



# Winona ORC

educate • empower • employ



**2014  
Purposeful  
Outcome  
Planning  
"POP" Report**

1053 East Mark Street • Winona, Minnesota  
[www.winonaorc.org](http://www.winonaorc.org) | [facebook](#) winonaorc

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## Introduction

### Mission

It is our mission to provide community based employment, vocational training and comprehensive job related skills and services to people with special needs. We will design programs to work harmoniously with other community resources to maximize opportunities to our clients and our community.

### Vision

Winona ORC envisions a world where all people are uplifted by working. Through pride, dignity, continuous learning and respect for all, we build a healthier community.

### Values

Dignity for all people • Respect for quality in work and programs • Learning organization

### Board of Directors

A volunteer board acts as the governing authority to Winona ORC Industries, Inc. (WORC) a private, non-profit organization. Members are selected because of their unique and valuable talents as well as their ongoing and committed interest in people with special needs. Board members also serve on a number of subcommittees including; finance, program, sales, fund raising and personnel.

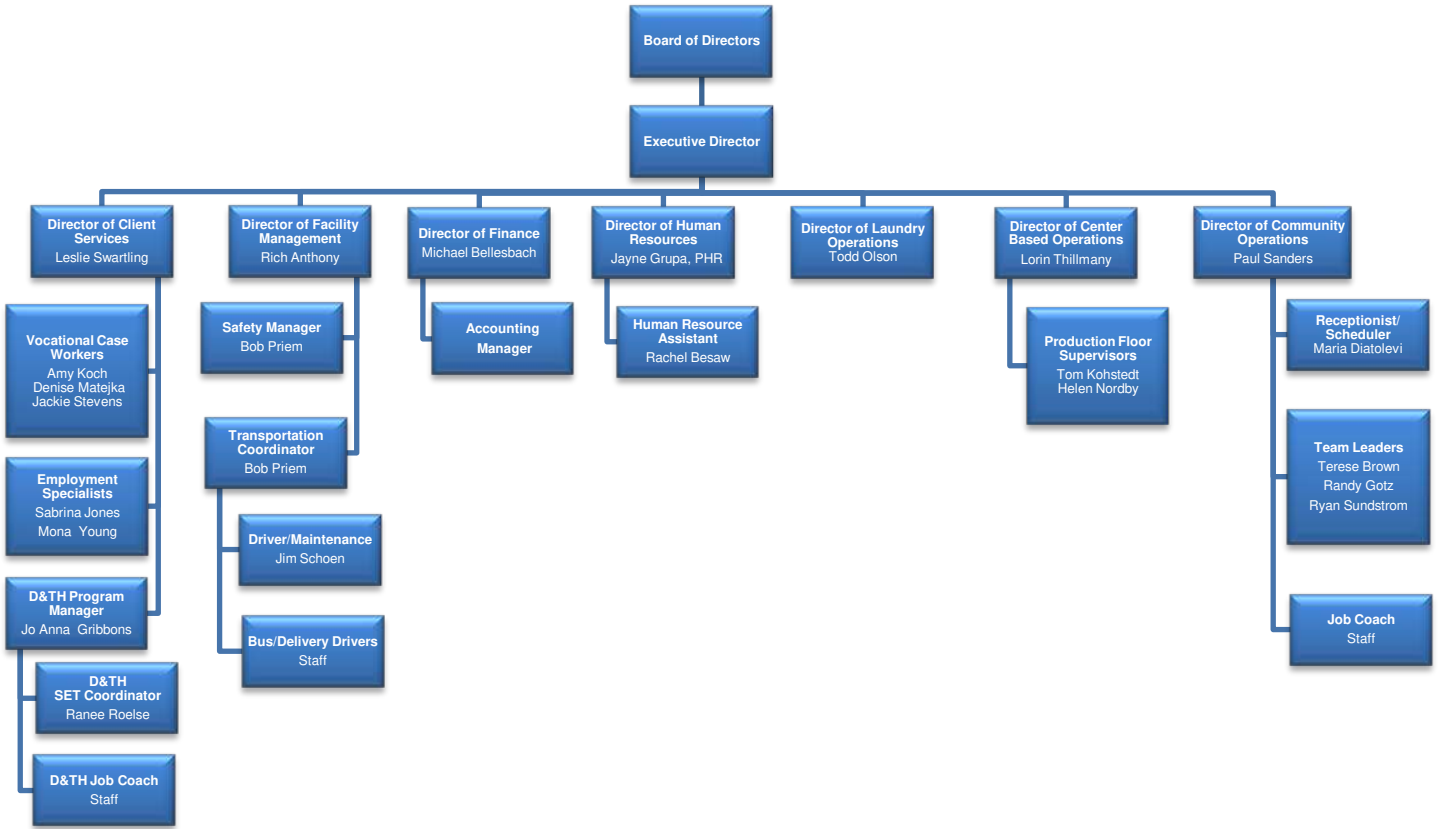
### 2014 Board Members

President:	Jim Yenish	Member:	Dave Adank
Vice President:	Steve Volkman	Member:	Chad Anderson
Treasurer:	Jim Pomeroy	Member:	Deb McClellan
Secretary:	Ann Nelson	Member:	Maggie Modjeski
Advisor:	Blaine Krogh	Member:	Kevin O'Reilly
		Member:	Bob Peterson
		Member:	Bill Reinarts
		Member:	Ron Wenzel

### Senior Management Staff

Executive Director:	Judie Foster-Lupkin
Director of Center Based Operations	Lorin Thilmany
Director of Client Relations:	Leslie Swartling
Director of Community Operations	Paul Sanders
Director of Facilities Management:	Rich Anthony
Director of Finance:	Michael Bellesbach
Director of Human Resources:	Jayne Grupa
Director of Laundry Operations:	Todd Olson

## Organizational Chart Ending 12/31/14



## Organizational Outcomes

The organization has a strategic plan that is reviewed and updated annually. The plan along with department goals and plans for individuals receiving services at WORC are analyzed for measurements and outcomes. A team consisting of management and supervisory staff and other personnel collect information for the purpose of evaluation and making program recommendations.

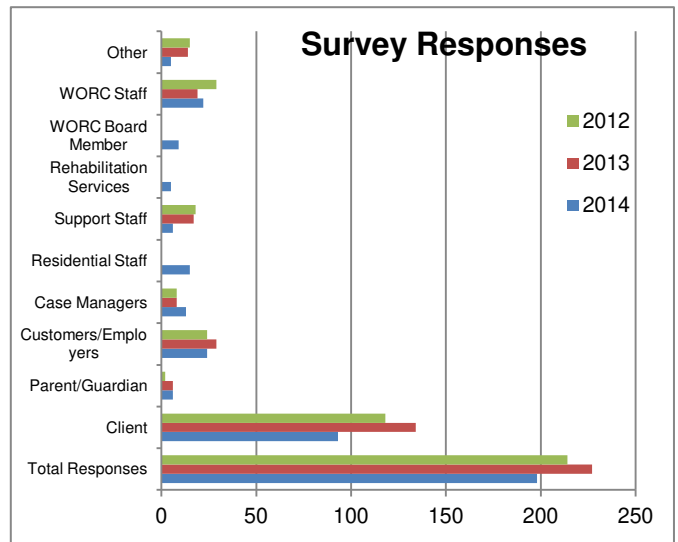
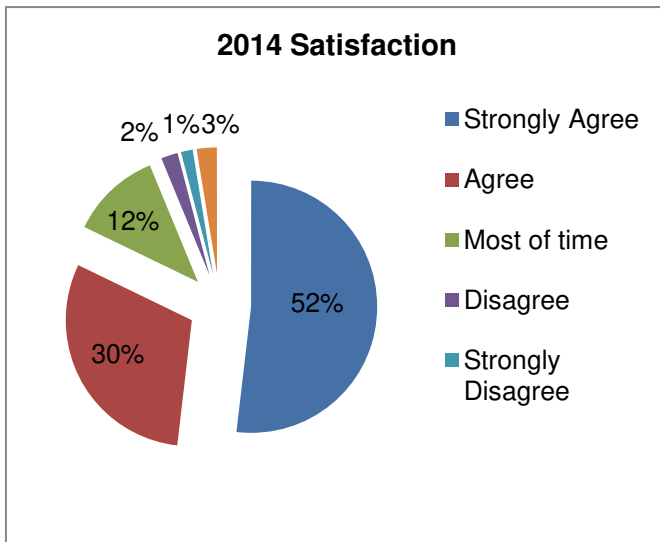
This approach which has been utilized since 1995 has been very successful. Evaluation of the rehabilitation programs that WORC offers to people with disabilities is intended to analyze specific areas of service delivery. Each program, at a minimum is measured in: efficiency, effectiveness, accessibility and stakeholder satisfaction.

