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"With the many new initiatives at PI, I feel that we are truly 'on the verge' of something big..."  
  
Wanda Rogers



# Person Industries Annual Report

For year ending June 30, 2007

PI On the Verge ...  
PI On the Verge ...

# The Facts

<p>January 28, 2005 was declared Person Industries Day by the City of Roxboro and the County of Person as the program celebrated 20 years of serving people with disabilities in Person County.</p>	<p style="text-align: center;"><b>Our Mission</b></p> <p style="text-align: center;"><b>To empower and assist individuals in achieving their personal/vocational goals.</b></p>	<p>Person Industries is listed as one of the top 10 employers in Person County by <i>Where We Live Magazine</i>. Person Industries employs a total of 145 employees and 30 staff members.</p>
<p>Person Industries received the “Organization of the Year” Award from the North Carolina Rehabilitation Association in 1988 and 2000.</p>	<p>Person Industries opened Bee-Line Designs, our custom embroidery and screen-printing business, in 2002.</p>	<p>In 1998, Person Industries received the Governor’s Award for Outstanding Volunteerism for our community outreach volunteer program.</p>
<h2>Table of Contents</h2>		<p>Person Industries was established in November 1984 and opened to the public in January 1985 under the management of Orange-Person-Chatham Mental Health Center, now known as OPC LME.</p>
<p>Letter to Community, Customers, Partners and Employees</p>	<p style="text-align: right;">3</p>	
<p>PI Surveys Stakeholders to Determine Satisfaction</p>	<p style="text-align: right;">4</p>	
<p>OCS Program Contributes to Stakeholder Satisfaction</p> <p>Our Services and Our People</p> <p style="padding-left: 20px;">Vocational Evaluation/Work Adjustment Training/ Occupational Course of Study and Work First</p> <p style="padding-left: 20px;">CAP-MR/DD</p>	<p style="text-align: right;">4</p> <p style="text-align: right;">6</p>	<p>In 2007, Person Industries contracted with GKN for tray washing operations on first and third shifts. Managing a third shift operation was a first in our 22 year history.</p>
<p>Supported Employment</p> <p>Vocational Evaluation &amp; Work Adjustment</p> <p>ADVP</p>		<p>Person Industries publishes a monthly newsletter entitled “PI Events” that has been in circulation since May 1997.</p>
<p>PATC Database—Creating Solutions Now and in the Future</p>	<p style="text-align: right;">7</p>	
<p>Financial Summary</p>	<p style="text-align: right;">7</p>	
<p>PI Staff and Leadership</p>	<p style="text-align: right;">8</p>	
<p>PI and the Future</p>	<p style="text-align: right;">8</p>	<p>In July 2005, Person Industries became a department of Person County Government.</p>

PI On the Verge ...

To Our Community, Customers, Partners and Employees,

Person Industries is truly “on the verge”. After all the accreditations, licensures, and endorsements in fiscal year 2006, Fiscal Year 2007 has been a year of new opportunities and a clearer vision for the future. We are in the process of becoming something new and different.

What’s new or different at PI and why?

- **A new database—PATC (Paying Attention to Change)** is a comprehensive Access database of all employees of PI. The database at first appeared overwhelming, but with a team effort from the PI business officer, program managers and administrative support staff, the project is up and running. The database is not totally complete as it needs at least one year of fiscal data and reports, but even in its incomplete state, it is proving to be most valuable. As we continue to add data, we are also looking at methods to test and validate the data we retrieve from PATC. PATC is the first database that is consumer driven for PI and I know it will be instrumental to strategic planning and the future of our program.
- **A new service definition.** Community Activity and Employment Transitions (CAET) has been developed as a possible alternative to our current Adult Developmental Vocational Program (ADVP). Since this definition is still just a “concept” in the minds of state mental health personnel, we wonder how the CAET program will eventually look. The CAET definition is considered “best practice” and PI is on board for the future transition.
- **A new community-based contract with GKN Driveline.** This contract is different from the many others PI has successfully managed in that it presented the challenge of staffing and overseeing a third shift. It took many long hours to put together this workforce, but it is well worth the effort to see the 10 individuals, some of whom are in the Supported Employment Program, employed and making competitive wages.
- **A new cardboard baler.** With the addition of the baler, new opportunities and ideas are opening up in recycling. PI bales all of the cardboard waste at our worksites as well as some from the Person County Recycling Center. In addition, PI also shreds and recycles paper, proving that we are definitely “on the verge” of expansion in our recycling efforts.
- **A new computer lab.** PI is ready to offer online GED classes to our employees. In fiscal year 2008, the lab will expand to include software that will allow anyone to access the computer, regardless of the disability. Our employees need to have access to and experience all of the latest technology in order to continue growing to their highest potential.
- **A new program of service.** The Department of Social Services is partnering with PI to offer a Work Experience Program for Work First recipients. The program is community based and provides participants with successful work experiences to enhance their vocational skills. PI expects to start the program in the first quarter of fiscal year 2008.
- **A new floor plan.** PI will execute plans for a new production floor layout to increase efficiency and safety for the PI Main production area. The plan, now in the beginning stages, will logistically improve the work floor and production operations.

