



# Annual Report

# 2013

## Background

Caramore Community, a 501 C-3, not-for-profit has been in existence since 1974.

Caramore Community currently employs 11 full-time staff members, 13 part-time staff members, and additional part-time production employees. Caramore Community serves the adult citizens of North Carolina that have been diagnosed with Severe and Persistent Mental Illness (SPMI) by providing vocational and residential treatment in a structured and supportive environment. The need to provide supportive residential and vocational services for this population is ever more important at this time as funding and employment opportunities have become increasingly more limited. Caramore served 130 clients over the 12/13 fiscal year, including visitors.

The “typical” Caramore client is a “white male from the Piedmont region, with a diagnosis of a Thought/Psychotic Disorder, who was referred by a psychiatric hospital.” However, Caramore takes into consideration all of the unique needs of individual clients, as well as the services they require. Caramore clients tend to be diagnosed with Schizophrenia (23%) and Schizoaffective Disorder (28%). (71%) at the time of admission had no supplemental or disability monies being awarded from the government. Most clients are from the combined areas of the Triangle, Triad, and greater Piedmont, and have a high school degree.

Fiscal year 2012/2013, Caramore did very well. The following outcomes to be promoted and addressed were developed from the 2012 – 2013 OMR:

### OUTCOMES TO PROMOTE

- Caramore Served a Total of (90) Clients in 12/13, up from (75) the previous year
- Caramore Served a Total of (130 Clients) including visitors
- This year’s VR Major Benefit Status rate (clients maintaining community employment for at least 30 days) was (85%) this year, a decrease from last year’s (93%), but still up from (81%) three years ago.
- Of the clients responding to surveys, (100%) of Residential Clients indicated satisfaction with living in the apartments.
- Caraclean experienced a (\$12,795) increase in revenue

- Caramore clients as a whole experience an increase in savings over 12/13 fiscal year, with all clients on average experiencing a savings increase of (\$375)
- Caramore clients admitted during the fiscal year experienced an average saving accumulation of (\$921)
- Of the clients responding to surveys, (97%) believed their life improved as a result of their participation in Caramore
- (95%) of Clients did not require an inpatient psychiatric hospitalization
- Of the clients responding to surveys, (100%) expressed satisfaction with job placement services
- Caramore's successful closures achieved was (64%), and the State Average was (21%) with Caramore at (23) clients served, and the State Average at (14) clients served
- Caramore's percentage of clients achieving 26 closures as contracted was (100%), and the State Average was (48%)
- Caramore's successful MB achievement rate was (75%) and the State Average was at (32%) with Caramore at 27 clients served, and the State Average at (21) clients
- Caramore's percentage of clients achieving MB achievement as contracted was (100%), and the State Average was (69%)
- Caramore did markedly better with MBs and 26 closures than the State average, with (100%) of its clients being the most-severely disabled, while the other providers were more likely to serve those not as severely disabled (63%)

#### OUTCOMES TO ADDRESS

- (37%) of all clients served have a criminal history, making job attainment more difficult
- Caraflora revenues decreased by (\$4,968)
- Admissions decreased from (29) to (28)
- The percentage of Caramore clients that achieved successful VR-determined closure status was (62%), or more accurately (73%) as some are still slated for this status. Last year the percentage of Caramore clients that achieved successful VR-determined closure status was (83%), meaning there was a (10%) decrease in this outcome this year.

Challenges over the 2014 calendar year continue to be related to the expansion of the Dartmouth Supported Employment model, as well as increased budget cuts, and the adjustment of service delivery to match the services changes based on stakeholder requirements. Caramore is currently funded by Vocational Rehabilitation as well as Cardinal Innovations, and seeks stakeholder satisfaction for service delivery without creating too many redundancies. The challenge of satisfying the requirements of multiple stakeholders poses difficulties for staff time and Caramore resources.

## Vision and Mission

**Vision** – The attainment of the highest possible quality of life through successful productive employment and independent community living in a fulfilled, positive, community environment.

