




Nearly 20 years ago, an innovative demonstration project focused on managing services and financing for people with serious mental illness was drawing to a close. From the late 1980s through 1992, Integrated Mental Health supported the transition of more than 700 people from the Rochester Psychiatric Center into the community. Under this capitated model, providers were responsible for ensuring comprehensive care – across all aspects of living – for each person enrolled. The project ended in 1992, but support for system planning, management, and service development continued under the auspice of a new not-for-profit organization – Coordinated Care Services, Inc. Today, as CCSI stands poised to support our customers in implementing the policy and practice changes prompted by Medicaid redesign and health care reform, we are mindful of the principles that gave us our beginning: data-informed service development and evaluation, effective fiscal management, and improved quality of life for individuals in the process of recovery.

This Annual Report follows a timeline format. With key shifts in State and Federal policy as a backdrop, we chronicle the past two decades – highlighting the evolution of our services, our involvement in projects that have shaped our organization and the systems within which we operate, and our work with customers – both locally and across the state. As we take time to appreciate how far we have come, and look forward to the work that lies ahead, we are grateful for:

- Our dedicated, talented staff – both those who are working with us today as well as those who have supported us along the way;
- Our Board of Directors – who have given generously of their time and talent to help shape our direction and foster our growth and development;
- Our customers – many of whom we have had the privilege of working with for more than a decade toward the development of a system that supports recovery and wellness for all.

Sincerely,

  
Anne L. Wilder  
President

  
Nicolette Leathersich  
Chair, CCSI Board of Directors

## Board of Directors 2011

Nicolette G. Leathersich, Chair  
NYS ACCES - VR

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Community Volunteer

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YMCA of Greater Rochester

Ellery Reaves, Secretary  
Genesee County Mental  
Health Services

Nancy Carlucci  
Community Volunteer

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US Department of Veterans Affairs /  
Tulane University School of Medicine

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Rochester Oratorio Society

Amy Galiana  
Eastman Kodak Co.

Cindee Gray, MBA  
RIT and RGHS Alliance

Cheri Jones  
Community Volunteer

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Wegmans School of Pharmacy at  
St. John Fisher College

Robert Tobin  
Simon Graduate School  
of Business at the  
University of Rochester

Ronald Vallot  
Community Volunteer

Joseph Vasile, MD  
Greater Rochester Independent  
Practice Association (GRIPA)

George Weidemer  
Community Volunteer

Lisa Zelazny  
Community Volunteer

## 2011 Financials

Statement of Activities	2011	2010
<b>Program Support and Revenue</b>		
Support and Revenue	\$ 42,612,705	\$ 42,198,832
Other Revenue	\$ 52,134	\$ 120,095
Investment Income	—	—
Total Support and Revenue	\$ 42,664,839	\$ 42,318,927
<b>Program Expenses</b>		
Direct Expenses	\$ 5,499,118	\$ 5,660,768
Pass-Through Expenses	\$ 37,133,340	\$ 36,585,909
Net Expenses	\$ 42,632,458	\$ 42,246,677
Subtotal Program Revenue Net of Expense	\$ 32,381	\$ 72,250
Investment Income	\$ 97,560	\$ 145,782
Depreciation	\$ (161,900)	\$ (179,611)
Total Excess of Rev Over Expense	\$ (31,959)	\$ 38,421
Net Assets - Beginning of Year	\$ 1,858,878	\$ 1,820,457
Net Assets - End of Year	\$ 1,826,919	\$ 1,858,878

## 2011 Customer List

Monroe County Department of Human Services –  
Office of Mental Health, Child and Family Services, Office for the Aging,  
and Rochester-Monroe County Youth Bureau

