



# Year-End Report 2015

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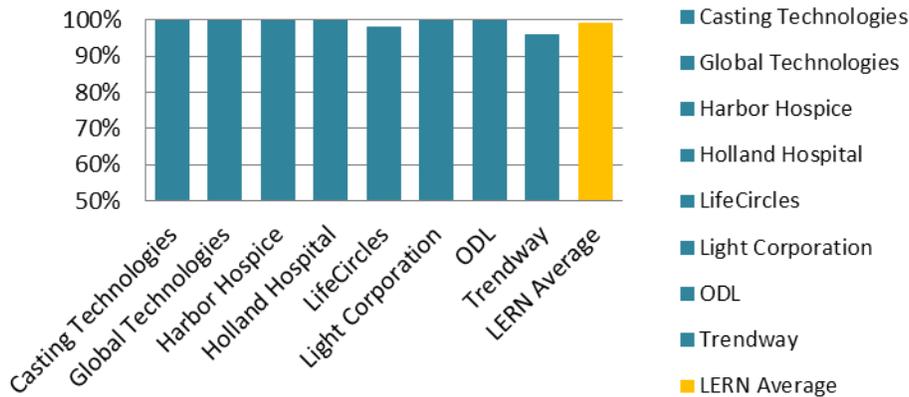


Pictures are representative examples and not actual employees

helping employees achieve their goals at work and in life

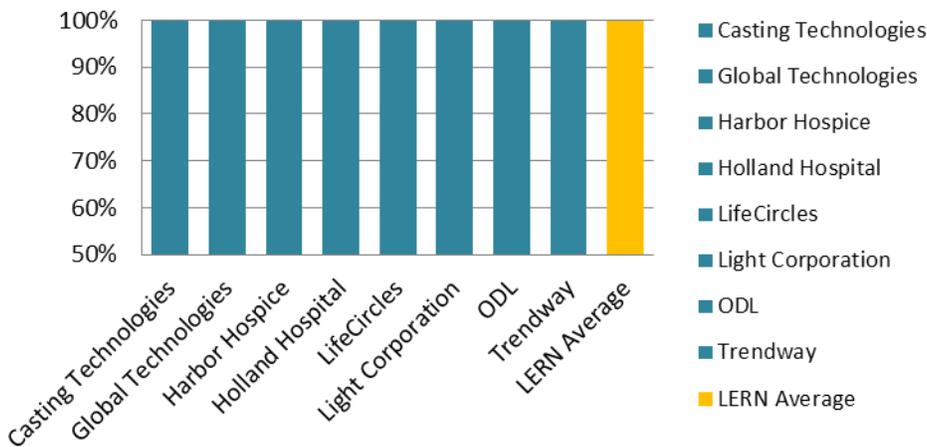
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## RETENTION



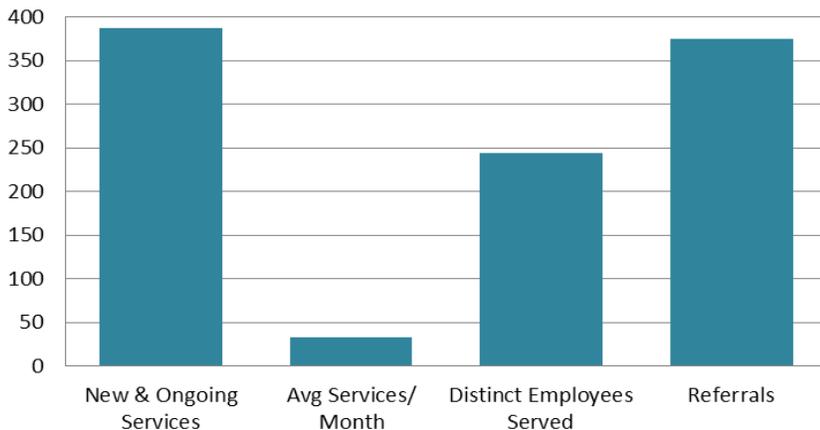
**RETENTION** represents the percentage of employees served through OPEN during the FY that were still employed at the end of the FY. **The overall program average for the year maintained at 99%, the same number from the previous two FY.** This is a key measure of the program's effectiveness.