**Mission** – It is the mission of Caramore Community, Inc. to provide normalized, clinically coordinated, transitional, community-based 24-hour employment and independent living training services to those adult citizens of the State of North Carolina with severe and persistent mental illness

## Values

- Equality
- Independence
- Inclusiveness
- Social Justice
- Commitment to the public good
- Accountability to the public
- Open communication
- Positive work ethic
- Ownership of responsibilities
- Teamwork
- Loyalty
- Respect for diversity
- Respect for the worth of individuals
- Respect for the dignity of individuals
- Respect for people
- Respect for property
- Respect for authority
- Transparency
- Integrity
- Honesty
- Commitment to safety
- Commitment to health
- Commitment to quality
- Commitment to excellence

## Championing the Cause

Caramore Community's current message comes in the following package, also known as the **WISE** structure:

- **Work** - Our participants immediately start receiving paid work that helps them develop the jobs skills necessary to receiving and maintaining community employment. Once our participants are ready, our job support staff will work with them to develop/enhance their resume, fill out applications, and interview effectively. Most importantly, we will get our participants a community job. Our job is not complete once our participants are hired...we continue to help them navigate the challenges of community employment, and offer support until no longer warranted.
- **Independence** - The participants that are receiving our residential services, move into a supervised apartment that allows them the opportunity to live in a de-stigmatized, integrative environment. While residing in a Caramore apartment, our participants will save money, buy their groceries, monitor their medications, maintain the cleanliness of their home, and develop or revisit those daily skills necessary to living independently. With the help of Caramore's budgeting and finance counseling, our participants will eventually move out into their own living situation with greater experience in dealing with the affairs of residential responsibility.
- **Structure** - Early on in the program, Caramore participants have a very structured day, which entails working Monday - Friday from 8:15am to 3:15pm. Our clients receive transportation to the grocery store, to mental health and physical appointments, and in some cases to their community job when they gain competitive employment. We conduct daily room inspections, hold our clients' medications, keep up with their appointments, offer cooking and computer classes, provide nutritional counsel, and assist with the overall coordination of their care. As our participants move through the program, the structure relaxes so as to give them more responsibility, ownership, and empowerment.
- **Engagement** - Every Caramore participant is different, and every Caramore participant requires different attention. Soon after admission, Caramore participants establish vocational and residential goals to improve upon. Instead of relying on our participants to work through their challenges on their own, we actively engage them with their goals, and work to help them realize their potential. We are a mirror of accountability meant to help our participants learn to weather the practical challenges of life.

## Goals and Priorities This Year

- Achieve increased contracted VR outcomes
- Evidence increasing documentation demands for multiple stakeholders
- Foster and nurture the transitional nature of Caramore services to both staff and clients by delineating steps through the program
- Serve more applicants, all-the-while maintaining quality, mission-based services that are not too far of a departure from the current service array
- Update technology to streamline processes
- Provide additional employment support for the VR-funded job development and job coaching services so that more clients can get more community jobs
- Maintain MCO-funded employment services for post-26 clients
- Research and pursue alternative funding streams

## Specific Objectives

Objective 1	Decrease reliance on outpatient clinicians	Date Created	1/31/13
Strategies		Action Steps	
Encourage and support the educational growth of staff members.		Speak with supervisors about the program's stance towards educational improvement of staff	
Provide educational opportunities within Caramore to enhance staff growth		Include mental health proficiency trainings for in-service	

Objective 2	Balance the increased need to satisfy funders with the limited resources of staff and time	Date Created	1/31/13
Strategies		Action Steps	
Evidence appropriate service delivery for funders		Prepare for and achieve compliance with audits	
Adjust staff responsibilities to fill in gaps of insufficiently used time		Assess staff member's current use of time management, and work with supervisors to address gaps	
Support and retain staff members as their responsibilities increase		Provide stress management assessment and training	

Objective 3	Increase opportunities for competitive employment for Caramore participants that have criminal histories	Date Created	1/31/12
Strategies		Action Steps	
Partner with an employer that is willing to hire participants with a criminal history		Develop marketing brochures, encourage board relationships with employers, and work with the chamber of commerce	
Increase job supports		Hire an additional job coach, utilize available staff time, or recruit volunteers to aid in finding employment for participants with criminal histories	

Objective 4	Increase staff comprehension and support of necessitated program changes to satisfy the requirements of funders	Date Created	1/31/13
Strategies		Action Steps	
Provide assistance in understanding the cultural shift		In-service training(s) and supervisor support	

