

Imagine Supported Living Services



Annual Report 2017

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Our Mission:
To empower individuals with developmental disabilities through service and advocacy.

WHAT IS IMAGINE?

Imagine Supported Living Services is a 501(c)(3) public benefit corporation in Santa Cruz County, providing services to adults with disabilities since 2002. We value people of all abilities and their inherent right to live with dignity. We work cooperatively with our community to increase access, foster meaningful relationships, and reduce barriers to full inclusion.

In 2017 our Supported Living Services (SLS) and Family Home Agency (FHA) services expanded and remain highly individualized. We're proud of the people we serve and how we help them through a variety of challenges, ranging from beginning independent living to care at the end-of-life. Imagine was also active in Self-Determined Services, Person-Centered Services Incubator, Person-Centered Advocacy, the Imagine Film Festival, and many community collaborations.

Over the last year, we lost two key members of our family, Stan Parry and Fountain Jeng. See below for more about them.

SUMMARY OF 2017

- Imagine provided an average of 11,000 hours per month of Supported Living Services (SLS) to adults with developmental disabilities living in Santa Cruz County. Our Supported Living Services (SLS) is at our planned capacity.
- We currently support five families through our Family Home Agency (FHA). Our Family Home Agency (FHA) program doubled in size, for the second year in a row.
- Imagine employs 115 people, 70 of whom are full time, benefited employees. Imagine continued to pay 100% of the health, dental, and chiropractic insurance for our employees working more than 30 hours/week. Staff turnover at Imagine in 2017 was just under 25%, which is in line with our multiyear trend.
- We held our sixth annual Imagine Film Festival at the Colligan Theater at The Tannery Arts Complex. For the second year, Premier Health Services sponsored the event and was joined by Sutter Health Palo Alto Medical Foundation. We also received support from Embertec, Bay Photo, Elkhorn Slough Brewing Company, and Woodstock's Pizza. The additional sponsorship enabled Imagine to provide direct support to filmmakers affected by developmental disabilities for the first time. We were also able to sponsor community members who were unable to afford the entry price through complimentary tickets.
- We continued the Self-Determination Learning Community program intended to prepare for California's new model of service delivery, Self-Determined Services Program (SDP). Our Executive Director represented Monterey County on the San Andreas Regional Center's Self-Determination Advisory Committee. Imagine trained parents, individuals, and other professionals, both locally and around the state, to serve as Independent Facilitators, a key role in the new model. While awaiting the rollout of the model, we worked with others in the Bay Area to develop ethical standards for people working with SDP clients.
- Our Person-Centered Service Incubator program continued to help individual and families establish new services for those with developmental disabilities, especially in underserved areas. In 2017, we received a \$5,000 grant from the Monterey Peninsula Foundation to support this program. We mentored new groups who had plans to provide services to Spanish-speaking individuals and families including an art-based day program.
- Imagine's leadership continued to work with the Person-Centered Advocacy Partnership and California Disability Community Action Network for advocacy at the state level. Imagine worked with the State of California to promote self-determination and to assist in guiding the transition to new Medicaid waiver rules. Imagine was one of a few organizations piloting a self-assessment tool to insure compliance with new federal rules.
- Imagine collaborated with other Santa Cruz County agencies, organizations, and community members in direct support of those with disabilities. See "Community Collaborations" below.

Regarding our financial position:

- Our budget remained in balance for all twelve months of the fiscal year for the first time in years. We set aside approximately 5% of revenue, including unrestricted donations and grants, for future needs.
- Unrestricted grants and donations exceeded \$66,000, our best year to date.
- Total revenue for the fiscal year rose to \$3,574,000 from \$2,722,000, an increase of 31%. Although this is the second consecutive year of growth over 20%, we plan to slow that growth.
- Our fiscal overhead was 9% of costs, including the addition of an Administrative Assistant position. Our fundraising costs were less than 0.5% of total expenses.
- We received a clean audit report for fiscal year 2016-17.

