Lutheran Services in America®

Together we can

An LSA Conversation

Opportunity Brings Ability to Life!

ONE LSA NETWORK'S RESPONSE TO *ABUNDANT LIFE TOGETHER*

"Conversations"

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Lutheran Services in America invites you to join a national conversation about how we are called to love and serve our neighbors. This booklet is just one in an ongoing and open series that is meant to provoke thought and generate discussion. Like conversations that one might have with one's family, friends, professional or academic colleagues, these booklets are meant to be **flexible in style, open to a wide range of subjects, limited only by imagination** and interests, and ultimately available for use with multiple audiences: board or staff members, networking or external partners, synodical or congregational committees, seminary or college sessions, or anywhere that they might stimulate more conversation around a particular topic. The list is limitless. LSA only requires that in using the booklets, or parts of the booklets, that attribution is given to LSA and the original author.

Please let us know where and with whom you are having conversations and what you are learning. We would love to hear from you, and to gather your "conversation" into a booklet like this one, and then share it by way of the electronic communication vehicles of LSA. We hope for many conversations – with a sincere exchange of thoughts, perspectives and experiences – on issues and topics that will shape our future together. You may send your conversation to us as text; don't worry about formatting or heavy editing – LSA will "publish" the conversation in a design just like this booklet. Or do you have ideas for other conversations you would like to see started? Let us know. If you would like more information about the LSA *Conversations Series*, including the list of the current booklets in the *Series* as PDFs for downloading, go to www.lutheranservices.org.

Join the conversations happening at LSA by email at conversations@lutheranservices.org or by phone 410-230-3552. We will quickly connect back to you!

Opportunity Brings Ability to Life!

One LSA Network's Response to *Abundant Life Together*

Lutheran Services in America – Disability Network (LSA-DN)

The text for this booklet comes from the work of the Lutheran Services in America – Disability Network (LSA-DN) Partner Project Team: ***Bob Kay****, Director of Public Policy and Advocacy, Lutheran Social Services of New England and Partner Project Team Leader;* ***Bill Nolan****, Executive Director, KenCrest Centers;* ***Jeri Schoonover****, Vice President, Community Services, Lutheran Social Service of Minnesota;* ***Julie Swanson****, CEO, Lutheran Family Service of Virginia;* ***Meg Cooch****, Director of Public Policy and Advocacy, Lutheran Services in America Disability Network. The work of the Partner Project Team began in August 2007 and included a grant from LSA-DN and the ELCA; work was accomplished through a series of and hearings, meetings and phone conferences and culminated in the fall of 2011.*

Lutheran Services in America – Disability Network (LSA-DN) is an association of 21 organizations that dedicate all or a large percentage of their service to people with intellectual and developmental disabilities. Most of the LSA-DN organizations have been serving this population for more than a century and have been active participants in advocating for people to ensure that they receive the necessary governmental, community and church support they need to live complete and fulfilled lives. Learn more and get involved at www.lsa-dn.org or by contacting Meg Cooch, Director of Policy and Advocacy, LSA-DN at 202-626-7949 or mcooch@lutheranservices.org

The end

The "beginning" of the story is somewhat obscure. Was it embodied in the creation of Lutheran Services in America? Or did it already exist as a goal of the group which created the Disability Network?

I suppose you could make the case the beginning of our story is much, much older, part of the "abundant life" promised in John 10:10; embodied in the Good News we share together. Finding the seed of the story doesn't matter all that much, it is the fruit we celebrate.

The thief comes only to steal and kill and destroy. I came that they may have life, and have it abundantly.

John 10:10

Sweet fruit

The end of this story is sweet fruit indeed! Lutheran Family Services of Virginia has been around since 1888 and now, through collaboration with the LSA Disability Network, in 2011 it successfully completed a major expansion into services for people with intellectual disability.

Julie Swanson, CEO, recently announced Lutheran Family Services of Virginia's purchase of a well-respected provider of programs for adults with intellectual and/or developmental disabilities. Julie wrote in a news release:

> *We welcome this agency's staff and rejoice that our partnership will allow us to build on our existing services to children with disabilities and their families. With the skill and expertise of our new staff, we will be able to help individuals with disabilities experience what we all desire – lives of abundance, well-being and grace – as close as possible to family and loved ones. It is our hope that together we will create an even wider community of care for those who need us most.*

The acquisition means that Lutheran Family Services of Virginia will expand into management of group homes and sponsored residential care, in home, day support, transportation and respite care for adults with intellectual and/or developmental disabilities. The new agency has about 135 employees in Roanoke, Bedford, Lynchburg, Gretna, Altavista, Danville and Charlottesville, Virginia.

