



Building Innovative Service Models

## **Koinonia Enterprises: Roadmap for the Development of a LIFE Adult Day Services Model**

Ohio Department of Developmental Disabilities

June 2021

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# Koinonia Enterprises: Roadmap for the Development of a LIFE Adult Day Services Model

## Executive Summary

Koinonia Homes (Koinonia) is proud of its history and tradition of innovation in services to support people with developmental disabilities to live full and productive lives in their community. Koinonia Enterprises, (KE) the division of Koinonia responsible for all day and employment services, has played a key role in expanding the horizons and opportunities of the people it supports.

Over the last ten years, KE has created and expanded robust employment services geared toward competitive integrated employment, closed its 14c workshops participated in provider transformation initiatives, and in partnership with Summit DD and local school districts, established Compass Pathfinder, a community-based transition program.

Beginning in 2019, Koinonia established community engagement criteria for all programs, building an organization-wide performance evaluation and quality indicator requirements. As part of this initiative, the agency adopted the Life Canvass Assessment to measure and monitor inclusion and person-centered goals. The agency developed a Choices app designed to help people find and choose resources in the community that match their personal goals and interests.

This BISM grant has provided KE with resources to take the next step in this pathway toward community integration, building on the tools the agency has developed for community engagement, the Life Canvass Assessment and Choices App. The goal for this initiative is to create a fiscally sustainable model for KE's day program that will promote community participation and integration centered around activities of choice. The vision is a program that will implement best practices in community inclusion to achieve meaningful community-based outcomes for everyone. The project will capitalize on technological tools to support each person to expand their horizons and become part of community life.

This roadmap will describe the process for developing the LIFE community-based model, with a focus on developing a fiscally sustainable model. Part 1 of this roadmap, is a description of KE's current services. Part 2 will describe the process for developing the LIFE community-based model and business plan, and next steps in implementing the model.

## Part I: Description of Current Services

In this changing COVID environment, program design and implementation requires a review of the KE program both before the pandemic and the program that emerged in response to the health emergency. An understanding of the program pre-pandemic provides a baseline set of expectations on the part of stakeholders including individuals, family, staff and management, and a baseline goal for revenue and billings. Changes in response to the pandemic provide the current starting point for implementation, and present both new opportunities and challenges.

### Pre-COVID Services

In 2019, KE offered people three programs: an employment program that served 72 people seeking or working in competitive integrated employment, the Compass Pathfinders school transition program serving 38 students transitioning from school, and an adult day service program serving 226 people including 139 people supported by ICF funding and 78 people with waiver funding.

Prior to the pandemic, a range of activities were offered to these 226 people as facility-based services in two buildings. The agency had just begun to pilot a small community-based day program with a small cohort of people supported by ICF funding when the pandemic hit. KE had also developed knowledge and expertise in developing and maintaining employer and community partnerships and activities through both its employment program and Compass Pathfinders school transition program that offered community-based work experiences to students transitioning from school.

### Response to COVID

When the pandemic hit, KE began to provide services to people funded by waiver in their homes, both in person and virtually, through a COVID response a Start Towards Emerging Possibilities (STEP) program, utilizing funding made available by the State of Ohio during the pandemic. Some of these people were previously served by KE through its day programs, others began to receive services during the pandemic. KE also began to provide services to people funded by ICF in their homes, both in person and using virtual services, as the State of Ohio approved for active treatment to continue. Over recent months, it also has begun to provide some waiver services in one of the two buildings it was leasing prior to the COVID pandemic, 1200 Resource Drive. In January 2021, KE served 73 people in its day services, through waiver funding including 28 people in facility-based services at 1200 Resource Drive, and another 47 people in the STEP program. As people have returned to pre-COVID programs, KE is now serving 64 people in its adult day service waiver programs including 42 people in its ADS/Voc Hab facility program and another 22 people in the STEP program.

KE staff have also been providing support to 132 of the 139 ICF participants in Koinonia residences, as 7 of them were attending the ADS/Voc Hab facility. Currently as we work this this new model, no participants with ICF funding are being served from the building.

## Facility Space

Prior to the pandemic, KE was providing facility-based services out of two buildings, its Mayfield building, and the building at 1200 Resource Drive. Currently KE is not leasing space at the Mayfield building and only has available space at 1200 Resource Drive. It is currently serving 42 individuals out of the space. The agency is looking into leasing space at another building location easily reached by people attending the current location in Brooklyn Heights, OH.

KE is exploring the possibility of serving up to 96 people, in the near future, from the 1200 Resource Drive building by providing services in shifts and offering services on weekends. A survey has been sent to individuals and families to determine their interest in attending early morning and/or late afternoon shifts. As part of the roll out of community-based day services, KE may also look to partner with community organizations to develop smaller spaces that can serve as hubs for community-based services in local neighborhoods.

