

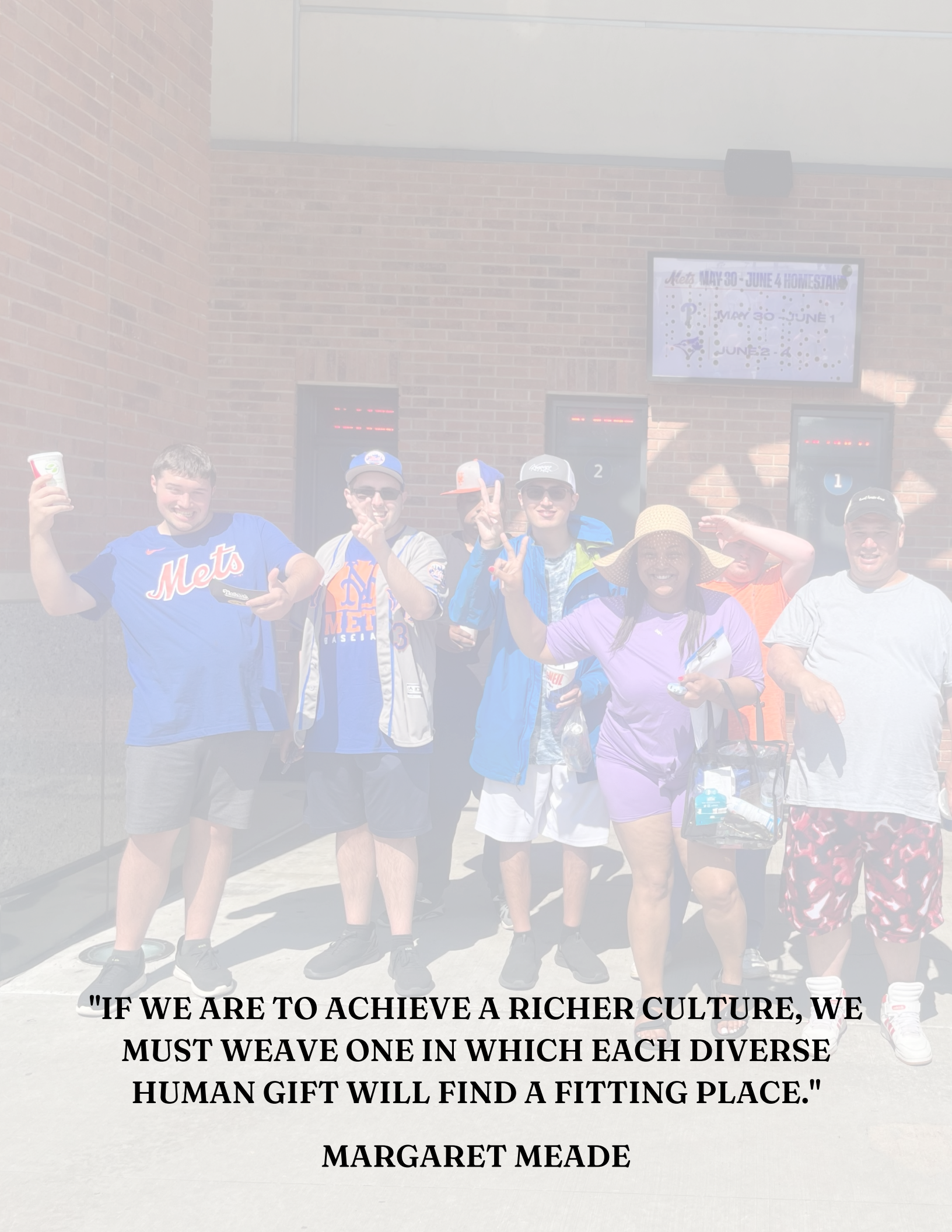


RISE

LIFE SERVICES



2023 ANNUAL REPORT



"IF WE ARE TO ACHIEVE A RICHER CULTURE, WE MUST WEAVE ONE IN WHICH EACH DIVERSE HUMAN GIFT WILL FIND A FITTING PLACE."