This is a positive step for people with intellectual disabilities in this part of our country. Residents of Virginia who languish on waiting lists have reason for renewed hope that a new, seasoned and dedicated faith-based service provider may stretch to find innovative supports and resources to meet their needs.

The acquisition also helps strengthen our own national network, as Lutheran Family Services in Virginia joins the disability network as a full

and participating member. Its board and CEO have benefited from the affiliation with Lutheran Services in America. They will now add their voice and expertise to the Disability Network and have committed to help "pay it forward" on behalf of the people of our mission.

Together We Can = Together We Did!

The theme of Lutheran Services in America, "Together We Can," has become real – Together We Did! The "we" included many people acting on behalf of a common vision to expand the mission of independent agencies to other affiliated and recognized agencies.

Since the inception of the Disability Network its members realized that there was great opportunity to expand the missions of services and supports for people with disabilities. Some organizations expanded far beyond the confines of their initial service area; some chose to grow within state, community, or campus boundaries.

All member organizations recognized that there was deep and growing need in America for supports and services far greater that the capacity of any existing Lutheran affiliated agency. We began to collaborate through project teams and this resource and talent sharing resulted in a directory of specialized personnel available to all members of the network, a robust and effective policy and advocacy function, and a physical presence in the nation's capital enhanced the capacity and reach of each network member's local effort.

These examples and others set the stage (pun intended) for a move to expand the current network.

An action play

In August 2007 seven LSA-DN board members became volunteer actors in a short play. Set in

the Commonwealth of Virginia the play begins with a call from a major donor to then Governor Kane asking for support on behalf of group of people with disabilities on a waiting list for services.

Through several scenes, the Governor and his staff attempt to respond in a positive way. He finds the current service provider community at capacity and seeks to enlist new providers into the field of supports for disabilities. The story could be happening all across the country as new funding and "choice" meets a low-capacity system of services and supports for people with disabilities and their families.

As the play goes on, the Governor's Secretary of Health and Human Resources, Marilyn Tavenner, contacts the local Lutheran agency. In this, the final scene, we witness a conversation between then chair of Lutheran Services in America Disability Network, Jeri Schoonover from Lutheran Social Service of Minnesota, and the CEO of Lutheran Family Services of Virginia, Julie Swanson. The "Jill," of course, is Jill Schuman, LSA President and CEO.

Is There Anybody Out There?

Julie proceeds to fill Jeri in on her call with Jill, her meeting with her management team and her call from the Commonwealth of Virginia.

Jeri Schoonover

Wow, sounds like you may have a real opportunity there. I'll bet not every agency got a call from the Secretary of Health and Human Resources. They must think highly of you.

Julie Swanson

I'd like to think you are right, but knowing how states work, they probably are in something of a bind and need some help.

Jeri Schoonover

It does make some sense. Your agency has a long history, you know the territory, you have office space and maybe some

program space. You have a donor base and probably more political connections than you know.

You kind of "speak the language" too if you know what I mean.

Julie Swanson
Sho'nuff' I do…but, that only goes so far.

We need help with best practices, billing, policies and procedures, IT, capital and cash flow and stuff we probably can't even think of.

You guys have the experience. Is there anybody out there among my Lutheran colleagues that can lend us a hand?

Jeri Schoonover
I can't say at the moment, but, you may be in luck.

I have a board meeting coming up in Milwaukee soon and I'll make sure this gets on the agenda. Julie, I'll get back to you as soon as I can.

And so … Is there anybody out there?

The LSA-DN board responded in two very positive ways. It allocated seed money to investigate the potential for mission expansion in Lutheran Family Services of Virginia or in some other state or agency. It also passed a resolution naming Bob Kay from Lutheran Social Services of New England as the chair of a project team to continue the work. Jeri Schoonover along Bill Nolan, CEO of KenCrest, also joined the project team.

The project team had several meetings with the Lutheran Family Services of Virginia (LFS-VA) CEO and members of her management team that resulted in a "go" for the further exploration of possible areas of expansion in Virginia. Swanson reported the activity to her board and solicited support in the

form of matching funds for the seed money authorized by LSA-DN.

The combination of financial investment from LSA-DN and matching funds from LFS-VA enabled the project team to begin work in three critical areas:

1. Recruiting an in-state consultant who was familiar with the state operations and the world of developmental disabilities. This was a critical step, providing assistance to the project team and to the CEO of Lutheran Family Services of Virginia.

