



**Comprehensive Strategic Plan  
2025-2027**



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## Executive Summary

Established in 2012, Advocacy Links, LLC offered Medicaid Waiver case management services to people throughout northern Indiana. In October 2021, the state of Indiana changed how Medicaid Waiver case management services were to be delivered and Advocacy Links was not chosen as one of the companies for selective contracting for this service. In the first quarter of 2022, Advocacy Links researched other service options and funding streams to diversify its array of services. Between April – December 2022, Advocacy Links learned a lot about the initially anticipated services to be delivered and adjusted the eventual service array to focus on 4 key areas (Child Mental Health Wraparound; MyLinks/Housemate Finder; Resource & Connections; Purposeful Life and Community Engagement (PLACE)).

In this period of redesign, it became evident that establishing a Not-For-Profit business status was going to be necessary to draw down the funding through grants and donations for a few of the services to be delivered in a fiscally responsible manner. A sister organization, Advocacy Links Resource and Advocacy Center, Inc. was established and approved by the Internal Revenue Service in November 2022.

For the purposes of this Comprehensive Strategic Business Plan, “ADVOCACY LINKS” reflects both Advocacy Links, LLC and Advocacy Links Resource & Advocacy Center, Inc. as the nature and mission for both entities are in alignment.

Beginning 1/1/2025, we are entering into another season of transition. We are scaling back all operations into one service line and starting a path for transferring organizational leadership over the next 3-5 years.

ADVOCACY LINKS employees are committed to the following core competencies:

**L**istening to individuals and their families to fully comprehend the wants and needs of the individual. ADVOCACY LINKS employees coordinate customized services to meet each person’s needs.

**I**ntegrity and honesty are critical to the role of all ADVOCACY LINKS employees. They convey current, correct information to individuals, families and stakeholders in a timely fashion. ADVOCACY LINKS employees respect the privacy of all protected health information.

**N**etworking with service providers, state entities, and local resources enable ADVOCACY LINKS, LLC employees to connect individuals with the crucial supports to meet needs. ADVOCACY

LINKS, LLC employees are encouraged to continue building rapport with various organizations and sharing these connections with individuals, families and co-workers.

**K**nowledge of both current resources as well as upcoming options is mandatory for ADVOCACY LINKS employees to provide continuous quality services. ADVOCACY LINKS employees keep up with current trends and resources with ongoing training. ADVOCACY LINKS employees share this information with individuals and families as the need arises.

**S**upport is provided by ADVOCACY LINKS employees through advocacy as well as personal contact. ADVOCACY LINKS employees are required to meet with individuals at least monthly and more frequently as deemed appropriate by individual teams and circumstances.

Day-to-day operations of ADVOCACY LINKS are based on a mission statement centered on commitment to advocating for people who need help, maintaining fiscal responsibility, and respecting both those in services as well as those providing the services.

ADVOCACY LINKS' target area includes northern and central Indiana with a focus in 22 counties. People served by ADVOCACY LINKS range in age from 6 to 17.

Commitment to quality service delivery is evidenced by the ongoing training received by all ADVOCACY LINKS personnel as well as the compliance with accreditation standards and state and federal requirements as appropriate.

ADVOCACY LINKS representatives have more than 176 combined years of human service experience. Personnel are located throughout northern Indiana so ADVOCACY LINKS can ensure availability of services in geographical proximity to the participants receiving services.

Over the last twelve years Advocacy Links has developed a stellar reputation for providing quality supports and services in North/North Central Indiana. This rich history is with individuals who have intellectual/developmental disabilities, including but not limited to those with dual diagnosis. Advocacy Links wants to provide Wraparound Facilitation as a continuum of our high ethical standards, quality services, and resource sharing our communities have become accustomed. We want to continue to support youth and their families using the person focused, respectful approach for which we are known.

Components of the Strategic Business Plan are reviewed at least quarterly in the Leadership Staff Meetings and updated annually or more frequently as needed.

## Business Description and Vision

Joy Greeney is the founder and owner of Advocacy Links, LLC and Advocacy Links Resource and Advocacy Center, Inc.. She has been working in the human services field since 1990 and brings extensive knowledge, experience and compassion to this position. She worked her way up through a variety of positions supporting individuals with intellectual/developmental disabilities such as direct care, residential group home manager, day service coordinator, residential Qualified Intellectual Developmental Professional, Medicaid Waiver Case Manager, and Case Manager Supervisor. She created Advocacy Links, LLC in 2012 at the urgency of individuals and colleagues to provide quality case management services to people in Indiana while providing a respectful working environment for Case Managers. Advocacy Links, LLC was proud to have grown to the third largest case management company in it's 10 years of providing waiver case management services. Over 3000 individuals throughout northern Indiana were receiving quality services by highly trained, respectful personnel. Advocacy Links was proud to be recognized for our high quality services by the state of Indiana through our clear record of compliance audits (there were never any sanctions imposed as a result of poor care to people we served). Whenever the state needed immediate help with high profile situations (converting group homes to waiver settings; placing 100+ individuals in new settings in less than 30 days, providing realistic feedback for new software development, etc.), Advocacy Links, LLC was the first company they called to assist with these projects because they were confident the project would be completed on time, correctly and respectfully.

In October 2021, when the state of Indiana did not choose Advocacy Links, LLC as part of the "selective contracting" process for ongoing Medicaid Waiver Case Management services, this was an enormous shock to Advocacy Links, LLC leadership as well as individuals, families, guardians, stakeholders, and community partners. However, through strong leadership and dedicated personnel, ADVOCACY LINKS used the knowledge and experience to create a new array of services that adhered to the mission of the company.

ADVOCACY LINKS commits to advocating for people who need help; connecting people to fiscally responsible resources; and respecting everyone in the process.

We have learned a lot since 2021 regarding the services and funding sources available. Through trial and error, we have did our best to try to continue to meet the needs of individuals with disabilities who typically weren't eligible for traditional funding and did not have funds to cover the cost of their care. We became a provider for the H&W/TBI Waiver anticipating a strong need for Care Managers when these waivers came under the DDRS oversight in July 2024. However, the point of entry continues to be one of the companies doing the care management

and they are not providing choice to individuals for Care Management so we have stopped our efforts to provide this service effective 12/31/2024.

Effective 1/1/2025, Advocacy Links will concentrate all efforts on the partnerships with youth receiving Child Mental Health Wraparound Services. It is the intent of ADVOCACY LINKS to use the knowledge and experience of all personnel to serve people receiving services so their needs can be met in a financially responsible fashion. As the need for additional personnel becomes apparent, additional qualified staff will continue to be brought into the organization, trained on the current procedures and continually mentored to develop their skills. ADVOCACY LINKS has invested in a quality systematic orientation training program to ensure new employees develop and demonstrate skills and commitment to our expected level of service.

## Description of Services

Youth and their family lead the treatment planning process with the Wraparound Facilitator facilitating the meetings. The wraparound facilitator coordinates service delivery and encourages the youth and family to grow their network of community and natural supports. Wraparound Facilitators should be the cheerleader for the family while assisting in planning.

Wraparound services are delivered in a combination of face to face meetings and alternative communication. Each youth and family receiving services will have one team meeting each month held in person either in the family home or community, based on family preference.

Each week the wraparound facilitator will contact each member of the youth's team via telephone, text message, or email. This is non-negotiable. Contact with the family is made no more than 48 hours after receiving the file from DMHA. The initial meeting with the family is scheduled within 10 days with the first child and family team meeting held within 30 days from the start of wraparound services. Facilitators will guide the meeting and the team will share progress and make updates to the plan of care. The purpose of weekly calls is to ensure there is progress toward completion of tasks and to continue discussion as to what is working.

Wraparound facilitators will enter plans of care, crisis plans, and all budget needs in the required system of TOBI (DMHA/CMHHW) and KidTraks (DCS/CMHI). Level of need will be completed every six months, more often if needs change. All work will be entered in TOBI or KidTraks per program requirements. Advocacy Links also requires facilitators enter master files for all youth in Health Cloud that includes activity notes, contacts and the plan of care. This will be used to track information through reporting as well as link the file to other programs for resources as needed/requested.

We want to provide another option for High Fidelity Wraparound Services based on our core values of advocating, linking others to resources, and respecting others. Many counties only have one provider/facilitator for Wraparound. Offering this service in these counties is providing youth and their families with choice.

We want to continue sharing resources we have developed through a person centered approach. We have built relationships with others through schools, counseling services, provider agencies, and community members that we feel benefit others.

We want to assist youth and their families in building a team of support through our expertise in person-centered planning and life-course planning. Advocacy Links is committed to ensuring each youth and family receiving services has their voice heard and their choices respected. We have extensive history and knowledge of youth dually diagnosed with emotional disturbances and intellectual/developmental delays. We have a lot to offer the industry in this area.

## Definition of the Market

Child Advocates has a contract with DMHA to be the access site for DMHA/CMHA referrals. Their contract ends in August 2025 but it is likely the state will contract with another entity to continue similar work beyond that date. Child Advocates does not provide wraparound facilitation services but all wraparound referrals begin with that referral source.

CMHI referrals go through the Access Sites that DCS has contracted in each county. All of the CMHI Access Sites also provide Wraparound Facilitation services. These entities have first dibs at all CMHI referrals that come through the system. If they are unable to process referrals, then they pass the referrals on to other facilitation companies by having the family choose a company from the picklist of available providers.

Each month, Child Advocates and CMHI Access Sites are responsible for reporting to the state the number of applications they have received and how many youth are waiting for services.

There are presently 19 CMHI Access Sites that cover all 92 counties of the state of Indiana. There are 28 companies providing Wraparound Facilitation services throughout the state. Each Wraparound Facilitation company covers only the counties they choose to support. Most companies tend to provide wraparound facilitation services in five or less counties. As of November 2024, there are 22 counties in which Advocacy Links provides wraparound facilitation services. For all 22 of those counties, there are at least 3 options of providers available for youth/families to choose their wraparound company.

44 of Indiana's 92 counties have less than 3 companies committing to providing wraparound facilitation services in that county. Following is a chart that reflects the data shown on the state's website about the number of providers for wraparound facilitation in each county. This data was pulled 11/11/2024. While there are numerous companies providing facilitation, there are also regular waiting lists for services in most counties.





As of 11/1/2024

- 6+ WF options
- 5 WF options
- 4 WF options
- 3 WF options
- <3 WF options

Counties where Advocacy Links has WF coverage as of 11/1/2024

In the summer of 2024, Advocacy Links and other WF companies brought to the attention of DMHA the discrepancies in the monthly System of Care reports that were supposedly tracking youth waiting for services. In reality, these reports only reflected the number of youth who applied for services, not the number of youth who had been found eligible and truly were waiting for wraparound facilitation and/or other services. WF companies had been using these SOC waiting list reports to determine where to grow their programs. However, until the reports are revamped and consistently reporting actual numbers of youth waiting for WF services, this can not be used as the indicator for potential growth.

Another piece of market data that is difficult to determine is the actual number of available facilitators. The pick lists are supposed to reflect an agency’s actual personnel who have room to accept new partnerships. There are regularly picklists that show companies that do not have any availability, but then we later learn that these companies have hired new personnel and filled those new openings immediately with CMHI youth who don’t require the use of picklists. This practice makes it extremely difficult to plan where growth and expansion is needed or not.

## Current Analysis

### Strengths:

We are familiar with the responsibilities and expectations of being a provider for services that are built around a person's strengths/wants/needs/desires.

Advocacy Links has well established resources and connections in the 22 counties that we serve throughout northern Indiana. We have connections within our communities at schools, medical/psychiatric offices, and various other resources built (food banks, free and low cost furniture, churches, therapists, mental health centers, schools, etc.).

Our reputation in each of the counties assists to connect families to their communities. Community members recognize Advocacy Links as the "go to" resource to get people who need help connected to genuine help in a timely and respectful manner. We are also known for being responsive to those reaching out for help.

We are well versed in person centered thinking and the process of the life course to assist youth and their families in further developing strengths and their vision of a good life. We are trained in extracting this information to build outcomes and strategies that will lead youth and their families to increased self-esteem and stronger familial bonds.

We already have a foundation in the wraparound principles including: family voice and choice, team-based meetings and conversations, connecting people with natural supports, collaboration with teams, community based, culturally competent staff at Advocacy Links, individualized plans and services, building plans based on strengths of the youth/family/team members, planning outcomes and strategies for success, and providing unconditional care to our youth and their families.

### Weaknesses:

Wraparound Facilitation is a fairly new program for Advocacy Links. We have learned a lot in these first 2 years of providing this service, but there's more to learn particularly related to working with DCS and DMHA. There are often changes in state policies/procedures that are not communicated efficiently so we learn new expectations after they have already been implemented.

It has been difficult to obtain and retain quality wraparound facilitators. The youth/families we are working with have extremely emotional stories and the workers need great personal support networks to be able to keep their own spirits up. To date, Advocacy Links has been unable to provide health insurance and retirement benefits due to the need to stabilize the finances of the company. It is anticipated that this will be rectified in 2026.

### Threats:

Wraparound facilitation is not a heavily populated service to date due to lack of education in the community. There are no guarantees on the number of referrals that will come through or the counties in which we will receive referrals. While the company has worked with a dual diagnosis population for many years, this is a relatively new service for us.

While many counties only have one company/facilitator serving the area, there are several other companies providing this service.

We had many contacts and supports built through DDRS and BDDS. We are still learning the key players through DMHA and DCS as well as how the program works. For example, many CMHI wraparound facilitation providers subcontract with other businesses to provide other CMHI services like respite, skills training, etc. Advocacy Links chooses not to subcontract for these services because there is a huge liability if those subcontractors do not provide high fidelity services.

## We promise:

The mission of Advocacy Links is to advocate for those who need help, connect people to fiscally responsible resources and respect everyone in the process.

## Organization and Management

Advocacy Links, LLC is a Limited Liability Corporation and it's Not For Profit 501(c)(3) sister organization, Advocacy Links Resource and Advocacy Center, Inc. are owned and operated by Joy Greeney. She comes to this position with over 30 years of experience working in the human service field in a variety of positions. Ms. Greeney holds degrees in Psychology and Social Science from Bethel College (University) in Mishawaka, Indiana. In November 2003, Ms. Greeney was presented with the "Case Manager of the Year" Award from the National Association of Case Management.

The business is not required to hold any specific licensing or permits, however, has received 4 consecutive 3 year accreditation awards (the highest available) from the Commission on the Accreditation of Rehabilitation Facilities (CARF) in May 2013, May 2016, May 2019 and December 2022. Additional certification was granted in the specialized areas of support for people who are Medically Fragile; Older Adult/Dementia Care; and Children/Adolescents. The accreditation survey reviews the systems we have in place and reviews our performance to insure we are implementing our systems. They also speak with employees, persons served and stakeholders about their satisfaction with our services. Advocacy Links will seek accreditation again in the Spring of 2025.

Advocacy Links has contracts with Division of Mental Health and Addictions (DMHA) for CMHW funding and Department of Child Services (DCS) for CMHI funding. These contracts are both renewing in 2025. Wraparound Facilitators are required to be certified by the Division of Mental Health and Addictions and maintain credentials for the Child and Adolescent Needs and Strengths (CANS) Assessment.

See Appendix C for the current Organizational Charts for both Advocacy Links, LLC and Advocacy Links Resource and Advocacy Center, Inc.

The positions outlined in the organizational chart have been filled with qualified candidates including many personnel whom Ms. Greeney had trained and worked with in former employment. Most of these staff have worked with Ms. Greeney for 5 years or more and have demonstrated competency, compassion, and dedication to meeting the needs of anyone who needs help. All personnel must possess appropriate knowledge and demonstrate necessary skills to fulfill the requirements of their positions. Additional members for the Advocacy Links Resource and Advocacy Center, Inc. Board of Directors will be added in the coming years as the organization grows to include a more diverse array that represents the people we support.

Staffing and supervision needs will change as partnerships grow and more facilitators are hired. Wraparound facilitators ideally partner with 10 youth- absolutely no more than 12 youth. Supervisors/Directors should have a combination of 10 made up between youth and facilitators.

Advocacy Links wants to have facilitator presence in all counties served. As partnerships increase and referrals come in more steadily, additional facilitators will be hired. Additional Team Leaders will be put in place once the supervision to youth ratio allows. Advocacy Links needs to have the Wraparound Director focus on the oversight of the program rather than continually being the immediate back up to cover cases. Throughout the remainder of 2024 and into 2025, the Director will close out her work with specific youth and transfer the partnerships to the relevant Team Leaders and facilitators in those areas.

Advocacy Links needs to fill the opening that exists in St. Joseph/Elkhart county as soon as possible. Additional facilitators will be added as the need arises in the geographic areas where we currently serve. Until the state has a better way of projecting the need for facilitators throughout the state, we won't focus on trying to expand to outlying areas. The following table reflects the anticipated number of partnerships for each current and potential WF.

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Sara	0	0	0	0	0	0	0	0	0	0	0	0
Dawn	6	6	6	6	6	6	6	6	6	6	6	6
Paula	10	10	10	10	10	10	10	10	10	10	10	10
M.Derf	10	10	10	10	10	10	10	10	10	10	10	10
TBA - west/north	3	5	7	10	10	10	10	10	10	10	10	10
TBA - west/north						3	5	7	10	10	10	10
M.Will	6	6	6	6	6	6	6	6	6	6	6	6
Michell	10	10	10	10	10	10	10	10	10	10	10	10
Austin	10	10	10	10	10	10	10	10	10	10	10	10
TBA - east/south			3	5	7	10	10	10	10	10	10	10
TBA - east/south									3	5	7	10
TBA - east/south												3
TOTAL	55	57	62	67	69	75	77	79	85	87	89	95

In an effort to stabilize the administration and oversight of the division, we anticipate that the existing Team Leaders will be fully implementing their roles so the Director can concentrate on developing the program and ensuring high fidelity performance. As current facilitators reach 6 – 8 partnerships within a 3 – 4 county geographic region, an opening will be posted to pursue adding an additional facilitator.