## SERVED / REFERRED



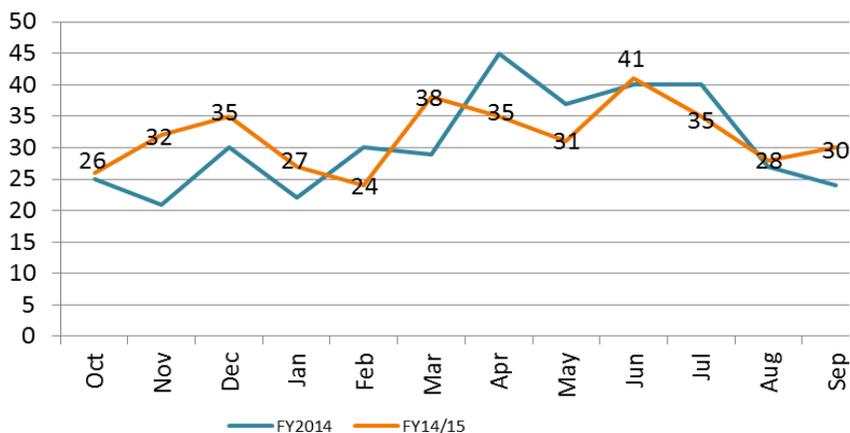
**SERVED / REFERRED** represents the percentage of employees served from the total number of referrals made during the FY. The overall program average for the year was 100%.

## KEY SERVICE & REFERRAL METRICS



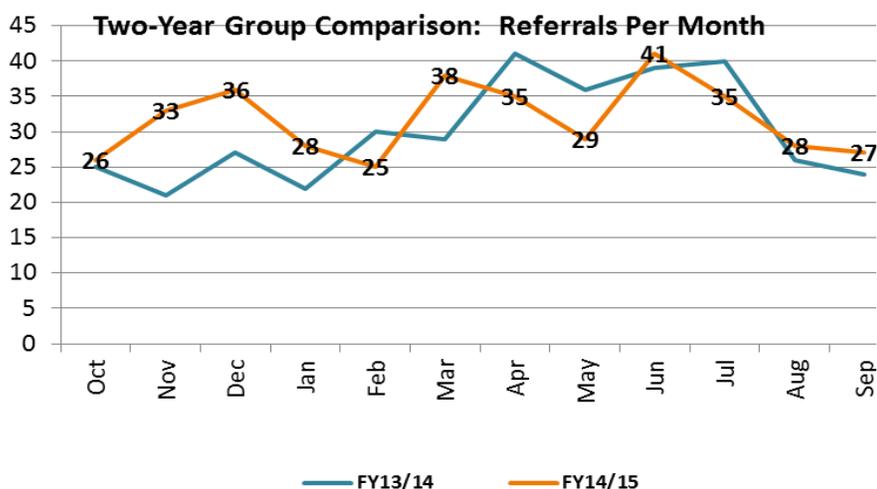
**KEY SERVICE & REFERRAL METRICS** represents overall program activity. New & Ongoing Services speak to both new referrals and ongoing follow up from previous months. FY2015 was another strong year. Overall OPEN averaged 32.4 New & Ongoing Services per month. There was an increase of 18 services and 5 referrals for FY2015.

### Two-Year Group Comparison: Services Per Month



### MULTI YEAR COMPARISONS

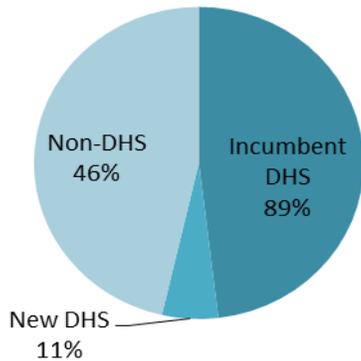
represent contrasts between FY2015 and the previous FY2014. The first graph shows a combination New Referrals & Ongoing Services. The second represents New Referrals. With a total of 8 employer partners the numbers with referrals and services continue to increase.



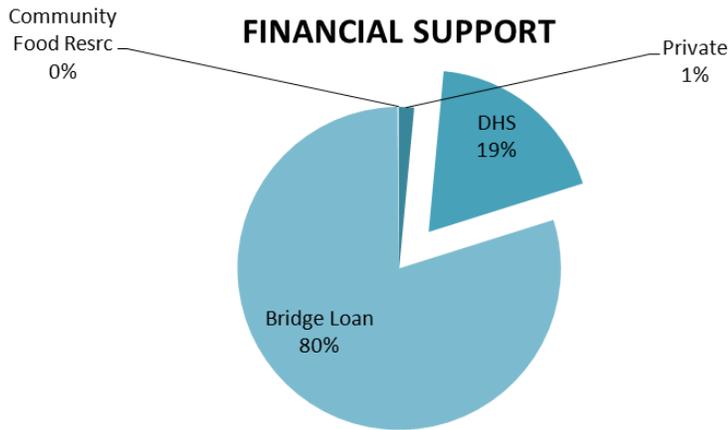
The trend lines for FY2015 show a measurable increase for Autumn and Spring. In prior years, the cyclical nature showed there was a predictable decrease in the last two months of summer. As a note, this year did show a summer slow-down, as in the prior year.