2. Introducing LFS-VA and its intent to serve a new population. Conference space was rented at a hotel near the state capitol. Using a formal "hearing" process, project team members and the CEO entertained a series of key individuals. State employees, various association representatives and parent representatives were interviewed. As these potential "customers" were interviewed they also learned more about the long history of quality services already provided by LFSVA. The addition of out-of-state experts in the field helped to build even more credibility for the local agency.

3. Soliciting additional grant funding. Three agency development officers were enlisted in the effort to solicit grant funds that would enable a longer term commitment to consultant staff and defray the expenses of agency and project team members. The Evangelical Lutheran Church in America steered the group toward the Lutheran Services for the Elderly Endowment (LSEE). The grant request, "for the purpose of establishing a pilot demonstration project to increase capacity among Lutheran-affiliated human services agencies to provide services to adults with intellectual and developmental disabilities (I/DD), many of whom are or will soon be elderly or who are being cared for by elderly parents." was favorably received. Consultant services for a longer period were assured and work continued.

An excerpt from a report submitted by the Chair of the project team, Bob Kay, follows:

> *Of special notice is the identification of over 2,000 people with developmental disabilities who are now in the care of aging relatives (usually a parent) and who, in many cases, are themselves elderly. This group currently receives no services whatsoever and has been placed on an "urgent" waiting list. It is our hope that we will be able to assist LFS-VA in the development of a program that will address the needs of these elderly and aging individuals and their elderly care-givers.*
>
> *The mechanisms established for addressing these needs in Virginia are complex ... We will continue to work with LFS-VA and its staff and consultants to identify solutions that can be established within the existing service delivery system that have the best possibility of addressing the unmet needs of elderly care-givers and their aging sons and daughters.*

It is also important to acknowledge with thanks that Lutheran Services in America acted as the conduit and oversight for the distribution of funds from the LSEE Foundation.

There were a number of significant points that led to success:

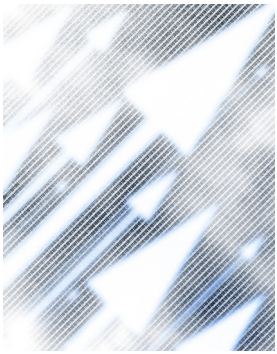
- The team set strategies and pursued specific tactics.
- Potential service delivery options, geographical location and responses to perceived need were all debated and refined. Strategic partners and potential acquisitions were on the agenda, along with decisions to respond or not respond to government requests for proposals.
- A candidate for potential purchase came from a contact from LSA-DN network member, Mosaic. A call from its Chief Financial Officer to the CEO of LFS-VA alerted the agency to a

potential acquisition and the target company became the focal point of interest.

- The project team was responsive. A series of conference calls helped to frame a letter of interest and ultimately an offer to purchase, if the terms of due diligence were satisfied. The target company entertained several offers and announced that the LFS-VA offer was accepted.
- The project team stayed in contact, sharing members' acquisition experience, the normative steps of acquisition and the elements of a thorough due-diligence process.
- The LFS-VA CEO, working with her board of directors, her CFO, bankers and attorney moved through all the steps necessary for a successful close and became the new owners of the target agency in July 2011. A fortunate epilogue was the hiring of the previously identified consultant as the VP for Program of LFS-VA.

It is anticipated that the new corporation will be converted to a non-for-profit and integrated into the current management structure of Lutheran Family Services of Virginia. It is also anticipated that LFS-VA will use this event as the catalyst to enrich the agency's strategy for further expansion into the field of services for and with people with disabilities.

Back to the future



And so, we go back to the beginning – or is it the End? Lutheran Services in America Disability Network will continue to seek opportunities to increase the breadth and scope of services to the people of our mission.

There is room at this network's table for the creation of new agencies that wish to serve people with intellectual disabilities or for the expansion of services by those agencies that presently do not serve this population.

Let's bring ability to life!

Called to Love and Serve Our Neighbors

In 2008, the LSA Board of Directors adopted these ends toward which LSA is to work:

The Lutheran social ministry system has integrated, results-driven capacity.

Lutheran social ministry organizations are healthy and vital, engaged in effective service and advocacy.

Lutheran social ministry organizations live out their Lutheran identities.

Lutheran social ministry expresses a spirit of possibility and a will that shapes the future.

LSA and its members, in partnership with others, are leading a movement of hope and grace toward a society that values generosity, inclusion, justice and mutual care.

LSA National Office
700 Light Street
Baltimore, MD 21230-3850
t] 800.664.3848
www.lutheranservices.org