Objective 5	Clarify relationship with UNC Center for Excellence STEP	Date Created	1/31/13
Strategies		Action Steps	
Pursue a partnership with UNC		Meet with UNC stakeholders to determine business strategy, and possibly seek partnership	
Define and establish boundaries		Meet with UNC stakeholders to determine their business strategy, and if competitive with Caramore, focus on uniqueness and delineate differences	

Objective 6	Develop and maintain SE/LTVS services, while maintaining the core identity and mission of Caramore Community	Date Created	1/31/13
Strategies		Action Steps	
Fulfill basic service requirements to continue SE/LTVS service delivery		Staff the service, bill for service provision, and maintain compliance	
Continue to review SE/LTVS service delivery and changes		Review service changes, and flag dis-correspondence with Caramore mission for review	

Objective 7	Maintain and market Caramore's housing so that other service providers do not monopolize supervised housing	Date Created	1/31/13
Strategies		Action Steps	
Market Caramore's housing		Maintain website, attend community forums, and foster relationship with MCO and VR	
Stay abreast of competitive service providers looking to provide housing		Research service provider changes	

Objective 8	Market and bolster the uniqueness of Caramore so that there is clear distinction of its need for this population, especially with the growth of other providers	Date Created	1/31/13
Strategies		Action Steps	
Flesh out the core components of organizations identity		Management staff meetings about organization's identity development	
Market Caramore program's uniqueness		Maintain website and update marketing material	

Objective 9	Achieve increased VR-contracted outcomes	Date Created	1/31/14
Strategies		Action Steps	
Expedite admissions process, and visit more individuals		Lessen paperwork barriers to clients in preparation for visit, but increase assessment scrutiny before getting records	
Increase job supports so that more clients can get and maintain jobs		Create Ted's targets as a means of tracking the push towards outcomes, and hire an addition job coach	
Improve support services to aid in job retention		Provide transportation to/from employers for client starting a community job, and increased medication monitoring and reconciliation to ensure greater adherence to medications	

Objective 10	Foster and nurture the transitional nature of Caramore services to both staff and clients by delineating steps through the program	Date Created	1/31/14
Strategies		Action Steps	
Impart the mission drift to staff		Have supervisors meet with support staff to send the same message about the need to return to the mission of transition	
Educate clients on the provision of services at Caramore, and help support their movement towards graduation in a timely manner		Educate clients on transitional nature of Caramore at admissions, and at milestones in their movement through the program	

Objective 11	Update technology to streamline processes	Date Created	1/31/14
Strategies		Action Steps	
Refocus on technology plan		Upgrade computers, upgrade smart phones, and purchase a new server	
Purchase a database to make note taking and record keeping more efficient		Research databases and EHR. Update server to accommodate new database	

Objective 12	Attain additional grant funding, or alternative income sources	Date Created	1/31/12
Strategies		Action Steps	
Apply for and receive grants to encourage the mission of Caramore		Research grants that are vocational and housing related, apply for grants, and implement systems for tracking earmarked monies	
Add another service to current contract with MCO		Research current service array for provider network, identify service needs, and pursue service(s) that can expand funding diversity	

Objective 13	More closely monitor strategic activities because of significant system changes	Date Created	1/31/14
Strategies		Action Steps	
Discuss strategic initiatives more frequently throughout the year		Review strategic plan at least twice yearly to assess progress	

## Management Plan

Caramore’s management plan informs the development of the annual report, as the annual report is generated from the strategic plan.

Caramore’s strategic plan is reviewed on at least an annual basis, but is referred to throughout the year, and is updated as needed. Management team reviews the content of the plan as necessary to ensure that objectives are being met, and to make any adjustments. Caramore management staff must remain cognizant of the current regulatory, legislative, and business/service environment when developing its strategic plan. Caramore’s strategic plan takes into consideration the financial position of the organization at the time the plan was written (budget vs. actual), and the financial position as anticipated in the future (operating budget). The following Quality Program Reports contribute toward Caramore’s ongoing strategic planning: Outcomes Management Report, Quality Improvement of Business Performance, Risk Management Annual Review, Accessibility Status Report, Annual Customer Input Report, Annual Review of Incident Reports and the Technology and System Plan.