

Abilities Inc.
COMPLETE BUSINESS PLAN
RISKS, GOALS, AND STRATEGIES

FOR
2024

Prepared by:

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I. EXECUTIVE SUMMARY

Abilities Inc. (referred to from hereon in as the "Company") is established as a C Corporation at 108 W. Caswell St., Kinston, North Carolina 28504 with the expectation of providing person centered, quality driven supports in the human services and supports industry.

Business Description

The Company was formed on 09/04/1998 as a C Corporation, under North Carolina state laws and headed by George Taylor.

Provides supports and services to approximately 24 individuals.

Receives 95% or better on Managed Care Organization Routine Monitoring.

Received 4 consecutive 3-year National Accreditations from CARF International. The Company currently employs 3 full-time employees and 1 Part Time as well as approximately 15 Contracted Paraprofessional staff/ part-time employees.

Management Team

The Company has assembled an experienced management team which consist of the following:

President/Director - George Taylor

- Graduated from Poudre High School, Ft. Collins Colorado in 1983.
- 17 years' experience working in Geriatric Care Facilities, providing one on one direct care services.
- Assisted in opening Alzheimer's Care Units in 2 ARA Facilities.
- Approximately 30 years' experience working with the IDD population.
- Opened Abilities Inc. in 1998. Co-Executive Director of Abilities Inc. 1998-2007. President/Director of Abilities Inc. 2007-current.
- AFL Home Provider for IDD individual 1997-current.
- Vice President Lenoir County Interagency Committee for People with Disabilities 2001-2002
- President Lenoir County Interagency Committee for People with Disabilities 2003-2004.
- CPR, 1st Aid, NCI + Certified

Office Manager/CFO - Lorrie Howard

- Coastal Delivery Service Office Manager, CFO, and Dispatcher 3 years
- 1999-current Office Manager and CFO with Abilities Inc.
- CPR, 1st Aid, NCI + Certified

Qualified Professional/Case Coordination - Cyndi Rafferty

- Bachelors' Degree at East Carolina University in Special Education
- Caswell Developmental Center Special Education Teacher
- QMRP/MRHC II, Qualified Professional 31 years;
- 2005-current Qualified Professional, Case Manager, Case Coordination with Abilities Inc.
- CPR, 1st Aid, NCI + Certified, NC Tops Certified

Qualified Professional/Documentation Reviewer - Minnie Arnold

- Bachelors' Degree Special Education East Carolina University
- EDA, Communication Tech at Caswell Developmental Center 15 years
- Greene County Schools 6-8 grade teacher 7 years
- Teacher at Caswell Developmental Center 14 years
- 2010-current Documentation Review/Qualified Professional with Abilities Inc.
- CPR, 1st Aid, NCI + Certified

Business Mission

The Philosophy and Mission of Abilities Inc. is to promote and encourage the potential that each person has, to become a productive, responsible, and valued member of today's society. We are dedicated to helping develop independence and skills for competitive employment, independent living, and community development. Our endeavor is to provide services in a clean, friendly atmosphere,

that promote community involvement and are sensitive to the cultural needs of those we provide services to. Our final mission is to educate the community and society to accept change, embrace difference, and promote equality for individuals living with disabilities.

Services Offered

The Company is prepared to provide the following services and supports:

Support Services: Abilities Inc. provides supports to individuals living in the Intellectual Developmental Disability community. Supports in independent living are provided to assist in learning how to budget money, pay bills, access community activities, schedule doctor appointments, taking medications and learning dietary options, as well as learning and maintaining positive behaviors. Supported Employment is an Innovations Waiver service, funded by Medicaid dollars and can be provided to assist in searching, obtaining, and maintaining paid employment. Supports in Vocational Services assist in compliance with the Americans with Disabilities Act (ADA). It assists the IDD population in locating and maintaining employment, which enables them to be more independent in their community. Individuals in the IDD community express a desire to be gainfully employed and contribute to their community and society. This gives them a feeling of belonging, and normalization. People with disabilities are matched to and trained in jobs where specific skills, interest and abilities can result in an asset to an employer. Those we support consistently prove themselves to be dedicated employees, who are dependable, hard-working, and productive. Employers receive dedicated and loyal employees, who are trained to the employer's expectations. This results in lower turnover and reduced absenteeism, training to the employer's expectations and on-going support and follow-up. Employers can access a virtually untapped labor pool, and at the same time, receive savings on advertising and hiring, and positive community recognition. Supports in becoming self employed assist the individual in providing a service to their community and receiving a fair wage for the service they are providing. Abilities Inc. advocates that each individual receiving services receive the same fair wage that any other person doing the same job duties would receive.

II. BUSINESS SUMMARY

Business History

1998- September 4 opened business.
1999- Contracted with Lenoir County Mental Health to provide services to the DD population.
2001- Contracted with Wilson-Greene Mental Health services to provide supports and services to the DD population.
2007- Restructure of ownership. George Taylor became President/Director May 2007.
2009- Received 3-year National Accreditation from CARF International.
2012- Received 3-year National Accreditation from CARF International.
2015- Received 3-year National Accreditation from CARF International.
2016- Received 100% monitoring review from Eastpointe Human Services MCO.
2018- Received 98.8% monitoring review from Eastpointe Human Services MCO.
2018- Received 3-year National Accreditation from CARF International with 99% score.
2020- Governors mandate on COVID-19 issued.

Legal Issues

The Company affirms that it has met all legal requirements.

III. MARKETING SUMMARY

Target Markets

The Company's major target demographics are as follows:

Individuals diagnosed with an Intellectual Developmental Disability.
Examples include but not limited to...Mental Retardation, Autism, Downs Syndrome.

