

**Association of Rehabilitation Facilities**



# **Annual Report**

**2016 - 2017**

**(October 1, 2016 - September 30, 2017)**

**Florida Association of Rehabilitation Facilities  
2475 Apalachee Parkway, Suite 205  
Tallahassee, Florida 32301**

**[www.floridaarf.org](http://www.floridaarf.org)**

***Florida ARF promotes the interests of individuals with disabilities by acting as a public policy change agent and promotes and serves the interests of community human service provider organizations.***

**Sixty-nine (69) Regular Members:**

Community Based Waiver	88%
Residential/Long Term Care	76%
Employment	72%
RESPECT Employment Centers	31%

**Five (5) Corporate Partners:**

Florida Insurance Trust; Park Shore Drug;  
Scioto; SourceAmerica; Therap

**Fourteen (14) Professional Members:**

Arlington Heritage Group; Employee Benefit Specialists; Evergreen Life Services (2); Moore Stephens Lovelace PA (3); Reingruber & Company, P.A.; Richards, Mitchell & Company, PA (3); Les Leech; Tina Philips; Peggy Wall

**We are a Voice for Community Agencies who are meeting the needs of individuals with disabilities as:**

Private Providers (Profit & Nonprofit)  
Goodwill Industries  
United Cerebral Palsy Affiliates  
Arc Chapters  
RESPECT Employment Centers  
Residential Programs  
Home and Community Based Services  
Community Rehabilitation Agencies (VR)  
Charter Schools  
Faith-based Programs  
ICF/IID Facilities  
Community Employment Programs  
In Home Services and Supports Providers  
Mental Health Agencies Providing  
Employment Supports



## **FY 2016-17 Board of Directors**

### **Executive Committee**

Shirley A. Balogh, Chair  
Jon Fisher, Vice Chair  
Michele Barnes, Secretary  
Phillip Hall, Treasurer  
Clint Bower, Past Chair  
Joe Aniello, Parliamentarian

### **Other Members**

Michelle Cherry, Steven DeVane, Diana Flenard, John Gill,  
Karen Higgins, Kevin Johnson, Jon May, Amar Patel, Melissa Walker, Dr. Sherry  
White, Zach Wray

### **Parent Members**

Gloria Wetherington

***We Are Member Driven!***

# Florida ARF Provides

## Industry Leadership

- Service delivery for persons with disabilities
- Appropriations funding
- Public policy reform
- Medicaid Policy – Federal & State
- Program Compliance
- Wage and Hour
- Employment Services and Supports
- Residential Care
- Provider workforce Issues



## Networking Opportunities

- Membership meetings
- Peer questions and answers
- Linkages
- Training
- Teleconferences and webinars
- Ad Hoc groups

## Advocacy

- Professional & Grassroots
- Local Agency Involvement
- Provider and Parent Testimony
- Social Media
- Stakeholder Collaboration



# Fiscal Year 16-17 Accomplishments

## Legislative Advocacy:

*The Association led a successful advocacy campaign featuring local agency involvement, legislative Fly In, professional Government Relations support, grassroots involvement, stakeholder partnerships, and a social media component.*

- Supported additional funding for HCBS waiver: \$4 million for waitlist individuals
- Obtained \$27 million in rate relief for Companion, Respite, & Personal Supports services to offset DOL home care rule changes
- Achieved modest rate increase for ADT, Residential Habilitation, Supported Employment & Personal Supports services totaling \$11 million
- Protected 2% rate increase for ICF/IIDs
- Supported Early Steps program additional funding



# Fiscal Year 16-17 Accomplishments

## Websites (Florida ARF & RESPECT)

- Enhanced website
  - Association news
  - On line registrations for meetings
  - Virtual Library: Papers, Forum Notes
  - ICF/ IID Info Center
- Grassroots webpage
- RESPECT Punch Out Catalog

## Member Representation

- Monthly Issues Forum Breaking News & Grants (12)
- Capitol Breaking Newsletters & Tracking Charts (10)
- Email transmittals and industry news (450)
- Member Events (269): Meetings, legislative hearings, conference calls, site visits

## Public Policy Input

- Tracked significant policy changes and provided member updates on topics such as iBudgets, Licensure Rules, and WIOA Changes
- Promoted Stakeholder collaboration
- Provided oral & written testimony on behalf of members (18)



