up slightly in 2023 to 40%, still relatively low compared to industry standards. Overall, the turnover rate continues to trend downward showing that current employee practices are producing favorable results. The turnover rate for 2022 was 31%, the lowest turnover rate in 4 years.



In 2022 there were 45 new hires and 37 terminations. This is the first year new hire totals have been significantly higher than terminations.

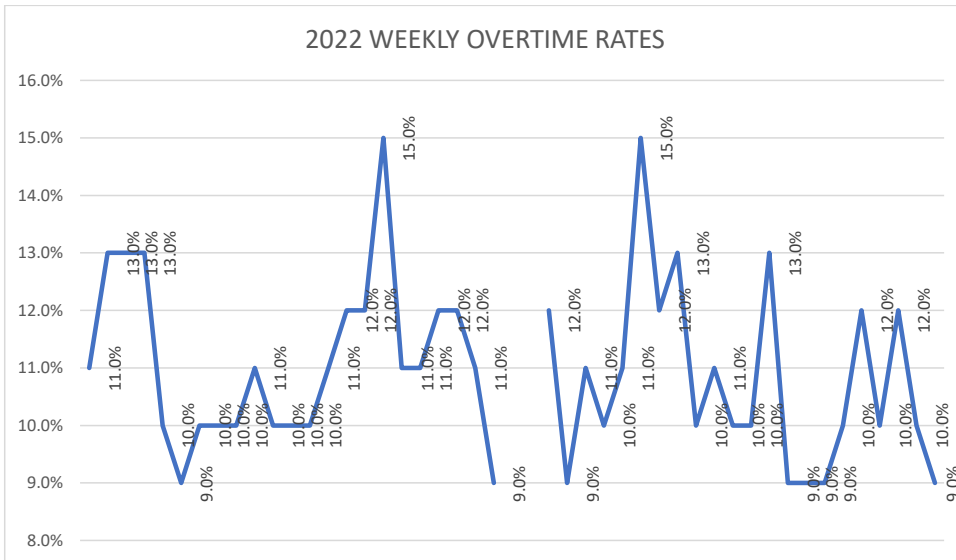
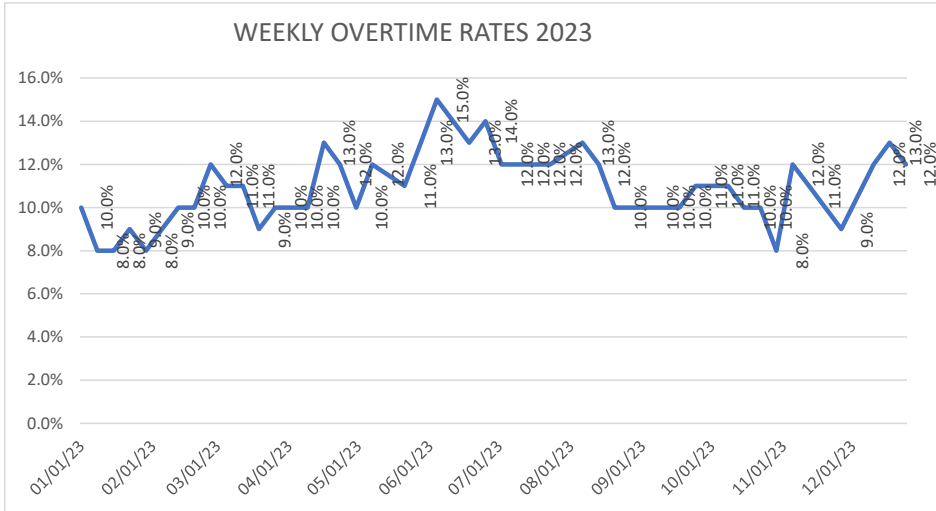
| | Total Hires | Total Terminations |
|------|-------------|--------------------|
| 2023 | 45 | 39 |
| 2022 | 27 | 29 |
| 2021 | 39 | 47 |
| 2020 | 31 | 36 |
| 2019 | 54 | 51 |
| 2018 | 65 | 51 |
| 2017 | 64 | 45 |
| 2016 | 48 | 48 |
| 2015 | 56 | 48 |

OVERTIME RATES

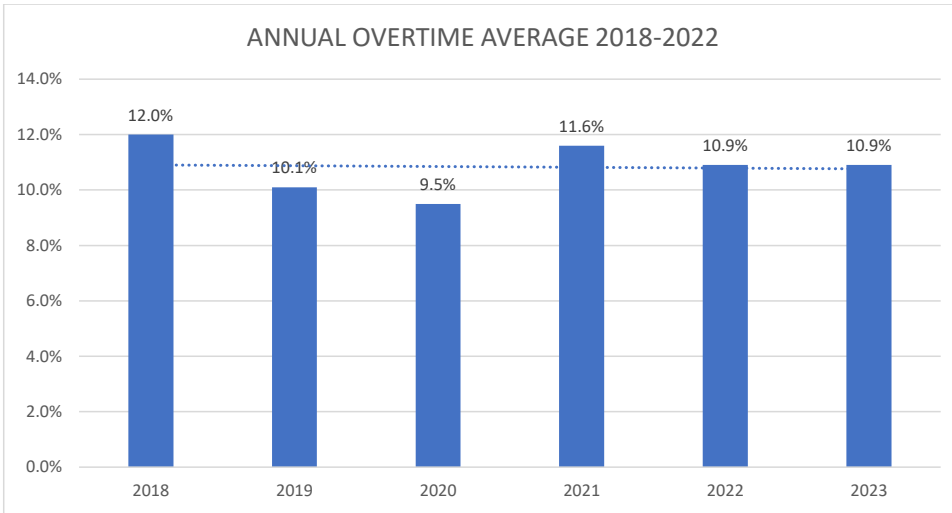
Overtime has been identified as the single most effective means of freeing financial resources for employee retention initiatives. Therefore, controlling and tracking overtime has been a major emphasis over the past year. The administrative budget anticipates a 11% weekly overtime rate. Every 1% under saves the agency approximately \$1000 a week. Overtime for the past year has

2023 TREND ANALYSIS

averaged 10.9%, for the second year in a row. This is down slightly from 11.6% in 2021. This compares to 9.5% in 2020 and 10.5 in 2019. During 2020-2022 overtime rates continue to mimic the unpredictability of the pandemic with erratic highs and lows. During 2023 overtime fluctuations seemed to be more affected by vacation schedules and outbreaks of flu, COVID and other viruses.