The estimated number of potential clients within the Company's geographic scope is 33,000.

Pricing Strategy

Services provided are already pre-determined by either the Managed Care Organization that we are contracted with, or by Medicaid.

Promotional Strategy

The Company will promote services using the following methods:

Abilities Inc. will utilize word of mouth advertising, website, social media, pamphlets, business cards to promote our organization. Recently, the company joined other community agency's by joining the Chamber of Commerce in order to further advertise its services to the community. However, it receives referrals from Managed Care Organizations that it currently has contracts with.

Competition

In the human services and supports industry, customers make choices based upon agency's that are available to them and which agency can provide for their needs.

The primary competitors for the business are the following:

Neuse Enterprises Inc.- a Supported Employment workshop that provides vocational services in a closed environment mostly, however, does do some community vocational placement.

Community Alternatives Inc.- a support services agency that provides a variety of supports and services to the IDD population.

Advanced Behavioral Services Inc.- a support services agency that provides a variety of supports and services to the IDD population, including residential services.

Howells Support Services Inc.- a support services agency that provides a variety of supports and services to the IDD population, including residential services and day support services.

Easter Seals UCP Inc.- a support services agency that provides a variety of supports and services to the IDD population, including residential services, day supports and supported employment.

A Small Miracle Inc.- a support services agency that provides a variety of supports and services to the IDD population. These services include residential, day supports, supported employment as well as other Medicaid Waiver services.

Abilities Inc. believes firmly that it has the following competitive advantages:

Abilities Inc. is a small family-oriented agency that knows each one of our clients. Providing a Person-Centered approach is our main goal. We treat those we provide service to in the same manner that we want to be treated ourselves. We are person centered and operate the services we provide using a standard of normalization. We recognize their need for services; however, we also recognize that they are a contributing and vital part of our community. They are our friends, neighbors, and family.

Services

First-rate service is intended to be the focus of the Company and a cornerstone of success. All clients will receive conscientious, one-on-one, timely service in all capacities, be they transactions, conflicts, or complaints. This, by experience, creates a loyal following and return business.

IV. Analysis of Target Customers

Target customers include:

Intellectually Developmentally Disabled including Mild Mental Retardation, Moderate Mental Retardation and Severe Mental Retardation
Autism Disorders
ADHD
Asperger's Syndrome

Programs concerned:

Innovations Waiver Services

Supported Employment

Non-Institutional Respite

Community Networking

Community Living/Supports

State Funded Services:

Personal Assistance

Developmental Therapies

V. Analysis of Target Location Area (Description of Needs and Gaps)

Kinston is in the Atlantic coastal plain region of North Carolina. It is mainly **on the northeast side of the Neuse River**, and is northeast of the center of Lenoir County. It is 26 miles (42 km) east of Goldsboro, 30 miles (48 km) south of Greenville, and 35 miles (56 km) west of New Bern.

It is home of **the CSS Neuse Civil War Interpretive Center**, an educational museum that tells the story of the Civil War in the United States and the CSS Neuse, one of 26 ironclad ships commissioned by the Confederate navy.

Kinston is in the 17th percentile for safety, meaning 83% of cities are safer and 17% of cities are more dangerous. ... The rate of crime in Kinston is 48.13 per 1,000 residents during a standard year. People who live in Kinston generally consider **the northwest part of the city to be the safest**.

Unemployment Rate

December 31, 2020	6.10%
November 30, 2020	6.20%
October 31, 2020	6.10%
September 30, 2020	6.50%
August 31, 2020	6.20%
July 31, 2020	8.00%
June 30, 2020	7.30%
May 31, 2020	9.90%
April 30, 2020	7.60%
March 31, 2020	3.80%
February 29, 2020	3.20%
January 31, 2020	3.50%

Percentage of residents living in poverty in 2020: 27.8% (13.1% for White Non-Hispanic residents, 33.2% for Black residents, 65.6% for Hispanic or Latino residents, 44.0% for American Indian residents, 34.7% for two or more races residents)

Per Lenoir County Department of Health

Residents who were surveyed, listed these as the top concerns, in order from greatest concern, in the community impacting health:

1. COVID-19
2. Youth violence/gangs/bullying
3. Obesity
4. Diabetes
5. High blood pressure
6. Property crime/robbery
7. Rx Drug/Substance Abuse
8. Illegal drugs/Rx drug theft
9. Addiction
10. Poor eating habits/lack of good nutrition
11. Cigarette smoking in adults
12. Job Opportunities
13. Responsible Parenting
14. Addiction Recovery

COVID STATISTICS

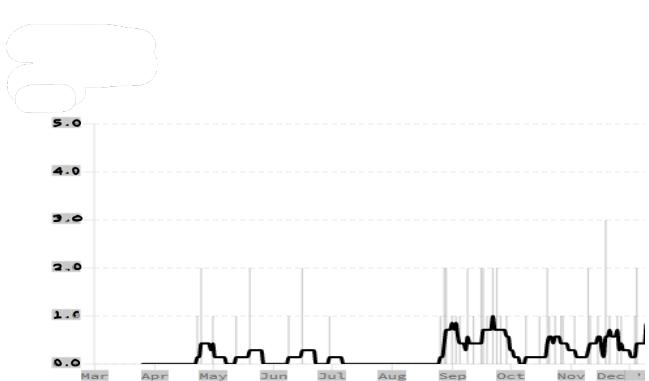
New Cases in Dec 2020

39.8 per 100K

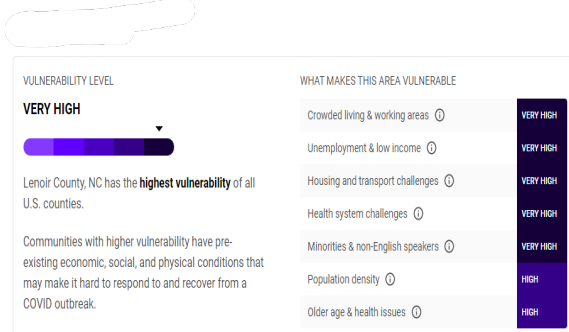


Daily Deaths as of Dec 2020

0.9 7 Day Average



Vulnerabilities as of Dec. 2020



Demographics of Kinston/Lenoir County (Per the US Census Bureau)