*Visit us at [www.floridaarf.org](http://www.floridaarf.org)*

# Fiscal Year 16-17 Accomplishments

## Training & Education

- 4 membership meetings: **March Legislative FLY IN; January, June, and September meetings (postponed until November) featuring industry presentations**
- *Offered:*
  - *Employment Outcomes Professional II Training*
  - *Affinity Group Calls - VR*
  - *HR Presentations (2)*

## Member Ad Hoc Groups

- **Social Media**
- **Workforce Enhancement**
- **iBudget Handbook**
- **Rates**

## Agency Liaison Involvement

- **CareerSource**
- **Department of Management Services**
- **Department of Education – VR & Adult Ed**
- **Agency for Persons with Disabilities**
- **Department of Children & Families**
- **Agency for Economic Opportunity**
- **Agency for Health Care Administration**
- **Department of Health**
- **Department of Elder Affairs**
- **Commission for Transportation Disadvantaged**
- **Florida Senate/House of Representatives**
- **Governor’s Office**
- **Florida Developmental Disabilities Council**
- **Disability Rights Florida**



---

*“We influence public policy that makes a meaningful difference in the lives of individuals with disabilities.”*

---

# Fiscal Year 16-17 Accomplishments



- Florida ARF serves as the Central Nonprofit Agency that manages the RESPECT of Florida Program.
- This year RESPECT facilitated competitive employment opportunities for 1,201 individuals with handicaps that impeded their employment opportunities.
- 53 RESPECT nonprofit agencies produced commodities and service contract work produced by individuals with disabilities for state and local government entities.
- RESPECT added new Commodity business lines such as batteries, lights, and medical supplies.
- The Service Contracts unit added a new call center operation with the Department of Economic Opportunity.
- RESPECT funded two microenterprise grants at \$12,500 per grant to promote self-employment of individuals with disabilities.
- Sales revenues were at about \$29 million for the year. Florida ARF dba RESPECT of Florida operates the program via a 6% CNA fee.



## **2016-2017 Statement of Activities**

**For the 12 Months Ending September 30**

	<b>Projected September 30, 2017</b>	<b>Audited September 30, 2016</b>
<i>Program Revenues</i>	30,240,157	30,054,316
<i>Other Revenues</i>	1,151	95,544
<i>Interest Income</i>	4,788	6,672
<i>Total Revenue</i>	<hr/> 30,246,096	<hr/> 30,156,532
 <i>Cost of Sales &amp; Services</i>	 27,856,320	 27,775,372
<i>Gross Profit</i>	<hr/> 2,389,776	<hr/> 2,381,160
 <i>Salaries &amp; Benefits</i>	 1,614,608	 1,572,363
<i>Consultants</i>	208,477	193,520
<i>Travel</i>	71,022	72,051
<i>Depreciation/Amoritization</i>	13,122	13,434
<i>Professional Fees</i>	38,448	39,894
<i>Property &amp; Casualty Insurance</i>	89,113	94,034
<i>Other Operating Expenses</i>	310,664	338,702
<i>Total Expenses</i>	<hr/> 2,345,454	<hr/> 2,323,999
 <i>Change in net assets</i>	<hr/> <hr/> 44,322	<hr/> <hr/> 57,162



## Fiscal Year 16-17 Operational Goals

- **To guide the Association's programs and activities in a direction that is consistent with its mission and in accordance with the overall direction established by the Board / membership.**
  - 1A. Participates in a minimum of 10 events per month representing membership.
    - Averaged 22 per month
  - 1B. Provides testimony at public events on behalf of membership once per quarter.
    - Provided testimony 18 times
  - 1C. Communicates Association's message via newsletters & web updates by forum.
    - Published monthly newsletters, grants letters, issued 332 email transmittals to members and another 118 industry news publications
    - Maintained Virtual Library by Forum

**Status: Goal met**



## Fiscal Year 16-17 Operational Goals

□ To conduct a viable legislative campaign responsive to the Association's needs.

2A. To develop a member driven legislative campaign responsive to membership needs.

The 2017 legislative campaign was well organized and our lobby team worked aggressively to implement our platform. We also continued a Social Media component.

2B. To achieve legislative successes in areas that assist members in achieving their mission.

For the most part, the 2017 legislative session generated positive outcomes for our iBudget Waiver, and VR providers. Our ICF/IID providers received cuts but the losses were minimized by a 2% rate increase.