MARGARET MEADE

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Executive Director's Report 2023

Charles Evdos

2023 was an eventful year for Rise Life Services. Our Agency continues to diversify and expand services on Long Island. We are looking at further expansion of services and opening another food pantry to serve Suffolk County. Here are some of the highlights:

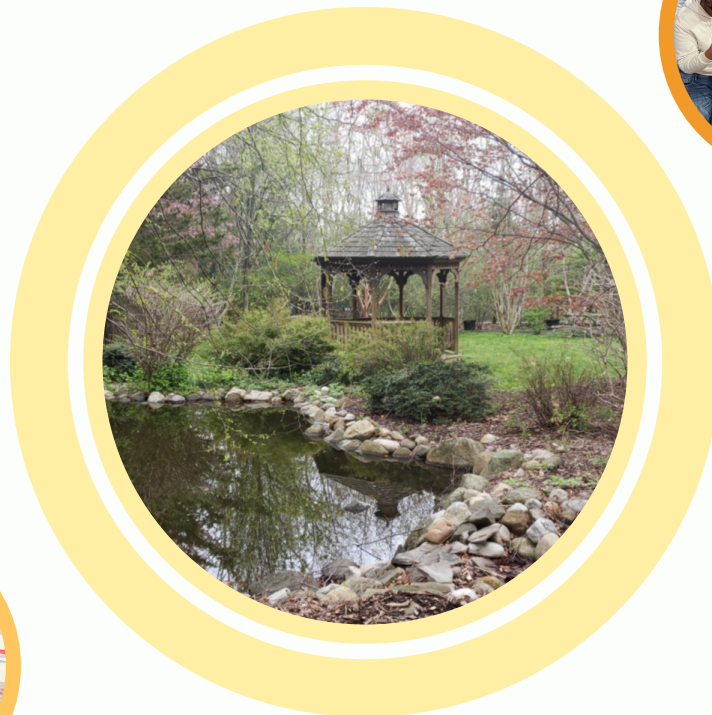
Here are some highlights from 2023:

- Our Suicide Prevention Program has been extended for 5 more years. That is great news in our effort to help reduce suicides on Long Island. An important fiscal fact this program allows Rise to spread a portion of our administrative expenses to this program. Every penny helps.
- Building our Endowment is critical to our Agencies future. We currently have almost \$2 million in cash, earmarked funds and insurance policies. Our goal is \$10 million to that will in essence a "Rainy Day Fund" that will allow Rise to continue services even when NYS cuts the budget.
- One June 23rd we had our dedication of Jack Van de Wetering for his vision and hard work to beautify the Sensory Garden. Jack has dedicated himself to making this site not only beautiful but an income producing venue. Jack thanks for your vision and your hard work.
- We have opened a 3rd "No Walls Program" At Huntington, one at the Sensory Garden and a new site in Patchogue. The importance of these programs allows individuals to choose a wide array of programs that they select. I have to say the Program Without Walls is the premiere program in NYS. JoAnn has done a fantastic job in getting these programs operational. The demand for this product is significant and all 5 "No Walls Sites" will be maxed out in 2023.

Executive Director's Report 2023

Charles Evdos

- We have approved and completed the conversion of the two-car garage into bedrooms at Patti Lane. This allows Rise to have ADA rooms and additional spots for individuals we serve. This will improve revenue for the program and help reduce expenses. We will be converting 2 more sites in 2023/24.
- In October 2023 we were awarded a \$5 million Grant to extend the Suicide Prevention Program (SPP) for 5 years. This new program allows our counselors to visit Suffolk Schools and help those in need of mental health services they need. The SPP has helped many teenager get the help and services they need.
- We have revamped our website to allow Rise to better display what we are about and the many new things we are doing



IRA/ICF Programs (OPWDD)

Matthew LeValle

2023 has been a year of change and innovation for OPWDD. We continue to evolve and adapt to an ever-changing human services landscape. The division has spent the last 12 months rising to meet the needs of those we support by pioneering service delivery transformation, new leadership, improved self-advocacy, and standardized systems. Over the course of the year, the division saw multiple changes in leadership, recruiting new administrators from outside the agency as well as promoting promising management candidates to oversee the continued evolution of our efforts to realize the agency vision. By December of 2023, the division proudly promoted a new Operations Director, a new Assistant Director, and multiple Program Coordinators.

This new leadership embraced and advocated change in an effort to professionalize and modernize service delivery. OPWDD designed its own internal strategic plan, outlining areas of improvement and strategies to standardize accountability and validation by administration. We expanded our Patti Lane IRA as part of our mission to improve individualized services. Internal training curricula were updated to better prepare staff and more uniformly deliver support to our Direct Support Professionals. Novel financial systems were explored and implemented to digitize and update programs' ability to deliver services while negating risk and loss. Digital forms were designed for multiple administrative processes crucial to day-to-day operations, digitizing interdepartmental communication and eliminating unnecessary paper. New tracking and accountability systems were put into effect in order to increase uniformity and accountability across locations.

