



My company,  
Your company,  
Our company!

*100% Employee-Owned!*

ANNUAL REPORT  
**2022**  
2022

# A Year of Growth

Dear IPMG Stakeholders,

*As I reflect on 2022, several key words come to mind; Pride, Thankfulness, and Inspiration. I am honored to lead such an exceptional organization and am extremely proud of IPMG's success over the past year. I am thankful for our extraordinary employee owners who provide the dedication, enthusiasm, and professionalism that drives our success, and I am continually inspired by the individuals and families IPMG is privileged to serve.*

*2022 was another transformative and exciting year for IPMG. It was a year in which we renewed and strengthened our long-range strategic plan, which provides a commonly understood and shared vision, plan of action, and a shared sense of accountability and direction. This plan is the roadmap that will allow us to continue to support our community with skill, compassion, and the highest quality services for many years to come.*

*Highlights of IPMG's strategic plan include:*

- Further defining the mission of IPMG to be an exceptional organization that supports individuals as they live their best lives. We do this by: Working with individuals, in collaboration with those who support them, to achieve their personal dreams, ambitions, and goals. Providing our employee-owners with the resources they need to do their jobs exceptionally well. Expanding the services our company provides and consistently performing at a best-in-class level.*
- Affirmed IPMG's commitment to fostering an environment where all people feel welcomed and valued regardless of race, ethnicity, social background, religion, gender and gender identity, sexual orientation, age, or disability. At IPMG, we encourage, support, and celebrate the diverse voices of IPMG Employee Owners and the individuals and families we are privileged to serve.*
- Development of an organizational vision of IPMG in 2030 to ensure we are the premier provider of care-related services in Indiana while continuing to expand our services in areas of proven expertise. And, most importantly created a structure and developed talent to ensure that IPMG thrives for generations of employee-owners to come.*

*Although I am looking forward to the future, one thing that will not change is our commitment to the core values on which the foundation of IPMG is built; Person-Centered Thinking, Self-Determination, Community Integration, Freedom of Choice, and Advocacy.*

*In closing, I invite you to read the following pages of IPMG's 2022 Annual Report which includes our key areas of focus over the past year and the results we achieved. None of this would be possible without our amazing Employee Owners, board members, and community partners and I would like to personally thank each and every one of you for your time, commitment, dedication, and support over the past year.*

Blessings,  
Karen D. Brummet

*Karen D. Brummet*  
Chief Executive Officer



Karen Brummet

The mission of IPMG is to be an exceptional organization that supports individuals as they live their best lives.

IPMG envisions the individuals we support will live quality, self-determined lives as integral and valued members of their communities.

# Leadership

IPMG's leadership team is comprised of a Board of Directors, a Chief Executive Officer, Department Directors, Associate Director, Assistant Directors and Program Managers who each bring to the table a unique and extensive experience in the delivery of services to individuals throughout Indiana. Their experience ensures that this organization possesses the level of expertise required to respond to the needs of the individuals we serve, and to deliver services to them in a person-centered and effective manner.

**Karen Brummet**



*Chief Executive Officer,  
Board of Directors*

**Ann Robertson**



*Board of Directors*

**Milton Thompson**



*Board of Directors*

**Mark Flinchum**



*Board of Directors*

**Sharon Hearn**



*Board of Directors*

**Larry Smith**



*Board of Directors*

**Brian Souders**



*Board of Directors*

**Art Vasquez**



*Board of Directors*

**Mark Ford**



*Chief Financial  
Officer*

**Jennifer Ewalt-Johnson**



*Chief Administrative  
Officer*

**Carolyn Underwood**



*Director of  
Case Management Division*

**Lana Hunt**



*Director of Communications  
and Professional Development*

**Jennifer Lantz**



*Director of  
Development*

**Michael Wagoner**



*Director of Corporate  
Compliance & IT*

**Heather Sorrells**



*Associate Director,  
Case Management  
Division*

**Michele Phillips**



*Assistant Director,  
Case Management  
Division*

**Tony Hakel**



*Assistant Director,  
Case Management  
Division*

**Janet Brummett**



*Program Manager,  
Wraparound  
Facilitation*

**Sarah Moore**



*Program Manager,  
Care Management  
Division*



# Business Operations

## Did you Know?

IPMG is proud to be CARF accredited and a certified provider of Indiana's Home and Community Based Waiver programs and the Child Mental Health Wraparound program.



IPMG's Corporate headquarters houses many divisions of the Business Operations Department, including the Chief Executive Officer, Human Resources, Customer Service, Communications and Professional Development, and Finance. Our conference rooms provide space for monthly new employee orientations, leadership meetings, committee meetings, and more.



Chief Administrative Officer, Jennifer Ewalt-Johnson, oversees the departments of Human Resources, Corporate Compliance, IT and Customer Service.