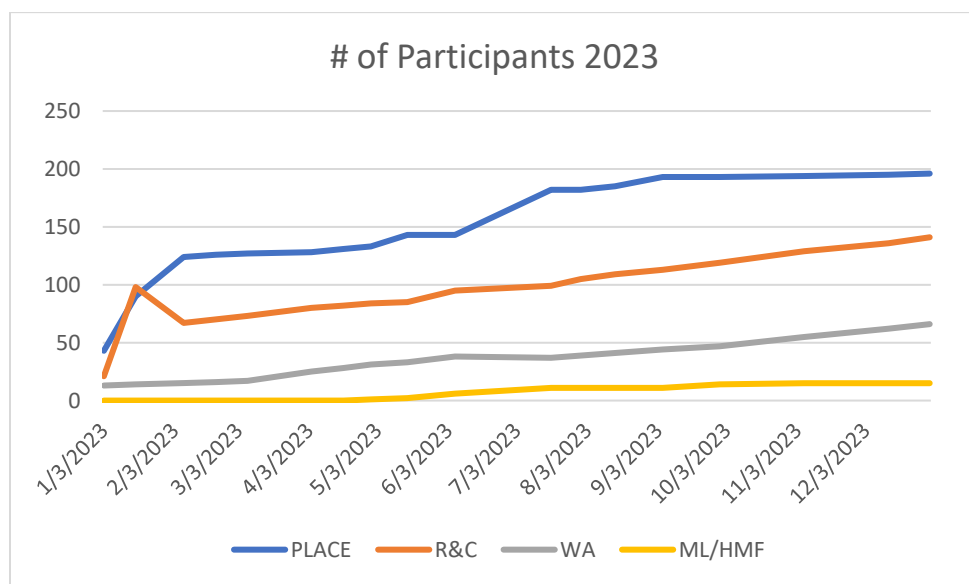
# Growth Plan/Workforce Development Plan

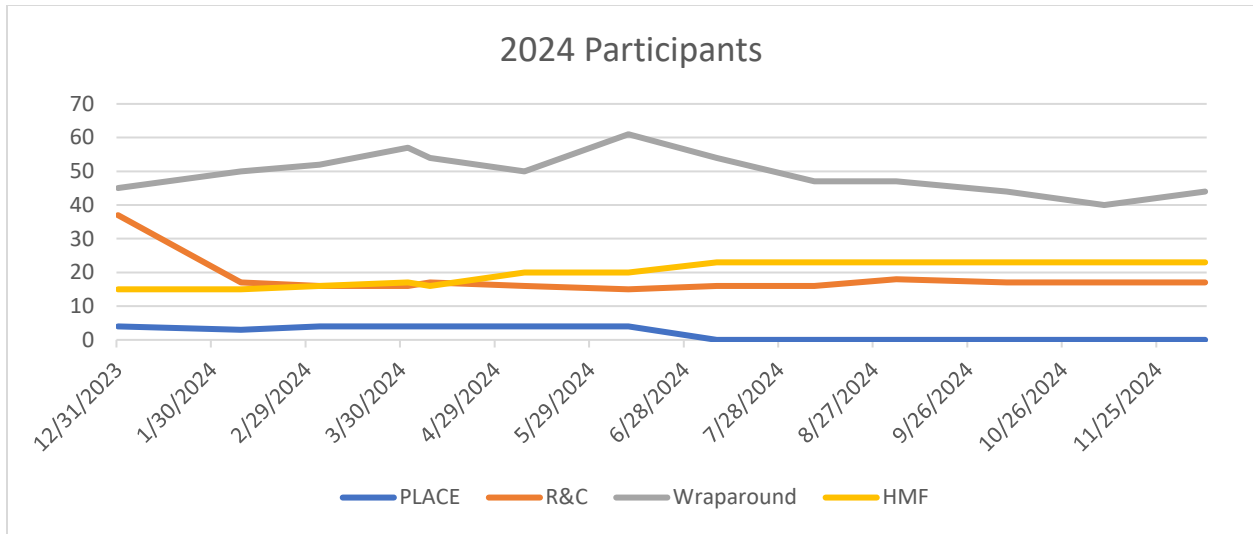
## Overview Statement

ADVOCACY LINKS is committed to continued growth as the needs arise. Since its inception in 2012, Advocacy Links has grown in all areas. ADVOCACY LINKS Leadership is emphatic about providing the best possible services before expanding. Throughout the life of the company, there have been times where we have paused growth in specific areas due to concerns that needed to be addressed. Advocacy Links has worked hard to build a reputable foundation based on integrity and quality. It has never been and never will be the desire of ADVOCACY LINKS to be “the biggest” company. While we recognize that there is power in volume, we truly strive to be “the best”. Our emphasis is on the relationships that we build with people served, the training, support and respect we give our staff, as well as the collaboration we have with state personnel, industry leaders and other companies.

In October 2021, the State of Indiana entered into selective contracting for Medicaid Waiver Case Management services and did not choose to contract with ADVOCACY LINKS. All 3000+ individuals supported by ADVOCACY LINKS needed to choose a new company and over 75 employees who wanted to remain Waiver Case Managers needed to find a new employer in less than two months.

Throughout 2022-2024, Advocacy Links concentrated a few different service lines that never really generated the revenue necessary to maintain their service provision. The statistics for these services for this time frame are reflected here for historical reference. The only service line that will continue into 2025 and beyond will be the Wraparound Facilitation Services.





Increase in the number of recipients occurs when a youth/family needs a partnership established to support their mental health needs. Decrease in the number of recipients occurs in a couple manners:

1. Person signs out of services
  - a. No longer wants/needs services
  - b. Moves out of state
2. Support is terminated due to lack of response
3. Person passes away
4. Youth is no longer eligible for services (loss of Medicaid/funding; CANS score is too low)

In the original business plan that was developed when Advocacy Links started in 2012, it was projected that approximately 500 people would be supported within the first 3 years. The initial projections were exceeded well before the anticipated time frame. Growth continued to occur through the years at a steady pace. In 2021, the State of Indiana’s selective contracting dissolved the entire customer base (over 3000) in less than 6 weeks. In 2022, ADVOCACY LINKS had been gradually building back customer base across 4 service lines. However in 2024, due to lack of involvement, PLACE supports were suspended in July 2024 and Resource and Connections efforts were eliminated in December 2024. Housemate Finder is still informally available to interested parties, but it is not generating revenue and no emphasis is being place on the further development of the tool.

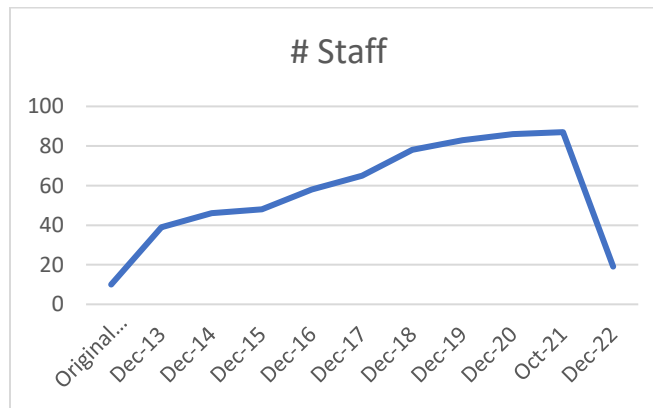
Throughout 2023 and 2024 Advocacy Links relied on data from the state known as “SOC Waitlist Reports.” We understood this to mean that the numbers reported were youth truly waiting for facilitation services so they could access wraparound services. We used this information to help us determine where we should consider expanding to meet the needs of youth & families. In the summer of 2024, we (along with other facilitation companies) identified that these reports were not reporting



accurate information. These reports were really only reporting the number of applications for services rather than the number of youth who met the eligibility criteria and truly were ready to receive services. In the fall of 2024, we began tracking the need for wraparound services in a different way by analyzing the picklists for facilitation services in each of the counties we serve. We have created a tracking system to reflect the availability of WFs in all the counties. This process isn't 100% accurate either though because CMHI Access Sites tend to list their WF availability only long enough to print a picklist for their preferred clients. They truly have personnel available but they want to reserve their availability for the youth that are most likely to succeed. They only pass referrals along for youth who have greater needs (interpretation, unable to contact, severe IDD, communication problems, etc.). For 2025, we intend to be partnering with 95 youth before 12/31/2025

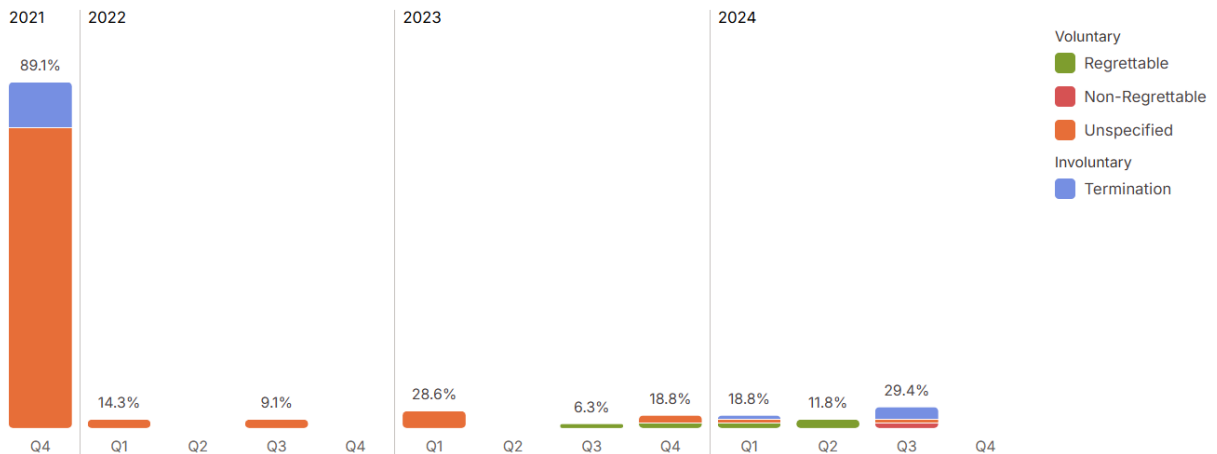
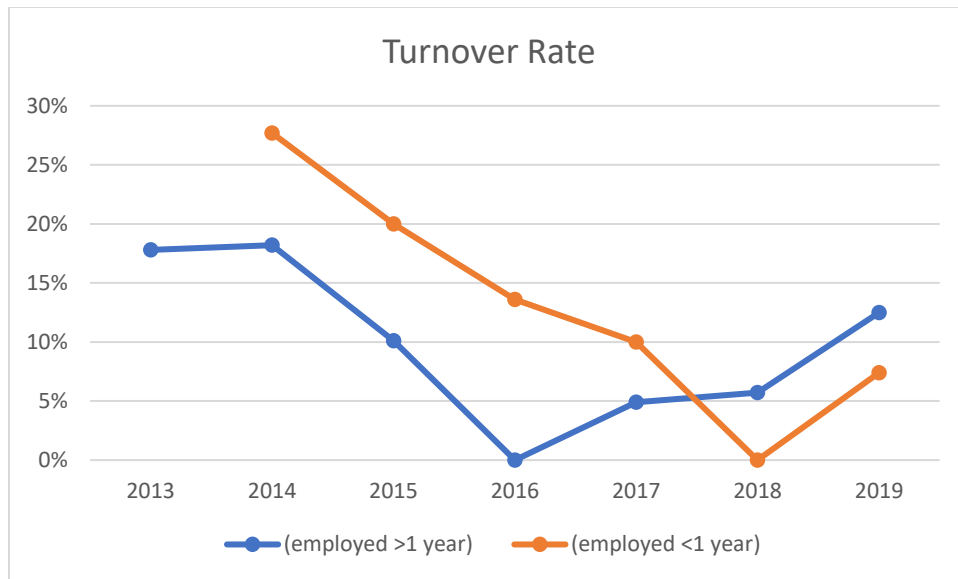
	By 12/31/2025	By 12/31/2026	By 12/31/2027
# youth	95	135	145
# wraparound staff	12	16	17

### Number of staff employed



The original business plan (2012) for ADVOCACY LINKS estimated that 11 people would like to work with us. As shown in the graph above, those early projections were significantly underestimated. Because of the reputation and integrity of the business leaders, numerous professionals who have worked in the industry for many years decided to change employers. In October 2021 when the state went to selective contracting for Medicaid Waiver Case Management services and ADVOCACY LINKS was not selected as a vendor, 66% of our employees changed employers to provide continuity of services for the individuals with whom they had built strong relationships over the past several years. Another 22% of staff exited the field entirely due to the traumatic nature of the state's current and historical decisions that are creating a hostile work environment.

Throughout 2022, some key employees were retained initially to help determine the direction of ADVOCACY LINKS supports and services for the future. As the new array of services/supports developed, additional personnel were added to implement the new services. In 2023 and 2024 as service division did not experience the growth as projected, employees were furlough and service lines were eliminated. As of 12/31/2024, there are 12 employees – 8 of which are dedicated to wraparound services, 1 part time nurse, 1 part time technology manager, 1 full time business manager and the Managing Member. Moving forward, additional personnel will not be added unless there is funding to support their addition. For 2025, we hope to add 1 new facilitator each quarter.

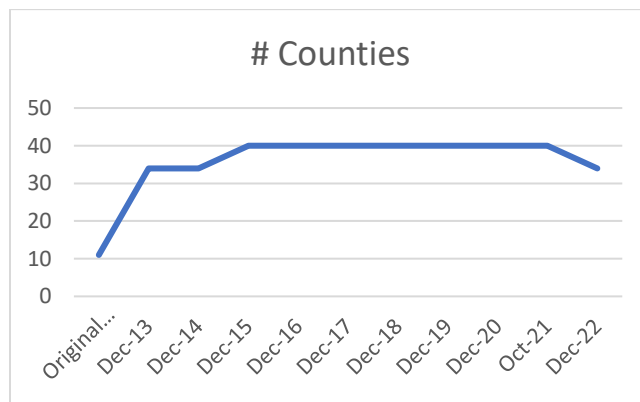


In the early years of ADVOCACY LINKS, we struggled with staff retention for new employees. Because of the complexities of the job and the vast amount of information that needed to be absorbed, employees would leave their positions within the first year consistently. Typically,

people who made it past their first year of employment generally stayed for multiple years. Over the course of time since the Medicaid reimbursement rate for case management service never increased in alignment with expectations and requirements, the trend was for employees to use Case Management as a stepping stone along their career path towards a career where their salary would grow as their credentials increased.

ADVOCACY LINKS worked really hard to create a supportive, respectful work environment that helped keep our turnover rate well below the industry average. In 2021 when a contract was not awarded, everyone who wanted to remain a waiver case manager needed to find alternate employment. The turnover rate is skewed as a result of the state’s decision rather than employee’s dissatisfaction with their employer.

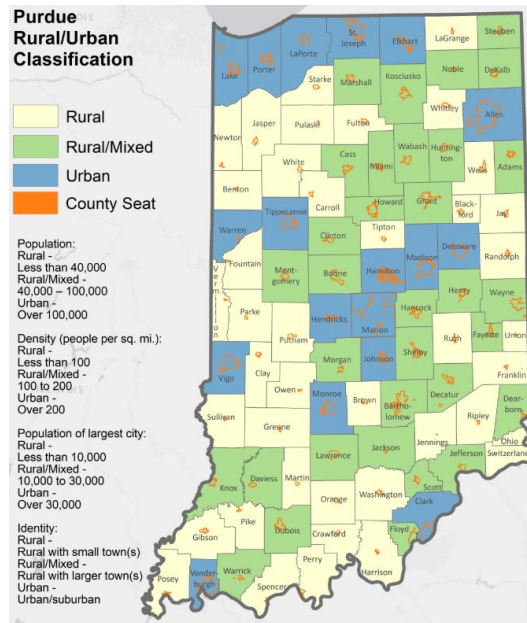
### Number of counties covered



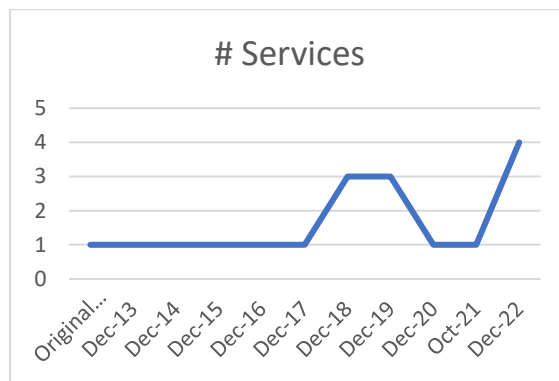
As noted in the original (2012) ADVOCACY LINKS business plan, it was anticipated that we would work in 11 counties. Initially, that was true, but when it became apparent that qualified, seasoned Case Managers in additional counties were interested in working with our company, we expanded our territory. We added the counties around the Fort Wayne area within the first few months and added the counties along the western border of the state a few months later. In 2015, six additional counties around the Muncie area were added.

As part of the service redesign in 2022, ADVOCACY LINKS modified the service delivery area to concentrate on the areas with the strongest presence and community networks that had been established. As of 12/31/2025 there are 30 counties that are open for Wraparound partnerships, with partnerships established in 22 of those counties. Additional counties will not be added unless the need exists and funding is available to cover the cost of service delivery.

Of particular note is the volume of “rural” counties that Advocacy Links is proud to serve. We have always thrived in the rural areas because of our humble beginnings and commitment to having people work in the same area where they live.



### Number of services provided



When ADVOCACY LINKS came into existence, there was only one type of service through the Community Integration Habilitation (CIH) and Family Support (FSW) waivers – Case Management. Over the course of time, Centers for Medicaid and Medicare Services (CMS) approved additional case management type services which we also provided until the state of Indiana rolled all the case management type services into one. As part of the ADVOCACY LINKS redesign in 2022, we began providing 4 lines of services:

- Child Mental Health Wraparound
- MyLinks/Housemate Finder
- Resource & Connections (including a variety of support services through various funding streams including H&W/TBI Waiver)
- Purposeful Life and Community Engagement (PLACE)

As of 12/31/2024, all services lines except Child Mental Health Wraparound have been discontinued. Our efforts and concentration for 2025 and beyond will be on building strong networks within the Mental Health arena and providing high fidelity wraparound facilitation supports.

### **Training and Development**

Training and development of the workforce is one part of a comprehensive strategy toward agency quality improvement. Fundamental to this work is identifying gaps in knowledge, skills, and abilities through the assessment of both organizational and individual needs, and addressing those gaps through targeted training and development opportunities. This document provides a comprehensive Workforce Development Plan for ADVOCACY LINKS.