Member Employers	Distinct Employees Served	Percentage Of Total Referrals	Percentage Of Company Workforce	Served/ Total Referred	Annual Retention	Annual ROI*
CTC	38	15%	14%	100%	100%	389%
Global Technologies	34	14%	56%	100%	100%	337%
Harbor Hospice	24	10%	24%	100%	100%	209%
Holland Hospital	29	12%	1%	100%	100%	273%
Life Circles-PACE	18	7%	23%	100%	98%	131%
Light Corp	38	16%	23%	100%	100%	389%
ODL	24	10%	7%	100%	100%	209%
Trendway	39	16%	13%	100%	96%	401%
<b>TOTAL</b>	<b>244</b>	<b>100%</b>		<b>100%</b>	<b>99%</b>	<b>342%</b>

### DHS - NON-DHS EMPLOYEES

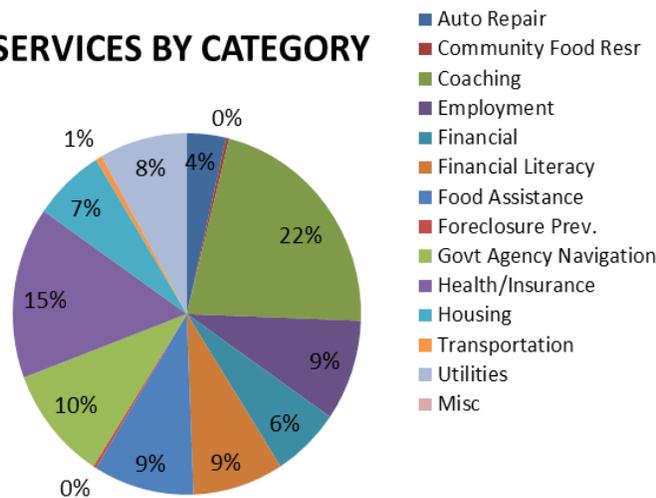


**DHHS - NON-DHHS EMPLOYEES** represents the utilization among employees that are active for DHS public assistance and those that do not qualify for public assistance. The 46% Non-DHS utilization shows the **program is nearly balanced and very well received by those in a variety of pay scales.** The New DHHS represents those pursuing DHHS benefits because of the OPEN program.



**FINANCIAL SUPPORT** – We are at over three years since our introduction to the no credit needed loan program in partnership with AAC Credit Union. It became very popular helping people meet unexpected needs and work to improve credit scores – this curtailed payday lending and job loss due to emergencies like transportation concerns. Although not represented by a number, there were some Community Food Resources utilized.

### SERVICES BY CATEGORY



**SERVICES BY CATEGORY – OPEN** saw a wide variety of types of service requests. They were weighted towards a few specific categories such as; general coaching, our bridge loan program, employment counseling, utility assistance, food assistance and guidance navigating various government agency services and resources.

# SUCCESS STORIES.....

These are generalized to all companies and have been presented so as to protect identities as much as possible.

**Daycare assist--** An employee was referred to me by HR for help with possible CDC assistance. I explained the application process and that I would be her case specialist. She was very happy to know she could see me in person on a specific day if she had a question about her case or paperwork. The CDC case was approved and is saving her \$400.00 a month, allowing her to open a savings account

**Marriage help-** An employee came in with an issue of the spouse wanting to end the marriage. The employee was willing to work with the spouse through counseling, but he declined. We worked through ways to protect and support the employee by friends and family to ensure the spouse would not try to sell items or remove assets. We have met on another occasion and the employee is doing well considering the hurt and betrayal that was felt. She stated her appreciation in having someone to talk issues out and work things through this difficult situation.

**Multiple help-** An employee needed assistance for both heat and electric shutoffs that were past the shutoff dates. We were able to get the case transferred to the LERN program success coach and process the shutoffs the next day resulting in payments totaling \$685.00. The employee was very happy to receive the assistance and to have the DHHS representative onsite weekly and not having the utilities turned off.

**Continued Support-** An employee was looking at a possible eviction notice from the landlord. We discussed options and the employee started a 2nd job for additional earnings and accepted assistance from the available employee fund. The employee is also developing a budget to maintain so the issue will not arise again. The employee was grateful for the help and guidance along with the continued support and accountability.

**Eviction prevention-** An employee received a court ordered eviction notice and did not have funds as short term disability was starting this week. We were able to contact the housing manager and notify her of the DHHS commitment and worked together to come up with a plan for the copayment. The employee was relieved to have the assistance and resolve the emergency.