Association for the Blind and Visually Impaired – Goodwill Industries of Greater Rochester, Inc.	NYS Conference of Local Mental Hygiene Directors
Broome County	NYS Department of Health
Cattaraugus County	NYS Office of Alcoholism and Substance Abuse Services
Chautauqua County	NYS Office of Mental Health
Chenango County	NYS Unified Court System - Office of the Seventh Judicial District
Children's Aid Society	Oneida County
Children's Technical Assistance Center	Onondaga County
City of Rochester	Ontario County
Columbia County	Orange County
Community Missions of Niagara Frontier	Orleans County
Council of Agency Executives	Oswego County
Erie County	Rensselaer County
Family Counseling of Cortland, Inc.	Rochester City School District
Franklin County	Schenectady County
Friends of the New Leaf	Schuyler County
Genesee Council on Alcoholism & Substance Abuse	Services for the Underserved, Inc.
Genesee County	Steuben County
Genesee County Mental Health Association	Ulster County
Greene County	University of Rochester - Family Institute
Livingston County	Warren County
Madison County	Washington County
McHenry County Family CARE (IL)	Wayne County
Nathan Kline Institute	Westchester County
National Building Bridges Initiative	Wyoming County
National Center for Mental Health and Juvenile Justice	Youth M.O.V.E. Maine
New York Care Coordination Program	Youth M.O.V.E. National



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CCSI ANNUAL REPORT 2011



# CCSI Timeline: A Celebration of 20 Years of Work

NYS/National Policy

Downsizing of State Psychiatric Centers.  
**1992**

**EARLY 1992** Community reinvestment funding supports enhanced community services.

**EARLY 1992** Increased emphasis on cultural competence / elimination of disparities in outcomes.

NYS enacts MH Special Needs Plan -- Legislations sunsets (1998)  
**EARLY 1998**

Surgeon General's report highlights significant disparities in health outcomes / life expectancy for mental health consumers -- focus on integration of physical and mental health.  
**EARLY 2002**

**MID 2008** Increasing State budget pressure / focus on Medicaid Reform

**MID 2009** Outpatient clinic restructuring - Mental Health and Chemical Dependency

**LATE 1999** Assisted Outpatient Treatment (AOT) begins.

**EARLY 2004** NYS OMH Winds of Change: Increased focus on quality and evidence-based practices.

**EARLY 2010** Personal Recovery Oriented Services (PROS) begins.

CCSI Services and Customers

Integrated Mental Health, Inc. Demonstration funded by NYS OMH, Monroe / Livingston counties, and United Way. Capitated payment system for individuals who were seriously mentally ill. Collaboration among area health systems. Expansion of community-based mental health services and the downsizing of Rochester Psychiatric Center. Significant savings reinvested into community services.  
**1987-1992**

**EARLY 1992** IMH transforms and incorporates as Coordinated Care Services, Inc. Single contract with Monroe County Office of Mental Health (MCOMH) for mental health contract and data management services.

**LATE 1997** Contract w/MCOMH expands to Chemical Dependency and Developmental Disability services.

**LATE 1999** MCOMH support expands to include special programs, including Youth Emergency Services, Consortia on Trauma, Illness and Grief, and Assisted Outpatient Treatment.

**EARLY 2003** Support MCOMH's work with law enforcement: Emotionally Disturbed Persons Response Team.

**MID 2006** Support expands to Monroe County ACCESS - \$9M SAMHSA System of Care grant to transform mental health services for children and families.

**MID 2008** Restructure scope of service to support MCOMH LGU functions.

**LATE 1996** 1st contract w/Monroe County DHS for transportation services.

**LATE 1999** Continued support to MC DHS - ARES, fiduciary and staffing support to Youth Bureau and Office of the Aging. Begin project management of Youth & Family Partnership program (1997)