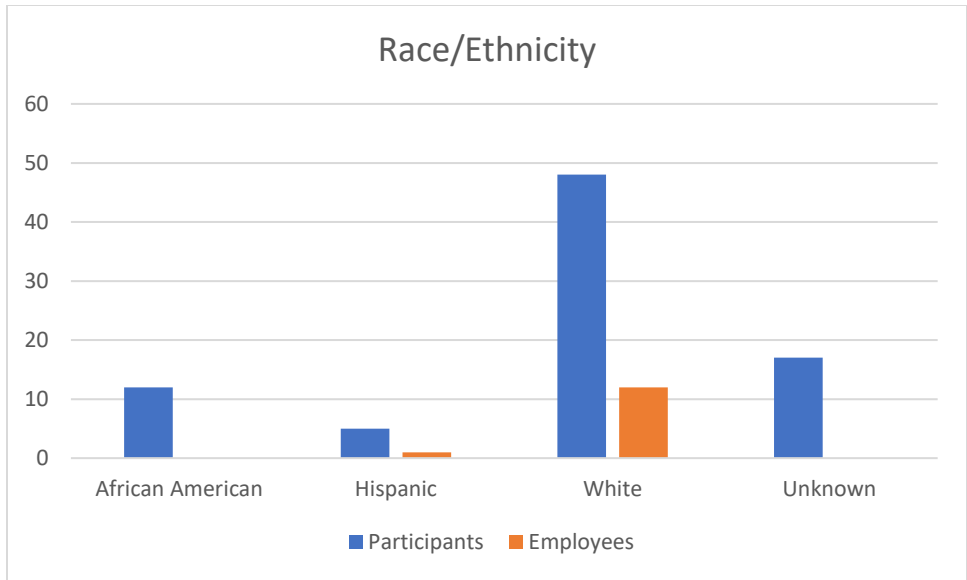
Currently, the responsibility for training and workforce development initiatives, including the maintenance of this plan are shared by:

Sara Fry, Wraparound Director  
888-537-5733, ext 43  
[Sara.fry@advocacy-links.com](mailto:Sara.fry@advocacy-links.com)

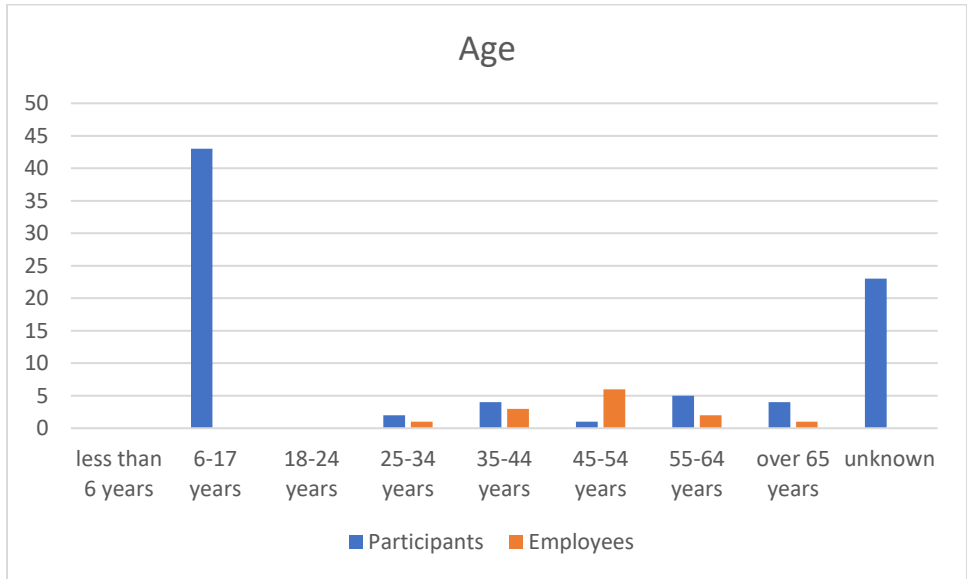
Heather Van Ness, Human Resources/Business Manager  
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ADVOCACY LINKS serves a diverse population throughout the northern Indiana area. While the majority of consumers are predominantly English speaking, there are pockets of individuals that require interpretation, which ADVOCACY LINKS coordinates when native speaking employees are not available. There are several individuals who are enrolled in the Housemate Finder online tool, but we do not collect data about race/ethnicity for these people so they are listed as “unknown.”



Presently, the bulk of the people we support are between the ages of 6-17 as those are the parameters for the Child Mental Health Wraparound program. As 2024 drew to a close, here are the breakdown of the ages for all the people we supported in the various divisions. Looking ahead to 2025 and beyond, the ages for all participants will be 6-17.



**Caseload Size & Oversight Structure**

Currently and into 2025, ADVOCACY LINKS is operating with a skeleton staff to deliver the promised services and to create an opportunity for responsible expansion and growth. Wraparound services are overseen by the Division of Mental Health and Addictions (DMHA) dictates that facilitators have isolated roles so 100% of their effort is devoted to partnering with youth and families. In previous work, our leadership staff was able to work directly with

individuals in addition to completing administrative responsibilities, but the DMHA standard has been a challenging hurdle when we are trying to grow responsibly and remain financially sound. Facilitators are capped at a maximum of 10 partnerships to ensure appropriate support is being provided to each youth/family.

As of 12/31/2024, all administrative and leadership functions are being shared by consultants, part time and full time staff. We presently have 7 Wraparound Facilitators, 2 Team Leaders, 1 Wraparound Director, 1 Nurse, 1 Administrative Support/Technology Manager, 1 Business/Human Resources Manager, and 1 Managing Member. Over the course of 2025 we will add 1 facilitator each quarter assuming budget projections remain on track. Facilitators gradually grow the number of partnerships as they build their skills. It takes about 6 weeks from start date to establishing their first partnerships and can take an additional 60-90 days to build to full capacity.

Currently, we have enough personnel to implement the plans of persons served, ensure the safety of persons served, manage unplanned absences, and manage ADVOCACY LINKS' performance expectations. In the event that an employee leaves, efforts are made before their departure to identify a new ongoing staff member. In the event that an employee's departure is unplanned, Leadership Staff are prepared to step in to ensure services continue uninterrupted.

As we look into 2025, and the potential for new employees exists, new employees will receive New Staff Orientation with customized training for the role they are filling. Division Directors work diligently with the Human Resources Manager and/or Business Manager to review applications, schedule interviews, and offer positions.

### **Learning Culture**

Performance management and quality improvement are key to sustainability, forward movement, and employee satisfaction. Workforce development for all employees will ensure staff achieves the desired social service and diagnosis-specific competencies needed for service delivery, customer satisfaction, and efficient internal processes. Some current employees do not have a social service background and improving the core competencies will help them understand the premises of social service and compliment their desire to "help others." ADVOCACY LINKS supports learning on all levels and offers job-specific training, in-house training on various topics and access to training through webinars and conferences. In addition, leadership development is achieved through the nationally recognized training resources (Fred Pryor/Career Track) as well as industry specific professional development opportunities (Charting the Life Course, INARF Leadership Academy and National Association of Case

Management), Transformational Collaborative outcomes Management (TCOM), John Praed Foundation, Indiana University Canvas, and National Wraparound Implementation Center.

ADVOCACY LINKS strives to conduct business with a value driven focus while maintaining open communication and respect. All policies and procedures are posted on the employee accessible online document library at all times. Supervisors have frequent contact with their subordinates to alleviate feelings of isolation in the virtual environment in which we work. Ample support methods (online as well as in person; topic specific and general work sessions; etc.) and times are available for employees to attend at their discretion. Training opportunities (both mandatory and voluntary) are available and communicated consistently.

### **Policy**

All new employees go through New Staff Orientation during their first week of employment. All new Wrap Around Facilitators are required to complete DMHA Wrap Around Facilitation training within their first year of employment based upon when it is offered.

Overall, ADVOCACY LINKS implements a best practice standard of at least 20 hours/year of training for each employee. This is broken down into at least 10 hours/year of social service related training (or training required for certification) and at least 10 hours/year of position specific training. More than 20 hours/year of training is acceptable for any position. Employees in leadership/administrative positions have additional training requirements specific to their leadership roles.

ADVOCACY LINKS hosts mandatory Company Wide Calls (Wraparound Implementation Calls) each quarter to update employees on the status of performance objectives, share highlights, and discuss concerns. The Wraparound Director hosts a mandatory monthly staff meeting for all wraparound staff where training is provided based on identified needs discovered through Processed Based Supervision, File Reviews, etc. In addition, ADVOCACY LINKS has a schedule for required training topics (to be completed on Bamboo) that each employee must complete to meet CARF requirements.

Employees are encouraged to seek out external training opportunities to meet their own specific position needs, and funding for these can be provided by ADVOCACY LINKS within budgetary constraints.

All Staff must complete all required annual training assessments with no less than the specified score set by the training entity. All training records are stored in the Bamboo Human Resource system. Business/Human Resources Manager tracks training completion and coordinates with supervisory personnel to ensure required hours are completed within designated timelines.



Title	Format & Location	Passing Score	Hire	Annual
Abuse, Neglect & Exploitation	Online/Bamboo	80%	Yes	Yes
Incident Report & Management	Online/Bamboo	80%	Yes	Yes
Human Rights and Protection of Individual Rights	Online/Bamboo	80%	Yes	Yes
Drug Free Workplace	Online/Bamboo	80%	Yes	Yes
HIPAA	Online/Bamboo	80%	Yes	Yes
Positive Behavior Supports	Will be recorded/online/Bamboo	N/A	Yes	Yes
1 <sup>st</sup> Aid/CPR	Online/Skills test by Advocacy Links Instructor in person	100%	Yes	Renewed as required, might be 2 years
Health and Safety Trainings	Online/Bamboo	80%	Yes	Yes
Position Specific Training Curriculum	Online/In person/Bamboo	80%	Yes	Retraining as required
DMHA Wrap Around Facilitation Training	Online/In person	As set by DMHA	Within 1 <sup>st</sup> year of employment as appropriate	As required by DMHA

### Concerns & Grievances

ADVOCACY LINKS operates with an “open door” mindset to encourage all employees to share their concerns immediately and have an opportunity for the issue to be resolved without the need for formal grievances. However, we do have processes in place for people to file

grievances should they so desire. Links for submitting grievances are available on the website so anyone can submit concerns.

### **Recognition & Feedback**

All along, ADVOCACY LINKS has conducted business adhering to its mission of “respecting everyone in the process” by thanking employees for a job well done, work done outside the scope of their responsibility, positive feedback from external and internal sources, etc. Efforts are being made to instill a broader mindset of employee recognition in all employees. As capacity is available in 2025, we intend to relaunch a more formal employee recognition committee to ensure this supportive working culture remains intact.

Supervisors are responsible for keeping in touch with their subordinates to ensure they are trained, supported, and accomplishing their responsibilities in a timely manner. In the event that an employee is struggling, the supervisor uses coaching, mentoring, and disciplinary action as needed to address concerns and bring about positive results. ADVOCACY LINKS strives to maintain a positive work environment and generally does not operate with punitive measures as the first means of addressing problems.

Currently, performance appraisals are conducted at least annually for all employees. New staff have an informal review as they are completing the new staff orientation phases and beginning their job responsibilities (approximately 90 days after start date).

The performance review process that is currently implemented is in the process of being overhauled as criteria for evals don't line up with responsibilities of some of the newer positions. In addition, the overhaul will ensure that policies and procedures are clearly outlined for the identified workforce; criteria against which people are being appraised; involvement of the employee being appraised; documentation requirements; time frames/frequencies related to the performance appraisal process; measurable goals; source of input; and opportunities for development. This overhaul will be a priority in 2025.

### **Compensation & Benefits**

ADVOCACY LINKS has worked hard to maintain overhead costs so that the bulk of revenue can be given directly to the people doing the real work in the form of compensation and benefits. We provide an equitable wage as compared to agencies providing similar supports/services. We offer expense reimbursement for mileage, phone, internet, postage. We provide free office supplies. We offer assistance with purchasing devices or other large ticket items that are necessary to complete the job. As soon as revenue supports it again, we will reinstate the provision of health insurance, dental, vision and life insurance as well as distributions into employee's 401K plans as funds are available.

## **Opportunities for Advancement & Job Postings**

Throughout the life of ADVOCACY LINKS, positions have been revamped and added to meet the needs of the organization at that given time. Initially, ADVOCACY LINKS was set up to operate as a small company with extremely limited administrative personnel and all positions were blended roles (everyone carried a caseload to remain proficient in the actual direct service responsibilities). Over time, it was evident that the company needed dedicated positions for critical business operation functions so some positions were added gradually (part time to begin, then morphed into full time as the needs arose). In today's work environment, many of the administrative positions are reverting back to blended roles due to the shift in service lines.

New positions have been created as needed to deliver the supports/services currently provided. As the company finances stabilize and need for dedicated administrative functions returns, additional roles will be created to enable employees to stretch their limits, experience leadership opportunities and demonstrate their expertise and passions.

All job openings are posted internally first by sending an email to all staff, discussing at staff meetings, etc. ADVOCACY LINKS would prefer to hire for open positions from eligible applicants within our current or most recent employee pool. For vital roles, if applicants from within the organization are not found, the posting will be listed in online job posting forums such as Indeed, Career Builder, monster.com as well as in college career counseling offices.

### **Workforce Profile**

#### **Current & Future Workforce**

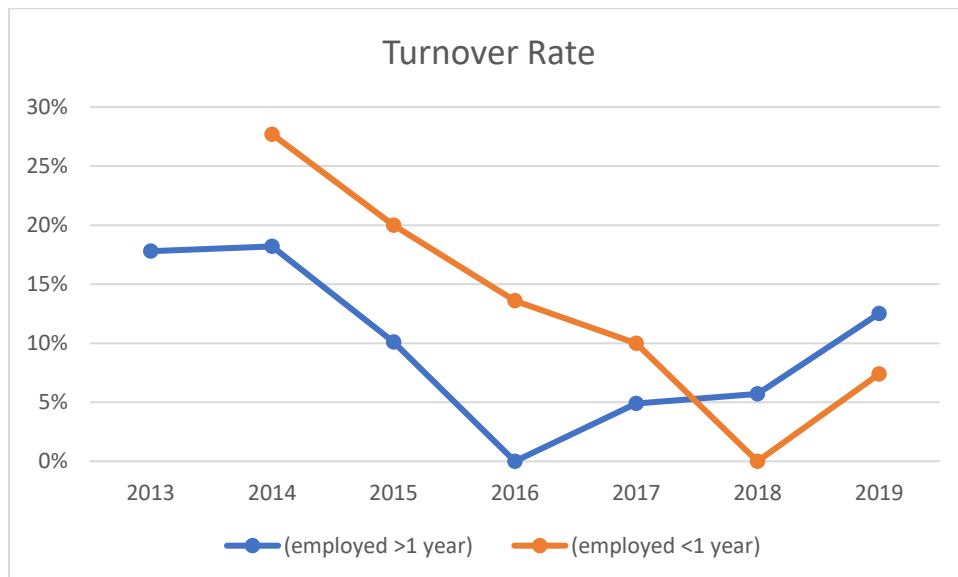
The current and future workforce needs of Advocacy Links reflect those of other social service companies in Indiana. The greatest struggle is the difficulty in hiring employees due to uncompetitive pay in the workforce in general. Our workforce provides essential services which require intense knowledge of paid and unpaid resources in a variety of geographic areas in addition to all phases of a person's life. While our compensation packages are comparable to other social service agencies, people can easily make more money at fast food restaurants, large retail stores or casinos.

In the counties in which ADVOCACY LINKS provides services, there are numerous colleges and universities that offer Human Service degrees which provide an ample pool of candidates for job openings. In addition, it is common for people who have been working in the human service industry to seek employment at an agency like ADVOCACY LINKS due to the flexible work hours, reduced responsibility for direct oversights, etc.

One of the trends we have seen with ADVOCACY LINKS employees has been that they used their employment as a stepping to a more lucrative career. Many people have worked for ADVOCACY LINKS while they are completing their Master's degree. As soon as they obtain their degree, they pursue a career as a Behavior Specialist because they can make 4 times as much money in that role and still work flexible hours with the same population.

Prior to 2022, ADVOCACY LINKS had no control over the Medicaid reimbursement rate for the services provided so there was limited flexibility in the funds available for salaries. As new service lines were developed in 2022, ADVOCACY LINKS had more control over the rates set for the services we provide for some services. It was hoped that revenue would be generated to adequately provide raises, health insurance, etc. That did not happen as planned. As we move into 2025 and beyond, we are concentrating all our efforts in Child Mental Health Wraparound services where the rate is again set by the State of Indiana. As long as we stick to the proposed growth budget projections, we should be able to provide raises, benefits, health insurance in 2026.

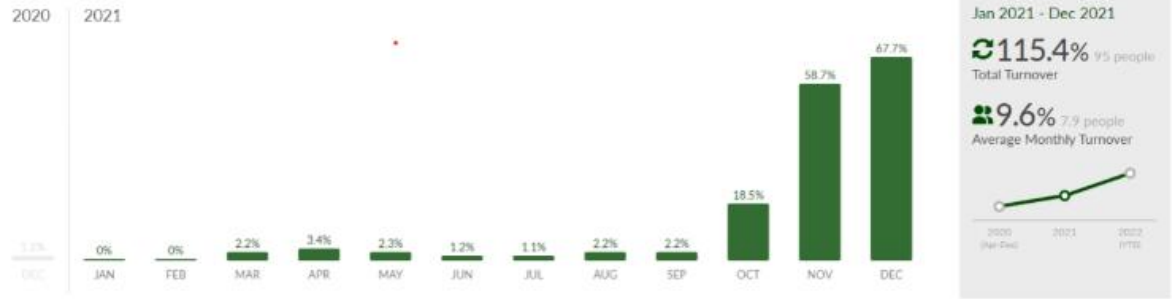
Below are charts reflecting the turnover rate for ADVOCACY LINKS employees for the past 10 years. In 2021, the turnover rate for that year alone was 115.4% due to the cessation of that service delivery option. In the chart for 2023-2024, it is obvious that we are seeing a return to the trend of new employees leaving within the first 6 months.



## Employee Turnover

How's this calculated? [More](#)

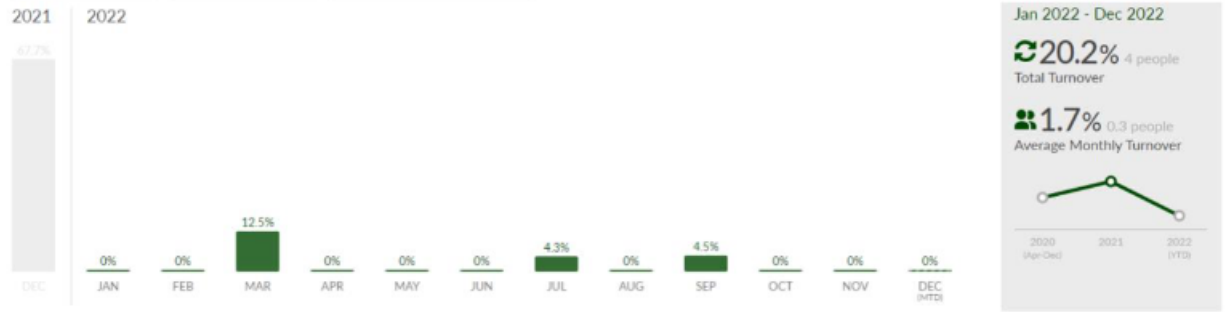
Jan 2021 - Dec 2021 All Employees

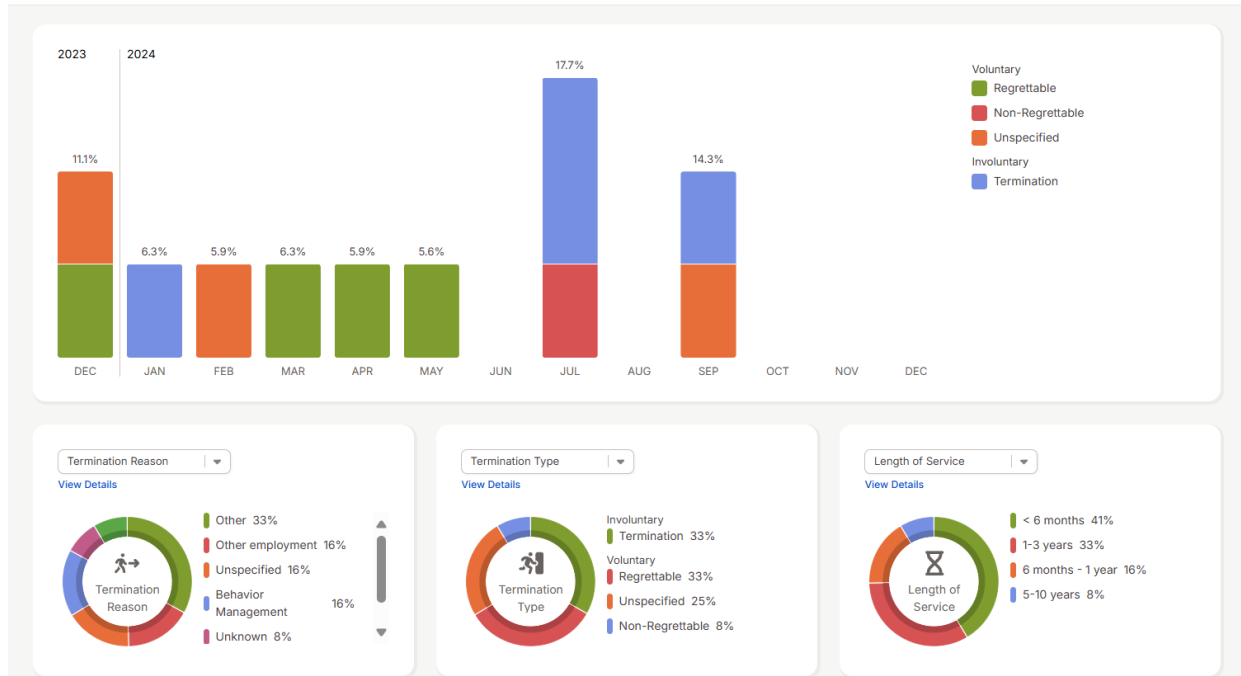


## Employee Turnover

How's this calculated? [More](#)

Jan 2022 - Dec 2022 All Employees





Many of the employees who work in this field have been doing this type of work for their entire career. Many took the opportunity in 2021 to retire rather than continue to work for a new employer. Currently, ADVOCACY LINKS has 1 Part Time administrative person who is already retired but is staying employed as a means of keeping active in retirement. In addition, there are 2 additional staff members who are within 5 years of potential retirement. We do not anticipate there will be anyone actually retiring in the next 3 years.