Unfortunately, due to the global staffing crisis, the OPWDD department was unable to plan and coordinate an all-inclusive vacation for all programs, but we were still able to reprioritize community inclusion, allowing for the individuals to enjoy the outdoors and take a break from the everyday, while digitizing the tracking of these activities. The division provided a Halloween Party for our recipients that included fun, games, and a costume contest. OPWDD also organized a house decoration contest for the holidays where the winners won a trophy and a holiday party.

IRA/ICF Programs (OPWDD)

Matthew LeValle

2023 set the foundation for our current projects and priorities. We have already begun transitioning our Intermediate Care Facilities to Individualized Residential Alternatives, modernizing our services to meet changing needs. Two OPWDD programs have already transitioned with three more scheduled to convert in the coming months. Conversions will allow us to increase individualized services and increase community integration through greater self-determination and access to funds. Our former ICF individuals will also receive more support and advocacy through independent care coordination services within this model. This will expand access to day programming services, decreasing daytime staffing needs and increasing choice for our residents. It will also allow us greater access to potential service recipients through care management organizations.

We have redesigned our management training curriculum in an effort to better prepare our leaders to supervise their teams and serve our population. This is part of a larger effort to better support and educate our staff. In addition, we have standardized management and administrative meetings to improve internal and interdepartmental communication. We have begun quarterly self-advocacy meetings in an effort to improve our residents' ability to advocate for their wants, needs, and rights. In addition, we have spearheaded weekend job-fairs to maximize our ability to recruit new staff. Finally, we intend to expand the number of beds in several smaller IRA programs in order to decrease the capacity of our larger ICF programs, individualizing care.

2023 was a year of growth and change. As OPWDD Operations Director, I would like to offer heart-felt thanks to all the staff members that are a part of the OPWDD program's success: Direct Support Professionals, Managers, Assistant Managers, Program Coordinators, Assistant Directors, the Maintenance Department, Nursing, Behavioral and Administrative Support staff. Your perseverance, dedication, and commitment are greatly appreciated. "Energy & persistence conquer all things" – Benjamin Franklin

Human Resources / Corporate Training

Christopher Nassauer

“HR professionals are the guardian of an organization’s culture, values, and ethics.” – John Wooden

The world of human resources (HR) is undergoing rapid and profound changes, fueled by an evolving workforce, technological advancements, and shifting societal norms. The profession itself is rebranding HR name, role and purpose initiatives in line with “people operations”. As we step into the year 2024, HR departments are faced with a host of challenges and opportunities that demand fresh perspectives and innovative solutions. Perhaps the two most important challenges to face are cultivating organizational culture and adapting to workforce demographics.

Cultivating Organizational Culture

Company culture is the heartbeat of an organization—shaping its identity, influencing its decisions, and determining its success. Diversity, equity, and inclusion (DEI) stands at the forefront of agendas this year. Cultivating an inclusive culture not only reflects social responsibility but also enhances decision making and innovation by bringing together diverse perspectives and talents. Organizations that prioritize DEI create environments where every employee feels valued, contributing to overall organizational performance. Improving company culture begins with a commitment to employee satisfaction. Encourage open communication and feedback channels to ensure everyone’s voices are heard and considered. Recognizing and rewarding employee contributions, promoting work-life balance, and investing in professional development opportunities can also increase morale and engagement. Employee recognition is so simple, yet organizations struggle with this and overcomplicate it. Recognition is viewed as a task rather than part of the culture. Recognition is acknowledging an employee’s contributions, talents, and skills on a consistent basis. Not only does it drive engagement, but it helps organizations increase productivity and performance and improve employee retention. Recognition is what can motivate employees and make them feel appreciated. RLS encourages peer to peer recognition and uses social recognition tools to encourage relationships and foster a culture of recognition. RLS is educating managers on building relationships with their employees.

Human Resources / Corporate Training

Christopher Nassauer

Adapting to Workforce Demographics

Adapting to demographic diversity involves recognizing the unique contributions of different groups, creating inclusive workplaces, and inciting collaboration among generations, genders, distributed workforces, and cultures. Generation Z are now the dominant generations in the workforce, bringing their unique values, expectations, and work styles into the workplace. As a result, HR must adapt recruitment strategies, employee engagement initiatives, and retention programs to cater to this younger group. One of the defining traits of Gen Z is their relationship to technology. While previous generations had to learn technologies such as the internet, smartphones and social media, Gen Z is the first generation of true digital natives. The way they use technology and how it's been a part of their lives, compared to other generations, is drastically different. Older generations had to learn to accept technology into their day-to-day roles where Gen Z has not. As Generation Z pushes the boundaries of traditional work-models, HR departments will need to review their talent retention strategies.