## Satisfaction of Stakeholders

Stakeholders are individuals or groups who have an interest in the activities and the outcomes of an organization and its programs and services. They include, but are not limited to: clients served families, governance or designated authority, purchasers, regulators, referral sources, personnel, employers, advocacy groups, contributors, supporters, landlords, business interest, and the community. Satisfaction is measured by our satisfaction survey and other processes.

## 2014 Satisfaction Survey Methodology, Results and Analysis

A survey was conducted to measure customer satisfaction for the 2014 year. WORC staff prepared and conducted the majority of the survey. The survey was delivered to stakeholders through a variety of media including, paper, email, and the web. A total of 193 people responded with an overall satisfaction rating of 82% in services. We have continued to improve in the area of communication reducing dissatisfaction from 8% in 2013 to 2% in 2014. However, work is still needed on improving timely reporting to collaborating agencies. Generally, stakeholders believe we provide needed and quality services in the community. "Winona ORC always puts our needs first and does whatever it takes to meet them. Winona ORC is an asset to our company and the community", is an example of one of the comments we received.



## Human Resources

### Statement

It is our goal to identify and formulate policies and practices that will promote growth and development to maximize each individual's ability to contribute to the mission of WORC in an environment of mutual trust, respect, and learning. Human Resources meet regularly with the Board of Director's Personnel Committee to ensure our goals are met.

## **Policies**

WORC has developed personnel policies that comply with regulatory requirements. The policies offer personnel guidelines for conduct and expected behavior. A staff handbook has also been developed that provides a comprehensive source of information.

## **Hiring and Retention**

All offers of employment of staff personnel are contingent on the ability of the applicant to successfully pass a series of credential checks and background studies including: criminal and sexual predator, driving records, and drug and alcohol screening. We recognize the value of our employees and are dedicated to attracting exceptional candidates, retaining well qualified personnel and improving job satisfaction.

## **Training and Development**

All personnel are required to be certified in CPR and First Aid. This training is provided in house through our own Red Cross certified trainer. Annual training is given in: vulnerable adult reporting, data privacy act, confidentiality and HIPAA, harassment, corporate compliance, transportation, blood borne pathogens, diversity, safety, crisis intervention and more. In addition qualified staff and many outside presenters provide specialized disability training. Staff and clients also participate in monthly "tool talks" that are short informational meetings that focus on safety and organizational policies and procedures.

Staff members have received nearly 600 hours of training in conjunction with our Minnesota Job Skills Partnership (MJSP) grant. Classes included: Business Ethics, Adaptive Technology, Customers Equal Jobs, Crisis Intervention and Introduction to Commission on Accreditation of Rehabilitation Facilities (CARF). The grant will continue into 2015 with additional modules including 16 hour training on Commercial Laundering Techniques for both staff and clients.

## **Performance Management**

Our performance review process provides pertinent information to allow a better understanding between supervisors and personnel of the requirements and expectations of their positions. Performance is assessed based on weighted core accountabilities and goals are established for the coming time period.

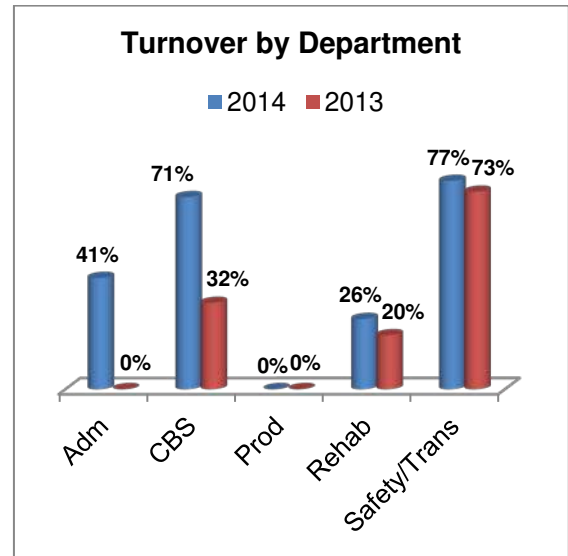
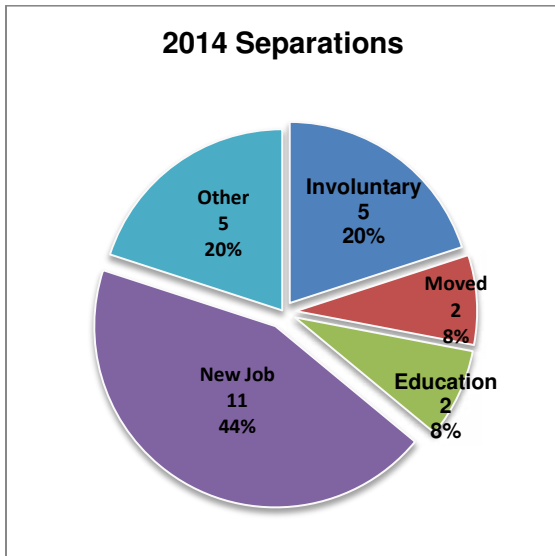
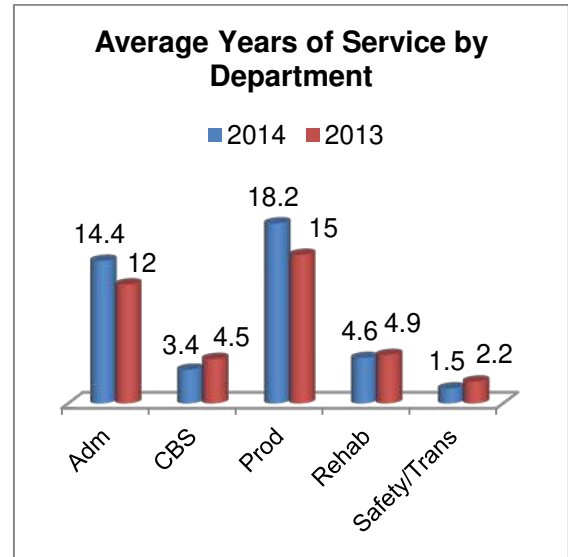
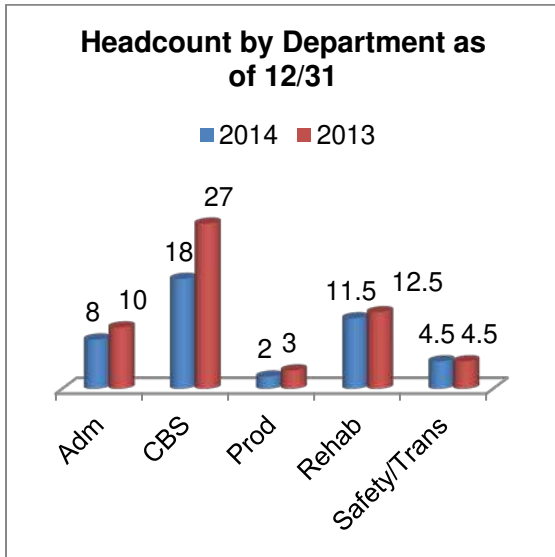
Job descriptions ensure that the description addresses the core accountabilities, minimum requirements, physical expectations, essential functions and measurements of success for each position. Salary grades and pay tables provide structure for fairly compensating employees and managing payroll.

## **2014 Highlights**

- 2014 was a challenging year regarding staff retention and compensation. Due to changes in state funding and decreased sales, a substantial loss was projected for the organization. In a proactive move, management decided to implement a reduction in workforce and also temporarily decreased staff wages by 5% and management wages by 10%. This action was implemented in April and we were able to restore staff wages in July due to the passing of the 5% campaign. Management wages were made whole in September.
- Matt Semling, Director of Operations tendered his resignation and a decision was made to split the position. Lorin Thilmany was named as the new Director of Center Based Operations and Paul Sanders was hired as the new Director of Community Operations.
- Executive Director, Judie Foster-Lupkin submitted her resignation to move out of state. A search committee lead by Jim Yenish was formed to select a new Executive Director. The three month process culminated with the hiring of Heidi S. Smith effective in January, 2015.
- We contracted with Accident Fund to provide WC insurance. The 2014 premium is \$63,759 compared to \$107,765 in 2013. A savings of \$44,007 due to improved mod rate and premium discount.
- UST, our administrator for unemployment insurance once again reduced our contribution rate to 2.262% in 2014 compared to 2.678% in 2013.
- The theme for our annual recognition banquet was "Dreams that You Dare to Dream Really Do Come True". Over two hundred people helped to celebrate our 40th anniversary and featured motivational speaker Tasha Schuh. This theme was incorporated into other events throughout the year.
- Winona ORC staff volunteered time each week to delivery meals through our local Meals on Wheels program.