ADVOCACY LINKS has worked with each employee in a position of leadership to develop a succession plan for their position. These succession plans are updated at least annually to ensure they are current and correct. In addition, ADVOCACY LINKS has been investing time and energy in developing leaders from the inside. We encourage strong staff to take extra responsibilities to develop their leadership skills and provide opportunities to demonstrate their abilities. We are emphasizing grooming strategies in areas where we recognize an additional leader will soon be needed. We encourage interested staff to participate in leadership training, at the company's expense.

ADVOCACY LINKS has a lean group of Leadership Staff that support the entire company and are not specifically located in a given region due to the virtual work environment in which all employees work.

Leadership Staff include:

**Managing Member:** Full Time employee. Must have 4 year degree in Human Services field and 1 year experience working with people who have disabilities/mental health. Critical skills

required are organization, supervision, communication and technology. High level of trust is required due to security access required. Maximum caseload size: 0 (DMHA forbids) This person is also currently overseeing the bulk of technological maintenance/support, quality assurance/improvement, consults with marketing/social media/website developer and serves as the company's Corporate Compliance Officer.

**Business Manager:** Full Time employee. No specific degrees or certifications are required but proficiency in Human Resources and Accounting is mandatory. Critical skills required: Technology, communication, and organization. Extremely high level of trust is required due to security access required. Does NOT carry a caseload. This person is also currently help coordinate the tracking of required company training through Bamboo.

**Technology Manager:** Part Time employee. No specific degrees or certifications are required but proficiency in technological systems is mandatory. Critical skills required: Technology, communication, and organization. High level of trust is required due to security access required. Does NOT carry a caseload. This person is currently providing additional administrative support as needed to support the company as a whole.

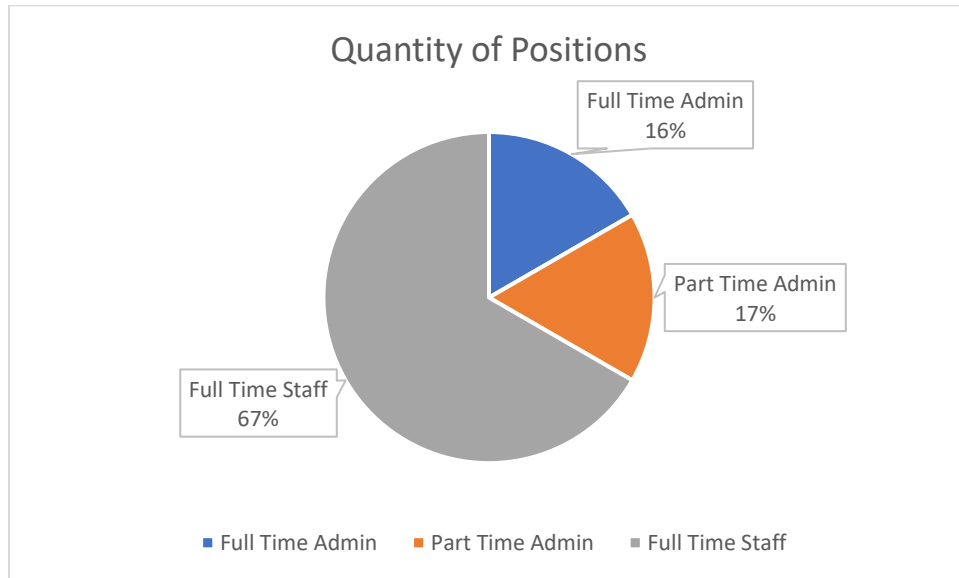
**Nurse:** Part Time employee. Must have RN license. Critical skills required: Knowledge of variety of health issues, organization, and communication. Does NOT carry a caseload.

**Wrap Around Support Director:** Full Time Employee. A 4 year degree in a Human Services field is required. Must have at least 2 years experience working with seriously emotionally disturbed youth and their families. Prefer at least 3-5 years of supervisory experience. Critical Skills required: wraparound facilitation skills as may have a few partnerships, quality review and analysis, training of staff, communication skills, understanding of trauma-informed care, organizational skills, collaboration with agency personnel to accomplish company goals, ability to provide support, and training to wraparound facilitators. Maximum partnerships: 10 (inclusive of youth/subordinates). DMHA does NOT want this person to have ongoing partnerships, but does allow emergency coverage. This person is currently processing all new referrals.

#### Other Staff:

**Wraparound Team Leader:** Full Time Employee. A 4 year degree in a Human Services field is required. Must have at least 2 years experience working with seriously emotionally disturbed youth and their families. Critical Skills required: wraparound facilitation skills, quality review & assessment, training of staff, communication skills, understanding of trauma-informed care, organizational skills, and ability to provide support. Maximum partnerships: 10 (inclusive of youth/subordinates).

**Wraparound Facilitator:** Full Time Employee. A 4 year degree in a Human Services field is required. Must have at least 2 years experience working with seriously emotionally disturbed youth and their families. Critical Skills required: wraparound facilitation skills, communication skills, understanding of trauma-informed care, organizational skills, and ability to provide support. Maximum partnerships: 10



Part Time – The Administrative Support/Technology Manager and Nurse are currently the only part time employees of ADVOCACY LINKS. These non-salaried Leadership Staff work less than 30 hours/week as recorded on time sheets.

Full Time – All other ADVOCACY LINKS personnel are salaried employees and work 30 or more hours/week.

**Competencies & Education Requirements**

As noted elsewhere in this plan, some of the positions available at ADVOCACY LINKS are ones that rely on knowledge and experience rather than degrees and licenses. Employees providing Child Mental Health Wraparound services as required to have a 4 year degree in a Human Services field is required. Must have at least 2 years experience working with seriously emotionally disturbed youth and their families.

Although all employees are encouraged to participate in trainings of their interest and to increase their own professional skills, some positions don't require initial or annual training other than the DMHA required trainings (outlined in above "policy" section and later in "mandatory training" section).



Over the next 3 years, ADVOCACY LINKS needs to develop a more concise protocol for training and measuring Core Competencies for all positions specifically related to the following domains and tiers, which also need reviewed and updated to reflect requirements and terminology concentrating on wraparound services. The tiers represent different phases of career development. The individual competencies within the tiers, build upon each other describing desired skills at progressive stages of their careers.

Core Competencies will be a combination of knowledge, skills, personal characteristics/attitudes, and individual & social behaviors/judgements needed for someone to perform a job, in conjunction with identified resources consistent with each topic. Core competencies will insure the right people are equipped to achieve optimal outcomes. Competencies will support the organization in the accomplishment of its mission & goals as well as to meet the needs of the people served.

Competencies will be assessed within specified time frames and with the frequency noted below. Competency assessment is more than just a checklist but is validated over time through a variety of situations and methods. Competencies across the organization ensure that each person in every position is competent in their role.

	Basic (Staff)	Advanced (Leadership)	Executive (Senior Management)
Analytical Assessment	Person Center Planning Facilitation	To be further defined in 2025-2027	To be further defined in 2025-2027
Policy Development/ Program Planning	Dress Code Confidentiality Ethics Human Rights HIPAA	To be further defined in 2025-2027	To be further defined in 2025-2027
Communication Skills	Call Back Expectations Organizational Chart Flexibility & Professionalism	Conflict Resolution To be further defined in 2025-2027	To be further defined in 2025-2027

	Contacting new consumers		
Cultural Competencies	Person First Language	To be further defined in 2025-2027	To be further defined in 2025-2027
	Overview of Disabilities		
	ID/DD History		
	Requesting an Interpreter		
	Cultural Diversity		
Community Resources	Medicaid	To be further defined in 2025-2027	To be further defined in 2025-2027
	Medicaid Waiver		
	Social Security		
	Vocational Rehabilitation		
	Section 8 Housing		
	First Steps		
	Head Start		
	Natural Supports		
	Guardianship/POA/ Emancipated/Supported Decision Making		
Job Specific Skills	Services	To be further defined in 2025-2027	To be further defined in 2025-2027
	Brief Review of Caseload/Partnerships		
	Review meeting time frames		
	Review ticklers		
	Review of quarterly vs. annual		
	Consumer Handbook		

	Handbook Signature Page		
	Provider Progress Reports		
	Lifecourse Framework/ MAPS		
	Overview of Referrals		
	Outcomes/Action Steps		
	Abuse/Neglect/Exploitation IRs & Follow Ups		
	Critical Incidents		
	Risk Plans		
Financial Planning & Management	Expense Reports	To be further defined in 2025- 2027	To be further defined in 2025- 2027
	Pay Stubs		
	Office Supplies		
Leadership & Systems Thinking	To be further defined in 2025-2027	To be further defined in 2025- 2027	To be further defined in 2025- 2027
Customer Service	Who are our consumers?  Satisfaction Surveys	To be further defined in 2025- 2027	To be further defined in 2025- 2027
Accountability	Activity Note Quality Guide  PCP Quality Guide  Care Plan Quality Guide  Hot Lists/ Individual Audit	To be further defined in 2025- 2027	To be further defined in 2025- 2027
Research	Meetings to be shadowed	To be further defined in 2025- 2027	To be further defined in 2025- 2027

Continuous Quality Improvement	To be further defined in 2025-2027	Case Record Reviews Spot Checks DMHA review (Wraparound Facilitators only)	To be further defined in 2025-2027
Occupational Health & Safety	Drug Free Workplace To be further defined in 2025-2027	To be further defined in 2025-2027	To be further defined in 2025-2027
Emergency Preparedness	Advocacy Links Health & Safety trainings	To be further defined in 2025-2027	To be further defined in 2025-2027
Managing Performance	Health Cloud Bamboo TOBI/KidTrax (Wraparound Staff only)	To be further defined in 2025-2027	To be further defined in 2025-2027
Managing Resources	To be further defined in 2025-2027	To be further defined in 2025-2027	To be further defined in 2025-2027
Public Health & Crisis Leadership Competency Framework	To be further defined in 2025-2027	To be further defined in 2025-2027	To be further defined in 2025-2027
Technology	Email/calendar/TEAMS RingCentral voicemail/fax ADVOCACY LINKS website PDF Printer	To be further defined in 2025-2027	To be further defined in 2025-2027

Attaching documents to  
Health Cloud

**Training Needs**

This section provides a description of mandatory training and identified training needs for ADVOCACY LINKS in addition to targets for achieving specific competencies among staff. The training needs incorporate results from training needs assessments, identified (through Process Based Supervision-PBS and File Review) and required training needed for all staff (organizational level), and training to meet professional competency requirements. ADVOCACY LINKS will conduct an organization-wide training needs assessment at least once every five years. As Advocacy Links concentrates our service delivery solely on wraparound in 2025, this training assessments/needs/development will take some time to fully implement. Projections for completion will extend for a year or two.

Training Needs Assessment Results

To further prepare and organize training and educational development at ADVOCACY LINKS, surveys and assessments are conducted to obtain feedback from staff. In the last five years, ADVOCACY LINKS has requested feedback and suggestions both formally and informally with limited response. In 2025 a more comprehensive, formal attempt will be made to survey identified specific training areas employees feel would be beneficial for the organization, in addition to providing personal benefit, while improving their job performance.

Organization Specific Needs

It is anticipated that the results from the training needs survey that will be completed in 2025 might reveal needs for competency-based training in the following areas:

- honesty and integrity
- performance/competence
- customer focus
- continuous improvement
- team work
- innovation
- fair enforcement of the law
- collaboration
- communication
- embracing change
- learning through experience.

- Occupational Health and Safety
- Emergency Preparedness

Discipline Specific Needs

It is anticipated that result from the training needs survey that will be completed in 2025 might reveal needs for competency-based training in the following areas:

- Planning for transitions
- Diagnostic review
- Advocacy
- Team building
- Conflict resolution
- Building community resource networks
- Person Centered Planning
- Charting the Life Course
- Encouraging natural supports
- Developing ‘meaningful day’ activities
- Managing medical risks
- Monitoring environmental risks
- Epilepsy
- Dysphasia
- Constipation
- Dehydration
- Incident reporting
- Mortality review
- Writing quality Service Agreements/Care Plans
- Creating thorough Person Centered Support Plans

Mandatory Training

	Upon Hire	Annually
All Employees except as noted below	<ul style="list-style-type: none"> <li>• Abuse/Neglect/Exploitation</li> <li>• Incident Reporting and Management</li> <li>• Human Rights (which includes Protection of Individual Rights)</li> <li>• Drug Free Workplace</li> <li>• HIPAA</li> <li>• Required Safety Trainings</li> </ul>	<ul style="list-style-type: none"> <li>• Abuse/Neglect/Exploitation</li> <li>• Incident Reporting and Management</li> <li>• Human Rights (which includes Protection of Individual Rights)</li> <li>• Drug Free Workplace</li> <li>• HIPAA</li> <li>• Required Safety Trainings</li> </ul>

	<ul style="list-style-type: none"> <li>• 1<sup>st</sup> Aid and CPR (update as required, which might be every 2 years)</li> </ul>	<ul style="list-style-type: none"> <li>• 1<sup>st</sup> Aid and CPR (update as required, which might be every 2 years)</li> <li>• 20 Hours of Social Service industry specific training</li> </ul>
Managing Member	As shown above for all employees	<p>As shown above for all employees</p> <ul style="list-style-type: none"> <li>• 5 hours of Leadership/ Business Management Training</li> </ul>
Business Manager	As shown above for all employees	<p>As shown above for all employees EXCEPT doesn't need 20 hours of Social Service industry specific training</p> <ul style="list-style-type: none"> <li>• 5 hours of Leadership/ Accounting/ Business Management Training</li> </ul>
Technology Manager	As shown above for all employees	<p>As shown above for all employees EXCEPT doesn't need 20 hours of Social Service industry specific training;</p> <p>FT employee would need</p> <ul style="list-style-type: none"> <li>• 5 hours of Technology/Web Design/etc. Training</li> </ul>
Registered Nurse	As shown above for all employees	As shown above for all employees EXCEPT doesn't need 20 hours of Social Service industry specific training

		FT employee would need
		<ul style="list-style-type: none"> <li>• 5 hours of Health Care Training</li> </ul>
Wraparound Directors	As shown above for all employees	As shown above for all employees
		<ul style="list-style-type: none"> <li>• 5 hours of Efficiency/ Time Management/ Quality Improvement/ Leadership Training</li> </ul>
Wraparound Team Leaders	As shown above for all employees	As shown above for all employees
		<ul style="list-style-type: none"> <li>• 5 hours of Efficiency/ Time Management/ Quality Improvement/ Leadership Training</li> </ul>
Wraparound Facilitator	As shown above for all employees	As shown above for all employees
		<ul style="list-style-type: none"> <li>• Any and all training as required by DMHA</li> <li>• Completion of re-certification training for wrap around as required</li> </ul>



## Marketing Strategy

Because ADVOCACY LINKS employees have an extensive history and rapport built with individuals, families, guardians, agencies, schools, government entities, medical professionals and public businesses, we have historically relied on word of mouth as that was the best strategy for individuals receiving Medicaid Waiver case management services. With the new service array that became available in 2022, more traditional marketing efforts were implemented to educate the public about the new supports/services available. Concentrating solely on wraparound services in 2025, we will emphasize our efforts to educate the community members and become a more active presence in our local communities.

The target audience for Wraparound Services includes families receiving child mental health supports through the DMHA (for children eligible for Medicaid) & DCS (for children not eligible for Medicaid). In addition, School Counselors, Special Education Teachers, Medical Professionals, Community Based Counseling services, Community Mental Health Centers, etc.

ADVOCACY LINKS will continue to supply high quality and knowledgeable services. Recommendations and word of mouth are always valuable marketing tools, but as we enter new areas of service, we will need to lean more heavily on educating people on our services and how they can be used. We will continue to further establish our reputation as quality providers within the referral systems of Wraparound Supports

Advocacy Links intends to have presence at all resource fairs and community outings offered in all counties served in northern Indiana. Informational brochures on Wraparound Services will be available at each event. Wraparound Directors and Facilitators will also network with local mental health centers, physicians, schools, and other community partners to share brochures and information. It is a priority for Advocacy Links to be aware of all resources. All Wraparound Facilitators attend System of Care (SOC) meetings in relevant counties. Advocacy Links is also involved in local continuum of care and interagency meetings that are offered in counties we serve. Facilitators and Director also share mental health resources with other company employees as pertinent.

The ADVOCACY LINKS website provides a visible presence on the internet including resource information. The website highlights the services we provide; indicates our mission; and introduces individuals to representatives who are available to work with them. The website can be found at [www.advocacy-links.com](http://www.advocacy-links.com) . An additional website exists to hold the Housemate Finder tool at [www.advocacy-links.net](http://www.advocacy-links.net) (this tool was bogging down the access speed of our formal webpage so it was relocated while we determine if we want to further pursue providing this resource). In addition, Advocacy Links utilizes social media (Facebook, Instagram, Pinterest) to share information with interested parties.