I am excited by all the new innovations that have transpired over this fiscal year. I look forward to seeing all the new ideas and opportunities unfold and expand. PI staff are working hard each and every day to ensure the success of all these new opportunities. PI is “on the verge” of becoming something new and different. Stay tuned as we move to the next level.

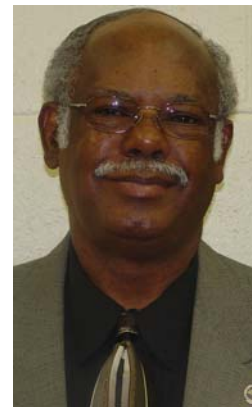
*Wanda Rogers*  
Executive Director



**Wanda Rogers**  
Executive Director



**Steve Carpenter**  
Person County Manager



**Johnny Lunsford**  
Chairman  
Person County Board of Commissioners



**Larry Bowes**



**Jimmy Clayton**



**Kyle Puryear**



**Larry Yarborough**

# PI Surveys Stakeholders to Determine Satisfaction



**PI's customer service in community contracts, like confidential shredding, was ranked average to excellent.**

Person Industries places high priority on customer service and satisfaction. Our customers, or stakeholders, as we call them, are the agencies we work with, businesses we work for, community contracts and employers. In Fiscal Year 2007, we surveyed over 40 community stakeholders about their satisfaction with the quality of our services, our timeliness, our follow-up and customer support. Agencies, such as Vocational Rehabilitation, DSS, and Person High School, rated our quality of services, customer service and follow-up as above average to excellent. Agency comments included: "Glad to be a cooperative agency," and "PI is a definite asset to Person County and its citizens".

Businesses for whom we do work ranked the quality of services, customer service and our ability to meet their work/production needs as average to above average. Several of our business customers had suggestions for improving our services. We are working on putting their suggestions into place.

We have a number of community contracts where we do confidential shredding, housekeeping and production work. These businesses ranked our customer support, the quality of the employees performing the work and our ability to meet their business needs as above average to excellent. One community contract customer

commented, "PI is outstanding".

Employers who hired people we serve during Fiscal Year 2007 ranked our ability to get the right employee in the right job as above average. They felt our customer service and support were above average to excellent. Several employers mentioned their employees by name, thanking us for bringing the employees to them.

The final question on all the survey forms is: "Would you recommend Person Industries to others?" We were very pleased that every one of our stakeholders gave us that recommendation. We appreciate all the stakeholders who took the time to let us know how they felt about how we are doing our job with them. We look forward to serving you for another year.

**A survey of the satisfaction of our stakeholders yielded the following comments:**

**"PI is outstanding"**

**"Continue to do what you are already doing so well. PI is a definite asset to person County and its citizens."**

**"Excellent job! Keep up the good work to our clients and the community!"**

## OCS Program Contributes to Stakeholder Satisfaction



**Pauline Porterfield and Lorri Barnett, PI/PHS Job Coaches**

The Occupational Course of Study (OCS)/School Transition Program had a banner year in 2007 with 13 students being placed in jobs and 11 seniors graduating with their OCS diplomas. While many teachers and family members played a part in the students' success, Pauline Porterfield and Lorri Barnett, PI/Person High School Job Coaches, were the primary job developers and coaches for these students. I spoke with Pauline and Lorri about the secrets to their great success.

**Q:** How did the great success of 2007 happen for you?

**L:** It was a real positive year. Many of the students were highly motivated. Some of the students didn't require much support and guidance. I could just direct them where they needed to be and they would do their part. Several of them had a lot of family support, which always helps. And several students had links to jobs in the community through family and friends. So we were able to place 13 students in jobs last year, which was our best year yet.