OUR MISSION and CORE VALUES

Imagine's mission is "To empower individuals with developmental disabilities through service and advocacy." Our six Core Values are interconnected and guide our organization towards inclusion, equality, dignity and pride for people with developmental disabilities.

Imagine is proud to be a diverse organization. The people we serve and our employees represent a broad spectrum of religions, ethnicities, economic backgrounds, national origins, family types, gender identities, and sexual orientations.

Empowerment

Empowerment is the focus of Imagine's mission, and it is also one of our core values. We promote the independence and advocacy of the people we serve; we focus on our own dependability so that the people we serve can be as courageous as possible; and we serve them without judgement. Imagine also empowers stakeholders through transparency and accountability of agency management. We want the individuals we serve, their loved ones, the community, and those who work at Imagine to be aware of how our resources and time are dedicated. In 2017, we supported the individuals we serve to seek their own resolutions in matters of health, love, and law.

Outstanding Service

Imagine has a reputation as a premier service provider, and we work to deserve that reputation. As our programs evolve, we take the opportunity to improve quality and individualization. Over the last year, our Director of Services, Facilitators, and other office staff received training in person-centered planning.

Fabric of the Community

As a small agency, Imagine is unusual in the depth and breadth of our outreach. Imagine has a history of leadership in the community serving those with developmental disabilities. We encourage a culture of volunteering and support for other agencies including the Homeless Garden Project, Costanoa Commons, and other causes including human rights, diversity, and homelessness. Imagine offers physical space and support to other community agencies and causes.

We are particularly invested in events that promote the inclusion of people with disabilities and their neighbors. Our film festival brings the broader community together, and the Gathering of Extraordinary People, which we co-sponsor, brings together hundreds of people from the developmental disability community. Imagine supports the Shared Adventures Day on the Beach event and hosts their office.

We believe the community extends beyond our county. Imagine uses its good relationships with local and statewide governments to advocate for people with developmental disabilities. We encourage and enable direct participation by people who have disabilities in governmental policy development—such self-advocacy is powerful and effective for awareness and change. We believe public policy will only improve through the input and participation of its beneficiaries.

Employer of Choice

Imagine recognizes that our excellence and fulfillment of the mission depends on the people who work here. We are sensitive to the challenges of compensation and benefits, and we pay 100% of our employee's health insurance costs. Our fiscal year report reflects a wage increase for direct care staff that began late last fiscal year.

Managers at Imagine are expected to have an open-door policy and be candid in response to questions. We updated our Employee Handbook with inclusive, gender-neutral language.

Lifelong Learning and Innovation

Imagine commits itself to teaching, learning, and listening throughout the life cycle of the people we serve. We look for opportunities to help the people we serve gain skills that will help them live more fully and meaningfully in our community. We look for training to support the growth of the staff. We work to maintain an open culture of experimentation where safe and appropriate, and we solicit feedback about how we are doing.

The leadership team at Imagine meets monthly to share new and best practices and how they are working. Direct care staff have received training in behaviorist techniques and stress management. As an agency, Imagine is working to digitize and automate our paperwork.

Safety and Security

Imagine takes a preventive, proactive approach to safety, security, and health for both the people we serve and our staff. Imagine creates individualized approaches to physical and behavioral challenges for the people we serve, balancing their autonomy with their need for assistance. We conduct a Critical Incident Review after every crisis, such as an unplanned hospitalization, to identify and develop new preventive strategies.

Empowerment, independence, and learning requires courage, and bravery comes easier to those with safe spaces and reliable allies who are available during and after a challenge.

OUR SERVICES

Supported Living (SLS)

Imagine has been providing Supported Living Services (“Supported Living”) since July 2002. This service model provides opportunity for personal choice, self-direction, and dignity in residential care. Supported Living acknowledges a person’s strengths and abilities, and it supports each individual in planning the life they find personally rewarding in homes they control and in the communities they seek.