Being a member of professional organizations continues to be the intent of ADVOCACY LINKS. These organizations include, but are not limited to:

- ARC of Indiana (an advocacy organization geared to educate families who have children with intellectual or developmental disabilities)
- NACM (National Association of Case Managers)

Interacting with partner organizations and holding positions with committees in the local service area is also critical for ADVOCACY LINKS to build professional relationships and maintain a presence in the local communities. This is being achieved by sitting on local Systems of Care, Interagency Councils, etc. Representatives from ADVOCACY LINKS are present at “transition fairs” held at high schools where families are gaining information about services available to their children that are aging out of school.

ADVOCACY LINKS leadership staff maintain open lines of communication with stakeholders (agencies that provide direct support to the people for whom we coordinate services). We meet as frequently as the provider organization chooses and make contact at least quarterly. In these conversations, we discuss concerns, upcoming changes, and any other trends.

Printed literature has been developed for families to have a tangible, visual reminder of ADVOCACY LINKS. Most of the resource materials generated by ADVOCACY LINKS are available in Spanish. An example of the company’s general informational brochure is included in Appendix B of this business plan.

## Financial Management

ADVOCACY LINKS intends to remain focused in the geographic area where previous experience and professional rapport has been established. By concentrating on a limited geographic area, services can be provided more cost efficiently. ADVOCACY LINKS representatives live in the geographic area where they will be working, so travel expenses and travel are significantly less than for a company whose employees need to come from an hour or more away to meet with participants. Due to living in the area where they are working, ADVOCACY LINKS personnel are already familiar with the majority of resources in the targeted geographic area, so the time needed to train staff on local resources is greatly reduced.

Overhead costs for ADVOCACY LINKS are significantly less than those of some other service providers because all personnel work from their home offices rather than having to pay for office space in a physical building. In addition, by keeping overhead costs minimal, ADVOCACY LINKS is able to compensate employees competitive rate, with the intent to keep retention high and new staff training costs low.

Prior to 2022, ADVOCACY LINKS maintained 2 months' worth of expenses to remain financially solvent in the rare instance that Medicaid payments were interrupted. ADVOCACY LINKS intends to continue this practice as we regain steady revenue streams.

ADVOCACY LINKS, LLC has a business line of credit up to \$100,000 through 1<sup>st</sup> Source Bank. Although we had to use some of this line of credit in the early months of operation, we paid off the entire line within the first year of operation. Since 2022, we have had to use this line of credit regularly and are looking to intentionally pay this off as quickly as possible with regular payments beginning in 2025.

There is an assessment and two types of wraparound services that require the exact same activities to be completed but the reimbursement rate is different depending on the funding source.

- CMHW is funded by Department of Mental Health and Addictions (DMHA) and is for youth who have Indiana Medicaid and not IDD diagnoses. CMHW reimbursement rate is \$1074.69/month. All work is documented on TOBI and payment comes through Indiana Medicaid's payment portal – Gainwell. Claims are paid within 2 weeks.
- CMHI is funded by Department of Child Services (DCS) and is for youth who don't qualify for Medicaid or who have an IDD diagnosis. CMHI reimbursement rate is \$965.49/month. All work is documented on KidTraks and payment comes through KidTraks as well. Claims are paid in 45-60 days.

- An assessment to determine eligibility for wraparound services is authorized for some youth at a rate of \$77.72 (one time).

Each Wraparound Facilitator can partner with no more than 10 youth at once as mandated by DMHA. Each wraparound supervisor can only have a combined total of 10 youth and people they directly supervise.

In 2025 and beyond, Advocacy Links has three main objectives related to finances:

1. Ensure all employees are consistently being paid.
2. Pay down/off line of credit
3. Provide health insurance

Throughout 2025, Advocacy Links intends to add 1 new Facilitator each quarter and grow the number of partnerships from 55 to 95 by 12/31/2025. It's necessary to stick to these revenue projections to meet our financial objectives noted above.

For 2026, if we keep on the same cycle of adding 1 facilitator each quarter and growing the number of partnerships from 95 to 135 by 12/31/2026, we should be able to provide health insurance in 2026.

In 2027, it's difficult to determine if the need for wraparound services will continue to grow at the same volume, so for purposes of this planning document, we will anticipate that the need won't expand excessively. We will plan to only add 1 facilitator over the course of the year and grow partnerships from 135 to 145 by 12/31/2027.

**Appendix D** contains the Balance Sheet for January 1 – December 31, 2024

**Appendix E** contains the Budget vs. Actual Report for January 1 – December 31, 2024

**Appendix F** contains the Income Statement for January 1 – December 31, 2024

**Appendix G** contains the projected Income Statement fiscal years 2025 - 2027

**Appendix H** contains the projected Cash Flow Statement for January 1 – December 31, 2025

**Appendix I** contains the projected Cash Flow Statement fiscal years 2025-2027

## Cultural Diversity Competency Plan

During the first 10 years of operation, ADVOCACY LINKS worked hard to create a culturally diverse working environment by providing education, resources and training to individuals served as well as employees. We had bilingual employees and access to interpreters as needed. It is the intent of ADVOCACY LINKS to continue to move forward with striving to be more culturally diverse. In the coming years, we will be concentrating efforts to increase our exposure in more culturally diverse communities. In addition, we will be implementing more training for our employees regarding cultural diversity competence.

### Cultural Competency Policy Statement

ADVOCACY LINKS is committed to a policy of cultural diversity and openness in preventing any form of discrimination. As part of our commitment to eliminate any possible discrimination, we have established the goal that the proportion of minority employees should be more representative of the relevant labor market for similar positions within our industry. This commitment extends to taking action to correct any failure to meet this goal, while still hiring the most appropriate candidate for the position. The Managing Member will oversee and monitor the implementation of this plan in cooperation with the Business Manager/Human Resources Manager.

Cultural diversity, Affirmative Action, and equal opportunities are viewed as integral parts of the mission of ADVOCACY LINKS.

### Equal Employment Opportunity Policy Statement

The Managing Member and Leadership Staff of ADVOCACY LINKS recognize their responsibility for the development of equal employment opportunities that do not discriminate against employees or applicants for employment because of race, color, religion, gender, sexual orientation, politics, and national origin, veteran's status, age, genetic information, disability, or any other characteristic protected by law. ADVOCACY LINKS will ensure that all applicants have equal opportunity for employment and that disciplinary action taken during employment will be taken without regard to any discriminatory factor.

Furthermore, ADVOCACY LINKS recruitment, employment, and promotion policies shall provide opportunities for a diverse pool of qualified candidates.

### Overview of Cultural Diversity

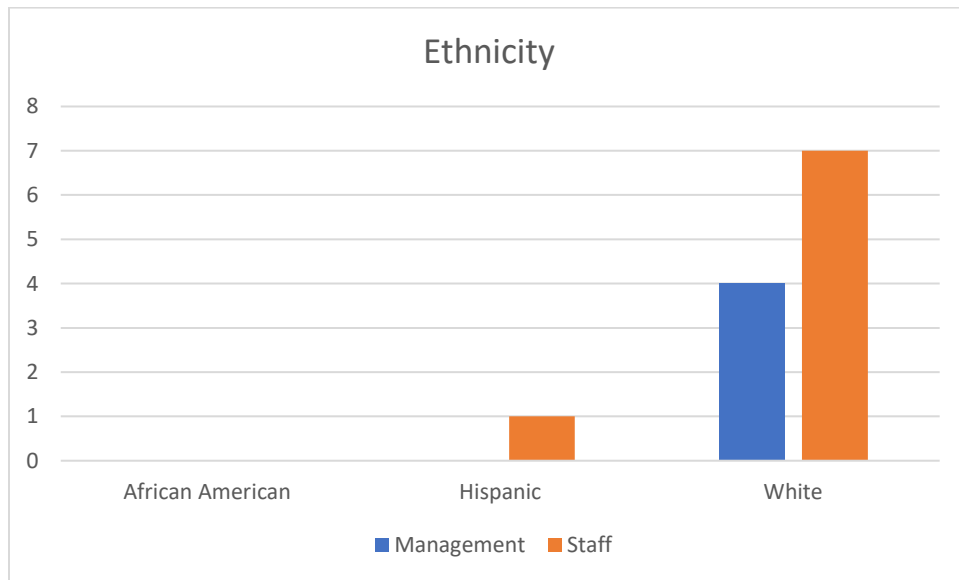
This document represents ADVOCACY LINKS' plan to provide an atmosphere of cultural diversity, equal opportunities for employment, and access to training to all ADVOCACY LINKS

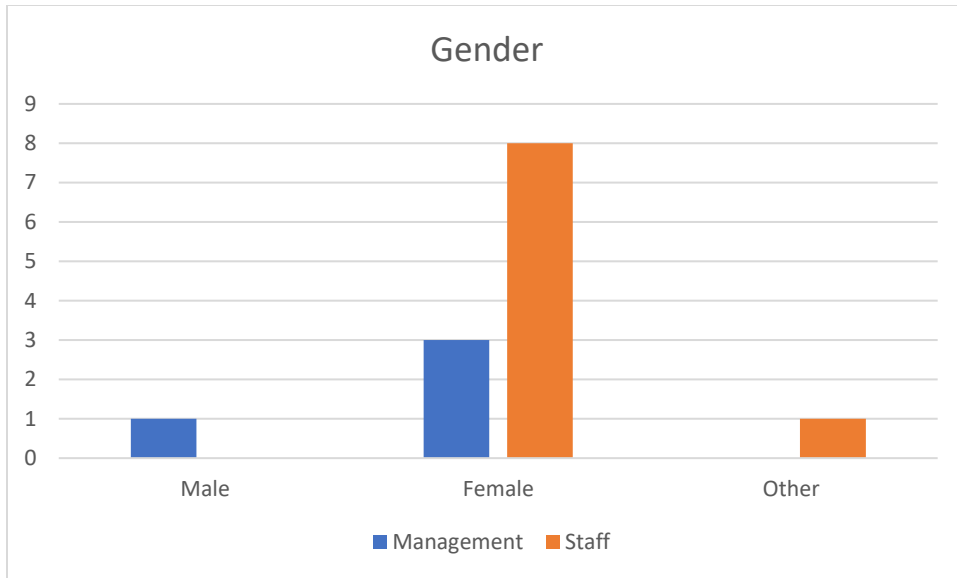
employees. This plan will ensure that the company is in compliance with federal laws, regulations, executive orders, and the mission of ADVOCACY LINKS.

This document should not be construed to acknowledge any past or present discriminatory practice by ADVOCACY LINKS. This document represents the good faith efforts of the Managing Member and the leadership staff to ensure equal services and employment opportunities for all protected classes, including the correction of the under-utilization of any protected class, and an environment demonstrating acceptance and respect for all employees and waiver participants.

### Current Analysis of EEOC Categories

The composition of current ADVOCACY LINKS staff is identified in the following tables broken down by gender and Equal Employment Opportunity Commission (EEOC) Categories (as of December 20, 2024). The stacked tables also provide a visual reference between management personnel and staff. See additional graphs in the Growth/Workforce Development Plan to show comparison between people supported and personnel statistics.





Available Minority Employee Analysis

ADVOCACY LINKS recruits individuals for employment throughout the state of Indiana as well as neighboring communities in the states of Michigan, Ohio, and Illinois. The large metropolitan communities in the area we serve offer a variety of qualified candidates with diverse cultural and ethnic backgrounds, which contributes to affirmative action goals. The minimum qualifications for Wraparound Facilitators are in accordance with the Department of Mental Health and Addictions (DMHA) regulations established for the that particular position. All other employees meet minimum professional requirements and accepted standards by other specialized accrediting agencies.

ADVOCACY LINKS seeks to employ qualified staff members who are dedicated to advocating for people who need help, connecting people to fiscally responsible resources, and respecting everyone in the process.

In the first 10 years of operation, ADVOCACY LINKS saw a growth in the number of younger people receiving waiver services due to the emphasis the state has had on getting people off of the waiting lists. There has also been a decrease in the amount of aging people we support primarily due to people passing away. People with disabilities tend to have a shorter life expectancy than the general population. There is an obvious decline in individuals served in 2022 due to the shift in service lines. Beginning in 2025, all recipients will be between the ages of 6-17 as mandated by the parameters of the Wraparound Program.

ADVOCACY LINKS is committed to the equal employment opportunity for qualified groups of individuals. The following cultural diversity program outlines how ADVOCACY LINKS has

initiated employment procedures to expand the company's minority employee base in an effort to reflect the demographic patterns within its service area (Northern Indiana).

### Plan for Administering the Cultural Diversity Competency Program

#### **Advertising**

ADVOCACY LINKS will post all job vacancies on the company's website. Position announcements are noted at staff meetings. On occasion, position vacancies are posted with other newsgroups such as, but not limited to, Indeed, Monster.com and Career Builder.com. In addition, ADVOCACY LINKS will expand its outreach and recruiting efforts in order to recruit and employ minority individuals. The position vacancy announcement will include the following:

1. Position title
2. The minimum qualifications
3. Proposed salary range for the position
4. Deadline for applying
5. Procedure for applying

#### **Monitoring and Select Record Keeping**

ADVOCACY LINKS has an Application for Employment which does not request completion of any statistical demographic information to eliminate the potential for discrimination based on this information. This information would only be available upon the applicant's filling of the position and would only be recorded to fulfill reporting requirements to demonstrate compliance with EEOC standards.

The company's applicant assessment and interview procedure allows the hiring Supervisor an opportunity to participate in the qualifying process and review all applications for an advertised vacancy. Initially, all resumes are reviewed by the Business/Human Resource Manager. Applicants who meet the regulatory requirements for the position are then referred to the hiring Supervisor for completion of the interview process. Qualifying for positions is completed without regard for race, gender, or age. Demographic information is not provided to the hiring Supervisor. The hiring Supervisor is required to provide the Business/Human Resource Manager justification supporting the decision not to interview any qualified applicant.

#### **Hiring Procedures**

Please refer to our [Employment Process \(section 11.0 in Operations Manual\)](#).

#### **Network with Culturally Diverse Community Partners**



In an effort to educate diverse populations about services for people who have Mental Health/Intellectual/Developmental Disabilities, ADVOCACY LINKS will make a concentrated effort to participate in activities in culturally diverse communities. In addition, marketing literature will be made available as needed in alternate languages.

**Staff Training/Professional Development Strategy:**

It is the intent of ADVOCACY LINKS to ensure our staff is thoroughly trained on Cultural Diversity Competency. Policies and Procedures have been written and are in the ADVOCACY LINKS Operations Manual pertaining to Cultural Diversity Competency.

During New Staff Orientation, each employee is trained on Cultural Diversity Competency. Periodically, additional training for Cultural Diversity Competency is provided in the monthly staff meetings and/or on other Training/Resource webinars.

# Risk Management Plan

## Executive Summary

Advocacy Links has been in operation since 2012 but in 2022 shifted it's service focus to include services not previously provided. Advocacy Links has several strengths and opportunities in the area of risk management: Strong leadership, extensive experience in the field of Intellectual/Developmental Disabilities, and hyper-organization.

One of our weaknesses was our limited array of service provision prior to 2022. All services that were provided prior to 2022 were Indiana Medicaid Waiver Case Management services. When the State of Indiana decided to change to "Selective Contracting" for waiver case management services, Advocacy Links was not chosen to provide ongoing case management services. All revenue prior to 2022 came from this one funding source. Between 2022-2024 advocacy Links expanded our service array in an attempt to diversify revenue streams but at the same time, the actual funding and commitments needed for revenue generating clients did not result in positive outcomes. As of 12/31/2024, Advocacy Links is returning to one service line (wraparound services). This obviously brings the risk back related to single funding stream, but this risk is necessary to take to ensure consistent funding to cover the expenses of service delivery.

Our greatest threat was the potential for funding to not be available to continue to provide the help to anyone who needs help through the Resource & Connections and PLACE divisions. This threat was apparent through 2022-2024 and was never resolved. These divisions were closed out in 2024.

Our current risk management systems are effective for the organization. It is the intent of Advocacy Links to continue to move forward with being diligent about documenting identified and potential risk as well as the responses to these risks.

## Policy Statement

As noted in our mission statement, Advocacy Links advocates for people who need help, connects people to fiscally responsible resources and respects everyone in the process. It is our intent to hold true to these values in all aspects of our operation. Any identified or potential risks that could jeopardize our ability to live out our mission statement will be addressed immediately.

## Overview

Since the inception of Advocacy Links there are multiple risks that the company has taken to launch and maintain the organization. We have faced financial, legislative, legal, and organizational challenges to be where we are today. The main hurdle has been modifying our service delivery model and remaining relevant in today's human service industry.

Post Traumatic Stress Disorder has been a large barrier that Advocacy Links has had to deal with in our legacy employees. A few years ago, employees were fearful of online training and webinars because so many had been impacted negatively by webinars from a previous employer. However, the Pandemic and need to use this form of communication provided more comfort in this technological practice. In 2021, all Advocacy Links employees were impacted by the State's decision to change to Selective Contracting. They found themselves immediately and inexplicably needing to seek a new employer if they wanted to continue to work with the families many had built relationships with for more than 5 years.

Advocacy Links has worked hard to develop a management structure that provides the respect, training and support that employees require. We are working diligently to rebuild the self esteem of employees whose positions were inexplicably eliminated earlier in their careers. We have established a compensation structure that is consistent regardless of an employee's years of experience. Regardless of the measures that Advocacy Links has implemented, there are still risks that exist for the continued operation of the organization.

Before risk management begins it is imperative that a foundation is established for providing structured project information, thus, the following project elements were completed and defined prior to developing this Risk Management Plan:

- work scope, schedule, resources, and cost elements:
  - Advocacy Links has a strategic business plan that outlines the overall intent for provision of quality services
  - Current budget and projected costs are reflected in the Strategic Business Plan's financial reports
  - Performance Outcome Measures are identified in the Strategic Business Plan's Performance Measurement section
- Baseline reporting requirements
  - Risk Management Discussions will occur as part of Leadership Staff Meetings every month.
  - Minutes from the Leadership Staff Meetings will reflect progress and new developments in each identified risk area.
  - Minutes from the Leadership Staff meeting are available to each Leadership staff member prior to the next meeting.
- Risk Management Roles and Responsibilities

- Advocacy Links Managing Member or her designee is the Project Manager who chairs the risk assessment meetings, which are actually a portion of the Leadership Staff meetings.
- Leadership Staff members participate in risk assessment meetings as part of the Leadership Staff meetings.
- Feedback from key stakeholders (DMHA/DCS, collaborative agencies, service recipients, guardians, family members, and employees is received via satisfaction surveys and personal interviews and is reviewed by Leadership Staff members at the Leadership Staff meetings.

### **Top Three Current Risks**

The top three high probability and high impact risks for continued operation of Advocacy Links are:

Lack of growth to sustain current expenses – As the company was morphing in 2022-24, Advocacy Links retained key employees to deliver the services that were planned in 2022. The anticipated growth did not occur as planned. Non-essential positions that were vacated were not filled. 6 employees were furloughed. As of 12/31/2024, there are clear expectations for growth for wraparound services which must be maintained for the company to continue to exist.