PEOPLE		
Population		
Population estimates, July 1, 2019, (V2019)	20,041	55,949
Population estimates base, April 1, 2010, (V2019)	21,749	59,507
Population, percent change - April 1, 2010 (estimates base) to July 1, 2019, (V2019)	-7.9%	-6.0%
Population, Census, April 1, 2020	19,900	55,122
Population, Census, April 1, 2010	21,677	59,495
Age and Sex		
Persons under 5 years, percent	△ 6.0%	△ 5.6%
Persons under 18 years, percent	△ 22.1%	△ 22.4%
Persons 65 years and over, percent	△ 22.9%	△ 20.2%
Female persons, percent	△ 53.2%	△ 52.2%
Race and Hispanic Origin		
White alone, percent	△ 29.0%	△ 55.4%
Black or African American alone, percent (a)	△ 66.2%	△ 41.4%
American Indian and Alaska Native alone, percent (a)	△ 0.4%	△ 0.6%
Asian alone, percent (a)	△ 1.1%	△ 0.7%
Native Hawaiian and Other Pacific Islander alone, percent (a)	△ 0.0%	△ 0.2%
Two or More Races, percent	△ 3.3%	△ 1.6%
Hispanic or Latino, percent (b)	△ 1.8%	△ 7.9%
White alone, not Hispanic or Latino, percent	△ 28.0%	△ 48.9%
Population Characteristics		
Veterans, 2015-2019	1,487	4,212
Foreign born persons, percent, 2015-2019	2.7%	4.4%
Housing		
Housing units, July 1, 2019, (V2019)	X	27,712
Owner-occupied housing unit rate, 2015-2019	42.3%	59.3%
Median value of owner-occupied housing units, 2015-2019	\$101,800	\$95,500
Median selected monthly owner costs -with a mortgage, 2015-2019	\$1,211	\$1,141
Median selected monthly owner costs -without a mortgage, 2015-2019	\$494	\$422
Median gross rent, 2015-2019	\$703	\$717
Building permits, 2020	X	107

Families & Living Arrangements		
Households, 2015-2019	8,901	23,148
Persons per household, 2015-2019	2.19	2.39
Living in same house 1 year ago, percent of persons age 1 year+, 2015-2019	82.0%	84.6%
Language other than English spoken at home, percent of persons age 5 years+, 2015-2019	3.3%	7.9%
Computer and Internet Use		
Households with a computer, percent, 2015-2019	79.3%	84.1%
Households with a broadband Internet subscription, percent, 2015-2019	70.8%	75.3%
Education		
High school graduate or higher, percent of persons age 25 years+, 2015-2019	79.6%	79.7%
Bachelor's degree or higher, percent of persons age 25 years+, 2015-2019	17.6%	14.9%
Health		
With a disability, under age 65 years, percent, 2015-2019	20.8%	18.8%
Persons without health insurance, under age 65 years, percent	12.9%	14.9%
Economy		
In civilian labor force, total, percent of population age 16 years+, 2015-2019	51.7%	56.7%
In civilian labor force, female, percent of population age 16 years+, 2015-2019	47.6%	50.9%
Total accommodation and food services sales, 2012 (\$1,000) (c)	67,427	78,364
Total health care and social assistance receipts/revenue, 2012 (\$1,000) (c)	269,501	305,492
Total manufacturers shipments, 2012 (\$1,000) (c)	D	D
Total retail sales, 2012 (\$1,000) (c)	600,753	728,897
Total retail sales per capita, 2012 (c)	\$27,780	\$12,307
Transportation		
Mean travel time to work (minutes), workers age 16 years+, 2015-2019	16.4	23.4
Income & Poverty		
Median household income (in 2019 dollars), 2015-2019	\$33,066	\$39,402
Per capita income in past 12 months (in 2019 dollars), 2015-2019	\$26,578	\$23,865
Persons in poverty, percent	27.8%	23.1%
BUSINESSES		
Businesses		
Total employer establishments, 2019	X	1,173
Total employment, 2019	X	24,138
Total annual payroll, 2019 (\$1,000)	X	894,757
Total employment, percent change, 2018-2019	X	1.6%
Total nonemployer establishments, 2018	X	3,234
All firms, 2012	2,057	4,470
Men-owned firms, 2012	1,163	2,601
Women-owned firms, 2012	664	1,449
Minority-owned firms, 2012	725	1,146
Nonminority-owned firms, 2012	1,178	3,141
Veteran-owned firms, 2012	259	881
Nonveteran-owned firms, 2012	1,611	3,289
GEOGRAPHY		
Geography		
Population per square mile, 2010	1,180.7	148.5
Land area in square miles, 2010	18.36	400.59
FIPS Code	3735920	37107

Value Notes

△ Estimates are not comparable to other geographic levels due to methodology differences that may exist between different data sources.