Imagine Supported Living Services provides a variety of direct services and support determined by the specific needs and desires of each client, with support from the people who are closest to that individual. These services may include, but are not limited to; finding and securing housing, direct staff support for personal care and tasks, money management, social and recreational facilitation, and medical management. We are currently serving twenty-five individuals in Supported Living.

Although the people we serve have and deserve unfettered choice in their service provider, we plan our supported living services to last the length of our clients’ lives. In Supported Living, the individual lives in a home owned or leased by them.

Family Home Agency

The Family Home Agency (FHA) offers the opportunity for up to two adult individuals with a developmental disability to reside with a family. Within the certified home, the individuals with disability receive services and support which enable them to be a participating member of the family and community where they reside. The family home arrangement allows for the sharing of food, shelter, experience, responsibilities, and love. A key distinction between Supported Living Service and FHA is that the former is centered on the individual served while the latter is centered on the family that includes the individual served. Imagine will continue to carefully match individuals with families where the individual can experience authentic membership in the family.

In 2017, consistent with our desire to provide opportunities for personal choice and self-direction, as well as seeking good fits for the FHA, Imagine worked with individuals as they transitioned to FHA from Supported Living and vice versa.

Self-Determined Services

Imagine anticipates that California will launch a new model of service delivery called “Self-Directed” or “Self-Determined” services (SDS) for individuals and families. Under SDS, the traditional system will be replaced with individuals receiving a limited budget

and freedom to plan and purchase services and support beyond existing service codes or vendored service providers.

The Self-Determination Learning Community program exists to prepare for this new model of service delivery. Our Executive Director represented Monterey County on the San Andreas Regional Center's Self-Determination Advisory Committee. Imagine trained parents, individuals and other professionals both locally and around the state to serve as Independent Facilitators, a key role in the new model. While awaiting the rollout of the model, we worked with others in the Bay Area to develop ethical standards for people working with SDS clients.

Person-Centered Services Incubator

Since our founding, Imagine has provided leadership and mentoring to individuals and other organizations, and Person-Center Services Incubator program grows out of that original orientation. This program helps establish new services for those with developmental disabilities, especially in underserved areas. Individuals, families, or organizations can, without cost, receive mentoring, office space, program-design, and vendorization help, HR and bookkeeping expertise, and referrals to legal and other forms of assistance. We hope to use these resources to improve how our system performs for everyone without having to grow our own organization beyond our ability to assure excellence.

We received a \$5,000 grant from the Monterey Peninsula Foundation to support this program. In 2017 Imagine mentored new groups who had plans to provide services to Spanish-speaking individuals and families including an art-based day program. We are seeking funding to expand, market, and evaluate this program.

Person-Centered Advocacy

Imagine works both statewide and locally with elected officials and policymakers, to empower stakeholders, and promote a healthier, more sustainable environment for people with developmental disabilities, their caregivers, family and friends. Imagine's leadership works with the Person-Centered Advocacy Partnership and California Disability Community Action Network (CDCAN) for advocacy at the state level.

In 2016 and 17, we worked with CDCAN, Claraty Arts, and other organizations and individuals around the state to develop an art show at the California Museum in Sacramento which shared the experience of individuals with developmental disabilities living in our state. Imagine consistently promotes the involvement of stakeholders in policy-making, and dedicates significant effort to tracking and providing feedback to policy development.

The Imagine Film Festival

Imagine hosted our sixth Imagine Film Festival with films by, about, and/or starring people with disabilities. This event was attended by around 150 people and held at the Colligan Theater at The Tannery Arts complex.

For the second year, Premier Health Services sponsored the event, and they were joined by Sutter Health Palo Alto Medical Foundation. We also received support from Embertec, Bay Photo, Elkhorn Slough Brewing Company, and Woodstock's Pizza. The additional sponsorship enabled Imagine to provide direct support to film-makers affected by developmental disabilities for the first time. We were also able to sponsor community members who were unable to afford the entry price through complimentary tickets. Thanks to Imagine staff and volunteers, we improved on last year both in the quality of films and the food provided.