**Status: Goal met, most of desired outcomes were achieved**



# Fiscal Year 16-17 Operational Goals

## □ To ensure that the Association operates in a financially solvent manner.

### 3A. To obtain a clean annual audit report.

Last year's audit report verified the Association's finances are in good shape. We have strong Accounting staff who manage \$29 million in annual revenues.

### 3B. To increase revenues through RESPECT sales and to increase membership.

RESPECT has 53 certified Employment Centers, of which 24 are Association members. RESPECT sales are projected to be slightly above last year's sales and the number of individuals served grew from 1,173 to 1,201. Compliance oversight is good.

Overall membership totals 88 (69 regular, 5 corporate, and 14 professional) and is up by four. Dues revenues are on plan and membership has remained stable. Recruitment efforts focus on enrollment of additional iBudget Waiver and VR member agencies. The most significant growth was in residential care providers who needed assistance with HCBS transition rule compliance.

### 3C. To ensure a viable financial oversight process.

The Florida ARF Finance committee meets regularly to review financial statements and provide fiscal oversight. The Association will end the year financially strong.

**Status: Goal met**



# Fiscal Year 16-17 Operational Goals

## □ To plan, direct, manage the operations of the Association in a professional manner.

### 4A. Enhance staffing and use of resources to promote and support professional growth.

The Association's Finance and Accounting functions are excellent; RESPECT commodities and contract services operate efficiently and effectively. RESPECT customer service has been enhanced. We have strong IT and HR Support. Membership service supports continue to be good. Staffing is supplemented by three Government Relations Consultants, one Employment Consultant, and a corporate attorney. This year, we merged two under-utilized FTEs which proved to be a good move. All staff are evaluated annually and professional development is encouraged.

### 4B. Ensure personnel policies and procedures are current and responsive to needs.

Personnel policies and procedures are updated annually. All employees have current position descriptions, negotiated performance measures, and annual appraisals. Our leave policies were updated in the summer of 2016. Employee benefits are excellent and are competitive with state agencies.

### 4C. Ensure adequate member contact to assess Association responsiveness and ensure that potential member agencies understand the importance of Association membership.

Agency site visits are made as time permits to identify and discuss needs. Word of mouth referrals continue to be our best recruitment tool followed by site visits.

**Status: Goal met**



# Fiscal Year 16-17 Operational Goals

## □ To provide at least one successful deliverable member benefit to Forums:

### 5A: Community Supports

- Worked with stakeholder groups on topics such as Employment First, Wait List, Adult Abuse and Neglect prevention, and Medicaid Buy In to communicate member needs
- Assisted members in responding to HCBS transition rule requirements
- Achieved iBudget Handbook amendments for one-year work experience for direct care staff
- Provided trouble shooting support for members on Medicaid and other concerns
- Resolved TRAIN learning system to address member concerns
- Conducted multiple “Ask a Peer” questions to assist providers with resolution of policy questions.
- Obtained modest rate increases for several key services
- Provided members with information and assistance with hurricane recovery efforts

### 5B: Employment

- Negotiating “in perpetuity” Employment Outcome Professional training resource
- Served on Employment First Work Group to represent member interests
- Worked with VR and members on AWD funding and VR legislation
- Hosted monthly Affinity calls for members
- Tracked WIOA implementation to evaluate impact on member agency services
- Provided trouble shooting support with members on VR billing
- Worked with VR on new demonstration program

**To provide at least one successful deliverable member benefit to the following forums  
- Continued:**

**5C: ICF/IID**

- Worked with Governor's Office, AHCA, and Social Services Estimating Conference to correct workload data that reflected accurate workload projections for funding
- Tracked monthly vacancies for reporting to APD and AHCA and posted on ICF/IID website
- Worked with AHCA on client behaviors for Level of Care needs – activity continues
- Represented member concerns at ICF/IID hearings on the Title XIX rate plan
- Hosted training teleconference with agency Support Coordinators on role of ICF/IIDs
- Negotiating ICF/IID proviso language concerns changes and prevailed in major areas of concern

**5D. Government Relations**

- Updated website with the 2017 platform, position papers, and member profiles to communicate member positions on key issues regarding individuals with disabilities
- Hosted a Legislative Fly In March 22-23, 2017
- Educated Government Relations consultants on member needs
- Worked with members to develop Social Media campaign strateg.
- Met with several legislative staff, legislators, and others to advocate for member needs outlined in the 2017 platform
- Educated and worked with stakeholder groups on need for provider rate increases which generated support for the request
- Realized iBudget rate increases, funding for DOL home care rule changes, expansion of AWD programs