- The Human Resource team consists of an HR Director, Senior HR Business Partner, two HR Business Partners and a Benefits Specialist. These professionals paved the way for the growth, onboarding and retention of 2022!
- Corporate Compliance is overseen by Michael Wagoner, Director of Corporate Compliance and IT, who ensures IPMG follows all standards and ethical practices.
- Small but mighty, IPMG's Customer Service Representative manages incoming calls and client inquiries, prepares new hire technology and materials and so much more!



Professional Development and Communications and Outreach are managed by Lana Hunt, Director of Communications and Professional Development. This team creates and manages professional development, training, communications, and outreach events, that support IPMG in continuing to be best in class. They also manage all external and internal communications, and organizes outreach events in local communities.



IPMG's Chief Financial Officer, Mark Ford, oversees the finance department. This team, comprised of a Controller and Staff Accountant, controls the income and expenditure in addition to ensuring effective business running with minimum disruptions.



# Case Management Division

Since 2006 IPMG has been proud to provide expert Case Management services to Individuals receiving support through Indiana's Division of Disability and Rehabilitative Services waivers. Through the leadership of Carolyn Underwood; Director of Case Management Operations, Heather Sorrells; Associate Director, and Assistant Directors: Michele Phillips and Tony Hakel, IPMG Case Managers are expert navigators that are able to guide and support individuals receiving the Family Supports and Community Integration and Habilitation Waivers to have the information and tools needed to best utilize all available waiver services and supports. Case Managers educate Individuals as they make choices about their desired goals, and efficiently coordinate services that support those goals. They also help Individuals and families access non-waiver services, including medical, social, educational, and natural community supports.

As Indiana's largest provider of Case Management for the Family Supports (FS) and Community Integration and Habilitation (CIH) Waivers, IPMG provides services in every county throughout the state of Indiana. Our professionals live in or near the Individual's community and are able to link them to valuable local resources and to assist them with becoming a valued member of that community.

## Did you Know?

In 2022, IPMG's Case Management Operations was recognized for the Best-in-Class Services through receipt of the Company Champion Award at the LifeCourse Showcase and The NACM Program Award from the National Association of Case Management. IPMG's Case Management Operations was again awarded a 3 year CARF accreditation, their highest level of accreditation.



**Left:** Carolyn Underwood, Director of Case Management Division

**Center-Left:** Heather Sorrells, Associate Director, Case Management Division

**Center-Right:** Michele Phillips, Assistant Director, Case Management Division

**Right:** Tony Hakel, Assistant Director, Case Management Division

## [www.gotoipmg.com](http://www.gotoipmg.com)

**Visit Us Online:** IPMG's website at [www.gotoipmg.com](http://www.gotoipmg.com), provides a wealth of information on the CIH and FS Waivers. Read about available waiver services, answers to frequently asked questions, state and local resources, success stories of Individuals served by IPMG, and more!



# Wraparound Facilitation Division

Wraparound is a voluntary program designed to help families when youth experience serious emotional and/or behavioral challenges. With assistance from family, community members, professionals and our facilitators, the child is “wrapped” in a variety of services tailored to support Participants as they move closer to reaching their Family Vision. Youth in Wraparound are more likely to remain in their communities for treatment rather than being placed in long-term residential treatment facilities.

**IPMG Growth:** In 2019, IPMG was thrilled to announce the addition of Wraparound Facilitation services to our company, offering an alternative option for those needing a more in-depth treatment plan. Beginning the program with just three employees, IPMG’s Wraparound team has grown to 53 this past year, currently serving over 350 participants!

IPMG was approved for the Children's Mental Health Initiative in 2021, which provides an additional funding source. When community services are not able to maintain the child at home, the CMHI may fund higher level out of home services for stabilization purposes only.

In 2022, IPMG’s Wraparound Division continued to improve their onboarding training to new staff, created multiple committees including: marketing, peer mentorship, IT and a division EAC. Wraparound was also excited to move from the Implementation to the Sustainability stage in the DMHA state program oversight review!



Janet Brummett, Program Manager



**Wraparound in Indiana:** IPMG was the CMHI Access site for 19 counties in 2022. This is exciting news in the continued growth of the Wraparound program. IPMG proudly serves 52 counties, and will continue efforts to expand throughout all of Indiana. Janet Brummett, IPMG’s Wraparound Program Manager, has been a certified Wraparound Facilitator since the launch of Indiana’s Wraparound Program in 2014. Combined with years of experience from our administrators and staff, IPMG brings knowledge and commitment while supporting Individuals on their path to community integration. With the founding principle of “the needs of the Individual are paramount” in mind, IPMG Wraparound Facilitators strive to become expert navigators, guiding Individuals and families to access quality, integrated services and supports.