**LATE 2006** Begin project management and staffing support to MC DHS for Family Access and Connection Team.

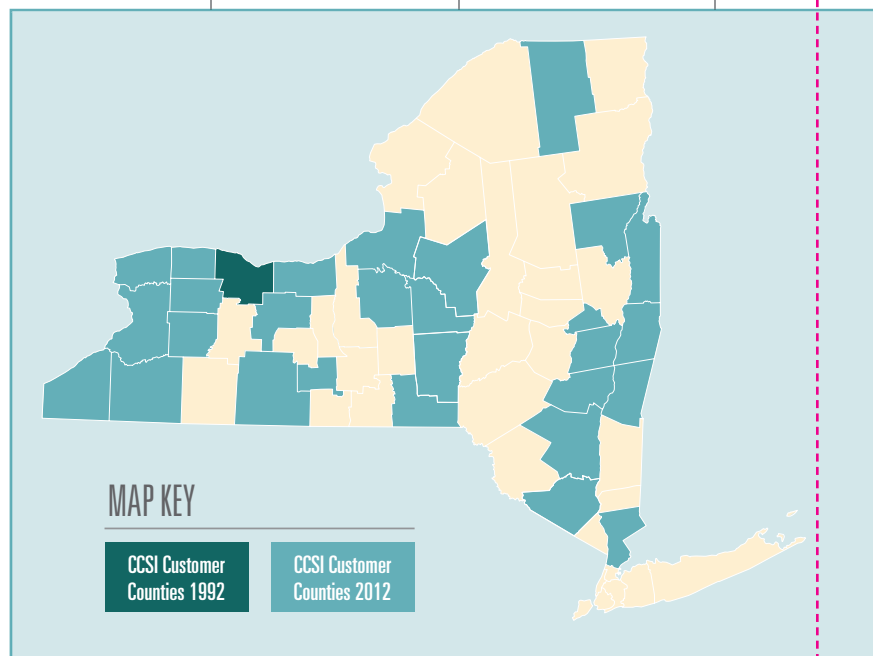
**MID 1992** Services to support local Diversity Consortia begin.

**MID 1997** CCSI hosts first Cultural Competence conference.

**LATE 1999** Cultural and competence assessment tool developed and provider assessments begin.

**EARLY 2003** Collaboration with Nathan Kline Institute on Cultural Competence to standardize assessment tool.

**LATE 2006** Cultural Competence support services to county government and provider agencies continues.



**EARLY 1998** CCSI supports Western NY counties in planning for Special Needs Plan.

**LATE 2000** Collaboration formalizes as the WNY Care Coordination Program (WNYCCP) planning continues.

**MID 2003** Initial focus on practice transformation. Project shows improved outcomes and contained costs. Statewide dissemination begins as well as enhancements to education/training curriculum.

Incorporates as NY Care Coordination Program. Partners with Beacon Health Strategies.  
**MID 2011**

Selected as 19-county Western Region BHO together with Beacon. Health Home planning begins.

**LATE 2011**

**MID 2002** First WNYCCP staff hired.

**EARLY 1998** CCSI begins to offer Technical Assistance (TA) services to other counties. Consolidated fiscal reporting, Medicaid data analysis, performance management.

**LATE 2003** TA services continue to expand: By 2012, more than 20 counties across NYS contract with CCSI for TA services, including financial services support, on-site staffing and special projects.

**MID 2001** The Conference of Local Mental Hygiene Directors contracts with CCSI for Technical Assistance services.

**EARLY 2001** Contract with NYS DOH for Facilitated Enrollment with Monroe & Livingston counties. FE services continue due to successful RFPs in 2006 and 2011.

**EARLY 2005** CCSI services expand to include Evaluation & Services Research.

**EARLY 2008** Evaluation activity continues to expand to include JADE, Drug Court, Veterans Court, Health Futures, and evaluation of programs for county mental health and human service departments.

1984 1992 1994 1996 1998 2000 2002 2004 2006 2008 2010 2012

Board of Directors  
We thank our board of directors for their leadership during the past two decades. Board chairs have included:

Samuel Reeder Thomas Riley John Mead Tim Doherty Hilda Escher Steven O. Russell Sister Barbara Moore Nicki Leathersich

Staff  
President: Glenn Gravino (January, 1993-2001) President: John D. Lee (2001-2006) President: Anne Wilder (2006-Present)

Number of Employees  
10 15 26 103 133