

# PATH TO A HOME

2019 ANNUAL REPORT

**TRILOGY**

BEHAVIORAL HEALTHCARE





# OUR MISSION

Trilogy's mission is to support people in their recovery from mental illness by helping them discover and reclaim their capabilities, life direction and well-being.

# OUR VISION

Trilogy's vision is to be the recognized leader in behavioral healthcare and the standard by which other providers measure their progress and success; an organization where each employee has a personal devotion to excellence in service and embraces the highest standards of ethics and integrity; where each person served takes pride in knowing that our organization provides the finest recovery-focused services available; and, where each of our funding sources and contributors rests assured that they are getting the best possible return in services for each dollar invested in our organization.

# OUR VALUES

## Hope

Hope is the intentional practice of believing that growth, change and progress is possible. We apply hope to our clients, each other, our organization and the external systems we work within, and foster a positive outlook on the endless possibilities of our collective futures.

## Excellence

Each employee at Trilogy is driven to do their very best, each and every day, in the service of our mission. We build upon each other's strengths, push each other to achieve our individual and organizational goals, and aspire to be better tomorrow than we were today.

## Adaptability

As an organization, Trilogy is flexible, creative, innovative and open-minded to change. We strive to proactively anticipate the needs of our clients, our organization and the communities we serve in order to build service models and systems that best address those needs.

## Respect

At the core of respect is a willingness to listen and learn from one another to broaden our understanding of the world. We cultivate a safe environment that acknowledges the inherent dignity of each individual, celebrates diversity and inclusivity, and encourages individuals to openly share their points of view.

## Teamwork

At Trilogy, we know we can achieve greater things working together than we can on our own. We cultivate a positive working environment built upon a foundation of mutual support and trust, collaboration, interdependence, accountability, open communication and appreciation of each individual's contribution to the team.

## Compassion

We genuinely care about the well-being and happiness of one another, our clients and our community. We demonstrate compassion by practicing mindfulness and self-care, listening with an empathetic and non-judgmental heart, validating each other's experiences, embracing humility, and seeking to learn from each other.



# FROM OUR CEO



Dear Friends,

It is my pleasure to present to you Trilogy's first annual report since I began serving as CEO of this remarkable organization. Though I have been with Trilogy for over twelve years, I spent the first several months in my new role reconnecting with staff and clients by listening to their ideas and concerns regarding the direction of our organization.

Among our priorities this coming fiscal year will be to develop a new strategic plan. As an organization, it will be an opportunity to review our programming and assess how to make the best use of our limited resources while continuing to adhere to our core philosophy—that recovery is possible for our clients when they have the right support.

I am determined to make this an inclusive process that will incorporate feedback from staff, community stakeholders and our clients. I believe their input is essential to ensure that we continue to recruit the best workforce, provide the highest quality services possible, and strengthen our community overall.

I should also acknowledge John Mayes, our former CEO, and Stephen Fatum, who recently completed his term as board chairman. Together, they built a strong foundation for Trilogy and our robust performance this year is a result of their commitment and leadership.

Though the dedication of our employees has always humbled me, one program that illustrates their compassion is our PATH program. Twelve hours a day, six days a week, Trilogy's employees are on the streets in some of Chicago's most impoverished neighborhoods, working to help the homeless. As you will read, during this year, PATH team members successfully screened 80 individuals experiencing homelessness, and were able to help nearly a quarter of those to obtain housing assistance.

I am proud of the progress we have made in my first year as CEO. As always, there are challenges on the horizon but I am confident that Trilogy is well positioned to make the coming fiscal year another success.

Best regards,

A handwritten signature in black ink, reading "S Handley".

Samantha Handley  
CEO, Trilogy Behavioral Healthcare





# PATH TO A HOME

The connection between homelessness and mental illness is well documented. Nationally, it is estimated that 20% of the homeless population has a severe mental illness. Without a home, the barriers to accessing behavioral healthcare increase dramatically, making it more likely that those persons may permanently live on the street.

Trilogy has joined with other behavioral health organizations across the country to support those who experience homelessness and mental illness. With funding from a federal grant and private donors, Trilogy has created an outreach program that is bringing services directly to the streets.

## About the Program

Trilogy's homeless outreach started two years ago when it was awarded a Projects for Assistance in Transition from Homelessness Grant (PATH) from the US Department of Health and Human Services Substance Abuse and Mental Health Services Administration (SAMHSA). PATH grants provide funding to local nonprofit organizations to help the homeless access healthcare, substance abuse

counseling and housing opportunities. The grant requires that Trilogy also raise an additional \$25,000, or 1/3 of the grant total, from private donors within two years.

Grant funding allowed Trilogy to hire new staff for homeless outreach within several designated neighborhoods including Chicago Lawn, Auburn Gresham, and Englewood, which are among the poorest communities in the city.