## Demographics

Our staff census at the end of 2014 was 44 compared to 57 in 2013. Turnover was 51% in 2014 compared to 26% in 2013. The reduction in workforce, temporary wage reduction and hiring freeze played a major factor in the increased turnover for 2014. 2015 will be a rebuilding year with concentrated effort in staff retention.



## Development Department

The WORC Development Department executes broad-based development strategies to secure financial support through individuals, businesses, corporations, foundations, volunteers and government. The activities involved include public relations, marketing, donor relations, communications, advertising, grant writing, event planning and volunteer coordination. The areas of fund development include general donations/annual campaign, fundraising events, in-kind capital and equipment and grants.

## Contributions and Special Events

We continued to have success in 2014 with our sponsorship package. Sponsors had the opportunity to sponsor any or all of three events: our annual golf outing, the Starlight Stroll Run/Walk/Roll 5k and the annual community banquet. Winona ORC also participated in Dancing with the Stars and was represented by Edina Realty.



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We held our fourth annual "Thank You" meal for clients and staff in November. This meal is a way to show appreciation for the daily contributions made by our clients and staff in helping to make Winona ORC great. We served over 100 meals.

<b>General Contributions</b>	<b>2013</b>	<b>2014</b>
Average Contribution	\$117	\$173
Lapsed Donors	9	32
New Donors	47	34
Repeat Donors from Prior Year	69	53
<b>Total Number of Donors</b>	<b>116</b>	<b>87</b>
<b>Total General Contributions</b>	<b>\$13,572</b>	<b>\$15,040</b>
<b>In-Kind Contributions</b>	<b>\$2,400</b>	<b>\$2,400</b>
<b>In-Kind Donors</b>	<b>2</b>	<b>2</b>
<b>Special Events</b>	<b>\$56,087</b>	<b>\$62,511</b>

## Grants

In December of 2014, we were notified that we were successful in qualifying for the MN DOT 5310 grant. We will be awarded 80% of the cost of a new bus for our transportation services. Two grants for the SET program were awarded in 2014; \$7,500 from the Xcel Energy Foundation and \$7,500 for the United Way of Greater Winona.

## Volunteers

Volunteers help WORC accomplish our mission of providing job opportunities to our neighbors with disabilities in Southeast Minnesota. It is estimated that 2,000 volunteer hours are provided to WORC annually.

We have a variety of volunteer opportunities at WORC. A few examples are:

- The WORC Board of Directors and committees
- Fundraising event committees
- Department volunteers
- Work Experience volunteers and interns from the local colleges

## Production

### General production information

WORC serves as a packaging and assembly subcontractor for work in Southeast Minnesota. Our core business is with larger local manufacturers that utilize WORC as a subcontractor to assist with various production needs. The services WORC offers assists employers with maintaining costs, better utilizing floor space, and improving output and profitability.

In 2014 WORC partnered with 53 local businesses an increase of 18% over 2013. The sales revenue from this business generated gross sales of \$375,000 for WORC, and provided 40,669 hours of meaningful work for our clients. A review of our larger contracts showed there was a \$30,000 increase in sales with Watkins and \$12,500 with Peerless. Sales declined by \$38,000 with Fastenal and \$20,000 with Wincraft.

### New Production Sales

In 2014, Winona ORC partnered with Peerless Chain as a subcontractor for a potential long-term assembly job with an international company. We worked on developing assembly systems, training clients and performing trial runs to ensure we could deliver both on quality and production. The contract will be awarded in the beginning of 2015 should be in full stride in the first quarter of 2015.

## **Confidential Document Shredding**

Our confidential document shredding operation has been increasing in sales and production every year. We have increased our customer base by 23% from 30 in 2013 to 37 in 2014. These 37 businesses utilize our services on a weekly/bi-weekly and/or monthly basis. The revenue generated is from contracts, business purges, walk-ins, and selling the baled paper to local recyclers.

Another project we have continued in 2014 is a community shredding event with a local church. We hold this event quarterly throughout the year at the church and have increased our pounds collected from 5,657 in 2013 to 9,000 in 2014.

Processed paper increased by 23% from 57,603 pounds in 2013 to 70,889 pounds in 2014. The shredding service provided 45 clients with 3,639 hours of work.

## **Winona Knits and Mitts**

After careful analysis, the Board of Directors made the decision to discontinue the Winona Knits and Mitts product line. While the products were highly praised for quality and style, the line continued to operate at a loss. The remaining inventory and equipment will be liquidated in the coming year.

## **Community Based Sales**

Our employment services are designed to provide effective training and rehabilitation services to individuals with disabilities. Every individual will be trained in job specific skills required for employment in the community including janitorial, food service, and manufacturing. Community Based Employment provides unique experiences for our job coaches and clients to work together as a team within the community. As a result of this teambuilding experience, we have developed consistent and strong relationships at all of our job sites. There are more than 53 local businesses that currently use our services in Southeastern Minnesota including: Bub's Brewery, Riverside Electronics, Fastenal Company, Benchmark Electronics, Cotter Schools, RTP Company, Watlow and Peerless Chain just to name a few. With more than 35 years of experience in these service industries, WORC has the capabilities of making local businesses more competitive in an ever-changing world.

Our strategic plan includes expanding our customer base sales by \$30,000 in new business each year. In 2014 an additional \$48,624 in sales was generated through Community Based Sales, with a year end total of \$747,145.

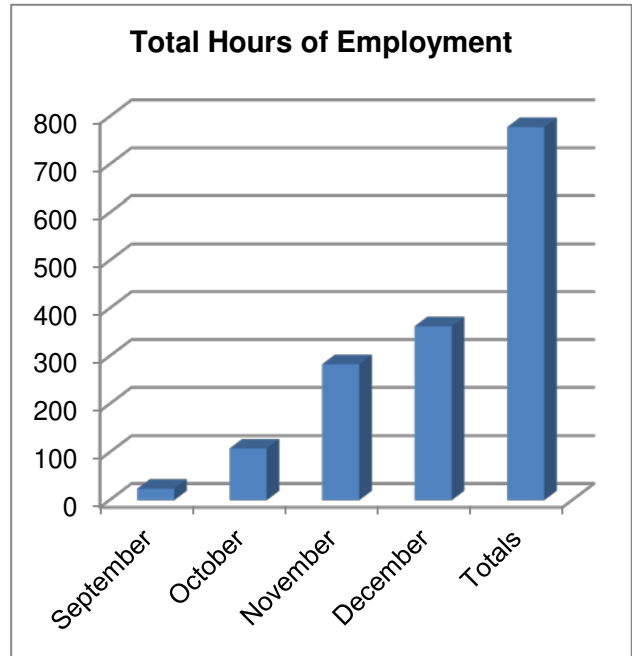
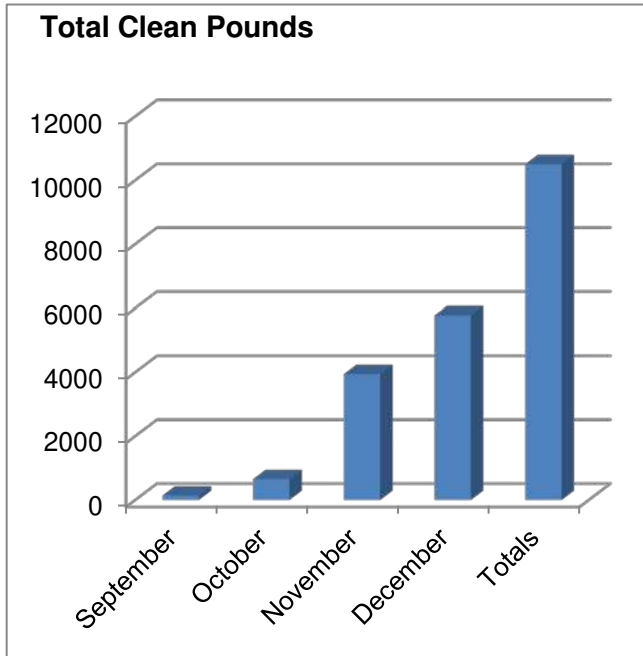
## **Winona Laundry**

Over the years one of the biggest struggles for Winona ORC has been finding and keeping work for clients with disabilities. Winona Laundry is an idea to help obtain and maintain large volumes of work for Winona ORC clients. The idea spans back over 6 years and includes a capital campaign and construction of the laundry facility. Winona Laundry is an industrial laundry focused on processing Health Care linens. The work necessary to process Health Care linens provides Winona ORC clients with consistent, meaningful work that spans wide variety of skill sets.

Construction of Winona Laundry was completed in August of 2013 and work on a couple of small accounts began soon thereafter. The goal was to start slow and train staff and clients on the details of running a commercial laundry before large volumes of work began flowing into the plant. The largest potential customer, a local hospital, started service on a small contract as a test of the laundry facility in December of 2013. In June of 2014 a contract was signed to provide linen services to the entire hospital, a contract that is estimated at over 600,000 clean pounds per year. This start date on this contract is January of 2015.