**Q:** Tell me about the method you use to help students become employed.

**P:** When I get a referral for a student who wants to go to work, I meet with the teacher, the student and the student's family to determine a direction for job search. I want to know the student's career goal and any jobs that they might be able to get now. I consult with the family about any vocational issues like transportation or the need for a certain work schedule. Then we do a resume. The student has to bring in a set of nice clothes to wear when we go out looking for jobs. The next step is the application process. I role-play with the student on how to go in and ask for a job application. When the student is comfortable with this, we go out and pick up job applications. Some students can fill out the application on their own; others do it with my help. When we return the applications and resumes to the employer, I assess the student's comfort level and ability to advocate for

## PI On the Verge ...

The 2007 fiscal year saw the rippling effects of mental health reform that began more than six years ago. The changes that occurred and those yet to come served notice that the PI programs of service are on the verge of major change. Here's how we performed ...

### ... in Vocational Evaluation/Work Adjustment Training/Occupational Course of Study/Work First

Vocational Evaluation/Work Adjustment Training/OCS/Work First programs served 60 to 70 individuals with barriers to employment during fiscal year 2006-2007. These individuals ranged from high school students to retirees who wanted to return to work. Thirty people receiving services were placed in jobs, returned to school or left the program at Person Industries ready to go to work. This was a banner year for the Occupational Course of Study students at Person High School with 11 seniors graduating with their OCS diplomas. Four Work First participants left PI with a better understanding of what it takes to be successful in the workplace. One went to work and is still working today.

As with all other PI departments, we are on the verge of new ways of achieving our goals and new relationships to help us in those achievements. We have made space for a computer lab and will be working with Piedmont Community College's Work Keys Program to assist our clients in becoming qualified for local industry jobs. Our relationship with Vocational Rehabilitation is changing as we have new local counselors, a new unit manager and a new VR Liaison. In addition, VR has made some changes in the way they provide services and we are adjusting to these changes through diligent communication and increased flexibility in how we do things at PI. We anticipate more community-based services and little to no wait time for people referred for services through Vocational Evaluation/Work Adjustment Training/OCS/Work First Programs.

### ... in CAP-MR/DD

The Community Alternatives Program for Mental Retardation and Developmental Disabilities (CAP-MR/DD) is likewise transitioning based on state guidelines and the individual needs of those served. The program is poised for growth and expansion in the following areas:

#### ■ in the number of people receiving services

Currently there are 20 individuals receiving CAP-MR/DD services for some portion of the day. This represents a 20% increase over those served last program year. There are nine people on the waiting list for individualized or small group services.

#### ■ in recycling contracts



## Our Services and Our People

PI's recycling efforts include shredding contracts brought in-house and some based in the community. These contracts employed six people in the CAP-MR/DD Program. Person Industries continues to explore other recycling opportunities for cardboard, paper and plastics. Potential for growth in the field is good but the need for space for expansion is a concern.

#### ■ in community employment

The number of CAP/MR-DD recipients working in the community has increased. This year there are five individuals working in community-based jobs compared to four recipients last year.

### ... in Supported Employment (SE)

Supported Employment had a year worthy of reflection. In addition to developing a partnership with the Department of Social Services to provide work experience for Work First participants, the program accomplished the following:

- **Nine job placements** — Placements were made in the categories of retail (11%), laborer (45%), janitorial (33%) and industry (11%).
- **Eight major benefits**—Major benefits occur when employees learn their jobs and become stable and independent.
- **Six 26's**— 26's occur when employees maintain employment for three months or more
- **100% satisfaction from SE consumers**

Bee-Line Designs, PI's screen-printing and custom embroi-

# Our Services and Our People

dery business is also operated by the SE Program. Bee-Line achieved a record year of sales—\$49,769.51.

As personal information becomes more vulnerable, our confidential shredding services grow, providing viable work for our employees. Service definitions are continuing to change, offering challenges of their own. It is the combination of the many challenges and the constant evolution of the “how tos” that keep us consistently “on the verge”.



## ... in ADVP (Adult Developmental Vocational Program)

The ADVP Program is on the verge of changes.

The ADVP that we know of as Adult Vocational Developmental Program, is being looked at by the State Division of Mental Health, Developmental Disabilities and Substance Abuse Services as well as community rehabilitation programs with an eye towards change. An employment work group that included members of NCARF, APSE, VR and the Division, was established to consider alternatives. The group crafted CAET (Community Activity and Employment Services) as a possible new way of conceiving ADVP services. So far, the Division has endorsed the CAET concept as a best practice. In the coming year, we hope to have more information to help us better understand the new concept. With understanding comes the opportunity to explore this concept with our Local Management Entity (LME).

Person Industries now has a computer lab that will offer GED classes to four people from the ADVP program. These partici-

pants will be attending these classes at a minimum of six hours per week.