# Care Management Division

In 2020, IPMG was thrilled to announce the creation of our Care Management Division. Since then, the program has grown quickly, from three employees in 2020, to 20 in 2022. IPMG's Care Management Division participated in many outreach events to reach clientele, including senior fairs, BINGO's, presentations to vendors, the Lafayette Alzheimer's Walk, and more.

## Care Management:

Indiana's Medicaid waiver program began in 1981, in response to the national trend toward providing home- and community-based services. In the past, Medicaid paid only for institutional-based, long-term care services, such as nursing facilities and group homes. Under the Waiver program, it now pays to provide community-based services to people with disabilities who meet specific criteria. Those services are provided in a person-centered manner and are designed to respect the Individual's personal beliefs and customs. Specifically, the Waiver program is meant to assist a person in:

- Become integrated in the community where he/she lives and works
- Developing social relationships in the person's home and work communities
- Developing skills to make decisions about how and where the person wants to live
- Being as independent as possible

The Indiana waiver program is administered by the Indiana Family and Social Services Administration (FSSA) through the Division of Aging (DA). The DA oversees two waivers, the Aged & Disabled Waiver (A&D) and the Traumatic Brain Injury Waiver (TBI).



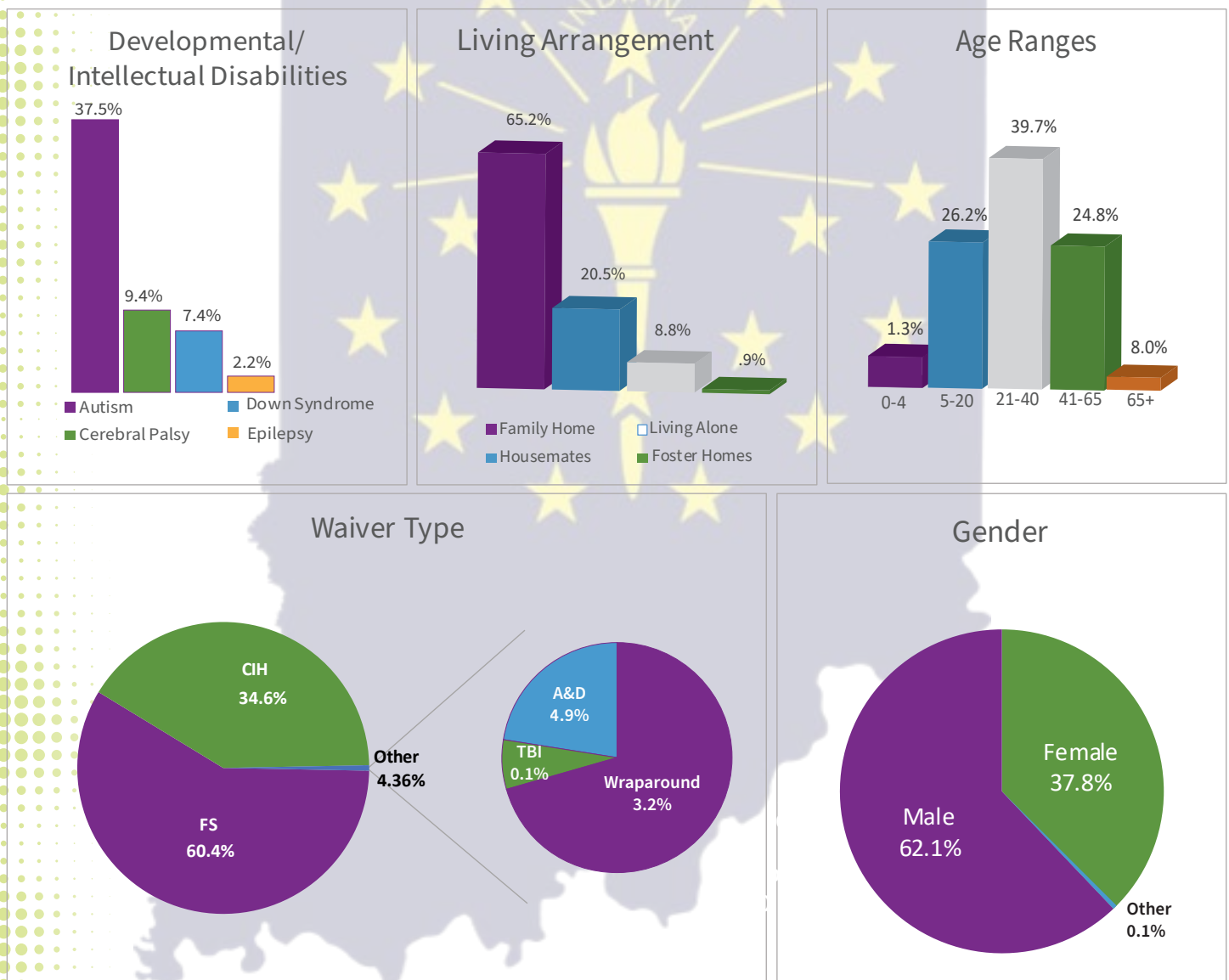
**IPMG and Care Management:** IPMG's Care Management Division reaches across the state to all 92 counties. In 2022, IPMG was excited to bring on Sarah Moore as the Program Manager, a Supervisor, three Senior Care Managers and 15 Care Managers. As a team, IPMG was pleased to receive 753 Referrals in 2022. We look forward to continued success and expansion in 2023.