Some estimates presented here come from sample data, and thus have sampling errors that may render some apparent differences between geographies statistically indistinguishable. Click the Quick Info ⓘ icon to the left of each row in TABLE view to learn about sampling error.

The vintage year (e.g., V2019) refers to the final year of the series (2010 thru 2019). *Different vintage years of estimates are not comparable.*

Fact Notes

- (a) Includes persons reporting only one race
- (c) Economic Census - Puerto Rico data are not comparable to U.S. Economic Census data
- (b) Hispanics may be of any race, so also are included in applicable race categories

Value Flags

- Either no or too few sample observations were available to compute an estimate, or a ratio of medians cannot be calculated because one or both of the median estimates falls in the lowest or upper interval of an open ended distribution.
- F Fewer than 25 firms
- D Suppressed to avoid disclosure of confidential information
- N Data for this geographic area cannot be displayed because the number of sample cases is too small.
- FN Footnote on this item in place of data
- X Not applicable
- S Suppressed; does not meet publication standards
- NA Not available
- Z Value greater than zero but less than half unit of measure shown

QuickFacts data are derived from: Population Estimates, American Community Survey, Census of Population and Housing, Current Population Survey, Small Area Health Insurance Estimates, Small Area Income and Poverty Estimates, State and County Housing Unit Estimates, County Business Patterns, Nonemployer Statistics, Economic Census, Survey of Business Owners, Building Permits.

As evident in the charts above, Kinston and Lenoir County has some issues that may hinder service provision for its stakeholders. With an unemployment rate of 6.2%, coupled with the already devastating COVID-19, employment for stakeholders and the community in general is poor. This may hinder the possibility of locating new jobs for stakeholders. Also, community inclusion activities may be hindered due to the COVID-19 pandemic. The safety of our stakeholders is a large concern due to the pandemic as well and guides us in the daily planning of services for our stakeholders. Staffing in the future may become an issue as well due to the pandemic. Stakeholders concern and fear for their family members during the pandemic have and may interfere with service delivery.

VI. FINANCIAL PLAN

12-Month Profit and Loss Projection

Monthly expense for salaries and overhead (projected as a yearly total):	\$ 443450.00
Revenue and sales for upcoming year of business (projected):	\$454200.00
Gross profit for upcoming year of business (projected):	\$10750.00

VII. TECHNOLOGY PLAN

Technologies Utilized

Abilities Inc. uses the following additional technologies.

1. Desktop computers
2. Scanner
3. Copy Machines/Printers
4. Email
5. Agency website
6. Desk top multi line phone system.
7. Cell phones
8. Assistive Technology
 - a. Computers
 - b. Weather Applications (Android and Smart Phone users)
 - c. GOOGLE Translation Services
 - d. ASL Translation Services
9. Authorization and Billing for Services
10. Backup and Restore Location
11. Google Docs
12. Motorized stair climber
13. Forehead temperature reader
14. Google Mini

Desktop Computers

Abilities Inc. currently uses a total of 7 desktop computers. 4 computers were purchased new in October of 2023. The specs of these machines are HP 27" All-in-One Desktop, AMD Ryzen 5 5500U, 16 GB RAM, 512 GB SSD, Full HD IPS Touchscreen, Windows 11 Home, 4 USB Ports, Privacy Camera, Dual Mics, Wireless Keyboard and Mouse (27-cb0060,2021). These machines are utilized by management for routine purposes such as Email transmissions, development of treatment plans, and day to day running of the organization, with each having Microsoft Word programs and Adobe PDF for creations and editing of documents. These computers are connected to the Internet via Modem. Verizon Wireless provides wireless internet services. Virus protection services protect each connected computer. 2 other computers are maintained in the documentation room and are connected to the Internet. These computers are used for documentation purposes only. They utilize a Microsoft Word program to create and edit documentation. They are monitored always by a Qualified Professional during normal business hours. 1 computer is kept in the conference area and is available for staff/clients to use for things like job searching, learning how to use a computer, and for clients who are on break, having a bad day and need a distraction, or are waiting for a ride home to watch a tv show of their choosing. All computers are maintained and repaired by CDS computer services located in Kinston NC. Their services are utilized on an as needed basis.

Documentation and service records are backed up Google Docs. This enables staff to document from home. This process was initiated during the years of COVID to lessen the risk of staff, clients, and office staff, but also allowed staff to complete their documentation in the safety of their own home. QP reviewing documentation can also log into the site, and review documentation in real time and offer guidance and suggestions to staff. Google Docs is a secured, username and password required site. Staff have a username and password that they use to sign into the files.

All new computers were purchased in 2023 and are meeting this agency's needs.

Copy/Printer/Scanner Machine

Abilities Inc. currently uses the Canon MF240 and the Brother MFC-L2707DW printer/scanner machines. These machines are used for basic scanning purposes. All administrative staff are trained to use the scanner upon hiring. The Office Manager maintain the scanners. They are replaced as needed, or approximately every 4 years.

Abilities Inc. currently uses the Canon MF240 and the Brother MFC-L2707DW printer/scanner machines. These machines are used for routine purposes in the office. All administrative staff are trained to use the copy machines upon hiring. The Office Manager maintain the copy machines. They are replaced as needed, or approximately every 4-6 years.

Currently, all copy/printer/scanner machines are meeting this agency's needs.