**Greater benefits-** An employee completed an online application. I was able to intercept it and have the case placed in the LERN success coach caseload. She was not eligible for daycare benefits due to income, but since she paid part of her daycare we included it as an expense. This allowed for the food benefits to be increased to \$421 monthly. The employee was grateful for the additional support.

**Easy Connection-** An employee was referred to me by the HR dept. regarding questions about her DHHS case. We discussed her current benefits and additional benefits she may be eligible for in the future. I was also able to connect her to other community resources to help resolve issues she was currently confronting. She was most happy to have her case specialist onsite weekly to connect with if a concern with her benefits arose.

**Daycare Connection-** An employee came to me regarding an issue with her government assisted daycare payments. We were able to have the case transferred to me and verify the program was accurate and get the provider the information needed to complete the billing process. The employee was grateful for the help and not needing to pay the difference out of pocket.

**Fast Food-** An employee needed to be taken off work due to a problem pregnancy. She was encouraged to apply for possible food benefits and was approved. All information was verified quickly allowing the family to receive over \$300.00 in food benefits a month. She greatly appreciated the additional grocery help to her growing family.

**Custody Battle Victory-** An employee was meeting with the courts to determine full custody of a child. We met on occasion and worked out documentation needed and what items needed discussing at the hearing. The employee was very excited to prevail in the case and have custody granted to him.

**What payment?-** An employee had received information from her employer that a garnishment was to take place for the upcoming check. from the state treasurer. The employee had not received any notices in the mail. Information was obtained via email and phone calls that an old address was on file and unpaid taxes were being recouped. Although the employee had to pay fine, she was glad to know the reason and have her address updated in the system.

**Loan backing-** An employee came needing a loan for vehicle repair. He had been employed with the company for more than a year, but not as a fulltime employee. Because of his work history and positive attitude the employer requested to back the employee and his request for the loan. With the budget showing good financial decision making and the employer backing the employee by trusting payments would be made without issue, the loan was approved. The employee was very grateful and proud with the employers faith in him.

**On the right track-** Met with an employee after he received a write up for attendance. We discussed best practices for notifying supervision regarding being late or absences. The employee was stressed about some personal issues he was involved with at home. We discussed ways to resolve and work through those issues and at a recent connection, the employee stated they appreciated further discussion to get to the root of the issue. There have been no attendance issues since the meeting and he has a more positive attitude.

**Finding resources-** We discussed at length possible options for best care of special needs children and services in the area. Also, the employee would have case transferred since the family would be under the same roof. The employee was very relieved to have his case be given additional care since the case specialist would be onsite at his employment. "I feel like a load has been lift off me just talking to him and getting his involvement in the situation surrounding the challenges of a special needs family. It appears that he has many connections that will help us navigate the mess that is the government and their programs."

**Talk it out-** An employee had an personal issue that came to a head at work and spilled over to other parties who were involved. This employee was frustrated with himself with how he handled the situation after "it has run its course". We discussed about the involved parties and the responses/reactions that were displayed. Also, we discussed the amount of time invested and how he was probably better off in the long run after determining true colors of some of the individuals involved.

**Child medical coverage-** An employee came to me puzzled and frustrated that her child's medical coverage had ended, however, her son's was still active. There is an ongoing issue with ACA coverage that will sometimes end the previous coverage without activating the new coverage. After verifying all information and recertifying the request, her coverage was reinstated. The employee was very happy to have the issue resolved. She stated, "I'm so glad you were here to help me, thank you, thank you."

**Medical support resolved-** An employee came to me with a request to assist her with a medical child support issue. The state was going to begin taking a portion of her check to pay for medical coverage. The child was already covered under the father's policy. She was not able to get through to her specialist. I was able to call my contact at Friend of the Court to clarify what the employee's available options were. She decided the best option was to have put in writing that the child received benefits from the father's policy and it was agreed by both parents.

**Financial foundation-** An employee had received the bridge loan in the past for an emergency and paid it off without incidence. Recently, a new issue came up that required more income than what she had currently saved. Since she had a loan in the past and was already a member with AAC, she was encouraged to apply for a loan directly with them. With her current standing and prior history, she was approved for the loan. She was able to resolve her situation and still was depositing money into her savings account.

**Safety First-** An employee had a baby and brought the child to a meeting for medical and food benefit approval. I was able to notice some possible safety issue in the car itself and anchoring the seat to the vehicle. I demonstrated and explained the changes with the mother observing. She was extremely happy to have been shown the correct method of installing the child safety seat correctly.