The Main Street Connection Day & Community Based Prevocational Services

JoAnn Vitale

Rise opened it's first day program in January 2018 – The Main Street Connection East, in January 2022 and with the success of this program Rise ventured West and opened it's second program The Main Street Connection West in Huntington where we share the building with The Spirit of Huntington Art Center.

Expansion was the word for 2023

Rise had many individuals living in their ICF program whose programs did not reopen so we created PWW 3 to provide active treatment to those who had been home too long. We were able to rent a space in the Parish Hall of the Unity Baptist Church in Mattituck. This program has made a tremendous difference in the lives of the individuals we support getting them out into the community participating in activities.

Rise wanted to offer additional programming opportunities to continue to diversify services, and applied to OPWDD to open Community Based prevocational Services. The program began in June of 2023 and offers prevocational skills to individuals in volunteer setting in the community. Individuals are also learning soft skills such as time management, working with technology, working cooperatively to complete tasks, travel training, resume writing and interviewing skills.

Enrollment continued and referrals from other communities lead us to consider opening another program on the South Shore of Eastern Long Island. November 2023 the Patchogue Day Program opened. The program rents space in the upper Parish Hall of St. Paul's Episcopal Church. The relationship with the church as enabled Rise to become a part of the south shore community. Rise now supports the church with volunteers form our program in their thrift shop, soup kitchen and next spring their new food pantry.

The Main Street Connection Day & Community Based Prevocational Services

JoAnn Vitale

Participants of these exciting and innovative programs are participating in the Life of The Community each day. The day program encourages and challenges individuals to explore new experience and build on their skills. Our schedule is prepared bi-weekly with the input of the participants with new and liked activities each program day that support each individuals' goals:

Promoting independence through exploration and community integration opportunities.
Maintaining and enhancing academic and life skills

Recreational activities with favorites like soccer, basketball, nature walks, swimming, fishing, adventure parks, dancing & bowling.

Group outings such as trips to parks, beaches, the Museum of Natural History, YMCA, Bronx Zoo & baseball games.

Weekly participation in The Spirit of Huntington Art Center where individuals take Art, Music, Movement and Clay classes is opening a new and creative side of individuals.
Money management and math skills can be done shopping and making purchases
Social interactions can be speaking with a store employee, a neighbor, community member or a friend.

Reading a street sign, a menu, reading an exhibit at a museum or a word search builds and strengthens skills in an interesting way.

Exploring new experiences widens the world.

The Main Street Connection Day & Community Based Prevocational Services

JoAnn Vitale

There are days to relax at a park, picnic, cook out, the beach or at our beautiful Sensory Garden where individuals will soon be planting and growing vegetables and flowers.

The Main Street Connection Day Programs puts a special emphasis on community integration. Each individual plays a part in creating their goals for increased independence. Those goals can be done in some untraditional ways such as:

Individuals have the opportunity to help work in Rises' Food Pantry, giving back to the community with food drives, picking up donations to stock the pantry and delivering food to households in need weekly.

Enhancing the lives of the programs' participants is Rise's mission.

The Main Street Market Food Pantry

The Main Street Market Food Pantry at Rise Main Street office provides needed assistance to the community weekly through the client choice pantry which is open Wednesday 9:00 am – 1:00 pm and through food delivery Thursdays and Fridays to people who cannot access the pantry due to distance, illness or lack of transportation. The pantry serves approximately 350 families monthly. We have partnered with local farmers and The East End Food Institute to receive local healthy produce which is a great benefit to the community members that we serve.

Rise is planning on collaborating with St Paul's to reopen their food pantry as a client choice pantry similar to Rise.

The day programs and food pantry are continuing to increase Rise's presence in the community.

Quality Assurance/Risk Management and Corporate Compliance Department:

Megan Kolsch

The RISE's Quality Assurance/Risk Management & Compliance Team is a support service to the agency that assists the organization in complying with the regulatory requirements set forth by our State Oversight Agencies. RISE provides services to people under the auspices of the Office of People with Developmental Disabilities (OPWDD), Department of Health (DOH) and The Office of Mental Health. In addition, we adhere to all Justice Center's regulations and the code of conduct.