By the end of 2014 Winona Laundry had obtained 12 entry mat customers and 6 linen customers. In total for 2014 104,539 clean pounds of linens were processed in Winona Laundry utilizing 5,607 client work hours to complete this work.

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### Annual Operational Sales History

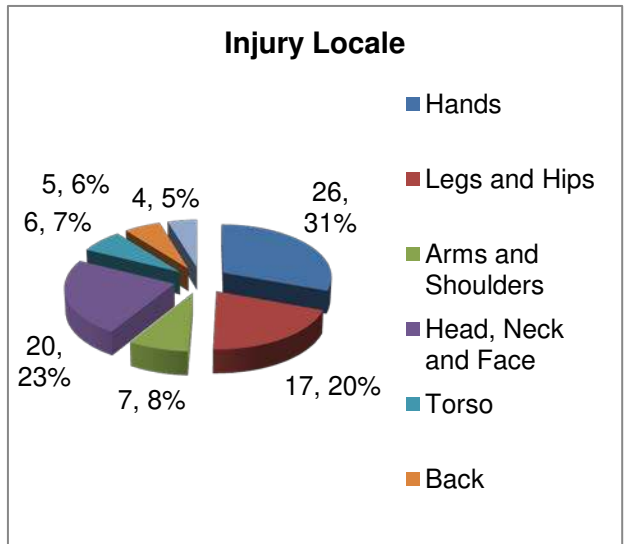
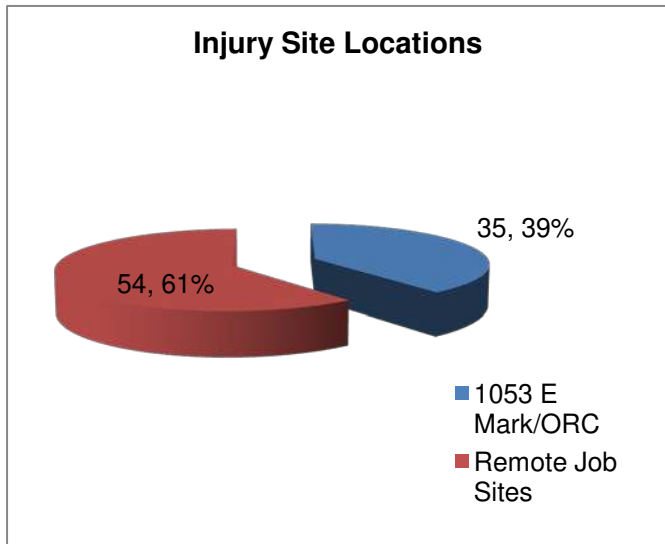
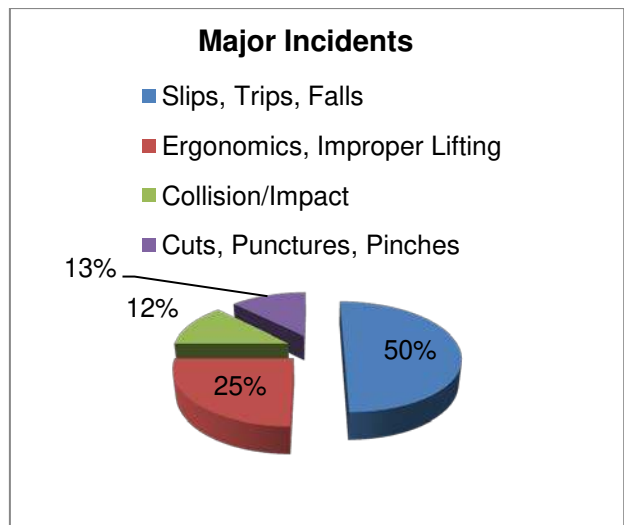
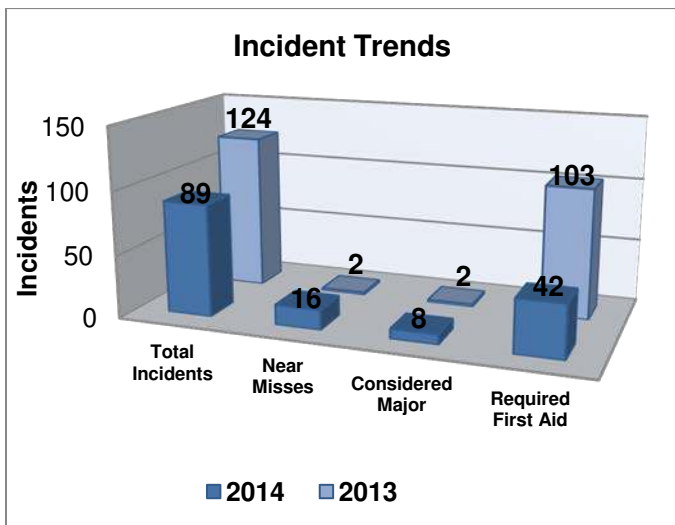


## Safety

In 2014 we began more detailed incident tracking, which allowed us to view trends and provide data that helped us define areas of needed improvement.

In 2014, 89 incident reports were filed, 16 of which were determined to be near misses and 8 were related to slips, trips and falls, 6 were collision/ impact related and the remaining 2 near misses were related to client disability / balance control and an elevator failure. There were 73 reports involving injuries/ medical emergency reported, of these eight were considered to be majors (requiring medical attention beyond the scope of first aid).

Reported Incidents decreased by 28% and the application of first aid decreased dramatically by 58% from 2013 while the number of majors and near misses increased. The increase in near misses can be attributed to changes made to reporting and data tracking, meanwhile the increase in major incidents is of concern.

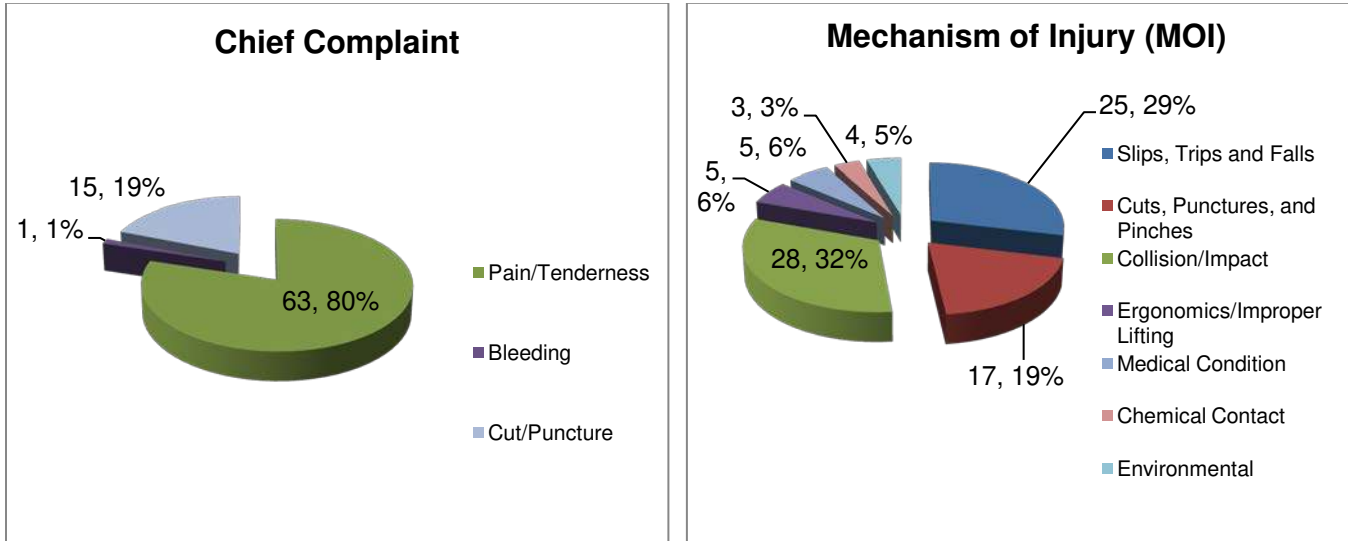


The occurrence of injuries at community based employment locations increased from 50% in 2013 to 61% in 2014, meanwhile center based occurrences decreased by 7% in the same period. The largest number of occurrences came from the Winona ORC production floor with 16 incidents, the Government Center and Scanning sites topped the list with 8 incidents each and Behrens with 7 incidents.

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The greatest proportion of injuries were hand injuries, stemming largely from cuts, punctures and pinches. Head, neck and face saw the next greatest volume, largely stemming from collision/impact related incidents.