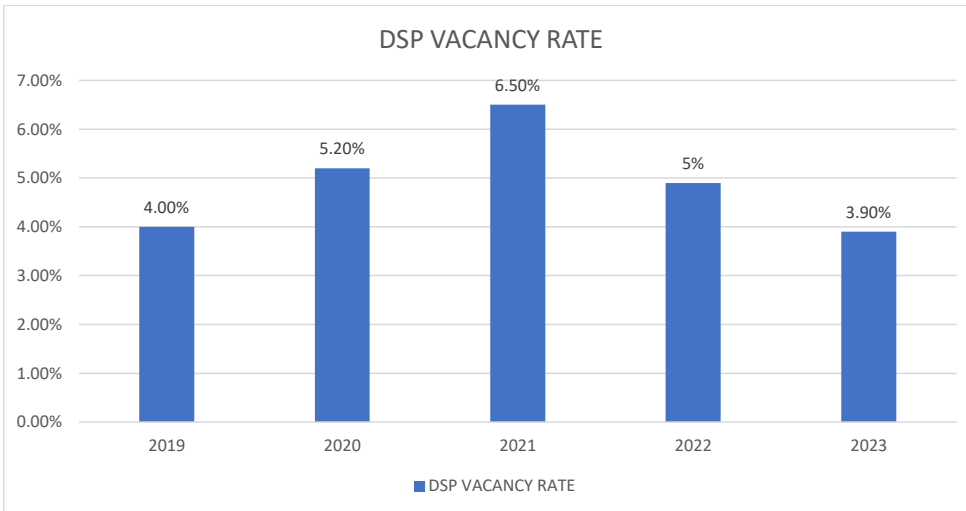


2023 TREND ANALYSIS



DSP VACANCY RATE

Unfilled DSP positions impact both quality of care and agency cost. The average vacancy rate for the past 12 months (2023) has been 3.9%. This is down from 4.9% in 2022. This represents a downward trend for the past 4 years, down from 6.5% in 2021. The DSP vacancy rate in 2021 was 6.5%, 5.2% in 2020 was 5.2% and 4% in 2019. The DSP vacancy rate was at the highest point during the pandemic in 2020 and 2021. The DSP vacancy rate has only been tracked as a metric since 2019. 2023 represented the lowest DSP vacancy rate in 5 years.



CREDENTIALLED EMPLOYEES

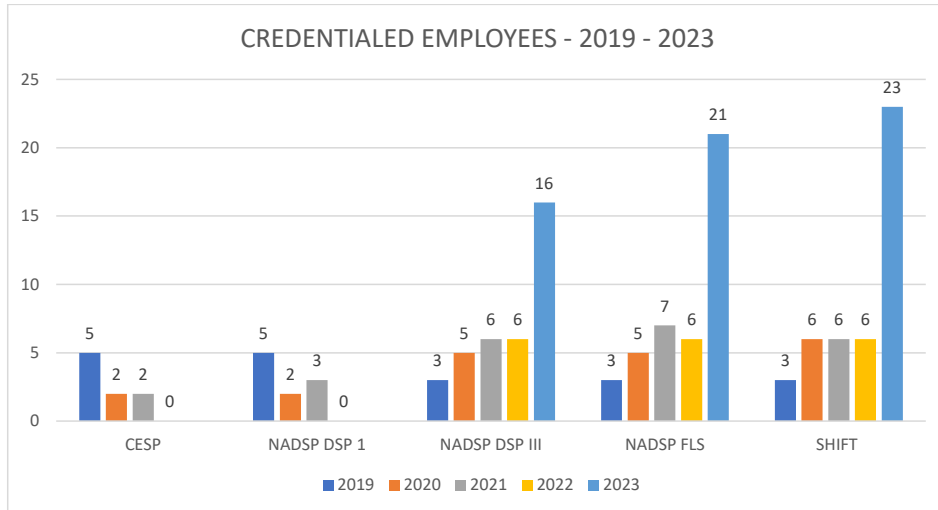
In July 2018 a DSP Career Ladder was introduced using the NADSP DSP credentialing program. Core Services will pay the NADSP cost of applying for credentials and upon receipt of each level, DSP Credentialed I, II and III the employee will receive a \$0.75/hour pay increase. A goal had previously been established for 10% of the DSP workforce to hold professional credentials by 2022. This goal has been achieved with 30% of employees holding professional credentials.

Twenty-one (21) employees have achieved an NADSP certification since July 2018. Of those 21 employees all but 4 remain employed indicating an 81% retention rate for employees obtaining credentials.

- NADSP DSP 1 – 6
- NADSP DSP 3 – 6
- NADSP FRONTLINE SUPERVISOR (FLS) – 6

In addition to the DSP NADSP professional credentialing, Core Services employees also have the opportunity to obtain Certified Employment Support Professional (CESP) credentials through Association of People Supporting Employment First (APSE) as well as SHIFT Certification. There are three (3) current employees who hold CESP certification and one employee preparing to sit for the exam.

There has been a significant increase in credentialed employees with over 28 employees holding professional certification or 28% of all employees or 18% of all DSP’s. During 2023 three (3) members of the management team continued as eBadge Reviewers. Each reviewer is assigned a subject and is responsible for reviewing eBadges for NADSP.