The mission of the Quality/Compliance Assurance team is to teach, assist, and support both the individuals that we support, as well as our valued team members. This is done by providing: Training for everyone! Advice and counsel on the Federal, State, and local regulations that our State Oversight Agencies have implemented.

We maintain a widespread Corporate Compliance Program that uses the Corporate Compliance Plan as the foundation, policies and procedures that explain what is required of all members of RISE Inc., best practice, and compliance with all laws and regulations that have been implemented by our oversight agencies on the Federal, State, and local levels. As of March 2023, new compliance regulations have been established and RISE is enforcing these new components. It is the responsibility of every board member, employee, volunteer, and vendor to adhere to the laws, regulations, and Abilities First Code of Ethical and Legal Behavior.

Accomplishments

OPWDD/OMH/OFPC/OMIG conducted the following external audits including person centered audits, truncated audits, full re-certification audits, monitoring audits, OFPC audits, DOH audits for ICF. QA/Compliance works all year round in anticipation of all external audits. Incident Management is a significant aspect to all auditing; as auditors have full access to our investigations, safeguards, required notifications, verification of notifications, statements, testimonies, and full thorough investigative reports for every incident agency wide. These such incidents set the tone for all external audits, as well as determine the sample of individuals selected as part of the audit.

Quality Assurance/Risk Management and Corporate Compliance Department:

Megan Kolsch

The following programs were audit by the above and all areas identified were systemically corrected. The residential managers, BIS, Nursing, maintenance, administration and QA work very diligently to prevent any deficiencies and this was prevalent during this year. Auditors focus a great deal on incident management, fire safety, medical care, behavior support plans, individuals' choice, individual satisfaction, physical plant, and overall continuity of care.

Northville ICF successfully now an IRA.

Calverton ICF successfully now an IRA.

Jamesport ICF

Cutchogue ICF

Patti Lane IRA

Lakeview IRA

Evergreen IRA

Middle Island IRA

Kings Drive Supportive IRA

Carmen View Supportive IRA

PWW- Person Centered audit

- QI/Compliance has successfully completed the annual satisfaction survey's see below graphs. Overall, individuals and family members are very pleased with RISE's support services. Any specific concerns were addressed immediately.
- The QI/Compliance department interfaces with all departments and provides guidance and support to ensure regulatory compliance daily.
- The QI Director chairs the Incident Review Committee, and the Human Rights Committee meeting which occur monthly and/or as needed.
- The QI department has incorporated both staff interviews and individual interviews when conducting audits to determine their knowledge and their overall satisfaction with services.

Quality Assurance/Risk Management and Corporate Compliance Department:

Megan Kolsch

- All Incident Management–related responsibilities have been completed in a timely manner and are in good standing. Throughout the 2023/2024 year, with new leadership, and determined abuse prevention curriculums – I am happy to report allegations of abuse neglect have decreased significantly. During the 2024 year the external audit teams for both OPWDD and OMH have been complimentary to the organization and thoroughness of all incidents. This is time intensive and critical when measuring the quality of a program. Any areas that were identified during an external recertification audit are being systemically corrected by the program administration.
- Area of focus during an internal audit include Nursing/Medical Care, Behavioral Programming, CFA, Life Plans, Financial records, Fire Safety, Physical Plant, Occurrence reviews, Mealtime observations, staff interviews regarding knowledge of what to do in emergencies, question regarding their specific role in fire evacuation, if their aware of any specialized diets, and other individualized specific information. Additionally, staffing ratios are reviewed as well as active treatment and recreational opportunities.
- QI/Compliance department completes all internal support visits, billing compliance audits, to ensure compliance is being enforced. This year on of our department goals is to conduct more unannounced visits at varying times.
- QI/Compliance department has restructured to delineate responsibilities to operate more efficiently.
- The Abuse Prevention Curriculum, HIPPA and Corporate Compliance training that the QI Department completed over 60 times during this 2023/2024 year. This course has been instrumental in minimizing allegations of abuse and ensuring compliance with OMIG regulations. This includes a 30–day exclusion check for all employees, vendors affecting a risk area, board members, and consultants. Compliance takes the lead with ensuring this is successfully completed every 30 days. In the event any sanctions are noted an attestation form is completed.