Sarah Moore, Program Manager



# Individuals Served

IPMG serves individuals throughout the state of Indiana who are approved by Indiana's Division of Disability and Rehabilitative Services for the Family Support Waiver (FSW) or the Community Integration and Habilitation Waiver (CIH), or who are approved by the Indiana Division of Aging for the Aged and Disabled (A&D) or Traumatic Brain Injury Waiver (TBI), or Child Mental Health Wraparound program and Children's Mental Health Initiative (CMHI).. Those individuals present with a diversity of strengths, challenges, and diagnoses. Throughout 2022, IPMG gathered, analyzed and applied demographic information about individuals served to refine our comprehensive case management training curriculum. The results of this ongoing project indicate that we are able to provide a more individualized and focused support approach to each person's unique life situation.





# Support for Families and Individuals

Since its inception, IPMG has been involved in a variety of initiatives designed to enhance the waiver experience and quality of life for the individuals we serve. We continuously strive toward innovation in the way we approach this important task.

**Accessibility:** IPMG's Accessibility Plan was designed to reduce barriers that challenge and inhibit the ability of individuals with disabilities to live a self-fulfilled life. One focus of the plan was the creation of accessible informational materials aimed at demystifying the waiver experience for individuals served and their families. Those materials, including videos, handbooks, CDs, a Spanish language guide, and Easy Read documents are available at [www.gotoipmg.com](http://www.gotoipmg.com). Content on our website is available in over 100 different languages.



**Eligibility Coordinator:** Obtaining and keeping Medicaid eligibility has sometimes proven to be a challenge for those not familiar with the related rules and responsibilities. In response to a demonstrated need by individuals and their families for additional supports, IPMG has on staff a full-time Eligibility Coordinator, Beth Peabody.

Beth is available to support Case Managers, Care Managers, and Wrap Facilitators in assisting those who may be experiencing Medicaid eligibility issues, or who may be in danger of losing services due to a lack of understanding of, or involvement in, the redetermination process. Beth is also available to support and educate Case Managers, Care Managers, and Wraparound Facilitators in advising individuals who have questions regarding Social Security, Medicare, Miller trusts, ABLE accounts, and the Healthy Indiana Plan 2.0. Beth assists families on an as-needed basis, and also provides education to families and providers via IPMG's Informational Webinars.

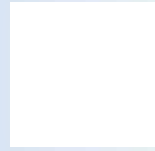
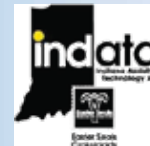


Beth Peabody,  
Eligibility  
Coordinator

# Support for Families and Individuals

**Risk Planning:** IPMG's Registered Nurse Consultant, Laura Dieter, provides supports to individuals who experience risk issues that require specialized attention and planning by the team. Since beginning this project, IPMG has identified over 225 of the top risk issues that require such focus and has created risk planning templates for each issue that help to ensure that key points of needed services are not inadvertently overlooked in the planning process. IPMG has also provided training on a variety of health and diagnosis-specific topics via our Informational Webinars.

**Community Connections:** IPMG has continued to grow a vast database of resources that enhance the ability of individuals served to connect to their communities. These resources are available to all IPMG case managers to use on behalf of the individuals they serve, and many of them are posted on our web site for direct accessibility by individuals served and their families. In addition, we continually update iConnect with Friends, which is a publicly accessible database containing activities and events that are conducive to building new friendships with others in local communities throughout the state. Members of the public are welcome to add events to this resource at <http://tinyurl.com/iConnectWithFriends>.



**Advocacy:** IPMG's Legislative Committee, led by IPMG Associate Director Heather Sorrells, continued to keep a close eye throughout 2022 on legislative issues that had the potential to affect individuals receiving services. IPMG connected with legislators, various legislative events, and by raising public awareness of relevant issues in order to lobby in favor of bills that promised a positive outcome to those individuals.



The Legislative Committee sends quarterly newsletters to Employee-Owners with updates and information.