### Highlights

- 95% of people receiving ADVP services participated in training classes, leisure activities and/or community-based job sampling.
- PI received all allocated monies for services provided through IPRS this fiscal year.
- 38% of employees achieved at least one goal this fiscal year.
- Employees increased their productivity this year by 1.801%.
- 98% of people served were satisfied with services they receive at Person Industries.

## OCS Program Contributes to Stakeholder

### Satisfaction Continued from page 4

themselves. Often, I will go in with the student and speak with the employer the first couple of times, but I like the students to do this on their own. One student wasn't having any response from employers and I felt that she was just going in and dropping off the application. So I started going in with her. I would make the introductions and then if the employer asked about hours, I would look to her and she would answer those questions. This approach seemed to help and she did

find a job.

Q: What is the hardest thing about trying to find jobs?

P: The hardest thing about doing job search is finding a good job match; one the students are willing to stick with. And Person County is so small that there's just not a lot of opportunity. Once an employer hires a student, I don't like to keep going back to them. So I look for new, untapped opportunities.

Q: How do you feel the OCS Program has benefited the students at Person High School?

L: The OCS Program benefited the students by teaching them the skills to be self-sufficient. They learned how to think and plan for their futures. They learned that despite having a disability, they still had quality skills that could be enhanced and marketed. Students had the opportunity to use their hands to make up for their reading or writing deficit and to be the best at what they were doing. We always encouraged the students to try, and made them aware that if they failed, we would be there to support them. As a job coach, I feel that the OCS program is a necessity for students with disabilities and their families. Without it, the students have no support.

# PATC Database — Creating Solutions Now and in the Future

Paying attention to change is a necessary action for every business and program that wishes to grow and remain viable. In spite of the wish, it does not always become so, at least not without effort to observe trends, track progress and plan for future growth. How though, does a small rehabilitation program on a limited budget do this? For the corporate world where money flows freely, where business and financial talent is easily recruited and where software is constantly being developed for any conceivable purpose, these tasks are not so difficult. However, for Person Industries, the effort had become quite daunting.

PI needed a means to track basic data on people employed in the production department and in our programs of service. This was easy enough for basic payroll software to handle. But what if there was also a need to

track NCSNAP and Target Population scores that are attached to expiration dates, as well as, the many authorizations, both with beginning and ending dates for each person? Add to that, the community inclusion experiences for each person and any job placement details and/or outcomes. What about tracking incidents and accidents? And leave, yes, we had to track any Family and Medical leave as well as any personal leave granted by PI. And for those employees who are paid on a piece rated basis, we needed a way to track their time studies, both the current rate and due dates for new rates. Then, when people moved from one program to another, we certainly needed to track their movement, whether they were enrolled in one program or several programs concurrently. And wouldn't it be nice to have all of the separation data in one place so that it is not necessary to rifle through charts and files when someone calls for employment verification or other information? And since we didn't want to spend excessive time retrieving this data, we needed quick and easy reports. Ah, a system that could do all of that. What a nice dream.

Even though it sounded like a dream, Veronica Wilkerson, PI Business Officer, was charged with learning Access well enough to accommodate all of these needs and build this highly demanded database. She was sent to trainings, given how to books and finally a one-on-one consultant to help with the project. And from it all, PATC (pronounced *Pat see*) was born. PATC had also come at the behest of PI's accrediting body, CAREF, who continually wanted to know how program managers were able to track and give validity to their data.

PATC is just off the ground but is proving to be invaluable in data tracking and report operations. Where program managers and administrative staff may have pulled data from several spreadsheets in the past, they are now able to print one report in PATC or run one query. Information is literally at their fingertips.

After the database is expanded to it's fullest potential, PI plans to investigate the possibility of licensing and selling this product to community rehabilitation programs with similar needs. This database is "on the verge" of creating future solutions.

The screenshot displays a grid of report options categorized into four sections:

- General Information:** EEOC-4 Report, Employee Information for Public Listing, Employee Listing (General Info)\*, Employee Listing by Type (All), Employee Listing by Type (Current), PI vs. Program Employee Summary (Ratio)\*.
- Program Information:** Authorization Dates, Employee Listing by Program and Employee Type\*, Guardian List, Notification of Early Closing, PI vs. Program Employee Summary (Ratio)\*, Disabled for Work Form, Wait List (Current).
- Personal Information:** Employee Listing by Age, Employee Listing by Race\*, High School Graduates.
- Scores:** GAF Expiration Dates, NC SNAP Expiration Dates, Target Pop Expiration Date.

A snapshot of PATC Reporting Screen shows the array of reports that may be printed from the database.