Email

Data that is composed, transmitted, accessed, or received via the internet must not contain content that could be considered discriminatory, offensive, obscene, threatening, harassing, intimidating, or disruptive to an employee or other person. Examples of unacceptable content may include but are not limited to, sexual comments or images, racial slurs, gender-specific comments, or any other comments or images that, could reasonably offend someone based on race, age, sex, religious or political beliefs, national origin, disability, sexual orientation, or any other characteristic protected by law. All email concerning Clients receiving services through Abilities Inc. via the Eastpointe LME (Local Management Entity) are conducted through a secure email site at <https://secure/psmtp.com/s/login?b=eastpointe>. This email account is accessed with a username and password, created by the President of Abilities Inc., with access granted to the Office Manager, and Qualified Professionals only. All other emails concerning clients served through other Local Management Entities, or day to day business operations of Abilities Inc. is conducted through a web-based email site.

This site, [www. https://email.secureserver.net/login.php](https://email.secureserver.net/login.php) is accessible via a username and password, created by the President of Abilities Inc., with access granted to the Office Manager and Qualified Professionals.

Currently, all email websites are meeting this agency's needs.

Agency Website

Abilities Inc. maintains an agency website at www.abilitiesinc-nc.com. This website is subscribed through godaddy.com. It is maintained by the President/Director and updated as needed. This website is used to promote the agency and to provide needed information concerning services to the agency's stakeholders. The website is updated as needed by the President/Director.

Currently, the website is meeting this agency's needs.

Desktop Multi Line Telephone System

Abilities Inc. uses a multi lined telephone system, with 2 available lines. AT&T. manufactures the phones. They are used for everyday business purposes.

Currently, the multi-line telephone system is meeting this agency's needs.

Cell Phone

All staff working with Abilities Inc. are required to have on their persons while providing service, a working cell phone. Each person is required to make available the number to that cell phone and to keep it on their person while providing services to our clients. Each staff is responsible for paying their own cell phone bill each month, however, as it is used for business purposes, they are encouraged to keep records of their bills so that they may list them on their annual tax filing.

Currently, this is meeting this agency's needs.

Assistive Technology

a. Computers

Computers that are used by Abilities Inc. are equipped with the ability to enlarge the screen and font size to better assist those who need larger views. All computers are equipped with the ability to turn written words into audible sound for those who are sight impaired or unable to read. All computers are touchscreen. Each computer is voice to word enabled.

Currently, this is meeting this agency's needs.

b. Weather Applications (Android and Smart Phone users)

Administrative staff cell phones are equipped with weather alert technology that will enable them to be warned if severe weather is approaching.

Currently, this is meeting our agency's needs.

c. GOOGLE Translation Services

Google Translation Services, an online translation service is utilized by Abilities Inc., which provides the ability to translate written and spoken word for those who require that service. ASL Translator services are used by those who have Android or Smart phones, to assist in the translation of sign language to those who are hearing impaired. If needed, other translations sources are readily available from a 3rd party "paid" service.

Currently, this is meeting this agency's needs.

d. ASL Translation Services

ASL Translation Services provide American Sign Language Interpretation via an Android or Smart Phone. If needed, other ASL translation services are readily available from a 3rd party "paid" service.

Currently, this is meeting this agency's needs.

Authorizations and Billing for Services

Abilities Inc. conducts billing and email conversations using the internet. Billing for Medicaid IDD services is done through a web-based tool located at <https://webclaims.ncmedicaid.com/ncecs>, or done directly through the contracting agency, depending on that agency's guidelines. Billing is done according to a Check-write Schedule published by Division of Medical Assistance and/or the contracting agency. Billing for IPRS (State Dollar) services, is done through a web-based internet site contracted by the Local Management Entity/Managed Care Organization. Each site used is accessed via a username and password, which requests a change in username and password periodically. The President of Abilities Inc. creates this username and password, with access granted to the Office Manager, and Qualified Professionals only. All authorizations for services transpire through web-based internet sites with each LME/MCO. Letters of approval or denial of authorizations are delivered through that internet site. Letters of approval or denial are also delivered to Abilities Inc. via regular mail and are delivered to the agency's PO Box. Authorizations for IPRS or State-funded services are obtained through the LME/MCO's web-based system.

In June of 2019 it was mandated that provider agencies utilize an electronic health record, however that mandate was rescinded. Currently, there are no plans to institute an electronic health record.

A mandate of June 30, 2021 was put in place for providers of certain Medicaid personal care services to install and have in place an electronic voice verification service, or EVV app. This app allows the direct care staff to clock in and out and maintain record of services for certain personal care services, which include Community Living and Supports under the Medicaid Innovations Waiver, which this agency provides. This agency currently uses the free EVV service that is provided by HHA Exchange, at this time.

Currently, this is meeting this agency's needs.

Backup and Restore Location

All computer-based work is backed up daily on Google Docs. Google Docs enables staff to document from home. This process was initiated during the years of COVID to lessen the risk of staff, clients and office staff, but also allowed staff to complete their documentation in the safety of their own home. QP reviewing documentation can also log into the site, and review documentation in real time and offer guidance and suggestions to staff. Google Docs is a secured, username and password required site. Staff have a username and password that they use to sign into the files.

Currently, this is meeting this agency's needs.

If the corporate location is not able to conduct business due to a hazard or a catastrophe...operations will be conducted from the following location

256 Tyree Rd.
Kinston, North Carolina 28504
Phone Number: 252-268-8700

This location is fully equipped with internet access and phone provided by Sprint. Emergency food supplies (water etc....) are also available at that location.

Currently, this meets this agency's needs.

Google Docs

Google Docs is an online word processor that lets you create and format documents and work with other people. The agency utilizes this resource so that forms can be accessed by other members of the management team.

Currently, this is meeting this agency's needs.

Motorized Stair Climber

In 2016, a Motorized Stair Climber was purchased to aide in the transportation of non-ambulatory stakeholders to the upstairs area of the office. Inservice was provided to stakeholders in the office, and safety signs were posted by the stair climber. Currently, this is meeting this agency's needs.