Expenses exceeding revenue – As noted above, the growth of “paying clients” did not occur in 2022-2024 as planned. Therefore, the expenses that were incurred throughout 2022 to relaunch the business (cost of HIPAA compliant email, web-based secure client management software, legal expenses, etc.) exceeded the revenue received through providing direct services. These necessary expenses are expensive and some of our personnel regularly look at the reimbursement rate for services and don’t understand that there are overhead expenses that must be paid for to operate our business. They get upset that they aren’t personally bringing home the full reimbursement rate in their paycheck.

Cyber Attacks – As with all business, Advocacy Links is at risk for cyber attacks. Currently, we use Microsoft Office 365 for our email and internal communication center. While this software is not the least expensive, we recognize the value of their HIPAA compliance credentials as well as archiving and encrypting capabilities. In addition, our client management software is Health Cloud (by Salesforce) which also maintains a high level of HIPAA compliance for cyber security. We have purchased Cyber Security insurance as required for the provision of Wraparound services. However, we recognize that there will always be risks for cyber attacks.

## **Risk Management Plan**

The approach we have taken to manage risks for operating Advocacy Links included a methodical process by which the Managing Member and the Leadership Team review each risk area as appropriate during Leadership Staff meetings every quarter. Updates and modifications for each risk area are reflected in the minutes from the Leadership Staff Meeting.

### Risk Identification

Risks for operating Advocacy Links continue to be discovered and discussed at the Leadership Staff Meetings. It is our intent to continue to identify risks and determine how to best mitigate the risks as part of the Leadership Staff Meetings. Feedback will be solicited from Service Recipients, Employees, and Stakeholders in the form of satisfaction surveys and personal interviews to gain additional information about possible risks.

### Risk Qualification and Prioritization

In order to determine the severity of the risks identified by the Leadership Staff team, a probability and impact factor is assigned to each risk. This process allows the Managing Member to prioritize risks based upon the effect they may have on the continuous operation of Advocacy Links.

### Risk Mitigation and Avoidance

The Managing Member has led the Leadership Staff in developing responses to each identified risk. As more risks are identified, they will be qualified and the team will develop avoidance and mitigation strategies. These risks will also be added to the Risk Register to ensure they are monitored at the appropriate times and are responded to accordingly. If necessary, the Risk Management Plan will be updated.

The risks for operating Advocacy Links will be managed and controlled within the constraints of time, scope, and cost. All identified risks will be evaluated in order to determine how they affect this triple constraint. The Managing Member, with the assistance of the Leadership Staff team, will determine the best way to respond to each risk to ensure compliance with these constraints.

In extreme cases it may be necessary to allow flexibility to one of the project's constraints. Only one of the constraints for this project allows for flexibility as a last resort. If necessary, funding may be added to the project to allow for more resources in order to meet the time (schedule) and scope constraints. Time and scope are firm constraints and allow for no flexibility. Again, the cost constraint is flexible only in extreme cases where no other risk avoidance or mitigation strategy will work.

Advocacy Links maintains commercial general liability and professional liability insurance through Capital Indemnity Corporation. Advocacy Links also carries the required Worker’s Compensation insurance through Pinnacle Point Insurance Company. Cyber Liability is provided through At-Bay Insurance Services, LLC.

Risk Register

The Risk Register for operating Advocacy Links is a log of all identified risks, their probability and impact to the project, the category they belong to, mitigation strategy, and when the risk will occur. The register was created through the Leadership Staff meetings led by the Managing Member. During these meetings, the Leadership Staff team identified and categorized each risk. Additionally, the team assigned each risk a score based on the probability of it occurring and the impact it could potentially have. The Risk Register also contains the mitigation strategy for each risk as well as when the risk is likely to occur.

Based on the identified risks and timeframes in the risk register, each risk has been added to the project plan. At the appropriate time in the plan—prior to when the risk is most likely to occur—the project manager will assign a risk manager to ensure adherence to the agreed upon mitigation strategy. Each risk manager will provide the status of their assigned risk at the Leadership Staff meeting held every month.

The Risk Register is shown on the following page:

Risk Identification		Qualitative Rating				Risk Response		
Risk	Risk Category	Probability	Impact	Risk Score	Risk Ranking	Risk Response	Trigger	Risk Owner
Expenses exceeding Revenue	Financial	10	10	100	1	Reduce expenses	Lack of grants, and fully funded provision of services	Joy Greeney
Lack of Growth	Financial	8	10	80	2	Adjust personnel to align with need for staffing	No referrals	Joy Greeney

Cyber Attacks	Technological	4	9	36	3	Seek legal advice; address as needed	Breach of online client data	Joy Greeney
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**Risk:** The risk stated in a complete sentence which states the cause of the risk, the risk, and the effect that the risk causes to the project.

**Risk Category:** Categorization of risks by area of project affected, source of risk or other useful category.

**Probability:** The likelihood that a risk or opportunity will occur (on a scale from 0 to 10 with 10 being the highest).

**Impact:** The impact of the risk on the project if the risk occurs (scale from 0 to 10 with 10 being the highest).

**Risk Score:** Determined by multiplying probability and impact (scale from 0 to 100).

**Risk Ranking:** A priority list which is determined by the relative ranking of the risks (by their scores) within the project with the number one being the highest risk score.

**Risk Response:** The action which is to be taken if this risk occurs.

**Trigger:** Something which indicates that a risk is about to occur or has already occurred.

**Risk Owner:** The person who the Managing Member assigns to watch for triggers, and manage the risk response if the risk occurs.

# Technology Plan

## Executive Summary

Advocacy Links, LLC is a virtual company using internet based, software and programs (required by the State of Indiana) to complete essential job functions. Each employee works from their home office using their own preferred technological devices to access the required programs. Each employee is responsible for obtaining and maintaining their own technological devices, but Advocacy Links, LLC does provide expense reimbursement to help cover these costs.

One of the immense strengths that our company has, is the elaborate amount of case management experience we have represented by our staff, as they as are able and willing to mentor new employees. In an environment where knowledge and technology are constantly growing and evolving, training and development are key factors to enhance job performance, improve productivity and increase morale.

While current information technology usually represent the material objects (such as machines, hardware, or software), it is the intent of Advocacy Links, LLC to continue to invest in training and professional development of employees, which is crucial for a business to retain clients, stay competitive, and keep a firm grasp on company goals.

Advocacy Links employs a Technology Manager and contracts with a IT professionals for support with required systems. Each Advocacy Links employee is required to obtain/maintain their own phone and computer to complete the functions of their position. Advocacy Links has an opportunity for expense reimbursement to help cover the cost of these items. Advocacy Links has policies in place to ensure devices are password protected to maintain the Protected Health Information for the youth with whom we partner.

In the event that a technological system is not operating or has lost data, the Managing Member, Business Manager or Technology Manager will work diligently to restore the system/data as quickly as possible, using the contacts outlined in the Technology Plan. It is anticipated that because all technological systems are web based, restoration should be possible within 48 hours.

## Policy Statement

It is the intent of Advocacy Links, LLC to ensure our staff are thoroughly trained on how to use the required software programs. Policies and Procedures have been written and are in the



Advocacy Links, LLC Operations Manual pertaining to the use of software, passwords, technology, etc.

## **Background Information**

This plan was developed by the Managing Member, and Technology Manager, as a result of the past several years experience using the required internet-based programs. Feedback has been provided by employees and various internal focus teams and taken into consideration as modifications are made to this plan.

## **Current State of Technology**

While it may have been tempting to retreat to what systems companies know after disruptions caused by COVID-19 crisis in 2020, Advocacy Links has been forced to embrace a new mindset because of how our business had been upended.

While, for the most part, we no longer need to wait for the “new normal” technology from the State of Indiana, we can prioritize our own tech and build it ourselves from our perspective. Its not just about fixing our business, but creating a new vision for the future that includes how well people thrive.

Presently, the following primary internet based software is what we’ve chosen to utilize for our business software programs:

- **Health Cloud/SalesForce (CRM).** This cloud based software allows us to track and better connect with businesses, record youth specific service activity and track trends. This software is relatively easy to use and offers powerful reporting tools. Advocacy Links works closely with consultant representatives from CopperConfig to design, collect and monitor metrics for our business in real time and optimize our workstreams.
- **RingCentral** (virtual phone system for simplified toll free access to staff and voicemails are automatically sent to email). There is one toll-free phone number designated for our agency. Each staff member has an extension which has all of their calls sent directly to whatever phone number is being used for their business line (usually the staff person’s cell phone number). This enables people who do not have long distance on their phone to access the Advocacy Links representatives free of charge. Any messages left on this system are automatically sent to the staff members email for easy tracking and response.
- **Website ([www.advocacy-links.com](http://www.advocacy-links.com))** This site contains general information for public viewing. We collaborate with an expert remote consultant from WP Indiana that specializes in Wordpress for our website design and development

- **BambooHR** - This website creates, collects and organizes all the information throughout the employee life cycle. Hiring, Onboarding, Terminating are all done in a single, secure database with different reports available. Training records are recorded and housed within this system.
- **Digital Signatures** – Hello Sign, esign genie - Electronically request and add legal & secure signatures to documents, ‘reasonable effort’ for patient confidentiality
- **Office 365 System** – All staff members use the company’s HIPPA secure email system for all work-related correspondence. The version we subscribe to includes access to Word, Excel, PowerPoint, OneNote, Outlook and Publisher applications. Proofpoint essentials provides cyber-security functions of email encryption, anti-virus, spam, content & outbound filtering to ensure that all email sent is free from viruses, malware and other malicious content. Another application within the O365 package is **Microsoft TEAMS** (an online resource for conference calling which enables participants to see another person’s computer screen). We use this regularly for staff meetings and training/resource sharing opportunities.
- **DropBox** – cloud based document storage location shared by all administrative personnel for collaborating on agency documents.

In addition, Advocacy Links, LLC also utilizes the following technological resources, which are all requested, credentials issued and maintained by the State of Indiana for the Wrap Around services our company provides:

- **KidTraks** (online portal to enter Department of Child Services for CMHI services) – system for storing care plans, signed documents, etc. Data interacts with licensing agencies like Child Protective Services)
- **TOBI** (mandatory Indiana statewide access site for Child Mental Health Wraparound programs for Division of Mental Health and Addictions) – system for recording ongoing work, care plans, storing signed documents.
- **DARMHA** (Data Assessment Registry for Mental Health and Addiction) – System for recording and storing assessments to determine eligibility for CMHW and CMHI youth.
- **DMHA Incident Reporting** (website to file appropriate critical incidents required by the State of Indiana Division of Mental Health and Addiction).
- **JIRA Help Desk Support** (Indiana Office of Technology Help Desk that can only be accessed by In the event of a disaster, the Managing Member will work with the Business Manager and Technology Manager to ensure all technological systems are able to be accessed, are functioning as anticipated and that all historical data is intact within 24 hours of the disaster.

**Budget**

Presently, the operating budget of Advocacy Links, LLC covers the cost of all required technological resources. Our vendor's mid-sized business team is adequately prepared and can confidently support our company employees easily up to 300 staff, so we have lots of room for growth.

### **Technology Plan Goals – FY2025**

In 2024, our primary technology challenge was data related security concerns due to hackers constantly evolving tactics and techniques and businesses needs to stay ahead of them. Generative artificial intelligence is also becoming more wide spread and can perform tasks that were previously only possible for humans.

We also identified critical operations, examined how a disaster might impact our business and developed a Disaster Recovery Plan to focus on IT operations, how to respond and recover from a disaster.

Our current website goals are:

1. Collect satisfaction data
2. Enhance traffic
3. Refine content (discontinue unused services i.e. mylinks & resource connections)
4. Enhance functionality (move housemate finder to another site)

Our current Salesforce/Healthcloud objectives are:

1. Streamline processes to reflect wrap-around services only
2. Implement tools for efficiency (CFTM)

### **Staff Training/Professional Development Strategy:**

During New Staff Orientation, each employee is trained on the use of each technological system as required to complete the functions of the staff person's position. Not all positions require all technological functions, so training is customized for each type of position. In addition, different positions have different security levels within Salesforce/Health Cloud and state required software systems which enable access to different sections of the software. Throughout the first few months of a staff member's employment, continuous hands-on and virtual training is provided until the employee is able to demonstrate proficiency with the use of all software.

As needed, personnel from Advocacy Links, LLC develop additional trainings (which are available on our Office 365 shared document library and our Bamboo HR system).

# Accessibility Plan

## Overview Statement

ADVOCACY LINKS is committed to the implementation of the Americans with Disabilities Act and to addressing other barriers to participation. Advocacy Links, LLC recognizes that accessibility is critical to the quality of life of persons served and their full inclusion in the community. ADVOCACY LINKS will not discriminate against persons served, employees or any other stakeholders and will address all barriers to accessibility identified through an inclusive process. It is the intent of ADVOCACY LINKS to partner with community service organizations to ensure that modifications and adjustments are made to make lives easier for people who face barriers to traditional services and supports.

In accordance with standards set forth by Commission on the Accreditation of Rehabilitation Facilities (CARF), ADVOCACY LINKS, with input from persons served and staff, has developed a comprehensive plan to work towards eliminating perceived and real barriers for persons receiving services, personnel and stakeholders.

This plan guides the identification of barriers to accessibility, planning, implementation and monitoring of accessibility to support the delivery of quality services and the full inclusion of individuals with disabilities in the community.

The goal of the Accessibility Plan is to provide barrier-free access to services and supports for persons served, employees and all other stakeholders. The Accessibility Plan objectives are to:

1. Promote the identification and removal of barriers to full accessibility of services and supports.
2. Establish the process to identify barriers and gaps in existing services and supports.
3. Continuously improve the level of accessibility to services and supports.
4. Encourage input from persons served and all other stakeholders.
5. Allocate resources to address the identified barriers.

Barriers currently identified, actions taken to address those barriers and/or a timeline to remove those barriers are addressed in each of the following 8 sections.

## Attitudinal

ADVOCACY LINKS is committed to addressing attitudinal concerns and barriers as they relate to participants served. Social stigma associated with individuals with disabilities exists within society, and ADVOCACY LINKS is dedicated to enhancing the quality in which individuals are viewed and treated through continued training and education available to employees, stakeholders, and the general public. As eligibility criteria for services creates inherent barriers to appropriate supports, ADVOCACY LINKS strives to ensure that information is available to the community through partnerships with State and Federal agencies, school systems, outreach

programs, and service providers. ADVOCACY LINKS continues to provide a quick response to persons served when they bring forth concerns regarding the services they are receiving. Leadership Staff are able to investigate and respond to any concerns or issues regarding programs or services. In addition, ADVOCACY LINKS uses a satisfaction survey for all persons served and/or their guardians to provide feedback, express concerns, and receive input. The Managing Member is responsible for reviewing the information received from surveys obtained. General satisfaction of persons receiving services is assessed via this survey at least twice annually.

Any recommendations on service delivery are referred to the ADVOCACY LINKS Leadership Staff for follow-up. The ADVOCACY LINKS Leadership Staff meets at least quarterly to discuss and potentially implement any suggestions, ideas and propositions from the individuals we serve, guardians and team members.

All ADVOCACY LINKS employees complete annual training on human rights which addresses specific attitudinal issues.

The ADVOCACY LINKS Cultural Competency Committee meets quarterly to discuss cultural, ethnic, societal, religious, and civil and human rights issues. They identify areas which may present barriers to accessibility within services/supports and develop goals and some training to address these barriers.

### **Community Integration**

ADVOCACY LINKS' commitment towards educating the public, reducing social stigma, and encouraging community integration is evident in the community events at which we are present. Community events and activities and resources are discussed at monthly staff meetings and information is also disseminated to all employees through Microsoft TEAMS. This information is shared with stakeholders through team meetings for individuals served and ongoing collaborative discussions with stakeholders. Following are several events in which ADVOCACY LINKS has been involved and provided resources to individuals and family members and educated them on community integration opportunities.

#### April 2024

- What's Next Day, Warsaw, IN (Kosciusko County)
- Elkhart County Disability Resource Fair, Elkhart, IN (Elkhart County)
- DCS Region 5 Provider Fair, LaFayette, IN (Tippecanoe & surrounding counties)
- Northwest Indiana Disability Information and Resource Fair, Highland, IN (Lake County)

#### May 2024

- Disabilities Expo, Fort Wayne, IN (Allen and surrounding counties)
- Marion Disability Resource Fair, Marion, IN (Grant County)

June 2024

- South Bend disability Resource Fair, South Bend, IN (St. Joesph County)

July 2024

- Kosciusko County 4 H Fair Possabilities, Warsaw, IN (Kosciusko County)
- Elkhart County 4H Fair Disability Awareness Day, Goshen, IN (Elkhart County)

September 2024

- Family Safety Day, Warsaw, IN (Kosciusko County)
- Knox High School Transition Fair, Know, IN (Starke County)
- Elkhart Community Resource Fair, Elkhart, IN (Elkhart County)

<u>Barrier</u>	<u>Plan of Action</u>	<u>Priority</u>	<u>Cost</u>	<u>Timeline</u>	<u>Person Responsible</u>	<u>Status</u>
Absence of community events and activities in certain districts.	Network with providers and community organizations to identify upcoming events and activities or opportunities to sponsor events.	Moderate	N/A	Ongoing	Leadership Staff/Accessibility Committee	Employees are encouraged to meet as appropriate with community partners relevant to their roles

**Environmental/Architectural**

ADVOCACY LINKS does not currently own any property or have any physical structures that are available to persons served or stakeholders. All business is conducted from each employee’s home office, but when meetings are held, ADVOCACY LINKS staff go to the home of the person served, or meet in another community-based location (library, coffee shop, school, provider,

etc.) In accordance with the Americans with Disabilities Act, service locations for persons that we serve are accessible or alternative program sites are available to insure equal access to persons with physical disabilities. If meetings are held in the community, ADVOCACY LINKS employees find locations that are suitable to meet the physical needs of the persons that we serve, personnel, guardians, team members and providers.

State and federal agencies ensure that Medicaid funded providers and programs comply with environmental barriers by completing internal emergency drills and physical site inspections. Environmental inspections have been completed at agency sites and the homes of the individuals we serve to ensure a safe, clean and healthy environment for the persons served and formal environmental inspections are completed as part of transition activities when a person moves from one residential location or provider to another. Informal environmental inspections are conducted by ADVOCACY LINKS personnel each quarter when the representative meets with the individual served.

No barriers have been identified at this time.

### **Financial**

ADVOCACY LINKS operates through several different funding streams depending on the service line. Ongoing access to services/supports are contingent upon consistent funding for the provision of services. See “Financial Management Plan” as part of this comprehensive strategic business plan for more information.

### **Communication**

ADVOCACY LINKS strives to maintain open and honest communication with people we support, family members, guardians, stakeholders and employees. There have been a few instances of communication breakdown between specific employees and team members. These situations have been resolved individually with those specific employees and teams. Supervisors will continue to monitor these interactions to ensure that communication is maintained.

On our company website ([www.advocacy-links.com](http://www.advocacy-links.com)), ADVOCACY LINKS has a variety of informational links and articles. The Media Consultant and Managing Member are responsible for keeping the website up to date with current information and resources, which are provided through the Leadership Staff. The company also has a Facebook page, and accounts on Pinterest and Instagram. All social media platforms, where resources and upcoming events are shared, are maintained by the Media Consultant and Managing Member.