Pain/Tenderness made up the majority of complaints at 80%, largely involving head and leg injuries. The 17 head injuries were associated with impact from hitting the head, and the 14 leg injuries were the results of slips trips and falls. Cuts/punctures followed at 19% largely associated with hand injuries.



Collision/Impact accounted for 32% of MOI Closely followed by slips, trips and falls (29%) and cuts punctures and pinches (19%) for 2014. Slips, trips and falls shared the top of the list with cuts, punctures, and pinches for most common Mechanisms of Injury (MOI) with 41 each, together totaling sixty six percent in 2014. Slips, trips and falls and cuts/punctures remained very similar in percentage to 2013, while collision, impact Injuries rose.

The safety committee will further analyze and discuss the results of the 2014 Incident Report Analysis to produce methods and timeline for implementation of practices to further reduce the occurrence of injury during the May 2015 Meeting.

A continued practice at the beginning of all meetings at WORC has been to review “safety first”, a discussion held surrounding concerns, incidents and suggestions. All safety policies and procedures were evaluated and updated annually in addition to the creation of new policies and procedures to address the changing workplace. Safety trainings were held at the beginning of employment and refresher trainings were held annually for all employees. Further claim reductions are a continuing goal of WORC, with a focus on safety and health, and an injury free workplace as the standard of achievement.

Each month a new safety topic that is relevant to the upcoming season, types of work, or other factors was introduced and information was shared in a variety of ways to insure staff and clients are aware. 2014 experienced continued development and additions to the informative “Tool Talks” that were designed to enhance the involvement of front-line leadership and employee participation. Due to the success of the talks, WORC will continue to utilize this valuable program in 2015.

Signs, posters and other notices were posted as required by regulatory agencies. Fire extinguishers, alarm batteries, and lights are checked monthly and repaired/replaced as needed.

### **Maintenance**

2014 saw continued growth in the Winona Laundry project, all safety and maintenance concerns and practices were reviewed to ensure compliance with regulatory agencies as well as WORC policy and procedure to provide safe and efficient laundry operations.

WORC continued pursuing “green” initiatives in 2014. The success of recycling practices, more specifically baling

## 2014 Winona ORC Purposeful Outcome Planning

recyclable materials to increase profitability has proven to be greatly successful not only in the reduction of disposal costs but in generating revenue and reduced labor costs associated with recyclable materials. WORC has also been looking into solar initiatives to reduce utilities costs and ensure economic viability into the future.

Continued pursuit of Compressed Natural Gas (CNG) as an alternative fuel source for the bussing fleet will remain a consideration as we move forward with future bus acquisitions. During 2014 we continued creating awareness at the state level of the potential benefit to transportation systems around the state if CNG were included in future grant vehicle configurations.

### **Transportation**

In 2014 WORC successfully applied for a 5310 bus grant vehicle, which should be delivered fall of 2015. The vehicle will be equipped with a 34" wide lift platform, which is critical to loading the larger wheelchairs. The bus will also provide us with the same additional per bus capabilities for hauling up to 3 wheelchairs in one trip, while folding seats allow us to maintain a full capacity with or without wheelchairs on board. This no capacity loss was a first for WORC, and has proven to be exceptionally beneficial in scheduling and route management.

In 2014 Winona ORC was awarded the privilege of being the first organization like ours to host the MN State Bus Rodeo, a skills competition for transit drivers statewide. This was great recognition for WORC as well as an opportunity for the community of Winona to show off during the 2014 event.

### **Programs**

Winona ORC is committed to continually improve our organization and service delivery to the persons served. Data is collected annually and analyzed and the information is used to manage and improve our service quality and delivery.

Winona ORC sets agency goals and service structure to ensure our outcomes are being met and that the highest quality of services is being provided at all times. WORC staff understands the concept of performance expectations and work together to achieve both the agency goals and personal performance goals. This is to ensure overall success and to maintain a service level of excellence. WORC believes that all clients and staff have the right to be treated with dignity and respect, to access services and programs that achieve most favorable outcomes, and the clients actively participate in the service delivery as well as being empowered to make informed choices about their employment future.

### **Referrals:**

#### **Admission Criteria**

- Have documentation of a verifiable disability
- Be at least 18 years of age
- Express the desire to work
- Funding source for services
- If re-applying for employment services, needs to follow the recommendations on the discharge summary paperwork

WORC had 142 potential referrals in 2014. We opened 99 case files to a variety of programs. These individuals were referred to employment services by Winona County and other Counties, Vocational Rehabilitation, Experience Works, HVMHC or were self referrals. Listed below are the programs the individuals were opened to:

- EE (Extended Employment) = 43
- VR (Vocational Rehabilitation Services) = 15
- CADI SE (Supported Employment) = 1
- CADI Prevocational = 9
- Welfare to Work = 5
- IPS (Individual Placement and Support) = 26

## 2014 Winona ORC Purposeful Outcome Planning

WORC attempted to work with 43 additional clients, but the client case files were not opened for a variety reasons including:

- Lack of follow through = 14
- No documentation of disability = 4
- Screened for services, but didn't start = 12
- Referred for services, but wasn't screened = 11
- WORC referred to another provider = 2

### Closures/Exit Criteria:

WORC follows up on individuals who are closed from our services and programs. We attempt to make contact with clients at three and six months. If the client is closed to competitive placement, we will try and contact them after one year of employment. In 2014, WORC closed 81 case files. Listed below are the reasons for the closure:

- Placement = 9
- Quit = 34
- Other (including termination or funding ended) = 15
- School = 1
- Moved out of the Winona community = 9
- Medical/Death = 8
- Transferred to another provider = 5

### Peer Review

Peer review is a system for checking quality and content in case files. A secondary purpose is for training new staff on case file standards. This team communicates ideas and suggests changes in forms and required documentation. Staff members that have case file responsibilities are required to participate in this process.

Case files are randomly selected and reviewed twice per month. A checklist of standards is used to ensure compliance in all service areas and programs. There were 281 files reviewed in 2014. Of those reviewed, 244 files or 87% passed on all standards the first time reviewed. Last year the overall percentage was 87% reviewed the first time.

### Workers Council

Workers Council is a group of WORC clients (8 clients in 2014) elected by their peers to represent the entire workforce. The council is led by an ORC staff person serving as the advisor. The Council works together to discuss working conditions, create events, and raise money for chosen charities. Each June, new members are elected and sit on the council for 2 years. Regular meetings are held monthly. Workers Council raises money through can collections and a percentage of vending machine sales. The Council hosts special events including: Halloween Party, Valentine Day Ice Cream Party, Root Beer Float Day, Breakfast Event and Popsicle Day. They also sponsor the Employee of the Month award, giving recognition to clients for outstanding job performance. In 2014, Workers Council contributed \$659.32 towards special activities, events and charities.

Ten Days of Giving for Merchants Bank	\$20.00
Children's Cancer Research	\$50.00
Special Olympics	\$25.00
Leukodystrophy	\$100.00
Family and Children's Center	\$25.00
Employee of the Month	\$180.00
8 other Special Activities, Events and Charities	\$259.32
<b>Total</b>	<b>\$659.32</b>

## Program Demographics

Winona ORC will provide persons served and other interested stakeholders with ongoing information about our actual performance as a business entity and our ability to achieve optimal outcomes for the persons served through their programs and services. This will be done by collecting program data based on our CARF accreditation areas. This provides accurate outcome data and allows better decision making based on how future funding will affect specific disabilities and programs. These include the following Employment and Community Services:

- **Community Employment Services: Job Development, Employment Supports and Personnel Services to Employers**
  - This program assists persons to obtain successful integrated community employment opportunities that are responsive to their choices and preferences.
- **Employee Development Services**
  - This program provides individualized services and supports that assist persons seeking employment to develop skills, attitudes, interpersonal skills, work behaviors to achieve positive employment outcomes.
- **Employment Planning Services**
  - This program is designed to assist a person seeking employment to learn about employment opportunities within the community and to make informed decisions.
- **Organizational Employment Services**
  - This program is designed to provide paid work to persons served at a site owned, leased or rented by Winona ORC. This creates opportunities for persons to achieve desired employment outcomes in their community of choice.
- **Employment Skills Training Services**
  - This program offers organized formal training services that assist a person with seeking employment to acquire the skills necessary for specific jobs.
- **Community Integration**
  - This program is designed to help persons to optimize their personal, social and vocational competency to live successfully in the community.

Each of the above programs has measurable outcomes in the areas listed below:

- The Effectiveness of Services
- The Efficiency of Services
- Service Access
- Satisfaction and Other Feedback from the Persons Served and Other Stakeholders

In determining if clients are in Facility Based Employment versus Community Based Employment, we analyze annual payroll records. Clients with over 50% of their work hours in the community are placed in the Community Based Employment category. Direct hire hours count as community hours, based upon the information in the direct hire billing sheet.