Quality Assurance/Risk Management and Corporate Compliance Department:

Megan Kolsch

- Developed and conducted required training on HIPAA and Corporate Compliance for Training new employees and for our annual ongoing trainings.
- The Quality Improvement Team has attends external audits and works in collaboration with the program administration in systemically correcting any areas identified.
- The QI team works in collaboration with all management and administration teams daily.
- The QI /CCO Director did develop a triage protocol which has been very instrumental this year.
- All compliance matters have been address and resolved in a timely manner.

Mental Health Department

Robert Melnick

Occupancy rate

The MH team is proud to have maintained a 96.3 % occupancy rate or higher this year. These numbers reflect our commitment to providing safe housing for Individuals diagnosed with severe mental illness. We have been successful in supporting those seeking discharged from our agency to either Section 8 housing, other community housing, and/or other alternative placement to address increased needs unsupported by Residential programming criteria. We are pleased to report that three individuals have transitioned internally from our APT to supportive housing opportunity. The apartment programs remain 100% occupied and are a highly sought after opportunity.

Home Improvements

- Our community residences did not require any major improvements this year, each of the homes are in good condition except for hallway and communal area flooring upgrades that are scheduled to occur at two of the residences.
- Apartment treatment managers continue to collaborate closely with respective landlords at apartment locations with successful outcomes realized.
- In addition to the above noted, each site received contemporary furniture and new décor.

Wellbeing/Inclusion

- Quality of life improvement of every Individual residing in the OMH department remains our number one priority. In addition to enhancement and availability of everyday activities that are made available we hosted various other events such as the Mental Health annual picnic, annual Wainscott pool party, Game nights, fishing trip, monthly sporting and social event, trips to NYC, attendance at major league sporting events and a host of other community-based venues.
- Wellness training this past year has focused on wide range of topics including drug and alcohol awareness, self-advocacy, community safety, men and woman groups, LGBTQ topics, nutrition, and exercise. Informative and interactive sessions occurred at all locations monthly.

Mental Health Department

Robert Melnick

- Assisting individuals with employment seeking skills such as dressing for success, resume writing, and interview skills continued this year. We are pleased to report that four individuals became gainfully employed this year.
- Community volunteering also remains a priority for the division. Each of our community residences continue to actively participate in at least one volunteer opportunity per month. We currently support two food banks, church thrift shops, and two animal shelters. We are particularly excited about our newest opportunity whereby we have adopted community parks in the Town of Riverhead to assist with upkeep and cleanliness.
- Self-Advocacy meetings remain productive and well attended. Discussions at these quarterly meetings included ideas surrounding a greater presence in the community to reduce stigma as well as plans to share their stories via social media. The hot topics this year were COLA for workers and access to more affordable housing.

Team member education/retention

- The OMH department continues to utilize the Onsite/Onboarding Roadmap Training Curriculum. The Program Coordinator and Manager meets with each new employee at the beginning and end of the initial agency orientation session to welcome and validate their initial weeklong initial training. Once complete a 90-day in-house training and mentoring session commences covering a wide variety of topics designed to provide all the tools necessary for the new team members success in their role.
- This year we initiated our enhanced leadership training program designed specifically for our resident assistant managers. The monthly sessions, designed to strengthen supervisory skills including topics such as staff feedback techniques, role modeling for success, creating fun and functional learning opportunities, and quality assurance measures. These sessions have been making a significant impact on our quality improvement efforts.
- Electronic Documentation- Precision Care continues to support the division. This paperless method allows for ease of auditing and thorough Electronic medical records (EMR).

Elevations Clinic Treatment Program

Jean Carr

Elevations Clinic continued its mission to provide vital mental health services to the community as well as individuals in our residential programs. Our comprehensive treatment program encompasses assessment, symptom management, medication education, psychotherapy, and medication management. We serve individuals dealing with a spectrum of mental health challenges, from anxiety and depression to schizophrenia and trauma, across youth, adolescent, and adult populations.