Monthly Staff meetings, conducted by Wraparound Director is one of the methods of relaying information to employees. In addition, the Managing Member facilitates the quarterly

Leadership Staff meeting to convey information to Leadership Staff. Each quarter, there is also a Wraparound Implementation Call/webinar on which new resource information is shared and new training is presented. Staff Meetings and Company Wide webinars are mandatory for all employees.

Periodically, various employees obtain information that would be helpful for colleagues and/or other participants. When this information is passed along to the Leadership Staff, it is forwarded to all staff and posted to our social media accounts, if appropriate. Employees are encouraged to share this resource information with the people they support, family members, and guardians.

Satisfaction Surveys are another communication tool that ADVOCACY LINKS utilizes to gather feedback from people served, stakeholders and employees. Information provided is shared with Leadership Staff and addressed appropriately.

Leadership Staff are committed to meeting with stakeholders on a regular basis to maintain open communication. These interactions occur via personal contact, phone conversation with as much frequency as requested by the specific stakeholder. Feedback from these interactions is shared with Leadership Staff and relevant employees as appropriate.

ADVOCACY LINKS has developed printed materials (brochures and other literature) that are distributed to interested individuals at conferences, transition fairs and other public community events to share our mission.

ADVOCACY LINKS recognizes the need to respect the cultural diversity of the region. Agency forms can be made available in alternate languages such as Spanish and Braille. Additional language translations of forms will be made available as needed. We have a contract with GLOBO for interpretation and translation services to best meet the needs of individuals and families whose primary language is not English.

No barriers have been identified in this area at this time.

### **Transportation**

In some portions of the state in which we provide services, there is a huge need for transportation services for people to access community-based services. ADVOCACY LINKS does not provide transportation as a service but employees are required to get themselves to meetings and appointments with the youth who have partnerships.

ADVOCACY LINKS representatives work closely with local transportation agencies and Medicaid providers to ensure that individuals served have access to their community through transportation services. Our representatives provide the individuals we serve and family



members with resources to access transportation services that are affordable or at no cost to them.

At this time, there are no barriers in this area that are not presently being addressed.

**Employment**

As an employer, ADVOCACY LINKS complies with all applicable sections of the Americans with Disabilities Act. It is our policy not to discriminate against any qualified applicant or employee because of a person’s disability. ADVOCACY LLINKS is committed to providing reasonable accommodations to a qualified employee with a disability. Employees with a disability who believe they need an accommodation should contact the Human Resources Manager/Business Manager.

One of the barriers that had surfaced in this area in the past few years relates to the lack of culturally diverse applicants. As of 12/31/2024, we currently do not have any bi-lingual employees, but we do have access to interpretation/translation services as noted above.

At this time, there are no barriers in this area that are not presently being addressed.

**Technology**

Increasingly, new technology offers the resources to meet the varied needs of our community. As technology continues to play a vital role in providing access to information, ADVOCACY LINKS is committed to meet the demands for an increased access to technology. In 2022, ADVOCACY LINKS invested in a stand-alone, HIPAA compliant Customer Management System (Health Cloud through Salesforce) to store confidential records for the individuals we support. Employees are still becoming familiar with the new software program.

<u>Barrier</u>	<u>Plan of Action</u>	<u>Priority</u>	<u>Cost</u>	<u>Timeline</u>	<u>Person Responsible</u>	<u>Status</u>
Unfamiliar software	Initial and ongoing training for position specific functions in Health Cloud	High	N/A	Ongoing	Leadership Staff	ongoing

## Advocacy Links Resource and Advocacy Center, Inc.

The non-profit branch of Advocacy Links was implemented in November 2022, but was allowed to go dormant for a season while Advocacy Links LLC stabilizes its operations. The Board of Directors continues to meet quarterly to determine the appropriateness of continued dormancy. It is not anticipated that the NFP will re-engage in 2025.

## Performance Analysis & Improvement

Following are the main rocks for Advocacy Links for 2025 – 2027. Throughout 2025 and beyond, ADVOCACY LINKS Leadership personnel will discuss progress towards these initiatives in strategic planning sessions quarterly.

### Financial Stability

Priority	Plan of Action	Person Responsible	Timeline	Cost	Status
URGENT	Consistently partner with youth as outlined in budget	Sara/Heather	Ongoing – 62 youth by 3/31/2025; 75 by 6/30/2025; 85 by 9/30/25; 95 by 12/31/2025	none	43 youth as of 12/23/2024
HIGH	Attend outreach events	All personnel	At least once/month through 12/31/2025	\$500/year	Need to commit & follow through

### High Fidelity Services

Priority	Plan of Action	Person Responsible	Timeline	Cost	Status
HIGH	Increase PBS scores	Sara/Joy	85% by 12/31/2025	0	Baseline established Oct 2024
MEDIUM	Develop concise training/core competencies	Sara/Joy/Heather	12/31/2026		Started some work on Bamboo
MEDIUM	Develop job specific	Heather/Joy/Sara	12/31/2025	\$0	Started

training for all  
positions

MEDIUM

Align job  
descriptions  
and  
performance  
reviews

Heather/Joy/Sara

12/31/2025

\$0

Initial  
conversations  
and research  
has begun

## Appendix A

ADVOCACY LINKS provides services to participants in 22 counties in northern Indiana. To minimize driving time and expense, staff originate in the majority of counties in this geographic area. All staff meetings and trainings are centrally located for the participants when online trainings are not able to be utilized.



# Appendix B - Sample Brochures

To request a referral and assessment for Child Mental Health Wraparound Supports, contact the State of Indiana's Access Site:

**Child Advocates**  
 incmhportal.fssa.in.gov  
 317.205.3055  
 or call 211 to request an assessment

**Contact Us**  
**Advocacy Links**  
 56159 Riverdale Drive  
 Elkhart, IN 46514  
 Email: info@advocacy-links.com  
 Toll-Free (24/7/365): 888.537.5733  
 Fax: 888.847.0805

[www.advocacy-links.com](http://www.advocacy-links.com)





**Advocacy Links**

Advocating for people who need help  
 Connecting people to fiscally responsible resources  
 Respecting everyone in the process

Follow Us



Proud Members of



**National Association of Case Management**  
Established the professional standards for the industry



**The Arc**  
Indiana

## Child Mental Health Wraparound Supports

1 / 2

## When Your Child Needs Intensive Mental Health Supports

Child Mental Health supports provided are provided to youth with a diagnosis of serious emotional disturbance. Do you know a youth who is:

- Aggressive
- Been expelled or suspended from school
- Experienced psychiatric hospitalization
- Involved in multidisciplinary systems (DCS, probation, special education, etc.)
- Using an Individualized Education Plan (IEP)
- Not successful in traditional mental health services
- Engaging in self-harm or self-injury (hurting his/herself, suicidal, exhibits reckless behaviors or making statements about hopelessness or worthlessness, etc.)

## What You Can Expect From Us

- Family Partnerships
- Monthly team meetings
- Weekly contact
- A strength-focused individualized plan to resolve problems that can be used across all the systems a youth uses.
- Connection to natural supports and professional services.
- Compassionate, knowledgeable, and local facilitators who are familiar with the resources available in YOUR area.



## Eligibility Guidelines

**Advocacy Links can provide Wraparound Support for youth and families eligible for Child Mental Health Wraparound (CMHW) services and the Child Mental Health Initiative (CMHI).**

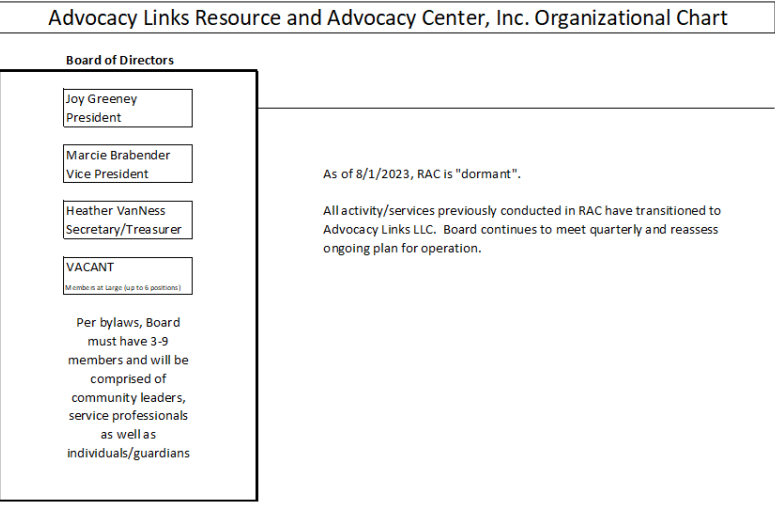
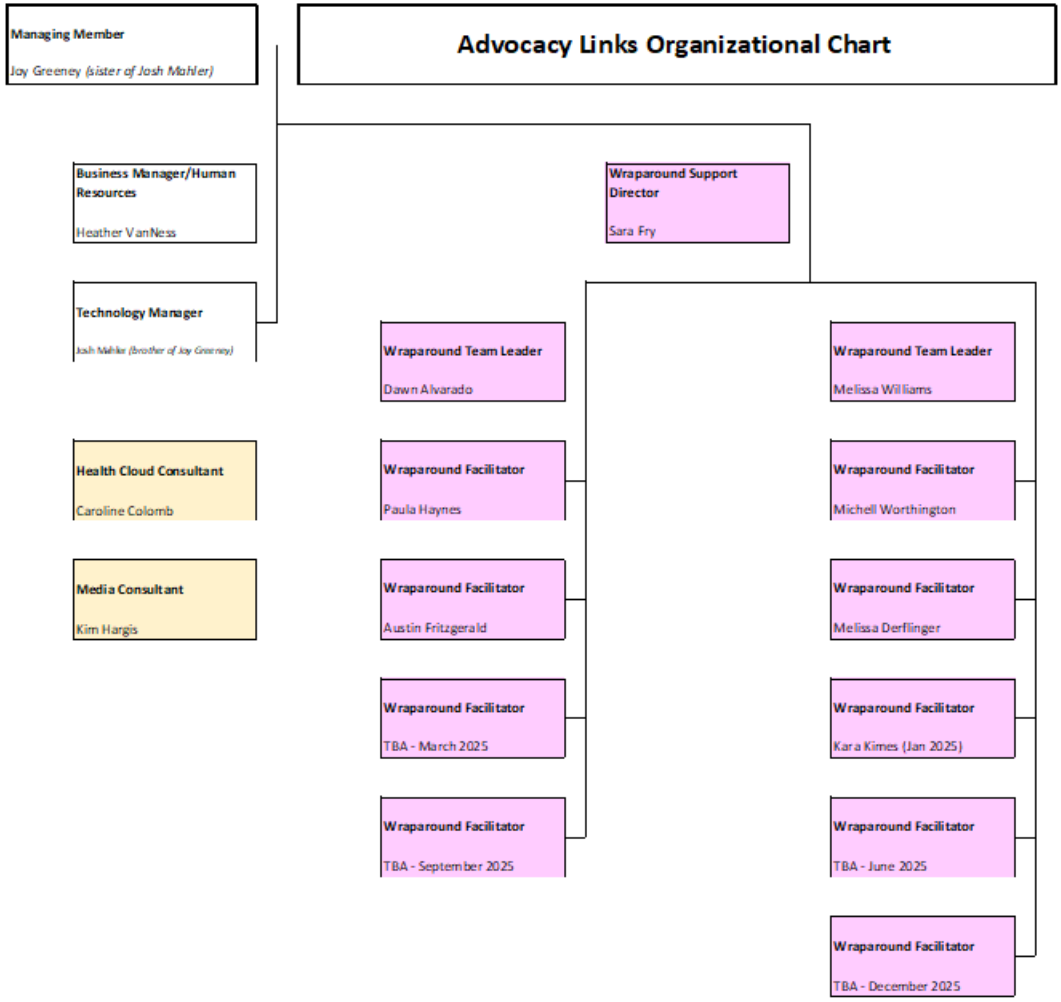
- For **Child Mental Health Wraparound (CMHW)** a youth must:
- Be eligible for Medicaid and Home and Community Based Services
  - Be 6 through 17 years of age
  - Have two or more Diagnostic and Statistical Manual of Mental Disorders diagnoses
  - Be experiencing significant emotional and/or functional impairments that impact their level of functioning at home or in the community (e.g., Seriously Emotionally Disturbed classification)
  - Demonstrate a level of need by meeting the following criteria:
    - Receive a score of 4 or higher on the Division of Mental Health and Addiction approved assessment tool
    - Have one or more of the following behavioral or emotional needs:
 

o Adjustment to trauma	o Debilitating anxiety	o Sexual aggression
o Psychosis	o Conduct Problems	o Fire-setting
- For **Child Mental Health Initiative (CMHI)** a youth must:
- Meet all of the criteria above for CMHW EXCEPT:
    - Meeting Medicaid and HCBS eligibility. Medicaid and HCBS are not required for CMHI
  - CMHI is best suited for youth who are not Medicaid eligible or who have insurance plans that don't cover mental health or Intellectual/Developmental Disabilities.

## High Fidelity Wraparound Supports

High Fidelity Wraparound is a team effort that brings the youth, their family, friends, and community together to create a personalized care plan. This plan uses the youth and team's skills, strengths, and resources with the goal of helping the youth and family to succeed.

# Appendix C – Organizational Chart



**Appendix D** contains the Balance Sheet for January 1 –  
December 31, 2024

**Advocacy Links, LLC**  
**Profit & Loss**  
January through December 2024

	Jan - Dec 24
<b>Income</b>	
4000 - Program Service Revenue	
4011 - services Resource Coordi	3,877.31
4022 - services WRAPAROUND	
40222 DCS Workforce Grant	140,515.15
4022 - services WRAPAROUND - Other	535,991.38
<b>Total 4022 - services WRAPAROUND</b>	<b>676,506.53</b>
<b>Total 4000 - Program Service Revenue</b>	<b>680,383.84</b>
4100 - Support - RAC	
4140 - Grants - Restricted	6,776.50
<b>Total 4100 - Support - RAC</b>	<b>6,776.50</b>
80000 - Interest Income	1.16
81000 - Owner Investment	13,000.00
<b>Total Income</b>	<b>700,161.50</b>
<b>Expense</b>	
60001 - Administrative Pay	75,218.25
60111 - Resources & Connections	52,593.80
60122 - Wraparound	397,798.76
60133 - PLACE/Meaningful Life	15,000.00
60800 - Payroll Taxes	42,974.56
60900 - Emp Expense Reimburse	30,371.04
61000 - Accounting, Prof Fees	8,995.00
61100 - Professional - Legal	226.00
61200 - Client/Staff Relations	220.34
61300 - Marketing / Advertising	18,136.44
61400 - Ins Business Liability	18,524.41
61600 - Ins - Workers Comp	-10,924.00
61700 - Administration Expense	3,755.38
61800 - Technology Expense	68,697.42
62100 - Licenses	1,095.00
62300 - Office Supplies	3,502.64
62350 - Printing & Reproduction	401.05
62400 - Interest & Banking Fees	2,725.73
62600 - Postage & Delivery	266.22
62700 - Professional Developmen	307.96
62710 - Prof Devel - Training	102.00
62720 - Prof Dev - Lodge/Meals	826.38
71100 Interpretation Services	30.00
<b>Total Expense</b>	<b>730,844.38</b>
<b>Net Income</b>	<b>-30,682.88</b>



**Appendix E** contains the Budget vs. Actual Report for January 1  
– December 31, 2024

**Advocacy Links, LLC**  
**Profit & Loss Budget vs. Actual**  
January through December 2024

	Jan - Dec 24	Budget
<b>Income</b>		
4000 - Program Service Revenue		
4011 - services Resource Coordi	2,584.36	53,689.90
4022 - services WRAPAROUND		
40222 DCS Workforce Grant	140,515.15	133,062.81
4022 - services WRAPAROUND - Other	535,991.38	781,343.57
<b>Total 4022 - services WRAPAROUND</b>	<b>676,506.53</b>	<b>914,406.38</b>
<b>Total 4000 - Program Service Revenue</b>	<b>679,090.89</b>	<b>968,096.28</b>
4100 - Support - RAC		
4140 - Grants - Restricted	6,776.50	15,000.00
<b>Total 4100 - Support - RAC</b>	<b>6,776.50</b>	<b>15,000.00</b>
80000 - Interest Income	1.16	
81000 - Owner Investment	13,000.00	
<b>Total Income</b>	<b>698,868.55</b>	<b>983,096.28</b>
<b>Expense</b>		
60001 - Administrative Pay	75,218.25	116,536.00
60111 - Resources & Connections	52,593.80	69,450.00
60122 - Wraparound	397,798.76	510,942.28
60133 - PLACE/Meaningful Life	15,000.00	36,000.00
60800 - Payroll Taxes	42,974.56	67,173.89
60900 - Emp Expense Reimburse	30,371.04	34,589.32
61000 - Accounting, Prof Fees	8,995.00	12,896.00
61100 - Professional - Legal	226.00	
61200 - Client/Staff Relations	220.34	220.00
61300 - Marketing / Advertising	18,136.44	18,100.00
61400 - Ins Business Liability	18,524.41	7,340.78
61600 - Ins - Workers Comp	-10,924.00	5,937.77
61700 - Administration Expense	3,755.38	2,490.00
61800 - Technology Expense	68,697.42	81,190.00
62100 - Licenses	1,095.00	
62300 - Office Supplies	3,502.64	2,400.00
62350 - Printing & Reproduction	401.05	2,400.00
62400 - Interest & Banking Fees	2,725.73	1,416.00
62600 - Postage & Delivery	266.22	120.00
62700 - Professional Developmen	307.96	
62710 - Prof Devel - Training	102.00	
62720 - Prof Dev - Lodge/Meals	826.38	210.00
62750 - Rent / Office Space	0.00	70.00
62900 - PLACE events	0.00	200.00
71100 Interpretation Services	30.00	
71200 Other misc expenses	0.00	5,080.00
<b>Total Expense</b>	<b>730,844.38</b>	<b>974,762.04</b>
<b>Net Income</b>	<b>-31,975.83</b>	<b>8,334.24</b>