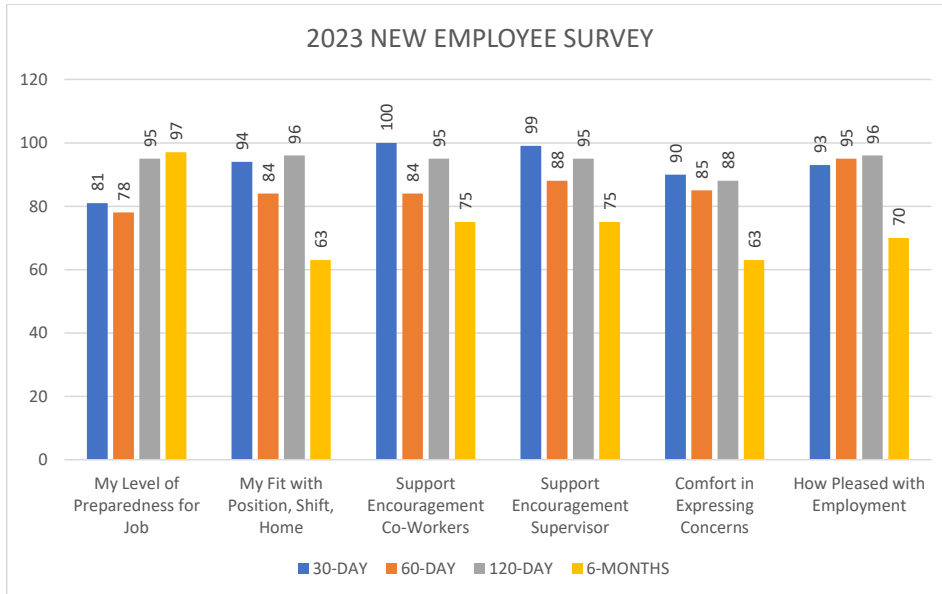


NEW HIRE SURVEY

During 2021 a New Hire Survey was adopted to assess the new hire employee experience. A link to take a New Hire Survey was sent by email to new hires on their 30, 60 and 120 day and 6-month anniversary. Respondents used a 100-point sliding scale to rate their response to each question with One (1) = “awful” and 100 = “Near Perfect”. There were 45 new DSP hired in 2023 and a total of 26 survey responses received.

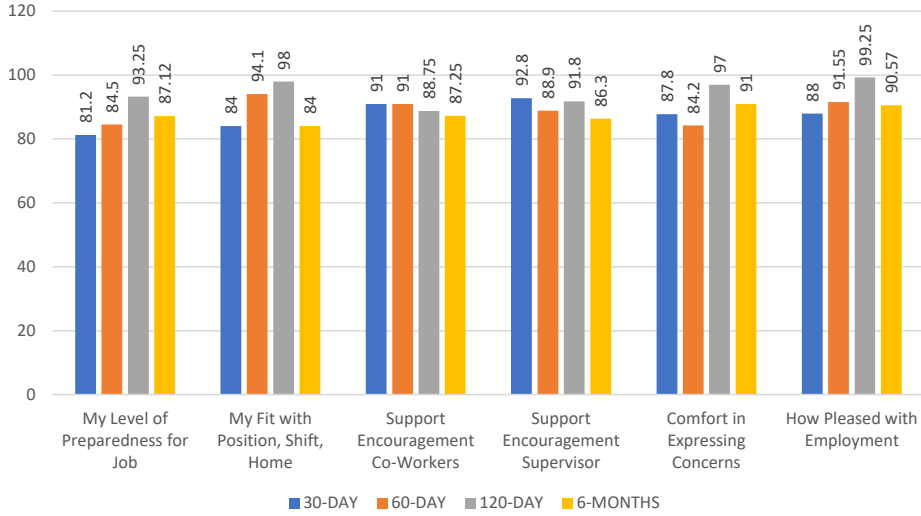
- 30-Day – 4 Responses
- 60-Day – 12 Responses
- 120-Day – 8 Responses
- 6-Month – 2 Responses

Although overall scores indicate there is a high level of satisfaction, however, there does seem to be a consistent decline in satisfaction at the 6-month mark