# Support for Families and Individuals

**Informational Webinars:** In 2022, IPMG continued regular Informational Webinar (IW) programming available not only to IPMG employees, but also to service providers, guardians, families, and individuals. IPMG continued to support the National Association of Case Management as a charter member and initiated a partnership with the Association that provides free monthly webinars focusing on the professional development of Case Management Professionals. Our IWs are offered multiple times throughout the year, via online webinar. The schedule and registration information is available on our website. IWs are recorded and posted on our website and YouTube channel for later viewing. Our IWs in 2022 had a combined total of over 2,000 attendees, and topics included “Stress: Identifying, Managing and Building Resilience”, “Understanding Alzheimer’s & Dementia”, “Hoarding: Understanding and Treating Chaos”, and many more.



## Employee Advisory Company Culture Sub-Committee

IPMG’s Company Culture Committee has continued in 2022 to provide education and resources on the cultural and diversity needs of the Individuals that we support. Resources and training are provided to all employees in order to support the development of enhanced knowledge and awareness of the needs of individuals. IPMG is also committed to an internal company culture that celebrates diversity within IPMG, and our policies and procedures are reflective of that goal. IPMG has developed a cultural competency and diversity plan and recognized this as ongoing process to assure quality services are available and effective for all Individuals served.



# Preeminent Statewide Provider

**Division Branding Refresh:** Since the creation of IPMG's current logo, 2 divisions have been added to the company, but until this year, no change has been made to demonstrate IPMG is a 3 program company! Division colors were implemented in 2022, giving each division it's own color to differentiate information from each other. Assigning each division a color will assist in identifying information specific to its target audience. Graphics, social media, newsletters, manuals, brochures, letterheads and anything published by IPMG began utilizing its own color.



**16th Anniversary:** September 2022 marked 16 years since IPMG was founded as the first statewide contracted Medicaid Waiver case management company in the United States. Today we are the largest provider of case management in Indiana and are growing rapidly in care management and wraparound facilitation services!

IPMG's growth and accomplishments would not be attainable without a strong and dedicated team of Employee-Owners and the Individuals who trust in our unconditional commitment to support them in a self-determined life.



# Corporate Compliance & IT

IPMG provides to its Employee Owners a virtual, yet structured environment in which to learn and grow as professionals in their field. Our impetus is always to continually improve our ability to ensure that employees feel connected and supported, and confident in their ability to support the individuals they support.



Michael Wagoner,  
Director of Corporate  
Compliance & IT

**Systems Development:** As a virtual company, efficient communication and resource distribution is essential. In 2022, the Systems Development Team, continued developing and updating IPMG's systems. Major updates include: expanded functionality in many Quickbase apps, while also developing many new apps, and built Pipelines throughout apps and Microsoft Teams.



**Smart Device Program:** An important part of supporting individuals served is the completion of documentation required by State and Federal regulations. To help employees complete their paperwork with least amount of extraneous effort, IPMG provides them with a smart device on their first day of employment. Employees also receive ongoing technology-related training and support. Employee Owners call the resultant time savings “huge” and “life changing” and have seen a significant difference in the time available to them to spend more time directly supporting individuals served.

**Corporate Compliance:** As Indiana's preeminent statewide provider of case management, care management and wraparound facilitation services, IPMG maintains those standards with the help of Michael Wagoner, Director of Corporate Compliance and IT. The major accomplishments of 2022 include:

- Successful CARF Accreditation Survey, awarded another 3-year accreditation
- Privacy and Security Committee formed to review HIPAA incidents/trends/patterns and to identify ways to improve privacy and security across IPMG
- Regular Compliance and IT trainings were delivered to all employees to provide education and awareness to risks and threats
- Secured a contract for the replacement of our phone system with Zoom

# Support for Employees

**Management:** Supervisors provide support to Case Managers, Care Managers, and Wraparound Facilitators via monthly in-person office hours, webinars, face-to-face meetings, and additional support as needed. Technical support, problem solving, peer mentoring, training and socialization are all part of this integral program, as well as monthly company webinars that provide up to date information to all Employee-Owners.



**Intake and Coverage Coordination:** Encompassed within the Case Management Division and led by Director Carolyn Underwood and Associate Director Heather Sorrells, IPMG's Intake and Coverage team supports Case and Care Managers by completing Intakes using a team approach of management level staff. By utilizing more experienced staff to coordinate initial services, we develop a sound base for the start of an individual's waiver life before they are transitioned to their Case and Care Manager. IPMG's Intake and Coverage team further supports Case and Care Managers by providing coverage during vacations and extended leaves. Our Intake and Coverage team is statewide and represents all 92 counties in Indiana.