Leading Trilogy's PATH program is Executive Clinical Director, Sarah Fletcher. According to Sarah, Trilogy already had significant experience working with the homeless before launching its PATH program. Partnerships were already in place with several area homeless shelters as well as the Evanston Library and the Logan Square Neighborhood Association to provide intake and linkage services.

"We find that approximately 20% of Trilogy's client population are homeless when they are initially screened for services," says Fletcher, "But we knew we were missing a large segment of the population, for whom the barriers of homelessness made it impossible to access our services"





## Building Trust

Getting people who have experienced homelessness to begin the treatment process can be challenging. After living on the street, many have lost trust in their families, friends or others, which may result in them being reluctant or hesitant to accept services. Others have experienced significant trauma that inhibits their ability to engage in services, or they might not be ready to discuss this with counselors.

The face of Trilogy's PATH program is its pair of recovery counselors, Steve Myslicki and Larry Henderson. Six days a week, twelve hours a day, both canvas the streets for people experiencing homelessness to check on those they may already know or introduce themselves to those who may be new to the streets. Both also spend time networking with neighborhood law enforcement, public agencies, churches, food pantries and other community groups to meet with any individuals they may come into contact with who need help.

Building a trusting relationship with PATH clients is critical, and Larry and Steve are experts in client engagement. When approaching someone for the first time, recovery counselors introduce themselves and offer a care package containing socks, hygiene products and other necessities. They actively listen to the clients' stories and needs, and then educate them on available resources often over a cup of coffee or a warm meal.

After the first meeting, Larry and Steve will continue to regularly check on clients and share information about services, with the eventual hope of getting them enrolled in appropriate treatment programming. When an individual decides to accept services, Steve or Larry will take them to one of Trilogy's open-access sites for an intake assessment and they can begin accessing a wide variety of Trilogy's services including therapy, medical and psychiatric care, substance use treatment, job training and peer support, in addition to housing location assistance.

## Success

Trilogy's PATH program is showing signs of success. Last fiscal year (the second full year of operation), PATH program employees contacted over 100 homeless individuals. More than 80 were screened for services and almost 20 of those were eventually enrolled in a housing assistance program. After only a few months of operation, community stakeholders began referring individuals experiencing homelessness to Larry and Steve.

"What is exciting about getting referrals is it shows we are beginning to build trust within the community," said Sarah Fletcher. "If we can get the community to trust us, it goes a long way towards building our credibility with folks living on the street."

## Future of PATH

Trilogy successfully fulfilled the grant's funding requirements by raising \$25,000 at its annual gala in September 2019 and intends to reapply for more funding this spring. The most recent state budget includes additional funding for PATH programs in Illinois, which could allow Trilogy to expand its PATH program. However, more funding could also bring new challenges for Trilogy.

"Though we were thrilled to learn that additional funding would be available, it would also require us to raise more from donors to match funds," said Samantha Handley, Trilogy's CEO. "It will be a challenge but, because of the team's tremendous success, I am confident that we will be able to raise the funds required to expand PATH."