Forehead Temperature Reader

Due to COVID-19, a Forehead Temperature Reader was purchased in order to take temperatures of stakeholders who enter the building. Temperatures are maintained on the bottom of the sign in sheets in the documentation room.

VIII. CULTURAL DIVERSITY

Abilities Inc. is committed to fostering, cultivating, and preserving a culture of diversity and inclusion.

Our human capital is the most asset we have. The collective sum of the individual differences, life experiences, knowledge, inventiveness, innovation, self-expression, unique capabilities, and talent that our employees invest in their work represents a significant part of not only our culture, but our reputation and company's achievement as well.

We embrace and encourage our employees' differences in age, color, disability, ethnicity, family or marital status, gender identity or expression, language, national origin, physical and mental ability, political affiliation, race, religion, sexual orientation, socio-economic status, veteran status, and other characteristics that make our employees unique.

Abilities Inc. diversity initiatives are applicable—but not limited—to our practices and policies on recruitment and selection; compensation and benefits; professional development and training; promotions; transfers; social and recreational programs; layoffs; terminations; and the ongoing development of a work environment built on the premise of gender and diversity equity that encourages and enforces:

- Respectful communication and cooperation between all employees.
- Teamwork and employee participation, permitting the representation of all groups and employee perspectives.
- Work/life balance through flexible work schedules to accommodate employees' varying needs.
- Employer and employee contributions to the communities we serve to promote a greater understanding and respect for the diversity.

All employees of Abilities Inc. have a responsibility to treat others with dignity and respect always. All employees are expected to exhibit conduct that reflects inclusion during work, at work functions on or off the work site, and at all other company-sponsored and participative events. All employees are also required to attend and complete annual diversity awareness training to enhance their knowledge to fulfill this responsibility.

IX. Situation Analysis

Analysis of Strengths, Weaknesses, Opportunities, and Threats (S.W.O.T)

Strengths	Opportunities
Person Centered Services	Good standing with Managed Care Organizations
We care about our stakeholders	Stakeholders can have better access to their community
Promote Independence	Stakeholders can make informed decisions about their services and their lives
Professional	Clients have community-based employment with fair wages
Efficient/Effective	Stakeholders can have services that consider their different cultural and personal diverse needs

Receive high scores on agency reviews and accreditations	Because of our good standing with MCO and quality of services, there are opportunities for referrals for those needing services
Positive Results	Increased ability to make payroll and other financial obligations
Family Oriented/Caring	Use of new software such as Google Docs/Google Drive will increase availability of forms used by all office staff and increase production.
Organized (Staff and Client Records are orderly and well maintained, being reviewed quarterly)	
MCO has become more dependable with on-time payments for services provided	
Cultural Competency. Staff and clients are seen as persons, and NOT as a “color” or “race”, while at the same time taking into account a person’s individuality and personal needs.	
Weaknesses	Threats
Funding for services	Loss of Accreditation
Although MCO has become more dependable with payment, possibility remains that payment will become unsteady	Loss of funding
Employment opportunities are not always readily available for stakeholders in the community	Loss of MCO contract
Staff do not always complete documentation in a timely manner	Reduction in services
Need for the inclusion of various types of software to assist the agency with service delivery and business functions.	Failure to meet documentation guidelines due to staff not completing documentation in a timely manner
Stakeholders receiving services do not always have available transportation outside of their service hours to attend community activities of their choice	Staff and client/guardian unable to deal with gender related situations while in the community, such as transgendered person entering a bathroom utilized by others who are not of the same gender identity.
Need to build on potential staff options.	Property Damage due to natural acts of nature (fire, flooding, hurricane etc....)
Need to develop policy pertaining to COVID-19	COVID-19 PANDEMIC
Total implications of COVID-19 are unknown to public.	Medicaid Transformation
Staff not knowledgeable of using Electronic Voice Verification application correctly, which may cause issues with billing for services.	

X. RISK ASSESSMENT

This Risk Assessment describes possible risk and implements a plan of action to reduce the severity of a loss if one were to occur. The strategy for implementation of the Plan of Action is included in the Goals and Objectives for the agency.

L=Low M=Medium H=High

Description of Risk	Possible Consequences	Prob. Of Risk	Severity of Risk
Loss of National Accreditation	Services cease Loss of MCO contract	L	H
Loss of funding/reduction of services	Denial of services to stakeholders Inability to keep within budget. Inability to pay staff. Inability to pay financial obligations	M	H
Medicaid Transformation Loss of MCO Contract	Services will discontinue. Stakeholders not able to get information as it pertains to Medicaid Transformation	H	H
Failure to meet documentation guidelines	Payback of claims Low monitoring scores Dis-satisfaction of stakeholders.	L	M
Lack of knowledge on more recent Gender Identity issues in our community	Inability to understand stakeholder's issues on gender identity. Inability to support and educate clients in certain social situations in their community.	M	M
Property Damage due to natural acts of nature (fire, flooding etc....)	Injury to stakeholders Disruption of services Damage to corporate headquarters.	L	M
Inability for staff to correctly use Electronic Voice Verification application	Reduce ability to bill for services in a timely manner	M	H
COVID-19	Exposure to COVID-19 Staff shortage Inability to bill for services due to staff/client absence	H	H

X. Goals and Objectives

The following goals and objectives are designed to promote accessibility and the removal of barriers for the persons served and other stakeholders. At the end of each year, each goal is reviewed for progress and results. Recommendations to extend the goal are made if it has not been satisfactorily met.