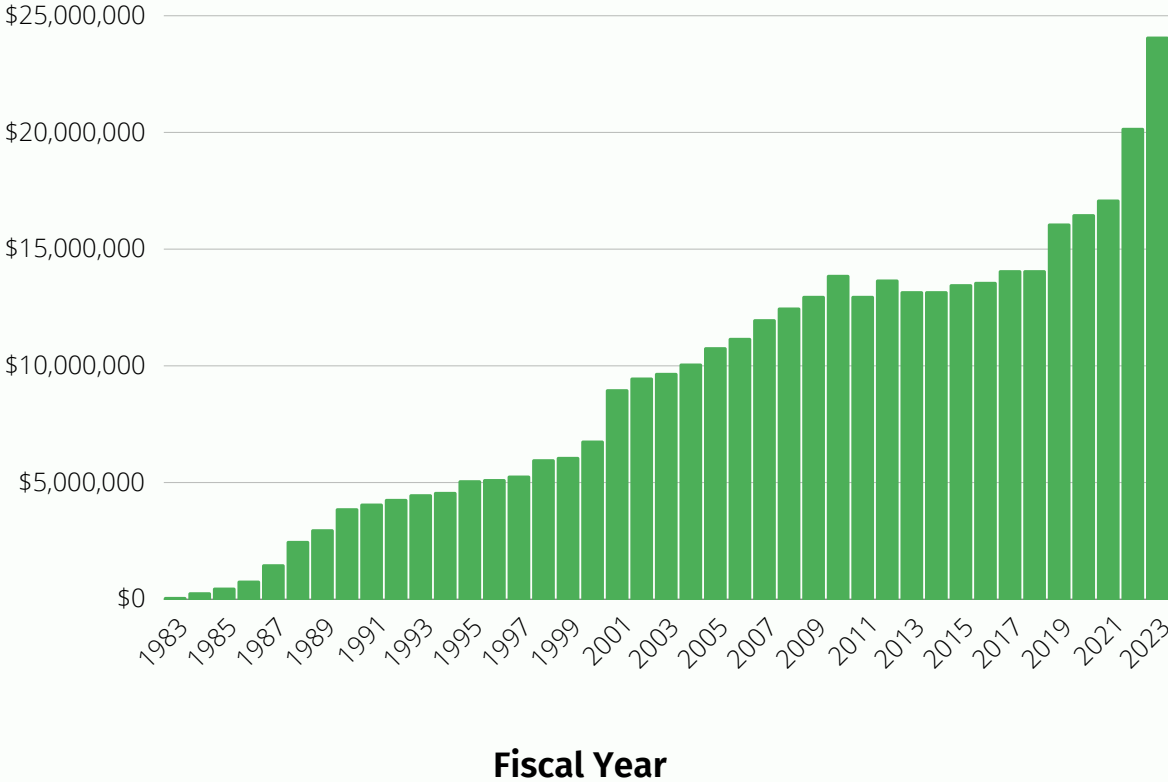
In our second year of operation, Elevations Clinic prioritized evaluating and enhancing our software to optimize service delivery resulting in the implementation of an upgraded Electronic Health Record (EHR) system. After extensive evaluation, we selected and began implementing a new Behavioral Health Module in the fourth quarter of 2023, with completion scheduled for 2024. This enhancement aims to streamline operations and improve patient care.

Elevations Clinic and Rise's Enrichment Experience Suicide Prevention Program launched a successful partnership at the beginning of 2023. By year-end, we were collaboratively providing services to thirty-five at-risk youth with future growth expected in 2024. A comprehensive analysis of our management structure was conducted in 2023, leading to strategic adjustments aimed at enhancing efficiency. These changes are expected to enhance service delivery, and client satisfaction moving forward. As of the end of 2023, Elevations Clinic served a total of 258 clients and expects further growth as we continue to expand staffing and community outreach efforts.