**20% OF TRILOGY'S  
CLIENT POPULATION  
ARE HOMELESS**  
when initially screened for services



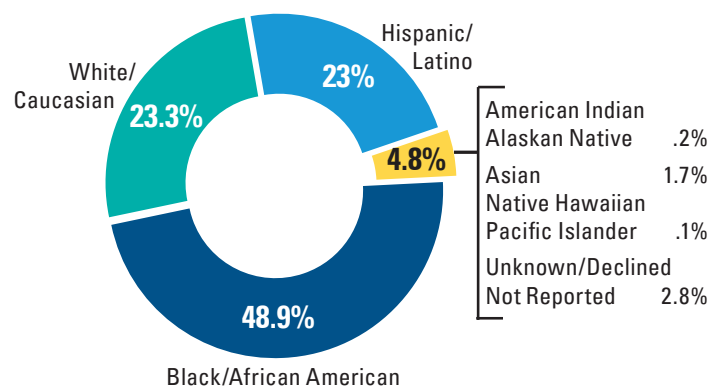




# OUR CLIENTS

Clients Served in 2019: 2,820

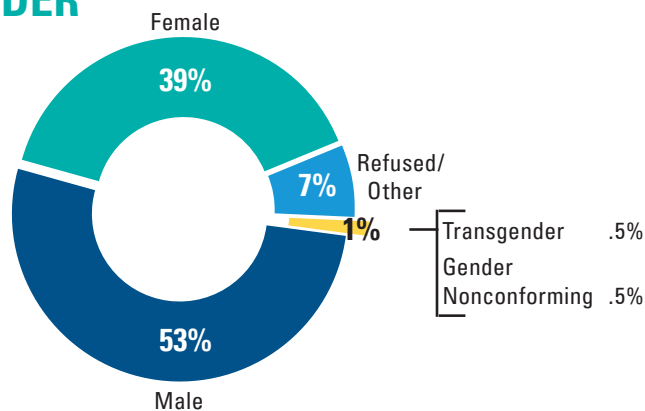
## RACE/ETHNICITY



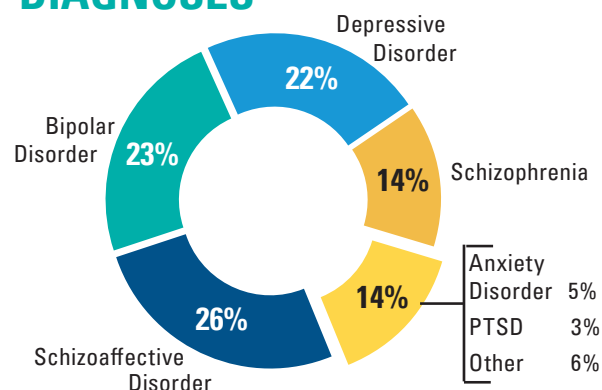
## HEALTH CONDITIONS

Hypertension (High Blood Pressure)	19.05%
Emphysema/Asthma/COPD	16.53%
Diabetes	12.50%
Epilepsy/Seizure Disorder	5.43%
HIV/AIDS/Infectious Disease	3.29%

## GENDER



## PRIMARY PSYCHIATRIC DIAGNOSES



## CLIENT SATISFACTION

**96.78%**

Satisfied or  
Extremely Satisfied  
with Therapist or Team

**95.87%**

Satisfied or  
Extremely Satisfied  
with Services

**96.78%**

Would Recommend  
Trilogy  
to Others



# MAJOR DONORS FY 2019

## Foundation Donors

Chicago Chapter Charities Foundation  
Thomas W. Dower Foundation  
Abe and Ida Cooper Foundation  
Cushing Foundation

## Corporate Donors

Stratosphere Network  
Armitage Pharmacy  
JP Morgan Chase  
Thuraya Inc

## Individual Donors

(Contributions of \$500+)

Rick Keesler, In Memory of Holly Sipples  
Luke Fitzgerald  
Anonymous  
Kristin and Michael Folan  
Genevieve Wortzmanshow  
Anonymous  
Sheila Rosenberg  
Aimee Feuser  
Crystal Williams  
Susan Fickling-Munge  
Ann Bosclair  
Jeffrey Jens  
Eileen Pembroke

Elizabeth Jones  
Gary Safron  
Selden Spencer  
Samantha Handley  
Duncan and Anita Farney  
Barbara Miles  
Daniel Burke  
Erin Grodnick  
James Doig  
Jessica Pan  
Mary Johnson  
Nancy Treiber  
Tod Forester

# FINANCIAL HIGHLIGHTS FY 2019

## REVENUE

SOURCE	AMOUNT
Clinical Fee for Services	\$19,724,245.00
Government Grant Related Funding	\$5,291,903.00
Contributions, Special Events	\$475,405.00
Foundation & Corporate Giving	\$110,936.00
Rental & Miscellaneous Income	\$968,256.00

**TOTAL: \$26,570,745.00**

## EXPENSE BY

MAJOR CATEGORY	AMOUNT
Outreach Services	\$11,290,152.00
Recovery Services	\$1,262,962.00
Outpatient Services	\$4,021,997.00
Medical Services	\$898,825.00
Housing	\$2,294,757.00
Intake & Clinical Administration	\$794,399.00

**TOTAL PROGRAM SERVICES: \$20,563,092.00**

Fundraising & General Expenses \$5,326,902.00

**TOTAL EXPENSES: \$25,889,994.00**

**NET SURPLUS (DEFICIT): \$680,751.00**

**% of TOTAL REVENUES: 2.56%**



## Trilogy Executive Leadership

Samantha Handley, LCPC, CSADC  
*President & CEO*

Susan Doig, LCSW  
*Chief Clinical Officer*

Rich Adelman, CPA  
*Chief Financial Officer*

Dr. Matthew Brown, DO, MBA, ABPN  
*Chief Medical Officer*

Amanda Rankin, LCSW  
*Chief Operations Officer*

Sheryl Munoz  
*Director of Human Resources*

Amy Joiner, LCPC, LPHA, CADC  
*Clinical Director of Outpatient Services*

Sarah Fletcher, LCSW, CADC  
*Clinical Director of Intensive Outreach Services*

Alice Geis, DNP, APRN, PMHNP  
*Director of Integrated Healthcare*

## Board Members

Stephen M. Fatum, Chairperson

Brett Cochrane, Vice Chairperson

Catherine A. Brownlee, Secretary

Angela Hainsworth, Chairperson of Finance

Kimberly Casey

Cheryl R. Farney

Aimee E. Feuser

Susan Fickling-Munge, MBE

Christine B. Fisher

Kristin B. Folan

Susan K. Laue

John Joyce

Matt S. Oey

Olayinka Owolabi

Barbara Youngberg

# TRILOGY

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