## LIFE Canvass Assessments

Koinonia has adopted community engagement criteria for all its programs, supported by agency wide performance evaluations. The agency is using a LIFE model, which stands for **Life Long Inclusion for Everyone**. This model is designed to identify adequate supports needed for people with IDD to move from exclusion to community inclusion while addressing each person's choices and barriers.

The LIFE model includes an assessment canvass that measures a person's 'LIFE Level' which is a ranking based on their ability and desire to be active in the community, and identifies any barriers to inclusion they face, and supports they may require. Individuals will receive a ranking between one and four. This ranking between one and four was designed to align with how a person selects their Path to Community Employment. Koinonia staff has begun to use the assessment to develop individualized plans for each participant to move toward greater community integration and independence and evaluate progress made toward this goal. People may choose to explore a career path or engage in volunteer work, participate in cultural activities, explore virtual events, join a sports team, or other physical activity.

Technology will be central to fulfill implementation of this program. A Choices App will be made available to help each person identify resources in the community that will help them achieve their personal goals. The Choices app allows staff or clients to quickly find community-based activities that are appropriate for each person's LIFE Level. Users can quickly get a synopsis of

activities happening within a chosen geographic limit near their current location. Users can select activities based on the category of interest and immediately receive all the information they will need to participate.

The agency began the LIFE Canvass assessments prior to the pandemic. During the pandemic LIFE Canvass assessments have been completed for most people enrolled in adult day services. As described below, this data was used in developing the community-based program model and analyzing costs for the model.

## Koinonia's Work Life Balance Project

Koinonia is just rolling out a new agency wide innovative staffing structure. The purpose of the program is to create more scheduling consistency, decrease burnout and reduce turnover by offering staff a better balance of work and life. This is designed to allow staff more time for their personal lives. The initiative will begin in August 2021 with the residential staff providing supports to those with ICF funding. In implementing community-based day services, KE may be able to take advantage of this staffing structure to pull in additional staff who are also working for the residential program, and available to provide community-based day services near the homes of the people they support.

## Part II: Development of a Community-based Day Services Model through the BISM Grant Program

### The BISM Team

Koinonia convened a BISM workgroup to accomplish both the assessment and early planning stages for development of a sustainable model that would incorporate community inclusion and choice. The initial workgroup included the following core team members from the agency:

- Jeanne Greene, Chief Clinical and Program Officer
- Sabrina Johnson, Director of KE
- Brian Hoyer, Director of Quality and Compliance
- Elizabeth Emonds, Director of Finance
- Tiffany Leach, Senior Accountant

The work group was supported by Rachel Pollock, a subject matter expert designated through the State of Ohio, Department of Developmental Disabilities. Britta Hough, Community Life Engagement Project Manager, NE Region, attended and provided guidance at work group meetings. During the planning process, the work group expanded to include:

- Maureen Schroder, Director of Transportation for Koinonia
- Cheryl Senko, Director of Development and Communications for Koinonia

- Kelsey Mulhall, Development Associate for Koinonia
- Carli Guzowski, Quality Improvement Specialist for Koinonia
- Joe DiFranco, Senior Manager of Community Supports and Development for Summit DD
- Drew Williams, Director of Community Supports and Development for Summit DD
- Scott Marks, Director of Operations for Ohio Provider Resource Association
- Patricia Nixon, Superintendent for Warrensville Developmental Center
- Kimberly Morgan, Program Director for Warrensville Developmental Center
- Mary Talpas, Parent
- Timothy Talpas, Parent
- Barbara Jarjisian, Parent
- Jennifer Krzynowek, Manager of Provider Development and Quality for Cuyahoga County Board of DD

## Developing the Vision and Framework for the Model

The BISM team members engaged in an assessment process highlighting opportunities and challenges and developed the vision and framework for a community-based model, guided by the LIFE Assessment Canvass criteria. We will call this the LIFE day program model.

The vision for the project was to provide expanded and meaningful opportunities for community inclusion and choice of community activities for all people in KE's ADS/Voc Hab program. The team laid out the following framework: people supported at Life Level 1, assessed at having a high level of interest and low barriers for community inclusion, should be provided the opportunity for spending all their day services time in community-based activities. People at Life Level 2 and 3, with some interest in community-based activities and higher barriers to inclusion should spend at least a third of their program week (approximately 10 hours a week) in community-based activities that promoted inclusion and choice. People at Life Level 4, with low interest and high barriers would initially spend small amounts of time in the community, approximately 4-6 hours a week, with the aim of increasing their interest and engagement.

## Developing a Fiscally Sustainable Model

With the vision and framework in place, the team worked with BISM subject matter expert to develop a model for fiscal analysis and completed a cost revenue analysis based on that vision. As a starting point, the team gathered and analyzed data about life levels and staffing ratios for the 28 people receiving waiver services as of February 2021 and for the 139 people receiving services through ICF funding.