## 2007 Financial Summary

Revenue	FY 2007	% of Total	FY 2006	FY 2005
County	\$195,085.14	7.3%	\$118,410.53	\$84,999.88
Medicaid	\$331,609.37	12.3%	\$291,429.24	\$355,093.49
Program Generated	\$1,414,907.14	52.7%	\$1,415,917.63	\$1,450,637.70
Contributions	\$6,779.48	0.3%	\$8,979.76	\$300.00
Miscellaneous	\$1,313.95	0.0%	-\$333.05	\$5,743.68
State Revenues	\$736,557.80	27.4%	\$789,561.89	\$686,660.43
Federal Revenues	\$0.00	0.0%	\$0.00	\$0.00
Agency Support	\$0.00	0.0%	\$29,758.66	-\$44,411.54
<b>Total</b>	<b>\$2,686,252.88</b>	<b>100.0%</b>	<b>\$2,653,724.66</b>	<b>\$2,583,435.18</b>
<b>Expenses</b>				
Salaries & Benefits (Staff)	\$1,350,992.89	50.3%	\$1,191,123.54	\$1,229,222.30
Salaries & Benefits (Employees)	\$901,311.91	33.6%	\$1,025,913.65	\$881,977.56
Supplies and Materials	\$83,337.23	3.1%	\$80,243.04	\$86,807.58
Current Obligations & Services	\$142,758.87	5.3%	\$138,976.00	\$167,904.80
Fixed Charges and Obligations	\$116,820.40	4.3%	\$138,668.10	\$167,102.40
Capital Outlay	\$24,373.78	0.9%	\$3,595.64	\$1,153.00
Client Services Contracts	\$66,657.80	2.5%	\$75,204.69	\$4,856.00
<b>Total</b>	<b>\$2,686,252.88</b>	<b>100.0%</b>	<b>\$2,653,724.66</b>	<b>\$2,539,023.64</b>

Foremost on the list of PI's Strategic Plan is the goal for our program to become less dependent on local and state government for support. This year's reliance on Person County Government was greater than usual because of the MAPS pay increase for staff salaries that took effect in November of 2006. The increase, though welcome to staff members, was unexpected and therefore not budgeted in Fiscal Year 2007.

If all goes as we strategically plan, the MAPS increase, which will inflate the salary line of the PI budget for the next few fiscal years, will be absorbed with program generated revenue.

## The Staff

Wanda Rogers  
Director

Roderick Canada  
Production Manager

Judith Casseday  
Vocational Evaluator

Becky Clayton  
Program Manager

Vernon Dowdall  
Work Adjustment Coordinator

Rhonda Gentry  
Maintenance/Production Technician

Lisa Jeffreys  
Program Manager

Dana Drumwright  
Program Specialist

Charles "Jody" Suitt  
Production Manager

Veronica Wilkerson  
Business Officer

Field Supervisors  
Ozell Barnett  
Alison Folley  
Annie Gibson

Job Coaches  
Lorri Barnett  
Sarah Martin  
Pauline Porterfield  
Tina Wilkerson

Production Assistants  
Clementine Goodman  
Shelia Long  
Sorside Zamora

Habilitation Assistants  
Beverly Berned  
John Dickerson  
Gennie Johnson  
Sharion Lawson  
Carolyn Fuller  
Evelyn Moore  
Gary Parks

Yvette Farmer  
Payroll Technician

Carolyn Walters  
Admin Support Specialist

## Accomplishments—Now and Future



### Some of what we accomplished in FY 2007

- Collected 100% of State revenues
- Bee-Line Designs exceeded sales expectations and experienced a record breaking year in sales.
- Renewed DFS licensure effective January 1, 2007.
- Procured two new customers for production sales and managed first 3rd shift operation
- Created comprehensive employee/consumer database
- Created computer lab for on-line GED and Work Keys
- Held Open House for Disability Awareness Month for community awareness and education
- Established PI Client Rights Committee, the need for which was dictated by our divestiture from OPC LME.

### Some of what we plan to accomplish in the future

- Increase program generated revenue in order to decrease local governmental support to less than 2% of total budget
- Move toward becoming an affirmative enterprise
- Merge PI Manufacturing and PI Packaging into one facility to increase efficiency
- Increase sales by seeking new customers and increasing business with existing customers
- Increase community-based services
- Finalize and license PATC Database
- Become "greener", both in practice and in service offerings by being more conscious of the environment and expanding shredding and recycling contracts



601 North Madison Boulevard  
Roxboro, NC 27573  
336-599-7571 (Phone)  
336-597-2834 (Fax)