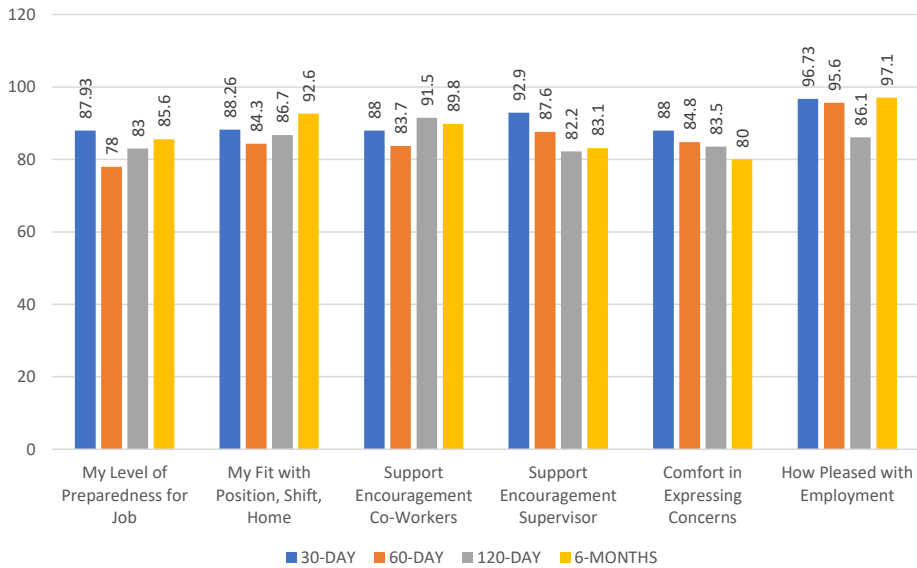


2023 TREND ANALYSIS

2022 NEW EMPLOYEE SURVEY



2021 NEW EMPLOYEE SURVEY



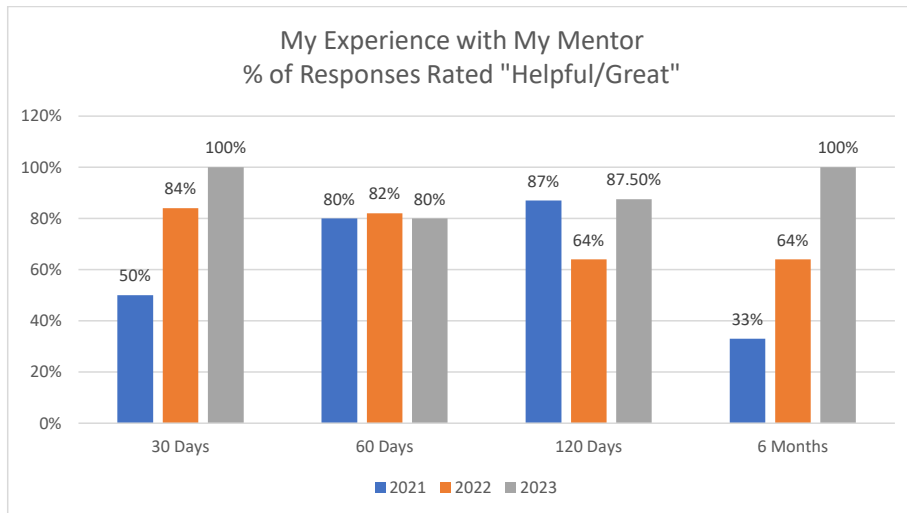
MENTOR PROGRAM

The DSP Mentor Program was started in February 2021 to combat the issue of high turnover during the first year of employment. All new Direct Support Professionals are assigned to an experienced DSP who meets with them weekly and provides support. The mentor program runs for one year.

Since inception 64 new hires have been enrolled in the program.

- There are 19 employees currently in the program.
- Of the 45 employees no longer enrolled in the mentor program
 - 17 employees (38%) successfully completed the program.
 - 14 of the 17 employees remain employed representing an 82.4% retention rate for employees successfully completing the program.
 - 28 employees (62%) left employment while enrolled in the mentor program

Employee experience surveys indicate that the mentor program is being well received and is helpful:



STAY SURVEY

In 2021 a STAY SURVEY was implemented using Survey Monkey as a platform. Instead of asking employees why they are leaving, the concept was to poll employees on their employment anniversary date to ask why they stay. 15 employees completed the survey in 2023. Down from 27 Employees who completed the survey during 2022. Comments were consistent over the past two years. The survey consists of 11 questions and in most instances revealed themes with common responses (as written) are recorded below:

1. **Why do you stay?** The people, making a difference, wonderful environment, excellent benefits, management, "love my work family"
2. **What do you like best?** The respect, never boring, helping people achieve goals, people, job coaching

2023 TREND ANALYSIS

- 3. What do you like least about your job?** Communication, cliquish office, seems like emphasis on catering to new employees, hard for night shift to attend events, gossip and drama, people not working together, doing notes!
- 4. If you ran the place what would you do differently?** More home inspections, better communication, make all management work in the homes, let staff attend house meetings virtually, make things fairer, same standard for everyone, ask people if they would like to help with events instead of just one person
- 5. Does management listen to and value your opinion?** 50% "YES", 36% "depends, 14% "NO".
- 6. What are the positive things about your job/manager/company that caused you to stay as long as you did?** Love the way you are made to feel important, the trust I have built with the people I support, management welcomes our input, job is rewarding, pay is good, positive company changes in recent years, benefits are good, management team cares
- 7. Comments or suggestions for improvement?** Better communication, treat all employees equally

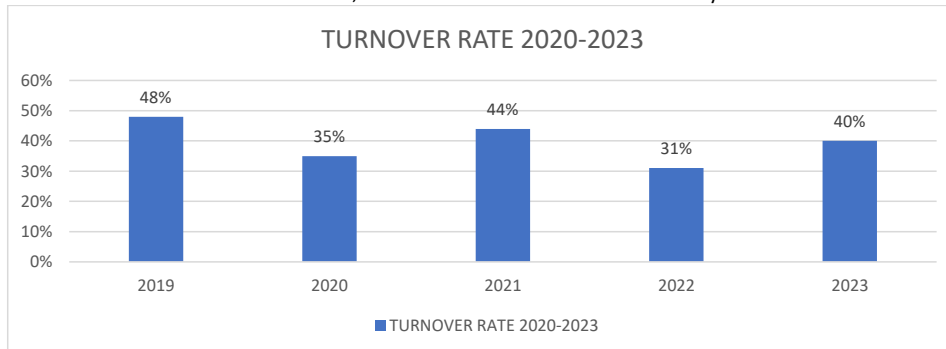
Results of the Stay Survey indicate many opportunities for improvement including improving communication and looking for ways for employees to be heard and share their opinions. There was a smaller number of respondents in 2023 than 2022. On the question does management value your opinions the answer yes declined from 62% in 2022 to 50% in 2023 indicating employees who do not feel listened to .

EMPLOYEE SAFETY

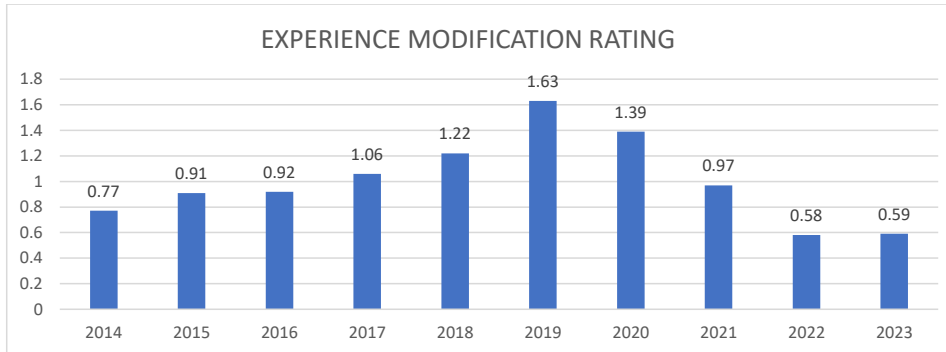
Many studies have shown that a quality workforce is closely tied to a safer workplace. Quality of the workforce is closely tied to DSP retention.