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Program		# of People Served Annually	# of Referrals	Entrances	Exits	Disability (Primary)	Gender	Age	Education Level
Career Options (CO)	2014	41	3	3	3	DD = 41	M = 19 F = 22	19-25 = 1 26-40 = 18 41-64 = 21 65+ = 1	NON = 3 HS = 38 POST = 0
	2013	43	2	2	5				
Brain Injury (BI)	2014	5	0	0	1	BI = 5	M = 4 F = 1	19-25 = 0 26-40 = 0 41-64 = 5 65+ = 0	NON = 0 HS = 2 POST = 3
	2013	5	0	0	1				
Facility Based Employment	2014	99	35	22	25	DD = 20 MI = 57 PD = 14 CD = 0 LD = 4 BI = 4	M = 62 F = 37	19-25 = 10 26-40 = 20 41-64 = 59 65+ = 10	NON = 21 HS = 51 POST = 27
	2013	126	56	34	43				
Community and Supported Employment	2014	160	44	31	30	DD = 66 MI = 68 PD = 15 CD = 1 LD = 7 BI = 3	M = 93 F = 67	19-25 = 23 26-40 = 42 41-64 = 91 65+ = 4	NON = 28 HS = 99 POST = 33
	2013	134	32	11	16				
Individual Placement and Support (IPS)	2014	28	36	22	6	MI = 28	M = 15 F = 13	18 = 1 19-25 = 3 26-40 = 11 41-64 = 12 65+ = 1	NON = 1 HS = 19 POST = 8
	2013	12	10	3	4				
Welfare to Work (WTW)	2014	6	7	5	4	NONE = 6	M = 2 F = 4	19-25 = 3 26-40 = 3 41-64 = 0 65+ = 0	NON = 1 HS = 5 POST = 0
	2013	11	9	8	8				
Vocational Rehabilitation (VR)	2014	20	15	14	12	DD = 5 MI = 5 PD = 3 CD = 0 LD = 7 BI = 0	M = 8 F = 12	18 = 2 19-25 = 9 26-40 = 3 41-64 = 6 65+ = 0	NON = 3 IN HS = 3 HS = 8 POST = 6
	2013	18	22	15	5				
All Programs	2014	359	130	97	81	DD = 132 MI = 158 PD = 32 CD = 1 LD = 18 BI = 12 NONE = 6	M = 203 F = 156	18 = 3 19-25 = 49 26-40 = 97 41-64 = 194 65+ = 16	NON = 57 IN HS = 3 HS = 222 POST = 77
	2013	349	131	73	82				

**Disability Terms**

DD - Developmental Disability  
 PD - Physical Disability  
 LD - Learning Disability

MI - Mental Illness  
 CD - Chemical Dependency  
 BI - Brain Injury

2014 Winona ORC Purposeful Outcome Planning

Program		Average Hours Work per Day	% of hours worked in the community	Average Hourly Wage	Annual Wages	Placemen t	90 Day Retention	One Year Retentio n
Career Options (CO)	2014	7.5	28%	Com = \$3.14 Facility = \$1.72	\$82,622.10	0	n/a	n/a
	2013	7.0	22%	Com = \$2.61 Facility = \$1.20	\$71,568.10	0	n/a	n/a
Brain Injury (TBI)	2014	4.5	10%	Com = \$3.76 Facility = \$2.08	\$4,188.31	0	n/a	n/a
	2013	3.8	12%	Com = \$3.75 Facility = \$2.36	\$5,571.99	0	n/a	n/a
Facility Based Employment	2014	4.1	n/a	\$3.77	\$153,982.17	n/a	n/a	n/a
	2013	4.7	n/a	\$3.29	\$218,757.50	n/a	n/a	n/a
Community Employment	2014	4.7	100%	\$4.85	\$391,140.08	n/a	n/a	n/a
	2013	4.8	100%	\$3.62	\$276,756.00	n/a	n/a	n/a
Supported Employment (Extended Employment Placement)	2014	6.9	100%	\$9.05	n/a	54	90%	64%
	2013	6.2	100%	\$8.64	n/a	54	87%	60%
Individual Placement and Support (IPS)	2014	5.5	100%	\$8.78	\$3,230.11	14	83%	60%
	2013	4.0	100%	\$8.55	\$3,097.90	12	80%	57%
Welfare to Work (WTW)	2014	8	89%	\$8.67	\$5,987.36	3	67%	n/a
	2013	3.5	60%	\$8.00	\$22,661.09	3	33%	n/a
Vocational Rehabilitation (VR)	2014	4	57%	\$9.34	\$7,311.77	3	100%	n/a
	2013	5.5	69%	\$8.85	\$6,088.87	3	n/a	n/a
All Programs	2014	5.7	n/a	Com = \$3.92 Facility = \$2.52 DH = \$8.96	\$648,461.90	74	87%	60%
	2013	4.9	n/a	Com = \$3.33 Facility = \$2.28 DH = \$8.51	\$604,501.45	72	67%	59%

## Career Options

This employment and service program is licensed to offer supports to 42 adults with Development Disabilities or related conditions. This program has a vocational focus, but is expanding into some programming. The clients develop and maintain employment skills, participate in life building activities of their own choosing and enhance their independent living skills. In this program, clients require a higher level of staffing supervision. This is set by the Minnesota Department of Human Services. Winona ORC staff may assist with job training, independent living skills, behavior modification, and social skills. Clients can work within in the community or in our facility.

**Effectiveness:** To maintain the number of hours clients participated in their work day. This includes work hours, alternative programming and transportation. In 2014, the clients averaged 7.5 hours per day compared to 7.0 in

## 2014 Winona ORC Purposeful Outcome Planning

2013. Clients participated in paid work or Skills Education and Training (SET) programming 92% of their scheduled day. The percentage of hours worked in the community was 28% and average hourly wage in the community was \$3.14. This was a \$.53 increase from 2013. The average hourly wage in our facility in 2014 was \$1.72 compared to \$1.20 in 2013. The clients worked on 156 different jobs both in the community and in our facility. These jobs included janitorial, light assembly, clock building, shredding and laundry. In 2014, our commercial laundry department began to operate. There is a range from 12-18 DTH clients working in this area at one time.

**Efficiency:** To decrease the number of hours clients are working on make work. It was determined that clients worked on make work 25% of the time they were scheduled. This was a decrease of 26% from last year. WORC made the decision to discontinue all paid make work in May 2014. We turned our focus on our Skills, Education and Training program. This has been a positive change for our clients and agency.

**Access:** In 2014, we had 2 full time clients and 1 part time enter into the DTH program and 2 full time and one part time exit the program. Two of the clients that left WORC were transferred to another work program in Winona County and one client moved out of the Winona area.

### Career Options Success Story

Greg began receiving employment services with WORC after his direct hire position at Burger King ended due to the business closing. Greg decided to try and explore a variety of community job sites when he came to WORC. In 2002, Greg discovered that he loved working at Fastenal doing light assembly and packaging jobs. After many years of working at this particular job site, Fastenal decided to end this community job site. This change was extremely hard on Greg and WORC worked with him to explore other areas of interest. Greg wasn't open to try different or new jobs at first, but after he became more comfortable in the new environments, he embraced the change. Greg found that there are other jobs he enjoyed and was good at doing. Greg is an essential employee doing clock assembly and he is also working on our shredding crew. Greg was recognized for his 30 years of service with WORC.

### Brain Injury (BI)

This program provides support to clients with Brain Injury (BI). It focuses on how to work with client with short term memory loss and other barriers that affect their employment. Assistive technology may be used to create devices that will create more employment options as well as increasing independent living skills.

**Effectiveness:** To maintain the number of hours clients participated in their work day. This includes work hours, alternative programming and transportation. In 2014, the clients averaged 4.5 hours per day compared to 3.8 in 2013. Clients participated in work or SET programming 78% of their scheduled day. The clients worked 10% of their scheduled hours in the community and their average wage in the community was \$3.76. The average hourly wage in our facility was \$2.08 compared to \$2.36 in 2013. This wage went down when one of our clients moved to another day program due to medical issues. The number of paid jobs the clients worked on was 72 different jobs this was in both in the community and in our facility. Some jobs included janitorial, light assembly and laundry.

**Efficiency:** To decrease the number of hours clients are on make work. It was determined that clients were on make work 7% of the time. With make work ending in May of 2014, staff were creative on providing paid work for clients by setting up jobs into multiple steps or making adaptive equipment for client's to use.

**Access:** WORC closed one full time client in 2014 and the agency didn't have any new referrals into the program in 2014.

### SET Programming (Skills, Education, and Training)

**Goal:** The goal of SET (Skills, Education and Training) is to provide employment, educational and training activities that promote employment training, communication, cultural awareness, independent living skills, healthy lifestyles and social/recreational activities for our clients.