1. Follow COVID-19 Guidelines
2. Be better prepared with budget to meet financial obligation in times of funding or service loss
3. Increase documentation compliance
4. Medicaid Transformation/Maintain MCO Contract (s)
5. Support Cultural Diversity and Awareness in the community
6. Be prepared for natural acts of God (nature) such as fire, flooding, storms, etc...
7. Maintain National Accreditation

DAILY

Goal 1	Follow COVID-19 Guidelines
1.1	Information will be provided to stakeholders concerning COVID-19, as it is forthcoming to the public.
Strategy	President/Director will monitor Policy and Procedure concerning COVID-19 for any changes that may be needed. Staff will receive a copy of the COVID-19 Policy updates as they are warranted.
Financial Projections	0
Execution Person(s)	President/Director
Evaluation Person(s)	President/Director
Evaluation Criteria	As evidenced in Policy and Procedure Manual.
Target Date	On-going

Goal 1	Follow COVID-19 Guidelines
1.2	Although COVID-19 limits have decreased considerably, and as the outlook is for a continuation of a decrease of limits, Abilities Inc. maintain certain standards to enhance the safety of all stakeholders.
Strategy	President/Director will monitor news and other resources for any new limits or updates as it pertains to COVID-19 and will pass that information on to the stakeholders as soon as possible.
Financial Projections	0
Execution Person(s)	President/Director
Evaluation Person(s)	President/Director
Evaluation Criteria	As evidenced by information provided on the agency website or in stakeholders/management/staff meetings.
Target Date	On-going

Goal 1	Follow COVID-19 Guidelines
1.3	Although COVID-19 limits have decreased considerably, and as the outlook is for a continuation in a decrease of limits, Abilities Inc. will maintain certain standards to enhance the safety of all stakeholders.
Strategy	Abilities Inc will continue to restrict access to the office daily. Office accessibility will be granted by appointment only until further notice.

Financial Projections	0
Execution Person(s)	President/Director
Evaluation Person(s)	President/Director
Evaluation Criteria	As evidenced by no incidents of COVID-19 diagnosis
Target Date	On-going

Goal 1	Follow COVID-19 Guidelines
1.4	Although COVID-19 limits have decreased considerably, and as the outlook is for a continuation of a decrease of limits, Abilities Inc. maintain certain standards to enhance the safety of all stakeholders.
Strategy	Abilities Inc. will utilize a web-based system of documentation, to not only make documentation more readily available to the staff, but to enable staff to complete documentation from home. This will allow staff to avoid coming to the office and risk exposure of COVID-19, or exposing office staff to COVID-19
Financial Projections	0
Execution Person(s)	President/Director
Evaluation Person(s)	President/Director
Evaluation Criteria	As evidenced by no incidents of COVID-19 diagnosis
Target Date	May 2023

MONTHLY

Goal 2	Be better prepared with budget to meet financial obligation in times of funding or service loss.
2.1	Overcome financial situations that could negatively impact the organization
Strategy	Office Manager and Director will review deposits and withdraws to determine weekly budget payouts. Office Manager and Director will review budget for the entire month, including bank statements, ledgers, billing systems with contracted MCO's and other sources of payments received for services provided. Monitoring of expenses paid out will be reviewed as well to ensure that monthly budget was adhered to and correct. Payment of services for 2 stakeholders will be billed but placed in savings account to build cash reserve.
Financial Projections	Projected revenue from MCO's (Eastpointe Human Services and Alliance Behavioral Health Services) Private Transportation Services & Janitorial Services. Anticipated costs are staff payroll; overhead expenses; office expenses.
Execution Person(s)	Finance Officer/Office Manager and President/Director
Evaluation Person(s)	Finance Office/Office Manager and President/Director
Evaluation Criteria	Financial Records, Bank Accounts, Payrolls, Rent Receipts, MCO billing websites, Ledgers
Target Date	Ongoing (January 1, 2023 – December 31, 2023)

Goal 3	Increase documentation compliance
3.1	Staff will receive proper training on Federal, State, and agency documentation guidelines expectations.
Strategy	Qualified Professional will meet with management team to discuss documentation issues with staff. Management will provide additional supports by reminding staff of the documentation guidelines of the agency. Staff will receive notification from management on documentation needs and shortages. Staff who do not get documentation in on time will have it reflect in their invoice. Staff will ultimately receive disciplinary actions if not able to comply including but not limited to termination of contract.
Financial Projections	None- routine
Execution Person(s)	Qualified Professional, Office Manager, President/Director
Evaluation Person(s)	Qualified Professional, Office Manager, President/Director
Evaluation Criteria	Completion of documentation in a timely manner (100% expectation)
Target Date	To be completed daily, or monthly at a minimum

GOAL 4	Medicaid Transformation/Maintain MCO Contract (s)
4.1	Management will monitor information received from DHHS and other info sources concerning Medicaid Transformation
Strategy	Management will monitor DHHS websites as well as other MCO websites to gather pertinent information concerning Medicaid Transformation and how it will affect the agency and services it provides to its stakeholders. Information will be shared through Stakeholders meetings, Management meetings, Staff meetings, and agency website.
Financial Projections	\$0
Execution Person (s)	President/Director, Qualified Professionals, Office Manager, Stakeholders
Evaluation Person (s)	President/Director, Qualified Professionals, Office Manager, Stakeholders
Evaluation Criteria	Notification from MCO's, DHHS, and other information resources
Target Date	On-going

GOAL 4	Medicaid Transformation/Maintain MCO Contract (s)
4.2	Management will monitor MCO contract requirements to ensure continuation of contracts.
Strategy	Management will monitor MCO websites as well as DHHS websites and other regulatory information sites to ensure that all requirements are being met by the agency. All will be researched by management and listed on the agencies website so as to make that information available to all stakeholders.