An Experience Modification Rating is a numerical safety rating that represents how safe your small business is compared with other businesses in your industry. Insurance companies use the rating to determine premium amounts. The standard Experience Modification Rating is 1, which just means that if your business is as safe as the average business, you'll get an EMR of 1. If you've had a few more safety incidents than most businesses in your industry, you'll get a number that's higher than 1. And if your small business has a spotless safety record, you'll get an EMR that's less than 1. Core Services was proud to achieve a 2023 EMR of .59.

2023 data indicates that Core Services, DSP Turnover Rate and EMR are closely correlated.



2023 TREND ANALYSIS



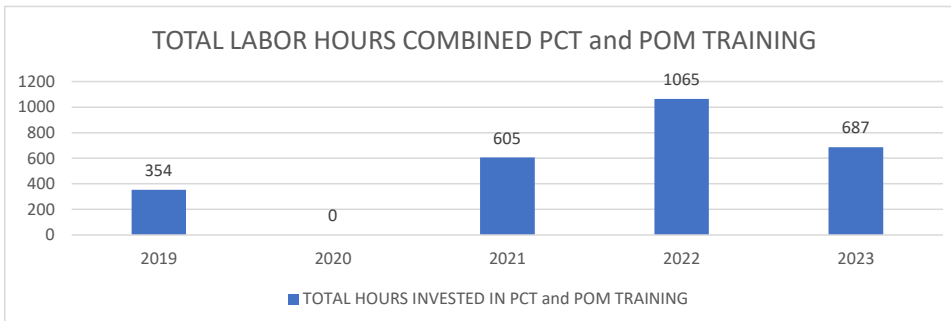
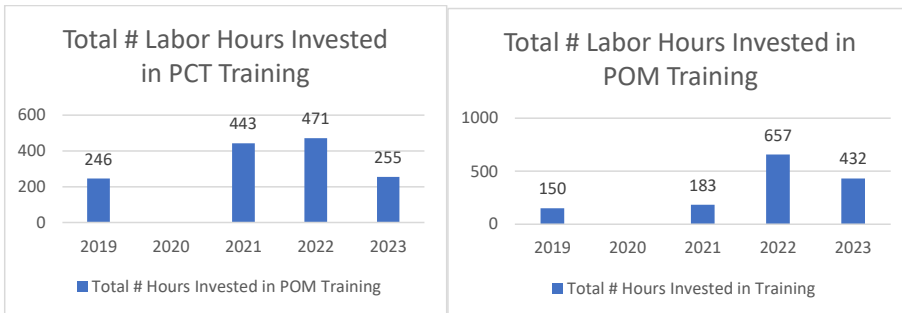
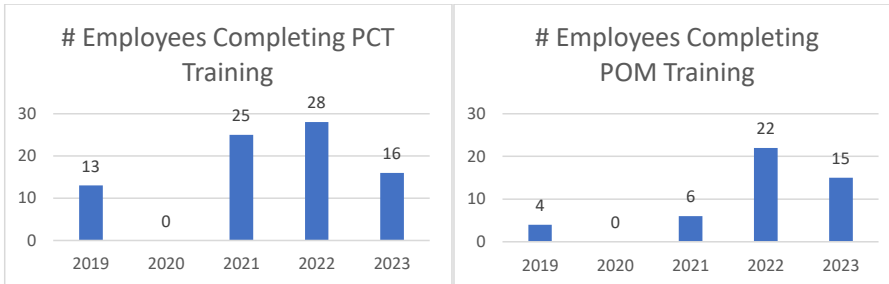
PCT AND POM TRAINING

Core Services has a goal of all employees completing Person-Centered Thinking and Personal Outcome Measures training. Management believes strongly that this training will promote a true person-centered philosophy that improves lives, and also will contribute to a higher DSP retention rate. This commitment to training comes at a significant cost to the agency. Each two-day Person-Centered Thinking class involves a minimum of 15 training hours for each staff in attendance. Each four-day Personal Outcome Measures class involves a minimum of 27 training hours for each staff in attendance. This does not take into account the additional cost of replacing these employees in the homes while they are attending class by another employee on overtime.

Core Services employees two (2) certified Person-Centered Thinking trainers and one (1) Personal Outcome Measures trainer. As of 12/31/2023, 94.4% of all employees have had Person-Centered Thinking training. This is up from 12/31/2022 when 92% of all employees had completed PCT training. 66% of all employees have completed Personal Outcome Measures Training. This is up significantly from 38% of all employees who had completed POM training as of 12/31/2022.

687 labor hours were invested in PCT/POM training in 2023 at an estimated cost of \$16,281. 1065 labor hours were invested in PCT/POM training in 2022 at an estimated cost of \$30,000+. The prediction is that this training contributes to the overall agency philosophy and retainment of a qualified workforce. 82% of employees completing POM training in 2022 and 75% of employees completing PCT training in 2022 remain employed. Data for 2021 reveals that 67% of people completing 4-day POM training and 52% of people completing PCT training remain employed.

2023 TREND ANALYSIS



In 2022 and 2023 a total of 59 employees completed Person-Centered Thinking Training. Of the 59 people trained on PCT, 43 employees are still employed or 73% of the employees who were trained on PCT.

During 2022 and 2023 a total of 46 people completed Personal Outcome Measures training. Of those 46 employees completing POM training 37 remain employed or 80%.

Agency turnover was 40% in 2023. The retention rate for employees completing POM and PCT training is substantially lower than the agency turnover rate of 40% making mandatory PCT and POM a retention effort that has promise.