**Outcome:** WORC provides a structured programming environment for our DTH clients and other clients that we serve. In 2014, our focus changed to specialized programming for our DTH clients. This allows them the

## 2014 Winona ORC Purposeful Outcome Planning

opportunity to have structured programming when the productive work is low and DTH clients are scheduled each day to participate in programming. Other clients at WORC participate when community partners present.

**Number of Clients Participating:** Sixty-one clients participated in SET Programming. There were a total of 14,154.30 unpaid hours and 733.16 paid hours including Safety Orientation in 2014. The total hours were 14,887.46.

### 2014 Community Partners- Collaborative Efforts

- University of Minnesota Extension - Nutrition Educators- Healthy Eating Options, Healthy Snacks and Economical Shopping
- Project Compass - Personal Grief lead by a Certified Grief Counselor, Nutrition - Lunch of the Go and Dating, Sexuality and Your Rights
- Winona State University Social Work Program - Social Skills (communication and dealing with your feelings), Positive Workplace/Teamwork (sexual harassment) and Self Care (aging, nutrition, exercise and social wellbeing).

### Other 2014 Topics Covered were:

- Basic math skills for daily living including cooking and money identification
- Workplace safety and boundaries - appropriate workplace social skills (using role playing)
- Healthy eating and how to read nutritional labels
- Various forms of exercising takes place weekly with the use of videos, internet and DVD's.
- Monthly bowling outings
- Learning about current events and historical happenings
- Developing leisure skills including games and crafts
- Studying various countries and states
- Various holiday projects

## Facility Based Employment

This employment service is designed to provide assessment, income producing employment, job training, and support services to individuals with disabilities. It serves the purpose of providing a structure employment environment which allows individuals to learn light assembly and packaging skills and appropriate work skills and behaviors. The program is set up for clients to gain employment skills, test their stamina and work on appropriate work behaviors like attendance and interpersonal skills. When the client feels that are ready for the next step in their employment, they can be transitioned into community employment.

**Effectiveness:** To increase the average hourly wage that a client earned while working on the production floor. In 2014, the average hourly wage was \$3.77 compared \$3.29 in 2013. This was an increase of \$.48 per hour. The numbers of hours worked per day was 4.1 hours in 2014 and 4.7 hours in 2013. WORC has less clients working in our facility this year. We only had 99 clients that worked more than 50% of their time in our facility compared to 126 in 2013. This decrease is becoming a trend in all Rehabilitation Centers in Minnesota and across the United States. The transfer of service dollars will be targeted to community and supported employment.

**Efficiency:** WORC measured total number of hours clients participated in alternative programming (SET). During 2014, the focus of our SET program changed. Starting in June 2014, SET became part of our DTH program. We still offer classes, presentations and activities for non DTH clients, but it is limited. This change did affect the number of programming hours offered this year. In 2014, there was a 396.94 hours of SET programming with 217.37 hours being paid time. In 2013, the total hours were 1,607.42 and the number of paid hours was 934.66.

**Access:** To increase the number of actual work time to where clients are working their full scheduled shifts. This would allow the client to have more consistency in their work schedules, access to developing new job skills and the ability to earn more money. Our agency is working on a plan that would allow us to have jobs available on a regular basis starting in 2015. The total number of lack of work hours in 2014 was 4,700.06 compared to 5,246.55 hours in 2013. This number could also be a reflection of less clients working in our facility and more working in the community as well.

### **Facility Based Employment Success Story**

Katie has a long working history with WORC. She began receiving employment services in 1974. This is when she graduated from high school. Over the years, Katie has done a variety of jobs including light assembly, packaging, janitorial, housekeeping and laundry. Her favorite job was doing laundry at the local hotels. Unfortunately, with the changes in economy, many of the hotels switched to their own staff completing their laundry needs. With this change, Katie had to re-evaluate her employment goals and the jobs that she would be working on. Her employment plan continued to include working in laundry because this was her "dream" job. Katie was flexible with the jobs she worked on in the community and in our facility. When work began in 2010 to construct a commercial laundry, Katie's entire world changed. She offered input and shared her ideas about laundry. Katie was featured in our Capital Campaign laundry video that promoted the expansion of this facility. She participated in fundraising social events talking about how this expansion would open many doors for the clients at WORC. Katie's dream came true. She is working 4 days a week in laundry on many tasks including the folding machine. Katie is a very independent worker in laundry who is often seen with a smile on her face. As she says to others, "I am happy to be working in laundry again. I like it a lot."

### **Community Based Employment**

This employment service is designed to provide employment training and rehabilitation services to individuals with disabilities. Individuals will be trained in specific skills in the community (janitorial, food service, and manufacturing). Community Employment is a team approach where clients work on small crews with a job coach for the purpose of achieving their maximum vocational potential. This service is also used as a transition into integrated competitive employment.

**Effectiveness:** In 2014, WORC had 211 clients that worked in community employment. The average number of hours clients worked was 4.7 compared to 4.8 in 2013. The average hourly wage in 2014 was \$4.85 compared to \$3.62 last year. This wage increase could be related to the clients being paid by wage determination and this is evaluated every six months (their skills do increase over time) and there was an increase in the minimum wage in 2014.

**Efficiency:** WORC continues to monitor our wage determinations (wage labs). We have these set up for janitorial, shredding, grounds keeping, production, laundry and food service. In 2014, we lost \$1,537.18 in late wage determinations and/or clients working at a job site before completing assessed wage. This was an increase from 2013 by \$586.00. We developed a new system for monitoring our wage determinations. The change that was implemented was that they are scheduled for the clients and the staff as part of their weekly routine.

**Access:** WORC continues to monitor the referrals for employment services. We look at the clients with a funding source before we review self referrals. Clients may be placed on a waiting list or referred to another provider for services if we don't have employment opportunities for them. In 2014, we screened all potential clients for services with the exception of self referrals that didn't have a documentation of disability. These 4 individuals were referred to Winona Work Force Center.

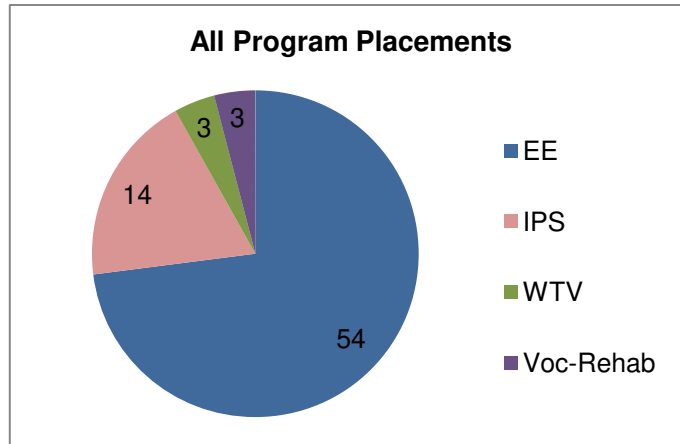
### **Community Based Employment Success Story**

Herman started at WORC in October 2014. Since he has started he has been working on increasing his stamina. When he first started, he was working 8 hours per week and he is currently working 34 hours per week. Herman is working in the community at both food service and janitorial sites. The job site that he excelled the most at is doing food service at Cotter Kitchen. With his previous experience in food service, he was able to quickly learn the new position. He is definitely an asset to this work environment. Herman is able to work independently with little supervision and he is always willing to help out his co-workers if they need assistance in completing tasks. Herman is working at 3 different janitorial sites as well. If he is available, Herman will fill in as a sub at other community job sites. With his work expertise and his flexibility with his work hours, he has grown into being a consistent and reliable worker for WORC. He is also a great role model for his co-workers.

## Supported Employment (Placement)

This program assists clients who are ready for a direct hire position in the community. This means that the client is hired and paid directly by the employer. Other skills and services include job readiness classes, assistance with developing resumes, practicing job interviewing skills, job development, job coaching and providing job leads.

WORC staff works on developing natural supports for these clients to help them maintain their direct hire positions and they work directly with the employers to assist in maintaining jobs and positive relationships. A temporary job is classified as a client working at least one day but not more than 89 days.



## Extended Employment

**Effectiveness:** To increase the number of individuals placed in direct hire positions. In 2014, WORC placed 54 individuals in direct hire positions in the Extended Employment program. The average hourly wage was \$9.05 and the average hours worked per day was 6.9.

**Efficiency:** To increase the number of individuals that maintained their employment at least 90 days. In 2014, 90% of the clients maintained their employment compared to 87% in 2013. We also measure one year retention. This includes only the clients that achieved their 90 day retention. There were 64% of the clients that maintained their job for one year compared to 60% in 2013.