**To provide at least one successful deliverable member benefit to the following forums - Continued:**

**5E. Legal Advocacy**

- Provided information to members on iBudget rules and litigation activity
- Provided monthly updates on litigation activity via monthly newsletters
- Tracked state agency rule activity and provided testimony at 18 public hearings to date

**5F. RESPECT Oversight Committee**

- Held four RESPECT Oversight Committee meetings to obtain direction on administration of the RESPECT program
- Added new service contracts that increased sales
- Added additional marketing newsletters and enhanced marketing support for ECs
- Added an EC partner newsletter
- Hosted janitorial training sessions in two regions of the state
- Conducted Program Reviews for all RESPECT Employment Centers and identified areas needing further review or correction
- Amended RESPECT Policies and Procedures document
- Significantly increased DOH purchasing requests for commodities
- Enhanced the Commodities Customer Support function

**Status: Goal met**





# Fiscal Year 16-17 Operational Goals

## □ To develop new programs providing opportunity for growth & profitability potential

6A. To increase revenues and number served in the RESPECT program:

- RESPECT service contracts have increased while commodity sales have decreased based on State agency purchasing practices. Several new service contracts came on board late in the fiscal year. We project a slight increase over last year's sales, and were particularly pleased to see a 2.4% growth in numbers served.
- Extensive efforts have been dedicated to not only continuation of existing service contracts but to also develop new contracts and more viable commodity lines.

6B. To offer new funding opportunities to members:

- Staff provide monthly funding grant opportunity updates for member opportunities such as the Florida Affordable Housing Coalition
- The Association remains committed to protecting member funding sources and developing new service models with partners such as VR (Pathways), APD (RESPEC-Ed model), and with other agencies such as DEO
- We are exploring Apprenticeship resources to assist with the hiring crisis our members face

**Status: Goal met**

# Florida ARF Value Statement

## (How can Provider Agencies Afford Not to be Members?)

Within the last year, Florida ARF accomplished the following:

- Advocated for \$3.7 million in additional funding for the HCBS waiver waitlist to serve approximately 400 individuals with intensive needs that was funded.
- Successfully advocated for a slight rate increase for Adult Day Training (ADT), Residential Habilitation (Res Hab), Supported Employment, and Personal Supports providers which equates to about \$11 million.
- Successfully advocated for \$11.2 million in continued rate relief for services such as Companion, Respite, and Personal Supports for 1:1 staffing ratios to cover implementation of the U.S. Department of Labor Home Care rule changes.
- Prevailed in supporting continuation of VR program and the addition of approximately \$1.9 million to current funding of \$5 million for the Adults with Disabilities (AWD) Program.
- Coordinated a comprehensive grassroots advocacy campaign featuring local community agency involvement including testimony at legislative committee meetings, legislative visits at community agency sites, and legislative visits to the Capitol. Also, provided professional lobbying support for member approved issues.
- Disseminated timely information including: *Issues Forum Breaking News* and *Issues Forum Grants* monthly, *Industry News* publications, *Capitol Breaking News*, and email alerts.
- Provided members with monthly updates on available grant and funding opportunities.
- Maintained an online library for members including work products, white papers, grassroots materials, and information to assist member agencies with resolution of policy questions.
- Represented Florida ARF member interests on multiple state committees and workgroups such as DD Waitlist, the Governor's *Employment First* Initiative, and APD workgroups.
- Provided testimony and represented Florida ARF member interests at multiple hearings on topics such as: iBudget rules, APD Licensure rule, provider rate rules, Fair Hearings, Behavior Analysis, ICF/IID Handbook, ICF/IID Reimbursement.
- Communicated provider input into federal rules on HCBS waivers, Workforce Innovation Opportunity Act, DOL home care and overtime rules, and Medicaid Reform proposals.
- Held training sessions across the state on the Employment Outcomes Professional module to assist members and employment providers in achieving more competitive employment outcomes for individuals served.
- Provided networking opportunities for members with opportunities to interact one-on-one with APD / VR program directors.
- Successfully achieved multiple amendments to state agency policies and statutes based on member input.
- Served as information and referral resource for interested parties seeking providers and services in geographic areas.
- Led a Workforce Enhancement initiative to respond to a provider hiring crisis for direct care staff.