EMPLOYEE OF THE MONTH

The employee of the month award is to recognize employees who consistently meet performance expectations. A winner is selected either through employee or management nominations. The winner receives a certificate, \$75 Gift Card and a metal plate with their name on the Employee of the Month plaque. This year’s winners included:

- January 2023 – Crystal Dawn
- February 2023 – Cindy Chapman
- March 2023 – Allison Austin
- April 2023 – Dylan Burlison
- May 2023 – Allen Selby
- June 2023 – Margaret Mayers-Worrell
- July 2023 – Kaleigh Hall
- August 2023 – Tami Teaster
- September 2023 – McKenzie Wiseman
- October 2023 – Wes Ripley
- November 2023 – Joni Jacobs
- December 2023 – Savannah Lovell

Of the 24 employees awarded Employee of the Month over the past two years (2022 and 2023), 23 employees remain employed, 96%. Employee of the Month continues to hold promise as a successful retention strategy.

CORE COUNCIL

The Core Council consists of tenured and newer Direct Support Professionals who meet without management to discuss pertinent issues. The Council governs its own membership and determines the meeting schedule. In 2023 the Council decided to meet quarterly, meeting on four occasions. The Core Council reviewed the following issues:

| ISSUE | ACTION TAKEN |
|---------------------------------------|---|
| Vehicle Maintenance Software with GPS | The Core Council advised against the company purchasing a vehicle maintenance software program because of the privacy issues associated with GPS tracking. |
| Integrated Quality Improvement Plan | Reviewed the 2023 IQIP and did not have recommendations |
| Documentation Incentive | Reviewed the documentation incentive policy. The Council recommended replacing the perfect attendance incentive with a documentation incentive in 2022. The Council made recommendations related to the policy that were implemented. |
| House Meetings – Virtual or In-Person | Recommended that house meetings remain in-person, monthly and always be specific to the house |

2023 TREND ANALYSIS

| | |
|-----------------------------|---|
| Employee Holiday Gift | Recommended Food City gift cards. \$100 FC Gift Cards were purchased. |
| COVID Policy | Reviewed changes to the agency COVID policy. Recommended that employees be required to COVID test with a trusted administrator. |
| DSP Performance Evaluations | Based on employee feedback, recommended a 5-point instead of 7-point scale. Changes implemented in November 2023 |
| Agency Calendar | Suggested a theme a month. |

My Concern Survey

Since 2020 Survey Monkey has been used to post a survey that is always open to employees. The survey link is on the Facebook Employee Page and the main page of PHS. The survey is a safe way for an employee to anonymously post a concern or ask a question. In 2023 there were 20 responses with various questions, statements and concerns. In 2022 there were 13 surveys received. There were 16 submissions in 2021.

Suggestion/Concern

Confused about the hours for shift differential

GPS in Company Cars

People not being paired with compatible peers during community participation

Will we have a semi-annual PTO buy-out

Offer more PTO (multiple responses)

Perception that day activities were being micro-managed by supervisors

Newer people supported by Core do not have canvas prints in the office

Follow Up

Informational email sent agency wide explaining the shift differential

Multiple people heard the company had placed GPS trackers on all vehicles and were upset by this. An informational email was sent out explaining that management had followed the recommendation of the Core Council to not proceed with GPS

Discussed during PERTS meeting

Informational email about the two bi-annual PTO buy-outs

PTO rates doubled for new employees in 2023

Discussed at PERTS meeting

Ordered canvas prints for everyone!

2023 TREND ANALYSIS

| | |
|---|--|
| Can we purchase choking devices for the homes | Researched the devices that do not have great reviews. Will not consider at this time |
| Don't like combining houses for monthly house meetings. Should be house specific | Reviewed by Core Council. See recommendations above |
| Have company events later in the day so people who hold jobs can attend | Discussed at PERTS. Most people supported are winding down by late afternoon and this is not the optimal time for an event. Will look at scheduling events in the evening. |
| Complaint about office staff not interacting with everyone at office events – (office staff congregating) | Asked everyone to make sure they mingle |

Pre-Employment Transition Services

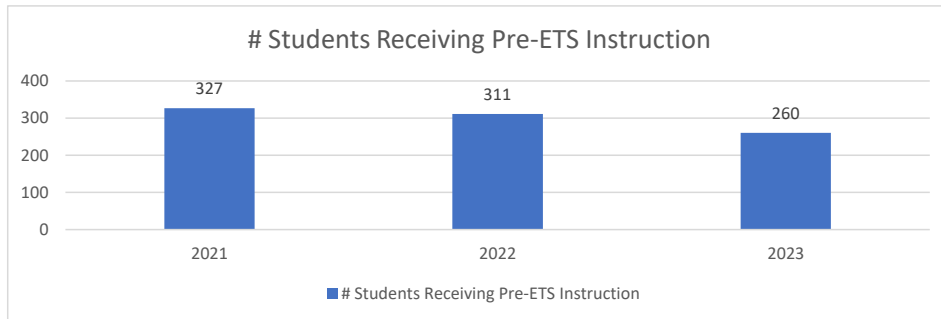
In August 2019 Core Services received a grant to provide Pre-ETS instruction to students ages 14-22 and services began in October 2019. 2023 represented the fourth year in the grant.

In 2023 instruction occurred in 20 schools within 8 counties (Greene, Hamblen, Cocke, Jefferson, Washington, Carter, Unicoi, Sullivan. 260 (nonduplicated) students were provided instruction.

In 2022 instruction occurred in 21 schools within 8 counties. 311 students were provided instruction.

On 12/31/2023 the program had 6 part-time instructors and 1 coordinator. Two instructors resigned in 2023 and three instructors were hired.

Since inception of the program in 2019, 19 instructors have been hired with only 31% retention. Hours can be rather erratic such as only doing a class once every two weeks for an hour. January 1, 2024 the instructor pay rate was increased from \$20/hour to \$22/hour to hopefully make this part-time work more attractive to retired educators.