Community Collaborations

Consistent with our value "Fabric of the Community," Imagine supported the Santa Cruz County community of individuals with disabilities in collaboration with other local groups. The following is a list of community collaborations:

- Co-Hosted the 14th annual Gathering of Extraordinary People with Employment and Community Options, Monarch ILS, and Santa Cruz Supported Living Services. There were over 300 people in attendance at this Harvey West Park event, where Imagine provided a high-quality meal at low cost to interested participants.
- Hosted a monthly Men's and Women's Group which includes people with and without disabilities from Imagine and other agencies. In 2018, we will combine the two groups and invite everyone.
- Our Village Hall is the site of lots of parties for the people we serve, people served by other agencies, and the community at large. Our Halloween party is a favorite, and our Valentine's and St. Patrick's Day parties are gaining in popularity.
- Hosted birthday celebrations and holiday celebrations for our consumers.
- Provided advice on an ongoing basis to Costanoa Commons.
- Proudly partnered with Shared Adventures, helping to plan and staff the annual Day on the Beach, and provided office space to the organization.
- Provided access to our physical space to other non-profits and organizations that share our mission. Community Action Board of Santa Cruz County, Shared Adventures, and Monarch ILS have all used our location for meeting space at no cost.

STAFF, OFFICERS, AND BOARD MEMBERS

Imagine's Board Members:

Mark Tracy	President
Fountain Jeng	Treasurer
Julie Picquet	Secretary
Will deDiego	
Rhonda Kinard	
Janine Roeth	

Imagine's Leadership Team:

Doug Pascover	Executive Director
Julie Ross	Director of Services
Peggy Carter	Bookkeeper
Patty Lopez	HR Coordinator
Drea Batteast	Facilitator
Heather Cahill	Facilitator
Robert Dunbar	Facilitator
Kimberly Ferguson	FHA Facilitator
Cherice Lovell	Facilitator
David Robles	Facilitator, special projects
Gregory Bondi	House Facilitator
Lili Chavez	Administrative Assistant

IN MEMORIAM

Stan Parry

The Imagine family lost a friend and a parent when Stan Parry passed away on August 19, 2017. First, and most importantly, he was the father to our friend, Chris, about whom he cared deeply. Second, he was a real advocate for people with developmental disabilities having worked with, helped to start, and supported a variety of agencies on both sides of the Santa Cruz Mountains.

He, with his wife Melinda, have been great supporters of Imagine and generous with time, thought, and financial support. Stan would actively share new plans for his son's welfare or thoughts on the long-term impact of some new policy on Imagine's business model His counsel was as solid and appreciated as all the other ways he supported Imagine.

Many important things have been made possible by Stan and Melinda, including the low-cost high-quality meals at the annual Gathering of Extraordinary People, holiday and birthday celebrations at no cost for people with developmental disabilities, and trips and activities that made life more meaningful for the people we serve. It's fair to say that Stan and Melinda's gifts to Imagine have been foundational to the generosity our culture.

We bid a sad and grateful farewell to our friend and commit ourselves to caring for his sons, his son's peers and our community as Stan always encouraged us to do.

Fountain Jeng

Fountain Jeng, a member of Imagine's Board of Directors and its Treasurer passed away on February 12, 2018. The energy she brought to her volunteer work at Imagine was spectacular both in its quantity and its positivity. At Imagine, she leaves behind an organization much richer for her having been here and friends poorer now that she's gone.

Earlier in her life, Fountain set aside her career to care for a woman in her last stages of Alzheimer's disease. When the woman passed, Fountain resumed her successful career as a financial analyst but the experience left her with a desire to continue helping people with cognitive challenges. Imagine at that time was seeking a board member with her accounting skills so the match was natural. But the magic happened when she met some

of the people we serve and when she noticed how individualized our services were for each one. She joined the board in April, 2015 and was elected treasurer the same day.