# Appendix F contains the Income Statement for January 1 – December 31, 2024

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Cash Basis

## Advocacy Links, LLC Custom Transaction Detail Report January through December 2024

Type	Date	Name	Account	A	Act. Gain/Br	Amount
<b>Jan - Dec 24</b>						
Deposit	01/03/2024	DEPOSIT	4022 - services WRAPAROUND			8,767.13
Deposit	01/10/2024	DEPOSIT	4022 - services WRAPAROUND			7,723.92
Deposit	01/11/2024	DEPOSIT	4011 - services Resource Coordi			25.00
Deposit	01/19/2024	St of Indiana Pa...	4022 - services WRAPAROUND			26,145.95
Deposit	01/23/2024	Quillo	4011 - services Resource Coordi			300.00
Deposit	02/02/2024	[REDACTED]	4011 - services Resource Coordi			270.00
Deposit	02/07/2024	[REDACTED]	4011 - services Resource Coordi			27.50
Deposit	02/07/2024	GAINWELL	4022 - services WRAPAROUND			13,861.77
Deposit	02/14/2024	DEPOSIT	4022 - services WRAPAROUND			5,482.65
Deposit	02/21/2024	GAINWELL	4022 - services WRAPAROUND			3,459.78
Deposit	02/21/2024	St of Indiana Pa...	4022 - services WRAPAROUND			18,343.41
Deposit	02/21/2024	St of Indiana Pa...	40222 DCS Workforce Grant			30,528.90
Deposit	02/27/2024	St of Indiana Pa...	40222 DCS Workforce Grant			5,124.99
Deposit	03/06/2024	[REDACTED]	4011 - services Resource Coordi			40.00
Deposit	03/06/2024	GAINWELL	4022 - services WRAPAROUND			11,821.59
Deposit	03/13/2024	GAINWELL	4022 - services WRAPAROUND			12,896.28
Deposit	03/15/2024	St of Indiana Pa...	4022 - services WRAPAROUND			9,654.90
Deposit	03/18/2024	St of Indiana Pa...	40222 DCS Workforce Grant			6,833.32
Deposit	03/26/2024	St of Indiana Pa...	4022 - services WRAPAROUND			7,879.36
Deposit	04/03/2024	GAINWELL	4022 - services WRAPAROUND			16,120.35
Deposit	04/05/2024	DEPOSIT	4011 - services Resource Coordi			42.00
Deposit	04/10/2024	GAINWELL	4022 - services WRAPAROUND			16,120.35
Deposit	04/17/2024	St of Indiana Pa...	4022 - services WRAPAROUND			9,654.90
Deposit	04/23/2024	St of Indiana Pa...	40222 DCS Workforce Grant			7,687.49
Deposit	05/01/2024	GAINWELL	4022 - services WRAPAROUND			3,224.07
Deposit	05/08/2024	[REDACTED]	4011 - services Resource Coordi			12.00
Deposit	05/08/2024	GAINWELL	4022 - services WRAPAROUND			12,896.28
Deposit	05/14/2024	St of Indiana Pa...	4022 - services WRAPAROUND			11,663.60
Deposit	05/15/2024	GAINWELL	4022 - services WRAPAROUND			7,522.30
Deposit	05/22/2024	St of Indiana Pa...	40222 DCS Workforce Grant			14,500.00
Deposit	05/29/2024	GAINWELL	4022 - services WRAPAROUND			10,746.90
Deposit	06/05/2024	GAINWELL	4022 - services WRAPAROUND			16,120.35
Deposit	06/06/2024	[REDACTED]	4011 - services Resource Coordi			40.00
Deposit	06/12/2024	GAINWELL	4022 - services WRAPAROUND			7,522.83
Deposit	06/14/2024	St of Indiana Pa...	4022 - services WRAPAROUND			4,827.45
Deposit	06/17/2024	St of Indiana Pa...	40222 DCS Workforce Grant			18,974.70
Deposit	06/20/2024	GAINWELL	4022 - services WRAPAROUND			2,149.38
Deposit	06/26/2024	GAINWELL	4022 - services WRAPAROUND			12,896.28
Deposit	07/03/2024	GAINWELL	4022 - services WRAPAROUND			9,672.21
Deposit	07/09/2024	[REDACTED]	4011 - services Resource Coordi			40.00
Deposit	07/09/2024	St of Indiana Pa...	4022 - services WRAPAROUND			15,681.00
Deposit	07/10/2024	GAINWELL	4022 - services WRAPAROUND			7,522.83
Deposit	07/16/2024	St of Indiana Pa...	40222 DCS Workforce Grant			20,791.36
Deposit	07/18/2024	St of Indiana Pa...	4022 - services WRAPAROUND			5,870.66
Deposit	07/24/2024	GAINWELL	4022 - services WRAPAROUND			15,045.66
Deposit	07/25/2024	St of Indiana Pa...	4022 - services WRAPAROUND			13,516.86
Deposit	07/31/2024	GAINWELL	4022 - services WRAPAROUND			1,074.69
Deposit	08/07/2024	GAINWELL	4022 - services WRAPAROUND			11,821.59
Deposit	08/08/2024	[REDACTED]	4011 - services Resource Coordi			33.00
Deposit	08/13/2024	St of Indiana Pa...	4022 - services WRAPAROUND			5,449.21
Deposit	08/21/2024	GAINWELL	4022 - services WRAPAROUND			2,149.38
Deposit	08/21/2024	St of Indiana Pa...	4022 - services WRAPAROUND			4,827.45
Deposit	08/22/2024	St of Indiana Pa...	4022 - services WRAPAROUND			8,689.41
Deposit	08/23/2024	St of Indiana Pa...	40222 DCS Workforce Grant			14,208.31
Deposit	08/28/2024	GAINWELL	4022 - services WRAPAROUND			13,970.97
Deposit	09/04/2024	GAINWELL	4022 - services WRAPAROUND			3,224.07
Deposit	09/06/2024	[REDACTED]	4011 - services Resource Coordi			30.00
Deposit	09/11/2024	GAINWELL	4022 - services WRAPAROUND			6,448.14
Deposit	09/19/2024	St of Indiana Pa...	4022 - services WRAPAROUND			12,551.37
Deposit	09/24/2024	St of Indiana Pa...	4022 - services WRAPAROUND			15,447.84
Deposit	09/25/2024	GAINWELL	4022 - services WRAPAROUND			13,970.97
Deposit	09/27/2024	St of Indiana Pa...	40222 DCS Workforce Grant			10,791.36
Deposit	10/07/2024	[REDACTED]	4011 - services Resource Coordi			40.00
Deposit	10/09/2024	GAINWELL	4022 - services WRAPAROUND			8,597.52
Deposit	10/16/2024	GAINWELL	4011 - services Resource Coordi			189.56
Deposit	10/18/2024	St of Indiana Pa...	4022 - services WRAPAROUND			5,792.94
Deposit	10/22/2024	St of Indiana Pa...	4022 - services WRAPAROUND			4,827.45

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Cash Basis

Advocacy Links, LLC  
Custom Transaction Detail Report  
January through December 2024

Type	Date	Name	Account	A	Act. Bal	Original Amount
Deposit	10/23/2024	GAINWELL	4022 - services WRAPAROUND			12,896.28
Deposit	10/23/2024	GAINWELL	4011 - services Resource Coordi			379.12
Deposit	10/30/2024	St of Indiana Pa...	4022 - services WRAPAROUND			5,792.94
Deposit	10/30/2024	St of Indiana Pa...	40222 DCS Workforce Grant			4,490.88
Deposit	10/30/2024	GAINWELL	4022 - services WRAPAROUND			1,074.69
Deposit	11/01/2024	St of Indiana Pa...	4022 - services WRAPAROUND			10,620.39
Deposit	11/13/2024	GAINWELL	4022 - services WRAPAROUND			9,672.21
Deposit	11/15/2024	St of Indiana Pa...	4022 - services WRAPAROUND			5,870.66
Deposit	11/18/2024	St of Indiana Pa...	4022 - services WRAPAROUND			6,758.43
Deposit	11/27/2024	GAINWELL	4022 - services WRAPAROUND			11,821.59
Deposit	11/27/2024	St of Indiana Pa...	4022 - services WRAPAROUND			5,060.61
Deposit	12/04/2024	St of Indiana Pa...	40222 DCS Workforce Grant			6,563.84
Deposit	12/11/2024	GAINWELL	4022 - services WRAPAROUND			5,373.45
Deposit	12/16/2024	St of Indiana Pa...	4022 - services WRAPAROUND			7,723.92
Deposit	12/18/2024	GAINWELL	4022 - services WRAPAROUND			2,149.38
Deposit	12/18/2024	GAINWELL	4011 - services Resource Coordi			568.68
Deposit	12/26/2024	GAINWELL	4022 - services WRAPAROUND			7,522.83
<b>Jan - Dec 24</b>						

**Appendix G** contains the projected Income Statement fiscal years 2025 – 2027

	PROJECTED INCOME STATEMENT Advocacy Links, LLC 1/24/2025		
	FY 2025	FY 2026	FY 2027
<b>TOTAL REVENUE</b>	<b>\$847,640.19</b>	<b>\$1,296,479.79</b>	<b>\$1,745,319.39</b>
<b>COST OF SERVICES PROVIDED</b>	95 youth, 14 staff <b>\$618,114.20</b>	135 youth, 18 staff <b>\$1,011,991.46</b>	175 youth, 22 staff <b>\$1,265,897.05</b>
<b>GROSS PROFIT</b>	<b>\$229,525.99</b>	<b>\$284,488.33</b>	<b>\$479,422.34</b>

# Appendix H contains the projected Cash Flow Statement for January 1 – December 31, 2025

PROJECTED CASH FLOW						
Advocacy Links, LLC						
2025 Budget Projections	Jan	Feb	Mar	Apr	May	
<b>6000 RESOURCE COORDINATION</b>						
4022 WRAPAROUND						
CMHW youth	27	28	31	33	34	
CMHI youth	28	29	31	34	35	
WA CMHW 1074.69	\$21,493.80	\$29,016.63	\$30,091.32	\$33,315.39	\$35,464.77	
WA CMHI 965.49	\$22,206.27	\$26,068.23	\$27,033.72	\$28,964.70	\$31,861.17	
WA DCS WORKFORCE STABILIZATION						
Beginning Cash Balance (Available through LOC if needed, plus prior month end)	\$12,500.00	\$7,219.32	\$6,243.22	\$14,018.50	\$22,167.08	
<b>TOTAL REVENUE</b>	<b>\$43,700.07</b>	<b>\$55,084.86</b>	<b>\$57,125.04</b>	<b>\$62,280.09</b>	<b>\$67,325.94</b>	
<b>TOTAL CASH AVAILABLE</b>	<b>\$56,200.07</b>	<b>\$62,304.18</b>	<b>\$63,368.26</b>	<b>\$76,298.59</b>	<b>\$89,493.02</b>	
60001 Administrative PAYROLL	\$5,113.00	\$4,910.00	\$4,910.00	\$5,910.00	\$5,910.00	
60111 RESOURCE COORDINATION PAYROLL	\$210.00	\$0.00	\$0.00	\$0.00	\$0.00	
60122 WRAPAROUND PAYROLL	\$31,416.67	\$31,416.67	\$31,416.67	\$34,916.67	\$34,916.67	
60800 Payroll Taxes (FICA@.062, MC@.0145, FUTA@.006, SUI@.009)	\$3,361.68	\$3,323.89	\$3,323.89	\$3,735.64	\$3,735.64	
60900 Employee Expense Reimbursement	\$2,120.00	\$1,736.00	\$2,650.00	\$2,850.00	\$2,850.00	
61000 Professional Fees: Accounting/Payroll Service	\$750.00	\$750.00	\$750.00	\$750.00	\$750.00	
61100 Professional Fees: Legal	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
61200 Client/Employee Care	\$0.00	\$0.00	\$0.00	\$60.00	\$0.00	
61300 Marketing/Advertising	\$1,600.00	\$1,600.00	\$1,600.00	\$1,600.00	\$1,600.00	
61400 Insurance - Business Liability (assume \$10 for every \$1,000 in payroll projected for next fiscal year on list)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
61600 Insurance - Worker's Compensation (\$1.49 for every \$100 in payroll)paid	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
61700 Administrative Expenses (bamboo, criminal history/BMV checks, etc.)	\$230.00	\$230.00	\$230.00	\$230.00	\$230.00	
61800 Technology Expense	\$2,189.40	\$10,224.40	\$2,199.20	\$2,199.20	\$9,299.20	
copperconfig	\$1,500.00	\$1,500.00	\$1,500.00	\$1,500.00	\$1,500.00	
salesforce		\$7,100.00			\$7,100.00	
dropbox						
ring central						
go daddy email	\$524.40	\$524.40	\$699.20	\$699.20	\$699.20	
go daddy website function/ InMotion webhosting	\$165.00	\$1,100.00				
Quickbooks						
61900 Insurance - Health USE THIS LINE ONLY						
62000 Depreciation and AMORTIZATION						
62100 Licenses	\$0.00	\$0.00	\$100.00	\$0.00	\$0.00	
62200 Dues & Subscriptions (Inst/Oct, ARC/Amazon Sept, HODNA-Sept)						
62300 Office Supplies	\$340.00	\$340.00	\$340.00	\$350.00	\$350.00	
62350 Printing & Reproduction (just 500/yr with 2,000 for surveys in Q4)	\$50.00	\$50.00	\$50.00	\$50.00	\$50.00	
62400 Interest & Banking Fees/Charges including Intuit fees	\$100.00	\$100.00	\$100.00	\$100.00	\$100.00	
62600 Postage & Delivery	\$20.00	\$20.00	\$20.00	\$20.00	\$20.00	
62700 Professional Development - all employee training						
62720 Prof Dev - Lodging / Meals (employee costs while training)	\$0.00	\$0.00	\$300.00	\$0.00	\$300.00	
62800 - Equipment & Technology: Repairs & Maintenance	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
62850 - Equipment Expense	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
62900 - PLACE events	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
63000 - Phone/Fax system						
63100 - Lodging & Travel - admin						
63200 - Meals						
71000 - Shredding						
71100 - Interpretation services - NEW - LUNA OR OTHER SERVICES	\$120.00					
31400 - Shareholder distributions (taxes paid by Joy and other misc)						
Other						
<b>Total Expenses</b>	<b>\$48,300.75</b>	<b>\$55,380.96</b>	<b>\$48,669.76</b>	<b>\$53,451.51</b>	<b>\$60,791.51</b>	
Bank Loan (Line of Credit income)						
Line of Credit Repayment / Interest payment	\$680.00	\$680.00	\$680.00	\$680.00	\$680.00	
<b>End Cash Balance</b>	<b>\$7,219.32</b>	<b>\$6,243.22</b>	<b>\$14,018.50</b>	<b>\$22,167.08</b>	<b>\$28,021.51</b>	



**Appendix I** contains the projected Cash Flow Statement fiscal years 2025-2027

PROJECTED CASH FLOW				
Advocacy Links, LLC				
<b>2025 Budget Projections</b>				
0				
4022 WRAPAROUND CMHW youth WA CMHW 1074.69 WA CMHI 965.49 WA DCS WORKFORCE STABILIZATION				
	<b>FY2025 totals</b>	<b>FY2026</b>	<b>FY2027</b>	<b>FY2028</b>
Beginning Cash Balance (Available through LOC if needed, plus prior month end)	\$30,000.00	\$50,000.00	\$70,000.00	\$90,000.00
<b>TOTAL REVENUE</b>	<b>\$847,640.19</b>	<b>\$1,296,479.79</b>	<b>\$1,745,319.39</b>	<b>\$2,328,920.07</b>
<b>TOTAL CASH AVAILABLE</b>	<b>\$877,640.19</b>	<b>\$1,346,479.79</b>	<b>\$1,815,319.39</b>	<b>\$2,418,920.07</b>
60001 Administrative PAYROLL	\$71,423.00	\$134,000.00	\$138,000.00	\$140,000.00
60111 RESOURCE COORDINATION PAYROLL	\$210.00	\$0.00	\$0.00	\$0.00
60122 WRAPAROUND PAYROLL	\$449,750.04	\$649,750.04	\$849,750.04	\$1,049,750.04
60800 Payroll Taxes (FICA@.062, MC@.0145, FUTA@.006, SUI@.009)	\$47,706.55	\$85,300.88	\$103,966.88	\$122,449.88
60900 Employee Expense Reimbursement	\$32,906.00	\$40,000.00	\$45,000.00	\$50,000.00
61000 Professional Fees: Accounting/Payroll Service	\$9,000.00	\$14,000.00	\$16,000.00	\$18,000.00
61100 Professional Fees: Legal	\$0.00	\$800.00	\$800.00	\$800.00
61200 Client/Employee Care	\$1,120.00	\$5,000.00	\$5,000.00	\$5,000.00
61300 Marketing/Advertising	\$19,200.00	\$20,000.00	\$20,000.00	\$2,000.00
61400 Insurance - Business Liability (assume \$10 for every \$1,000 in payroll projected for next fiscal year on liability)	\$5,213.83	\$10,000.00	\$10,000.00	\$1,000.00
61600 Insurance - Worker's Compensation (\$1.49 for every \$100 in payroll) paid	\$7,768.61	\$9,890.53	\$12,930.13	\$15,939.93
61700 Administrative Expenses (bamboo, criminal history/BMV checks, etc.)	\$2,760.00	\$3,500.00	\$5,000.00	\$6,500.00
61800 Technology Expense	\$58,380.80	\$60,000.00	\$62,000.00	\$64,000.00
copperconfig				
salesforce				
dropbox				
ring central				
go daddy email				
go daddy website function/ InMotion webhosting				
Quickbooks				
61900 Insurance - Health USE THIS LINE ONLY	\$0.00	\$75,000.00	\$95,000.00	\$115,000.00
62000 Depreciation and AMORTIZATION	\$0.00	\$0.00	\$0.00	\$0.00
62100 Licenses	\$400.00	\$600.00	\$11,000.00	\$600.00
62200 Dues & Subscriptions (Ipsart/Oct, ARC/Amazon-Sept, INDOANA-Sept)	\$0.00	\$12,000.00	\$12,000.00	\$12,000.00
62300 Office Supplies	\$4,350.00	\$5,550.00	\$6,750.00	\$7,950.00
62350 Printing & Reproduction (est 500/line with 2,000 for surveys in Oct)	\$600.00	\$800.00	\$1,000.00	\$1,200.00
62400 Interest & Banking Fees/Charges including Intuit fees	\$1,200.00	\$1,500.00	\$1,500.00	\$1,500.00
62600 Postage & Delivery	\$240.00	\$390.00	\$540.00	\$690.00
62700 Professional Development - all employee training	\$0.00	\$2,500.00	\$3,000.00	\$3,500.00
62720 Prof Dev - Lodging / Meals (employee costs while training)	\$670.00	\$800.00	\$1,000.00	\$1,200.00
62800 - Equipment & Technology: Repairs & Maintenance	\$0.00	\$300.00	\$300.00	\$300.00
62850 - Equipment Expense	\$0.00	\$600.00	\$600.00	\$600.00
62900 - PLACE events	\$0.00			
63000 - Phone/Fax system	\$0.00	\$3,600.00	\$3,600.00	\$3,600.00
63100 - Lodging & Travel - admin	\$0.00	\$1,000.00	\$2,000.00	\$3,000.00
63200 - Meals	\$0.00	\$500.00	\$500.00	\$500.00
71000 - Shredding	\$0.00	\$500.00	\$500.00	\$500.00
71100 - Interpretation services - NEW - LUNA OR OTHER SERVICES	\$120.00	\$1,000.00	\$1,000.00	\$1,000.00
31400 - Shareholder distributions (taxes paid by Joy and other misc)	\$0.00			
Other	\$0.00			\$0.00
<b>Total Expenses</b>	<b>\$713,018.83</b>	<b>\$1,286,581.44</b>	<b>\$1,556,437.04</b>	<b>\$1,776,279.84</b>
Bank Loan (Line of Credit income)				
Line of Credit Repayment / Interest payment				
End Cash Balance	\$164,621.36	\$59,898.35	\$258,882.35	\$642,640.23