Medicaid Alternative Pathways

During 2023 Core Services became a TN DIDD MAPs provider. MAPs is a new “program that will set people with intellectual and developmental disabilities on a path to learn skills to help them work, live

2023 TREND ANALYSIS

independently, learn about their neighborhoods, and find hobbies that interest them. MAPs service give people in the program the tools, technology, and support they need to meet the goal they set for themselves. This program is available to anyone with an I/DD diagnosis who has graduated high school or will graduate within three years. MAPs participants cannot be enrolled in another long term services and supports program including ECF CHOICES, CHOICES, the Katie Beckett Program, or 1915(c) Waivers.

During late 2023 Core Services accepted three recent graduates of the ETSU ACCESS program.

ACCESS ETSU

In 2023 Core Services established an agreement with the ETSU ACCESS program to provide consultation on community integration and employment. Through this arrangement Core Services will provide two employees to work exclusively with ACCESS students in developing graduation plans that involve independence and employment.

Motor Pool

For 2023, the agency was fortunate to be able to purchase two new vehicles: a 2023 Nissan Rogue and a 2023 Honda CRV Hybrid. Our overall fleet continues to age but we are able to put new vehicles into the fleet each year, The majority of the fleet averages around a 150,000 miles total mileage with the average age of 2016. This year’s maintenance consisted mainly of routine repairs such as brakes, tires and oil changes with no major repairs. Two vehicles were involved in car accidents. Both resulted in no injuries and slight cosmetic damage.

| | | | | |
|------|----------|--------|---------------|--------------|
| 2009 | Black | Dodge | Grand Caravan | |
| 2007 | Brown | Honda | Accord | Admin |
| 2010 | Silver | Dodge | Grand Caravan | 56 |
| 2010 | White | Toyota | Corolla | 66 |
| 2010 | Red | Toyota | Prius | 40 |
| 2012 | Silver | Honda | Civic | 40 |
| 2012 | Silver | Honda | CRV | 42 |
| 2012 | Brown | Honda | CRV | 44 |
| 2012 | Blue | Nissan | Versa | Admin |
| 2013 | Charcoal | Dodge | Caravan SV | 42 |
| 2013 | Brown | Honda | CRV | 54 |
| 2013 | Silver | Honda | Pilot | Admin |
| 2014 | Blue | Nissan | Versa | Admin |
| 2014 | Silver | Toyota | Camry | 76 |
| 2015 | Metallic | Nissan | Quest | 60 |
| 2015 | Silver | Nissan | Quest | 74 |
| 2015 | White | Toyota | Corolla | 56 |
| 2016 | Charcoal | Dodge | Caravan | 60 |
| 2016 | Charcoal | Dodge | Caravan | 58 |
| 2016 | White | Dodge | Caravan | 47 |
| 2016 | White | Dodge | Caravan | 71 |
| 2016 | Brown | Nissan | Versa | 9A |

2023 TREND ANALYSIS

| | | | | |
|------|--------|--------|-------------|--------------|
| 2016 | Gray | Toyota | Camry | 37 |
| 2016 | White | Toyota | Camry | 62 |
| 2016 | Silver | Toyota | Tacoma | Admin |
| 2017 | Black | Toyota | Camry | 47 |
| 2023 | White | Nissan | Roque Sport | Admin |
| 2022 | Silver | Nissan | Roque Sport | 54 |

\$61,453 was spent on new vehicles in 2022. \$29,470 was spent on vehicle maintenance and registration.

Advocacy

In 2023 all levels of the agency participated in advocacy efforts.

Two people supported became certified Self-Advocate Mentors through TN DIDD Advocates in Motion training. Advocacy in Motion (AiM) seeks to transform lives and cultivate independence through education, advocacy and employment training for individuals with intellectual and developmental disabilities in our community. Joe and Alex will qualify for a payment of \$50 each time they assist in teaching an AiMs Class.

When the National Alliance of Direct Support Professionals, NADSP reached out seeking a DSP to testify in Washington before the Presidents Committee on Person’s with Disabilities with Joe MacBeth, CEO of NADSP, Core Services DSP Victoria Afa rose to the challenge. Mr. MacBeth and Ms. Afa pleaded the case of national Department of Labor classification for the job title of Direct Support Professional.

TN DIDD established a DSP Workforce Advisory Committee and asked for DSPs to serve on the Committee. Core Services DSP Carolyn Osborne attended meetings throughout the year and became a spokesperson for the group. She presented the Committees work to TN DIDD Commissioner Brad Turner at a special meeting of the workgroup.

CQL frequently directs agencies from across the nation to reach out to Core Services to discuss and share best practices. In addition, agencies that have listened to Core Services presentations at conferences also frequently reach out. In 2023, the agency hosted provider agencies from Indiana, Iowa, Ohio, Tennessee and New York at Core Services for discussions on best practices. Hosting other agencies to discuss best practices is a best practice. Each encounter provided insight into the successful practices of other agencies. In addition, members of management participated on various state committees and councils including the ETSU ACCESS Advisory Board, TN DIDD Regional Human Rights Committee, Vanderbilt Consortium LEND (Leadership Education on Neurodevelopmental and Related Disabilities) Advisory Council, TN DIDD Investigation Review Team and the TENNCare and TN DIDD System Leadership Transformation Group.

Awards

During 2023 Direct Support Professionals and people supported won the following awards:

- April 2023 - ANCOR Tennessee DSP of the Year – Person-Centered Supports – Keith Buchanan
- October 2023 - Tech-First SHIFT– Dustin A. Wright Technology Award- Pam Weaver

- November 2023 – Tennessee Department of Intellectual and Developmental Disabilities Trail Blazer Awards – Anita English and Brad Presnell

Certifications

Core Services of Northeast Tennessee has maintained the following certifications:

- CQL Person Centered Excellence with Distinction
- TN DIDD Person Centered Organization
- Tech First SHIFT Certification

During 2023 two people supported completed AiMs Self-Advocate Mentor Training. The agency completed requirements for a second round of SHIFT First Technology Certification.