The Treasurer's special responsibilities- creating the budget, reviewing financial statements and working on our independent audit- are not always fun. But with Fountain working on them, they were all fun. Fountain was lively and witty with a great laugh and a nearly constant great big smile. There's no better way to brighten a room clouded with spreadsheets. She co-chaired our fundraising and development committee with Julie Picquet and they made that fun too

Fountain had much, much more to give and to enjoy, but Imagine is fortunate that we received her generosity and proud that we gave her joy.

FINANCIAL REPORT

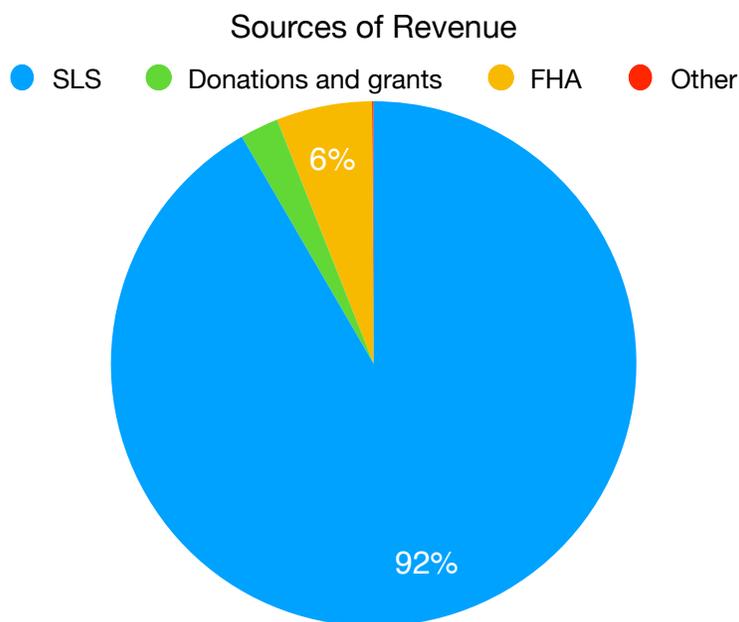
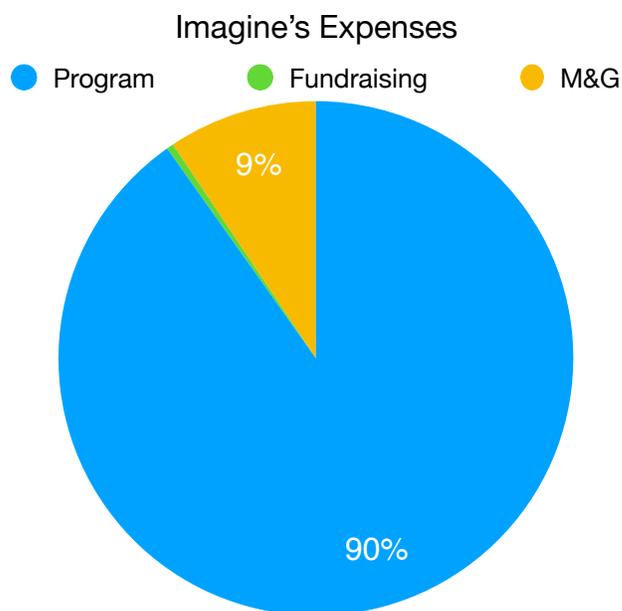
Imagine is a financially sound organization, receiving a clean audit report from Patricia Beckwith, CPA for our 2016-2017 financial year. We would like to gratefully acknowledge the support we received from individual donations, foundation grants, essential volunteer hours, and in-kind donations from our supporters.

Our overhead for the fiscal year ending June 30, 2017 was 9%, and our fundraising costs not quite half a percent (0.5%). We intend to keep overhead at around 10% and continue to rely on volunteers, our community of supporters, and salaried personnel to keep fundraising costs low. Our surplus was just over \$190,000 and 5% of our revenue.