**Access:** We looked at the number of days from initial date of referral to actual screening date. This year, our staff was able to set up the screening date in 5 days compared to 7 days 2013. Actual screening date from initial referral date may start to increase in the future because clients have more supportive agencies that they are working with. It is more challenging to set up meetings with a larger group of individuals.

## Supported Employment Success Story

Janelle and her story is a true success for both herself and for WORC. Janelle is a fifty five year old woman that has both a physical and a learning disability. As a child, she fell off her horse which resulted in her having difficulties with comprehending and processing information. Life for Janelle was very difficult but with assistance from her teachers, she was able to graduate from high school and then seek employment with repetitive type jobs. As a young girl, Janelle dreamed of only one profession for herself, which was to help and care for people. She thought of her self as a very compassionate person and knew if given the chance, would be successful as a Certified Nursing Assistance. With the help of Rehabilitation Services, Janelle was referred to WORC for tutoring into our C.N.A. program. Janelle worked with the Placement Department over twenty hours of 1:1 tutoring and hands on training to first prepare her for the classroom training with St. Anne's Health care. Rehabilitation Services approved additional hours to support and work with Janelle during the classroom training. This was to

## 2014 Winona ORC Purposeful Outcome Planning

assist Janelle to work on each skill from the class. After Janelle completed and passed the C.N.A. course, the Placement Department continued to work with Janelle to prepare her for the State Boards This is a written and skills test. Through Janelle's determination and hard work, she passed the State Board's written test the first time and then passed her skills test the 2nd time. WORC is very proud of Janelle and can report that today; she is working as a Certified Nursing Assistant and along with supports from the Placement Department, has been able to maintain her job working in healthcare.

### Individual Placement and Support (IPS)

IPS supported employment is an evidence based practice that helps people with serious mental illness to work in a regular jobs related to their work preferences. The eight principles of IPS are integration of employment with mental health treatment, zero exclusion, individual preferences are honored, rapid engagement, systematic job development, focus on competitive employment, proactive benefits counseling and time unlimited individualized job support. WORC made the transfer from what we called the Next Step program to IPS in 2014.

**Effectiveness:** To increase the number of individuals placed in a direct hire positions. In 2014, WORC placed 14 individuals in direct hire positions. The average hourly wage was \$8.78 and the average hours worked per day was 5.5 hours.

**Efficiency:** To increase the number of individuals that maintained their employment at least 90 days. In 2014, 83% of the clients maintained their employment compared to 80% in 2013. We also measure one year retention. This includes only the clients that achieved their 90 day retention. There were 60% of the clients that maintained their direct hire position for one year compared to 57% in 2013.

**Access:** To determine the number of days the first face to face contact with an employer either by the client or the Employment Specialist. The goal of IPS is 30 days and we were able to have this face to face contact in 14 days.

### Individual Placement and Support Success Story

Jacob is a 22 year old male who battles with depression, anxiety and post-traumatic stress disorder and historically has struggled with suicidal thoughts, sleep disturbance, fatigue and feelings of worthlessness. After a semester of failing out of college and reapplying to a new one, Jacob spoke to his ARMHS worker about finding another place of employment. Jacob's ARMHS worker referred him to Winona ORC and the IPS program.

Jacob had been dishwashing, working one or two days a week and had no routine because of the inconsistent hours. He had been given few employment opportunities in the past and had lost them due to attendance issues and disagreements with managers and supervisors. He was working on his mental health issues with a therapist when introduced to an Employment Specialist and Vocational Rehabilitation Counselor. Jacob did not enjoy his position as a dishwasher but was fond of electronics, weaponry and stocking. As a team, Jacob and his team decided against working with weapons. He began working with his Employment Specialist to find a position that better suited him and his lifestyle. Jacob and his Employment Specialist completed job development together in the community and thoroughly went over interviewing skills. While working with his Employment Specialist, Jacob was let go at his dishwashing job; he wasn't comfortable driving to work after a snow storm. Less than two weeks later, Jacob attended orientation at Target for a stocking position. The Employment Specialist helped him navigate through the hiring process and his school schedule. Target was very flexible with his schedule. One week later, Jacob had an interview at RadioShack that he went to but decided against leaving Target because of how much he liked the position, Target's flexibility and his earnings.

Jacob obtained a 3.0 GPA the semester he started working with his IPS team. Jacob no longer has problems with his ADL's (activities of daily living) like sleeping because he has a routine that works for him now. Jacob has lost over forty pounds since working at Target and states that he has less fatigued. Jacob stated "I'm more confident and I like my supervisor and coworkers. I like what I do." When Jacob was asked if he were in the Employment Specialist position if he would do anything different, he responded with "No, I wouldn't do anything different. She found me a job very quickly." He has been employed with Target for 11 months and no longer has issues with his supervisor or not attending work. Jacob will continue to be supported by his team in the IPS program. Jacob's new goals are to finish his Associates Degree at Minnesota State College Southeast Technical and continue working at Target.

## Welfare to Work

The WTW program was developed to provide employment opportunities and support to individuals with severe impairments to employment. Welfare to Work program incorporates paid work opportunities, work readiness, employment skill building and job development. The goal of this program is to assist individuals with obtaining and maintaining competitive employment which will allow self sufficiency.

**Effectiveness:** To increase the number of individuals placed in a direct hire positions. In 2014, WORC placed 3 individuals in direct hire positions. The average hourly wage was \$8.67 and average hours per day were 8 hours.

**Efficiency:** To increase the number of individuals that maintained their employment at least 90 days. In 2014, 67% of the clients maintained their employment compared to 33% in 2013. Since this is a short term program, we don't track clients' one year retention. Their case files are closed after they reach 90 days unless the funder requests follow up services for a longer period of time.

**Access:** We looked at the total number of hours our Placement Department worked on job development with the WTW clients. In 2014, the placement staff had 41 hours of job development for three clients.

## Vocational Rehabilitation Services

WORC is contracted with Vocational Rehabilitation Services to provide Work Adjustment Training, Assessments, Employment Skills Training, Job Tryouts and Placement services. In 2014, WORC provided employment related services to 20 clients.

Service areas included:

- Work Adjustment Training - 3 clients
- Employment Skills Training - 6 clients
- Assessments - 7 clients
- PBA - 3 clients
- Job Tryout - 1 client

## Employment Skills and Training Program

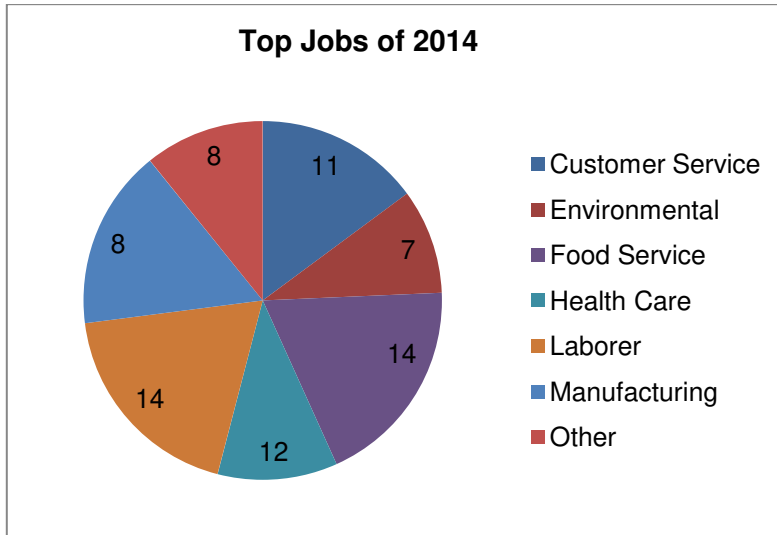
This program allows staff to work one-on-one with clients to tutor them in areas such as Certified Nursing Assistant, food service, basic education, computer training and budgeting. In 2014, there were 24 referrals into the program and we worked directly with 24 of the clients. Staff provided 190 hours of tutoring this year. This year, WORC saw an increase of clients that needed assistance budgeting finances and how to calculate how many hours and earnings they could earn while on Social Security.

Certified Nursing Assistant	5 Clients	Four clients became CNA's and one quit
Food Service	4 Clients	All have direct hire positions
Basic Education	2 Clients	Neither client completed their GED
Computer Training	3 Clients	Improved skills, and two obtained new employment opportunities
Budgeting	10 Clients	Improved skills, and continue to meet monthly with five clients
<b>Total</b>	<b>24 Clients</b>	



### Labor Market Analysis

The Minnesota Department of Employment and Economic Development prepare a labor market statistic report annually. It reports on occupations in demand in Southeast Minnesota.



### Financial Information

Audited Financials - 2013 Year Ending 12/31/2013 - Attachment I

990 2012 - Attachment II

Pre Audit Financials - 2014 Year Ending 12/31/2014 - Attachment III