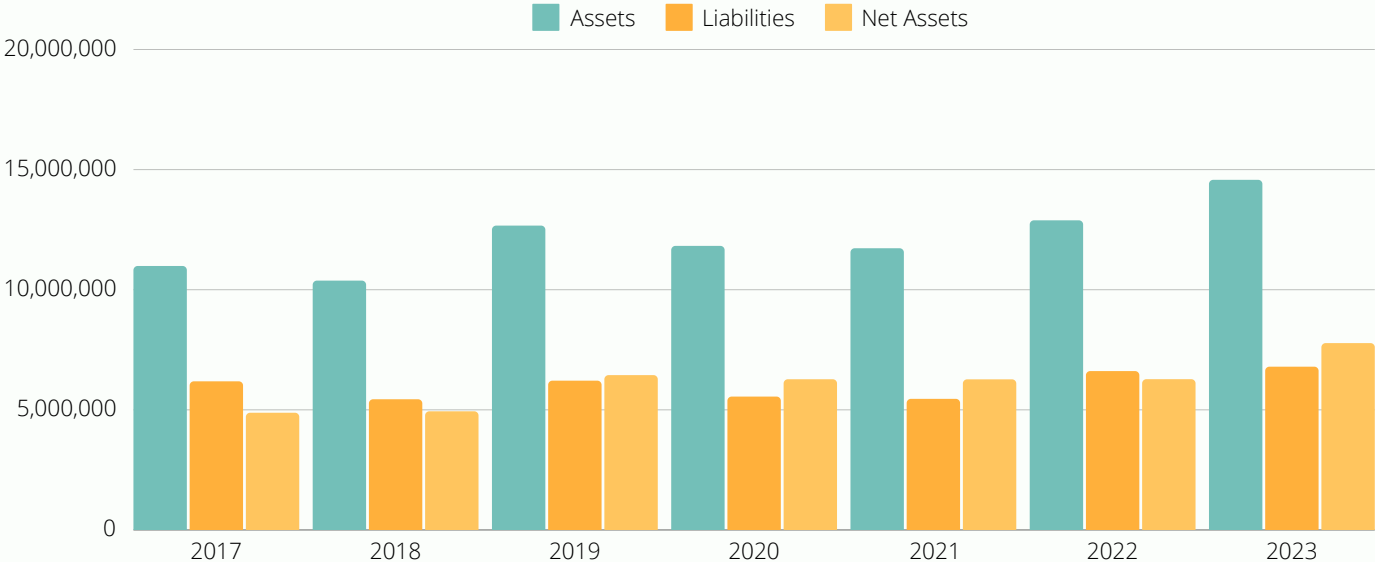
Financial Reports

Holly Gurnick

Annual Revenue



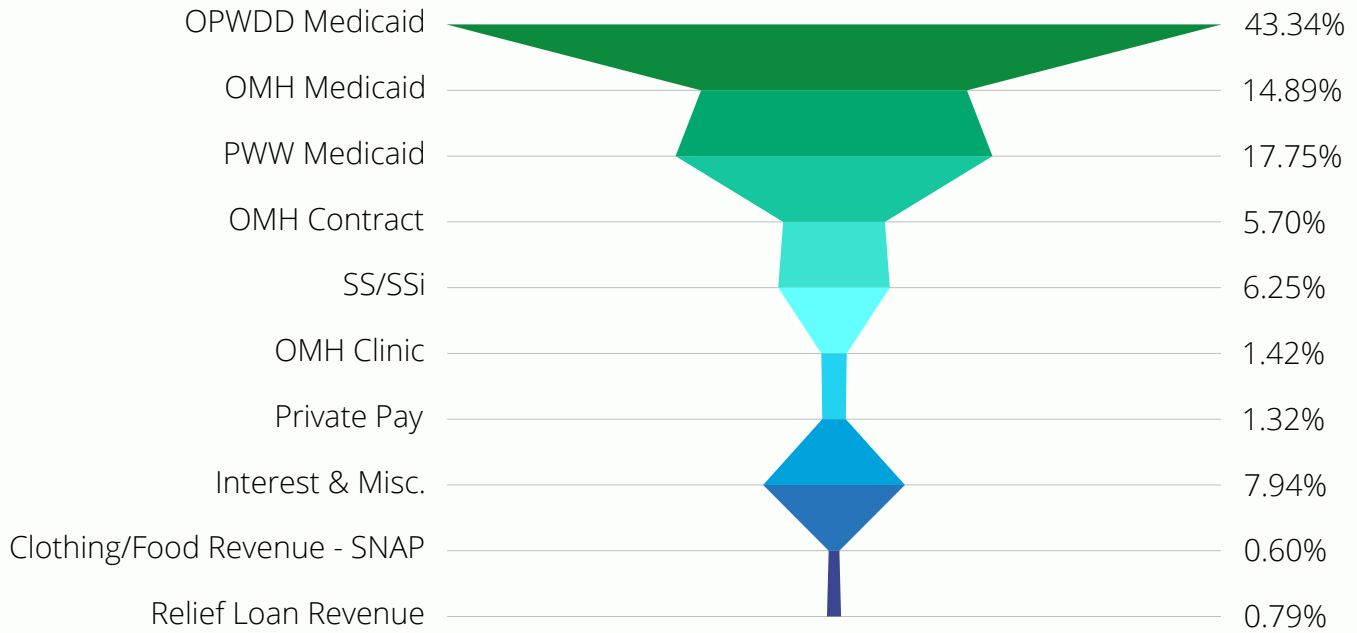
Balance Sheet



Financial Reports

Holly Gurnick

Revenue Distribution by Funding Source



Expense Distribution