During the initial assessment stage, the subject matter expert, advised that, in line with best practice for a group community-based day services program, KE should make every effort to keep staff to individual ratios as low as possible. She recommended a goal of no higher than a

1:3 ratio, unless the financial analysis and funding would not support that ratio. She also advised that it would be challenging to achieve meaningful outcomes of community inclusion and choice if services were provided at a ratio greater than 1:4.

The subject matter expert also advised that a meaningful and effective community-based program would require more supervisory staff focused on resource development, monitoring community engagement, mentoring direct support staff, and filling in for support staff during absences and vacations.

In developing a financially sustainable model, the team used these best practice guidelines as a framework for analysis. Working with the BISM program team, the subject matter expert developed alternative cost scenarios, at varying levels of minimum staffing ratios and supervisory caseloads. The program team provided data on required staffing ratios for specific individuals to ensure that the cost modeling was based on the actual support needs of the individuals currently served including those who needed 1:1 or even 2:1 support. The team used baseline cost data from 2019 for management level personnel costs and non-personnel costs because financial data from 2020, given COVID, was not representative of typical costs.

#### Analyzing and Restructuring Program Design and Funding to Create a Sustainable Model

The cost analysis revealed that a reallocation of program structure would be necessary to create a sustainable model. Based on current allocations of funding, the costs of support services were much higher than 2019. The team recognized that these costs would not be covered by the combination of potential waiver revenue and the ICF funds allocated in prior years to KE.

The team looked at how to break down funding silos by using staff creatively. Several key findings were helpful in breaking down and restructuring funding and staffing.

- KE could continue to blend ICF funding and waiver funding serving both groups together as long as appropriate billing, service and ratio requirements were met.
- All KE staff are paid for a 40-hour work week and a fiscally sustainable model needed to maximize the funding for those 40 work hours for the increased number of staff needed for a community-based model.
- Transportation to and from KE's day program had been provided by Koinonia's transportation department and these services could be provided by KE staff who could accompany people to and from both facility and community-based day services.
- ICF funding allocated to Koinonia transportation might be able to be reallocated to KE to support this change in service structure.
- Provision of services through two shifts could reduce costs and also enable KE to provide service to as many individuals as possible until additional physical space could be

located either in a second building or in smaller hubs leased from other community partners.

## Developing the Solution: Expanding Team and Collecting Data

The BISM team leader, Sabrina Johnson, expanded the team to plan in tandem with Koinonia's transportation department. Maureen Schroder, Director of Transportation became another key BISM team member. Collaboration between KE management and the Director of Transportation was essential to the development of a fiscally sustainable model that creatively restructured program services and funding to support a community-based component.

The BISM team also developed and distributed a survey to individuals, families, and residential staff to see how much interest there would be in three possible program shifts: an early morning shift from 7:30am-12:30pm; an afternoon shift from 1:30pm-6:30pm; and a weekend alternative for people attending part-time with the same shifts available.

## Obtaining Feedback from Stakeholders

In May, the team invited additional stakeholders to join the planning discussions. Included in this meeting were several family representatives, several representatives from Cuyahoga and Summit County Boards of DD, and a representative from the Warrensville Developmental Center. All stakeholders supported a program design that would provide a significant community component. The parents of an ICF resident were comfortable with community-based activities that were based out of small community hubs rather than a larger building but were eager for services outside the ICF to begin as soon as possible. County Board members informed that a few providers have tried similar designs but were not successful at maintaining their trial models. There was also a general feel that cold calls should be made to pre-COVID participants to get a better sample size for the survey responses.

## Developing the Business Plan

Through collaboration, the expanded team, with feedback from stakeholders developed a business plan and strategic/implementation plan for the new LIFE ADS model. This plan, as described in the accompanying document, is based on a redesign of staff responsibilities and reallocation of funding. It is supported by a cost and revenue analysis. It also is based on a continued blending of services for participants receiving waiver and ICF funding, ensuring that all service requirements are met.

In developing the model and business plan, it included key components for a successful program model.

## Next Steps in Implementation

The accompanying business plan will be the blueprint for 1) careful detailed fiscal analysis incorporating continued changes in the programmatic environment and investments needed for key program components including technology, physical space, development of community partnerships and community-based protocols; and 2) phased in implementation of community-based day services on the background of post-COVID reopening and phased increases in staffing through recruitment and reallocation of any available staff from other programs.

Additional cold calls will be made to get additional feedback from participants, their families, teams, and Koinonia's leadership.

Another meeting will be held to review deliverables and get additional feedback. Leadership members from KE, Transportation, and ICF will continue meeting on a strategic plan for the overall big picture. KE will continue to work on getting feedback over the summer from as many stakeholders as possible. There will be a pilot to test the logistics of the model, and an Open House this summer will also cover the relocation to the new facility-based program along with community-based activities review.