**Accessibility Support:** As support to both our employees and the individuals we serve, IPMG employs a Field Support Coordinator, Lori Crossley. Lori Crossley assists case managers with RFA requests for home/environmental modifications, such as ramps and roll in showers, vehicle modifications, and specialized medical equipment covered by Medicaid, such as weighted blankets. In 2022, IPMG received 1,235 referrals!



Lori Crossley,  
Field Support Coordinator



# Support for Employees

## Balanced Life Wellness Program:

IPMG's Balanced Life Wellness Program, managed by the IPMG Employee Health and Wellness Committee, offers resources on topics such as workplace safety, diet and exercise, and stress reduction. In 2022, IPMG organized several Wellness Challenges for employees and moderated an associated online support group. Employees relate a new level of cognizance regarding potential threat factors that previously had gone unremarked, and great successes in achieving their personal health goals.



Laura Dieter,  
Registered Nurse Consultant



**Information Technology (IT) Committee:** The IPMG IT Committee was formed in response to employee suggestions requesting technology support. The purpose of this committee is to review and discuss the technology needs of the company, to brainstorm, develop and implement solutions. The committee develops and publishes Tech Tips and is instrumental in implementing new and enhanced features of ipmgConnect and related apps to make the system as user friendly as possible.



**Employee Advisory Committee:** This committee was formed to garner input from employees to ensure that IPMG provides a positive and supportive work experience. In 2022, IPMG created Division EAC groups. These groups meet to discuss division specific topics, sending representatives to the full company EAC meeting. EAC members serve as leaders and ambassadors for IPMG, and they serve as the liaison between their local teams and the company as a whole. They provide communication to the local teams regarding company decisions and policies including why decisions and policies are developed and implemented. They also encourage employees to provide suggestions on ways in which IPMG can improve the overall work experience.

# Support for Employees

**Human Resources:** Through strategic partnerships and collaboration, the Human Resource Department attracts, develops and retains a high performing, inclusive and diverse workforce and fosters a healthy, safe, well-equipped and productive work environment for employees, their families, retirees and the community in order to maximize individual potential, expand organizational capacity and position of Indiana Professional Management Group as an employer of choice. In 2022, IPMG's HR Department transitioned to a Business Partner Model, and hired a Benefits Specialist to coordinate and manage employee benefit programs. The entire team passed their SHRM certification, and worked tirelessly to onboard 68 Case Managers, 19 Care Managers and 39 Wraparound Facilitators!



**Internal Opportunities:** 2022 saw much growth and resulting promotions within IPMG. Seventeen Employee-Owners were promoted to Management-level positions, and the positions of Administrative Assistant for Wraparound, Chief Administrative Officer, HR Benefits Specialist, Eligibility Coordinator and Systems Development Supervisor were developed. IPMG Employee-Owners have opportunities to serve as peer mentors, serve on multiple committees, and participate in the IPMG Emerging Leaders Program.



# Input from Employees and Stakeholders

IPMG strongly believes that the way we operate should be consistent with the perspectives of the individuals we serve, of our employees, and of those stakeholders within the disability population whose lives we touch in the regular performance of our responsibilities. We continuously enhance our methods for collection and utilization of input from all stakeholders to help shape and refine our way of doing business. In 2022, we utilized an NPS format with emojis for clarity on our annual satisfaction surveys. This format allowed us to immediately reach out to survey respondents who requested follow-up. We also realized an improved response rate with the NPS format.

**Individuals Served:** In October 2022, IPMG conducted a comprehensive survey of individuals served and their guardians to determine their satisfaction with IPMG's services. When asked "How likely is it that you would recommend IPMG to a friend or colleague?" on a scale of 1 to 10, most respondents selected 9 or 10, which indicated they are promoters of IPMG. Respondents also had an opportunity to provide feedback regarding what IPMG can do to improve the services we provide. The results of the survey were utilized by IPMG's leadership to better tailor our services to meet the needs and expectations of the individuals we serve.

**Employee Satisfaction Survey:** In 2022, IPMG sent a survey to all Employee Owners to gauge satisfaction with the company. All survey respondents were asked to state whether they agree or disagree with the following statements in categories of Leadership & Planning, Corporate Culture & Communications, Role Satisfaction, Work Environment, Relationship with Supervisor, Training, Development & Resources, Pay & Benefits and Overall Engagement. Statements included: "We have opportunities to grow, learn, and train", "The feedback from supervisors is a huge strength", "IPMG is very honest with employees, which builds trust", "I feel truly valued and appreciated as an employee" and "My supervisor is open to hearing my opinion or feedback". IPMG will continue our commitment to working with IPMG Employee Owners in creating the best workplace, while consistently analyzing feedback through our ongoing suggestion box.