We remain concerned about the impact of the Santa Cruz County housing market on the people we serve and the costs which can flow from that to Imagine. Health insurance for employees was the largest cost increase for Imagine, but so far, we have managed to maintain and expand our employee health benefits and believe we will be able to continue to budget for that at least into 2019.

Another principal fiscal concern is the unpredictability of federal policymaking at present and the impact of federal policy on the state budget and policy. From a budgetary and a regulatory aspect, the opacity of federal rule-making makes it difficult for us to navigate effectively. We pay close attention to local, state, and federal rules, both so we can advocate effectively and so that we can adapt proactively. We will be in touch with our community as policy direction takes shape.

Currently, many other nonprofits worry that the new tax law reduces the incentive for donations. We are not very concerned



about that as most of our supporters have strong personal reasons to give, and individual donations make up only about 1% of our budget. We remain committed to conservative budgeting, and expect a surplus between 2-5%.

Although fundraising and development play a small role in our overall fiscal picture, philanthropic funding functions critically at the margins. We use our regular funding to prioritize wages and benefits for our employees, with additional investment in training and projects that help deliver on our mission. The revenue we receive through donations and grants provide most of what we save towards future sustainability and investment.

We depend on volunteers and friends for our fundraising and grant development. Since the 2013-14 fiscal year, our unrestricted donations have risen from \$51,000 to \$63,000, a 20% increase. Over the same period, our spending on fundraising and grant development fell from \$33,500 to \$14,200, meaning the impact of our efforts and your gifts nearly tripled. While it represents only about 2% of our revenue, charitable giving less fundraising expenses contributed fully a fourth of our surplus. See below for a list of our donors, as permitted.

Restricted giving, grants, and donations also add to our culture and mission. Grants made annually by Stan and Melinda Parry through the Bernini Fund of the Silicon Valley Community Foundation support the social and recreational climate we encourage for our clients without impact to our fiscal results. A grant made at the end of the fiscal year by the Monterey Peninsula Foundation helped us grow and improve our Person-Centered Service Incubator program.

We earn nearly 98% of our revenue through our direct care services. In fiscal year 2016-2017, 92% of our funding came through our Supported Living Services program with an additional 6% through our Family Home Agency program.

Community Partnership: Although events held in the community are often labeled by us as fundraisers, they are primarily self-supporting opportunities for community-wide fellowship. Contributions from the Bernini Fund support Imagine's organizing leadership for the Gathering of Extraordinary People each year.

Thank you to all our supporters listed below

Bill Allen	Donald Allen, in memory of Stan Parry
Nancy and Vincent Altman	Ann Armstrong
Community Action Board of Santa Cruz County	Cathryn Calfo
Peggy and Eric Carter	Falcon Trading Company
Luise Custer, in memory of Jules Tygiel	Will and Shanna deDiego
James Dess	Tom Dixel
Susan Douglass	Donald and Elaine Dvorak
James and Carol Dvorak	Elkhorn Slough Brewing Company
Embertec	Jonathan Flint
Ted and Pat Gross	Ed and Amy Gunzelman
Matthew Healey and Jacqui Rubin	Michael Honack
Christine Houlihan, in memory of Stan Parry	Fountain Jeng
Mark & Jill	Martha Johanson
Michele Lagamma	Ed and Miriam Landesmann
Rebecca LaRussa	David and Pat Leiner
Dennis and Jayne Leiner	Maya and M Levine
Monarch Independent Living Services	Jeff Mabert and Debby Wechsler
John and Connie Neil	Monterey Peninsula Foundation
David Parry, in memory of Stan Parry	Newman's Own Foundation
Michelle Patrick	Stan and Melinda Parry
Google, Inc.	Julie Picquet
David and Leslie Plumlee	Roger Picquet and Sharon Dvorak
Irv Rollins	Walter Robb
Nicholas Ross	Ryan Schwab
Bob Scowcroft and Judy Fried	Jonathan Thatcher
Mark and JoAnn Tracy	Andrew and Lacie Wall
Rod and Sheila Williams	Embertec
Bay Photo	Woodstock's Pizza
Community Foundation of Santa Cruz County	Nick Apodaca and Anchorheart Productions
Premier Health Services	Frank and Ethelyn DeStefano
Janine Roeth and Henry Hooker	Rex Levering