- November 2023 – Advocacy in Motion, AiMs Self-Advocate Mentor Training – Joe Watterson and Alex Head
- November 2023 – Tech First SHIFT Certification

Presentations

- April 2023 – ANCOR – Changing Company Culture – Nick Filarelli and Susan Arwood
- April 2023 – National Alliance for Direct Support Professionals presentation to the Presidents Committee of Persons with Disabilities. Victoria Afa testified with NADSP CEO Joe McBeth.
- May 2023 – Tennessee Disability Megaconference - Nick Filarelli
- May 2023 – NADSP Day on the Hill – Glenda Gonzalez and Allen Selby
- August 2023 – Arkansas Provider Association – Forget About Great Services – Nick Filarelli
- August 2023 – Tennessee First Lady Maria Lee visit to Core Services
- October 2023 – Ohio Provider Association – Changing Company Culture – Nick Filarelli and Susan Arwood
- December 2023 – Tennessee System Transformation Leadership Group – Changing Company Culture – Susan Arwood

Webinars

- January 2023 - University of Tennessee, Center for Literacy and Vocational Rehabilitation Collaboration Webinar – Susan Arwood
- March 2023 – NCAPP Dignity of Risk Webinar – Susan Arwood and Carl Lipford
- November 2023 – Tennessee System Leadership Transformation Group- Changing Company Culture – Susan Arwood

Consultations

- March 2023 – New York Foundling Agency
- April 2023 – Pathfinders – Iowa
- May 2023 – The ARC of LeGrange Indiana
- October 2023 – MillarRich Agency
- October 2023 – New York Foundling Agency

- December 2023 - Comcare

Conference Attendance

- May 2023 – Nashville – Tennessee Disability Megaconference (10)
- September 2023 – Columbus, OH- APSE Conference – (4)
- April 2023 – ANCOR Conference – Chicago, Ill – (8)
- October 2023 – St. Louis, MI - Person Centered Gathering (2)
- November 2023 – Memphis, TN - NAQ Conference (5)
- September 2023 – Pittsburgh, PA – NADSP Conference (4)
- November 2023 – Murfreesboro, TN – TN DIDD Tech Conference (10)

Board and Council Membership

- Agency Membership:
 - TNCO
 - ANCOR
 - NADSP
 - The ARC of Tennessee
 - Open Future Learning
 - SHIFT
- Other
 - Vanderbilt Consortium LEND Advisory Council
 - ACCESS ETSU Advisory Board
 - TN DIDD Investigation Review Committee
 - TN DIDD East Regional Human Rights Committee
 - TN DIDD Accreditation Workgroup
 - TN DIDD Workforce Development and Value Based Payment Workstream WFD/VBP
 - TN DIDD DSP Advisory Group
 - NADSP e-Badge Reviewers

Beneficial Change Ideas

- **Employment**

The number of people employed has dropped 31% since the pandemic. The 13 people who are working are employed by 4 major employers. Goals for 2024 include:

- Explore the use of VR for career exploration
- Formalize an annual career exploration process for everyone supported
- Weekly employment meetings
- Promote CESP credentials for job coaches – Goal of 3 credentialed a year
- Formal job training/orientation that goes beyond RELIAS. Establish agency specific job coach orientation/training to promote agency values and performance expectations. Talk about employer and consumer complaints we have received.

- **Medication Variances**

- Develop an annual process to do medication self-administration assessments for all people who participate in self-administration
- Develop strategy for better awareness of wrong person /wrong med errors

- **Enabling Technology**

- Create position dedicated to the promotion of technology first support model
- Explore the use of VR for onboarding, such as a virtual tour of home and people.
- Explore the use of VR for career exploration
- Include annual technology assessments in pre-planning activities
- Use of VR for adaptive keys, zippers
- Technology upgrade plan for agency

- **Stakeholders**

- Adhere to a communication protocol with families to assure that we are checking in with them at a frequency they desire
- Start a Family Council that meets quarterly
- Make sure family and people supported are educated on concern resolution procedures.

- **Agency**

- Continue communication classes to address co-worker relationships in the home
- Management retreat and team building. How do we improve the success rate of new administrative team members?
 - How to we rid management team of cliques or perception of cliquish
- Committee to evaluate referrals to the agency comprised of DSP, Person Supported, and management. Who do we want to accept? Need more diversity in age and funding sources
- Work on legal limbo list – POA, etc. Goal of successful resolution for 1 person a year
- Nutrition software for homes with the most nutritional concerns?
- Focus group of mentee's - people who have had a mentor
- Quarterly meeting of mentors to keep them involved and motivated
- Send out regular reminders that people can plan events

- Explore retention ideas for Pre-ETS Instructors
- **Personal Outcome Measures**
 - Develop more opportunities for people to learn about rights through Focus Groups and other activities
 - Look for ways to create educational opportunities on abuse, neglect, exploitation and mistreatment.
 - Talk to people more often about where they live and with whom they live to determine what changes are needed
- **Basic Assurance Monitoring**
 - Develop ongoing training to teach people how to access emergency medical services
 - Continue to refine the process of teaching people about their medical conditions, choosing medical providers and medications so they can be active players in their own healthcare decisions.
 - Continue Basic Assurances reviews at house meetings twice a year
 - Continue education with staff to avoid “house rules” and other practices that do not promote rights.
 - Organize POLICY COMMITTEE comprised of family, people supported, DSP and admin representatives to meet quarterly and review polices.
- **Falls**
 - Revisit and reevaluate fall prevention plan
 - Assure that all employees who work in homes with the highest fall risks have had all available training on fall prevention
- **Workforce**
 - Career Ladder Support Group to keep people moving, lead by a DSP mentor. Improve annual completion rate. Track!
 - Continue to look for ways to include people supported in interviews
 - Include people supported as trainers during orientation
 - Onboarding procedures seem to be creating the desired effect on trends such as hires, terminations, employee tenure and overtime. Results of new hire surveys indicates that check-in’s with new employees should perhaps increase at the 120-day and 6-month marks where there is a noted decrease in how employees respond to the question “how pleased are you with your employment?”
 - Support people to be involved in advocacy efforts on local, state and national level
 - Develop and implement agency succession plan