**Other Stakeholders:** IPMG also published in October a survey for waiver service providers, of similar format and content. Results of the survey indicated that stakeholders feel that IPMG has particular strengths in the areas of "IPMG has knowledge that not only helps the persons served but also those of us that are a part of their teams", and "every case manager I have worked with from IPMG has been present, responds quickly to questions and concerns, and works hard to help the client have a good life". The results of the survey were utilized as a basis of collaboration with our community partners.



# Outreach

IPMG's Communications and Outreach team continued expanding our connections to the community. Although some events continued in a virtual format in 2022, IPMG will never cease its commitment to connect with and support schools, disability advocacy organizations, providers and individuals and families in the community.

**Community Events:** IPMG participated in and supported multiple events throughout the state.



Case Management  
Autism Acceptance Walk



Care Management  
MDFF Expo



Wraparound Facilitation  
Tipton Safety Fair

**IPMG Representation on State, Regional, and National Committees:** In 2022, IPMG continued its commitment to being the preeminent provider of Case Management, Care Management and Wrap-around Facilitation services by representing IPMG on multiple state, regional, and national workgroups and committees, including the Division of Disability and Rehabilitative Services Stakeholder Advisory Committee, the Indiana Association of Rehabilitation Facilities, Inc. Board of Directors and Professional Development Committee and Leadership Academy, the Indiana Association of People Supporting Employment First Board of Directors, the Charting the LifeCourse Ambassador Series, National Association of Case Management Board of Directors, Indiana State Guardianship Board, the System Navigation Advisory Council, the Governmental Affairs Committee, and the State Task Force 1102.

**Online Communication:** IPMG continued to update our website in 2022 with improved accessibility features to better connect with the individuals we serve and the disability community in general. Through a variety of our online communication modalities, we are better able than ever to share information about important issues in an accessible and timely manner.



Newsletter



Website



Social Media

# Outreach

**Community Service Days for Employees:** 2022 was the tenth year in which IPMG gave all employees one day off per year to be involved in the community service of their choice. Our staff responded enthusiastically and supported their communities with determination to make their small corner of the world a better place. Staff volunteered at Habitat for Humanity, local food pantries, Foster Fairies, nursing homes, dances for individuals with disabilities, and more! Thanks to all our employees who took seriously our initiative to give back to the communities in which they live!



IPMG Wraparound Team at the Howard County We Care Event



Case Management volunteers at the Jackson Street Commons



Volunteers spending the day at the Noble County Humane Society



Lake County Case Managers at Girls on the Run

**Provider Outreach:** Waiver service providers play a key role in the day-to-day lives of individuals that we mutually serve. In 2022, IPMG reached out regularly to them to ensure that the lines of communication remain open, and that we work together to coordinate and problem solve as challenges occur. We completed 54 provider outreach contacts in 2022. As an Indiana Association of Rehabilitation Facilities, Inc. member, IPMG collaborates with them regularly regarding issues related to the waiver program.

**Collaboration with State Agencies:** IPMG is proud of our collaboration and partnership with Indiana state agencies, including the Department of Child Services (DCS), Division of Disability and Rehabilitative Services (DDRS), Division of Aging (DA) and the Department of Mental Health and Addictions (DMHA). IPMG CEO, Karen Brummet, leads this effort and represents IPMG on multiple state initiatives, committees and boards, including the Children's Waiver Initiative, Wavier Redesign Steering Committee, Indiana Living Well Grant and the Division of Disability and Rehabilitative Services Advisory Council. Karen also represents IPMG as a member of the INARF and ARC of Indiana Board of Directors. Additional IPMG Employee Owners are members of a variety of local, state and national boards, committees and work-groups that support our unconditional commitment to ensuring all individuals will live quality, self-determined lives as integral and valued members of their communities.

# 100% Employee-Owned

In 2022 IPMG celebrated our 5th anniversary as an Employee Stock Ownership Plan (ESOP), which turned over 100% of the ownership of IPMG to our employees. ESOPs are federally regulated employee benefit plans that allow employees to grow their retirement income while being able to share directly in the success of the company.

IPMG's ESOP means that Employee-Owners have even more reason to be committed to providing the best possible services to the Individuals we support. History has shown that employees who have vested interest in the success of the company are more dedicated to ensuring that their jobs are performed in an exemplary manner. They also tend to stay with the company for longer periods of time, which helps to ensure consistency for the individuals they serve.

Since the creation of the ESOP, IPMG's leadership, administrative and management positions and Board of Directors have seamlessly led the company to growth and development, never ceasing to listen to the advice of Employee Owners.

IPMG's ESOP Communications Committee, led by Supervisor Mindi Kenney, consists of Employee-Owners who have the opportunity to provide input into the communication of ESOP-related information companywide. The ESOP app is constantly updated with documents, videos, resources, and a place for Employee-Owners to ask questions regarding ESOP and receive answers.