Daragh Murphy	Annie Llewellyn
Mandy Kakavas	Philippe Day
Steve Pascover	Jenna Mooney
Allison Derse	Linda Locklin
Angie M	Nancy Chance
Miriam Stompler	Sophia Vandergrift
Amy Wood	Isabel Gutierrez
Raymond Lujan	Drea Batteast
Suzi Kyriakidis	Stephanie Laws
Pascaline Servan-Schreiber	Daniel Zimmerman
Ann and Curtis Gavin	Steven Loving
Linda Rochin	Lisa Rose
Laura Fledderman	Tom Conway
Heather Wilson, Maclean Sellars, Miles and Theo	Royce Siggard
Linda Kishlansky	Lauren Cutter
Anna Moscovitch	Holt Ruffin
Laura Duggan	Joy Edgar
Cindy Ragatz	Micahelyn Ragatz
Emily Brown	Kathleen Kelvie
Jen Chen	Alex Dewar
Barbara Thompson	Lisa Margulies
Shirin R	Marika Daggett
Diana Crawford	Alexander Larro
Lee Grant	Michelle Beaver
Kevin Foisie	Kathleen McBurney
Maria Marx	Bridget Barnes
Kate Hooker	Marc Levine
Jake Sand	Catherine Picquet
Roger Chao	Kit Anderton
Victoria Wilson	Joanne Wright
Julie Goldstein	Joe Shimpfky
The Ruchti Family	Andy, Lori, Jacob and Payton Pascover

Marian Malatesta	Jeralyn Jacobs
Penny B	Ward Wilats
Elizabeth Waymire	Colleen D
Lara Hoke	Terry Duff and George Bernard
Joshua Welber	Sara Marston
Jonathan O'Connell	Adam Urrutia
Nicholas Baumann	Sarah Bender
Leah Press	Brian Kretz
Gina Herzfeld	Jennifer Towle
Greg Huang	Julia Woodward
Neha Mehta	Allison Patrick
Amy Gardner	Ellen Mossman
Jonathan Beal	Pete Rischbieth
Mark Williams	Margaret McCue
Trish Barr	Mary Ann Johnson
Sue Hyland	Michael Stillman
Josh Thompson	Denise Fitch
John Williams	Johanna Scully
Tammy Stevens	Hannah Weste
Alexandra Hurley	Jo Collins
Monique Sesto	Karen Morwood
Beck Cooknell	Josh Gold
Sophie Cambria	Charlie Wright
Jess Gonzalez	Elise Clark
Jo Williams	Andrew Morphett
A Womg	Pam C
Tom Contos	Nikki Williams
Katy Hopwood	Susan Mobbs
Kaye Feskanin	Wendy Cahill
Jill Brackley	Shauna Betof
Sarah Hooker	Andre "MoD" Anderson
Elizabeth Muth	Neil Roeth
Henry Muller	Alina and Anya Armstrong

Carole Kyle	Susan Stewart
Monika Schmidt	Nathalie Hoke
Barbara Bava	Robert Sterbal
Janet Levering	Surekha Paruchuri

**We'd Also Like to Thank Our Human Race
and Facebook Fundraisers**

Andrea Batteast	Heather Cahill
Karen Carpenter	Alexis Kargl
Simone Hooker	Fountain Jeng
Dave and Pat Leiner	Patty Lopez
Cherice Lovell	Sheila Neil
Emma Lynn Pascover	Doug Pascover
Julie Picquet	Julie Ross
Ryan Tracy	Cynthia Velasquez
Sophie Williams	

For more information please contact Doug Pascover at Doug_Pascover@imaginesls.org.