Financial Projections	Routine
Execution Person(s)	Qualified Professionals, Office Manager, President/Director
Evaluation Person(s)	Stakeholders, Management Team, President/Director
Evaluation Criteria	Reviews from Stakeholders, surveys, meeting minutes.
Target Date	Monthly-Ongoing

GOAL 5	Support Cultural Diversity and Awareness in the community.
5.1	Become more aware of gender terminology and gender related issues. Provide gender identity information to stakeholder's
Strategy	Information will be provided to staff and other stakeholders to educate them in gender related issues. Abilities Inc. acknowledges that gender issues are a part of today's society, and those receiving services need supports in understanding those issues as it relates to their social situations. Information will be shared through staff meetings, and the agency website throughout the year.
Financial Projections	Routine
Execution Person(s)	Management Staff
Evaluation Person(s)	Qualified Professionals; Office Manager; President/Director
Evaluation Criteria	Monthly Staff and Management meetings agendas and minutes. Review of agency website and forms. Monitoring of suggestion box and complaints submitted to agency
Target Date	Ongoing

GOAL 5	Support Cultural Diversity and Awareness in the community.
5.2	The décor and atmosphere where the consumer/staff is offered/providing services and where relationships are established reflects the diverse population that we serve. It makes all stakeholders feel comfortable in the environment.
Strategy	<p>Management will assess the décor and atmosphere for cultural appropriateness. The décor and atmosphere will be such as to make stakeholders comfortable and unoffended.</p> <p>Stakeholders entering the premises will be encouraged to dress in normal street clothes that are appropriate in nature, such as no short shorts, tight pants, clothing with negative or political statements or slander.</p> <p>An Air of neutrality will be stressed to reduce any type of "teach/student" atmosphere situations. Stakeholders must feel that they are in a safe environment.</p>
Financial Projections	Routine
Execution Person(s)	Management Staff Stakeholders
Evaluation Person(s)	Qualified Professionals; Office Manager; President/Director

Evaluation Criteria	Monthly Staff and Management meetings agendas and minutes. Review of agency website and forms. Monitoring of suggestion box and complaints submitted to agency. Completion of Cultural Diversity survey.
Target Date	Ongoing

GOAL 5	Support Cultural Diversity and Awareness in the community.
5.3	Abilities Inc. will reduce stigma and promote community inclusion by attending community activities that are offered in the area, that are culturally and personally diverse.
Strategy	Abilities Ill will provide a list of culturally diverse activities that are taking place in the community. Update Website
Financial Projections	Routine
Execution Person(s)	Management Staff
Evaluation Person(s)	Qualified Professionals; Office Manager; President/Director
Evaluation Criteria	Monthly Staff and Management meetings agendas and minutes. Review of agency website and forms. Monitoring of area programs that offer community activities such as RADD.
Target Date	Ongoing

GOAL 5	Support Cultural Diversity and Awareness in the community.
5.4	Abilities Inc. stakeholders will not force their religious or political beliefs or desire onto those for whom they provide services or any other stakeholder of the agency
Strategy	Stakeholders will be informed that their religious and or political beliefs are their own and are not to be forced onto other stakeholders. While Abilities Inc encourages diversity and recognizes the personal needs of stakeholders, the agency also understands that it indeed is a personal issue and will be treated as such.
Financial Projections	Routine
Execution Person(s)	Management Staff
Evaluation Person(s)	Qualified Professionals; Office Manager; President/Director
Evaluation Criteria	Monthly Staff and Management meetings agendas and minutes. Review of agency website and forms. Monitoring of complaints and suggestions.
Target Date	Ongoing

QUARTERLY

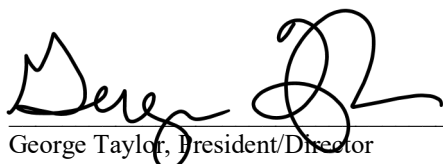
Goal 6	Be prepared for natural acts of God (nature) such as fire, flooding, storms, etc...
6.1	Decrease incidents of damage to business property that would inhibit the ability to provide services and supports to stakeholders.

Strategy	Maintain staff training in evacuation procedures via fire drills, tornado drills etc. Monitoring and maintenance of required insurance policies. Maintain fire inspections. Maintain policies and procedures on disk, in fire-proof lock box. Maintain health and safety reviews.
Financial Projections	none.....routine
Execution Person(s)	Qualified Professionals, Office Manager, President/Director
Evaluation Person(s)	Qualified Professionals, Office Manager, President/Director
Evaluation Criteria	Evidenced by completion of all reviews, trainings, and inspections. Policies loaded onto disk and stored in fire-proof lock box and stored off premises.
Target Date	Monthly-ongoing

YEARLY

Goal 7	Maintain National Accreditation
7.1	The agency will maintain a 3-year National Accreditation status with CARF International.
Strategy	Maintain standards that meet accreditation standards. Complete Annual Conformance to Quality Report (ACQR) yearly. Next accreditation will be Fall of 2021.
Financial Projections	On a yearly basis, projections are \$0.00 in order to maintain accreditation and submit ACQR. In Fall of 2023, projections are \$900.00 Intent to Survey fee and approximately \$1500.00 per surveyor for each day they are scheduled.
Execution Person(s)	President/Director
Evaluation Person(s)	President/Director
Evaluation Criteria	Continuation of National Accreditation
Target Date	On-going

Created By:


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1/20/2024