Over the years IPMG's employees accumulate increasing equity holdings in the company, at no cost to the employee. They have the ability to directly affect the success of the company by their own performance, and to share in that success in the form of shareholder dividends. These dividends are provided in addition to, and in no way affect, any other retirement program in which the employee may be invested.

After five years as an Employee-Owned Company, IPMG is already recognizing the benefits, as the satisfaction of the Individuals we serve and of our employees are integral components of our overall success. We are excited to see what the future holds for IPMG, and anticipate even greater levels of achievement and excellence over the long term, as we continue to support our vision of providing Individuals served with Employee-Owners who are expert navigators of the Medicaid Waiver system.



The ESOP Employee Engagement Sub-Committee set up an ESOP table at the Company Event, complete with ESOP trivia, fun facts, and swag!





# Special Recognitions

The year 2022 was an exciting one for IPMG. We focused on our mission statement, which is “to to be an exceptional organization that supports individuals as they live their best lives.” On a weekly basis, we highlighted the successes of the individuals we support in being integral and valued members of their communities. In our monthly newsletters and on social media, we highlighted case managers who are “expert navigators” and provide exceptional support to the individuals we are privileged to serve.

## ipmgGEM

In 2022, we continued our internal employee recognition program which allowed employees to nominate each other for three different award categories: Above and Beyond, Embodies the Culture, or Unsung Hero. One nominee from each category was selected each quarter for this award. Winners were celebrated on internal company webinars.



## LifeCourse Innovation in Person Centered Practices

IPMG was honored to accept the LifeCourse Innovation in Person Centered Practices award at the 2022 Charting the LifeCourse Showcase. IPMG is committed to utilizing a Person-Centered approach in all services and supports provided to Individuals served and in utilizing the LifeCourse Framework in supporting Individuals in achieving their vision of a good life. IPMG provides initial and ongoing training and resources to all IPMG Case Management Professionals to support the professional growth in Person Centered approaches. This training includes collaboration with Indiana’s Division of Disability and Rehabilitative Services, LifeCourse Nexus, and other experts. IPMG is actively involved with the LifeCourse Framework program and currently has nine Employee Owners that have successfully completed the LifeCourse Ambassador program.

## Indiana Chamber of Commerce Best Places to Work in Indiana

IPMG Employee-Owners shared their enthusiasm for their careers at IPMG in an Employee Satisfaction Survey administered by the Indiana Chamber of Commerce. IPMG is proud that our company was named as one of the top 100 Best Places to Work in Indiana for six consecutive years. Thank you to the entire IPMG family for making this a reality! The passion and dedication of our Employee Owners, individuals we are privileged to serve, and the entire IPMG community is truly unique and we appreciate each and every one of our staff!

## National Association of Case Management Xcel Award for Program

IPMG was proud to accept the National Association of Case Management’s Xcel Award for Program at the 2022 National Association of Case Management conference. The National Association of Case Management is the ONLY not-for-profit national voice for Case Managers and Service Coordinators. Members of the National Association of Case Management are part of a network of practicing professionals who are advocates for community-based case management systems. These valued members share ideas and work to minimize bureaucratic barriers, practice high ethical standards, support career growth, and promote the vitality and professional image of case management and service coordination.



# Looking Forward

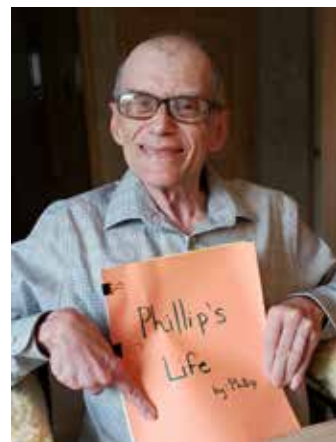
The year ahead looks to be one of continuous creativity, responsiveness and enhancement for IPMG as we look to always provide the highest quality services to the Individuals whose lives we impact on a daily basis. Our ability to seamlessly communicate with individuals served, families, and stakeholders will receive ongoing attention, and the use of input received will continue to impact the way in which we provide services.

The year 2023 has already been an exciting one for IPMG. We will continue to focus on supporting our Employee Owners in implementing the LifeCourse Framework, which the Division of Disability and Rehabilitative Services (DDRS) identified as a tool to help individuals and families of all abilities and at any age or stage of life develop a vision for a good life, think about what they need to know and do, identify how to find or develop supports, and discover what it takes to live the lives they want to live.

As always, advocacy on the state and national stage will continue to receive our attention and efforts as we work to educate legislators and other influential members of the community about the value every Individual can add to their communities, to the workforce, and to the lives of those who know them.



*Vision  
IPMG envisions the individuals  
we support will live quality,  
self-determined lives as  
integral and valued members  
of their communities.*



# Partnerships



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