

Management Services for Social Service Agencies

Business Services Management

**Orion Associates
9400 Golden Valley Road
Golden Valley, Minnesota 55427
763-450-5000
www.orionassoc.net**



**Rebecca Hage Thomley
CEO**

BIO:

Dr. Rebecca Thomley is the President and Chief Executive Officer of Orion Associates, Meridian Services, Zenith Services, Orion Intermediary Services and their related company Morning Star Financial Services. In this position, she is responsible for all aspects of the organizations.

Dr. Thomley feels that the most important things in her life are her family, friendships and the clientele she serves. She feels that it is important to look for the commonality in understanding individuals, not to make judgments without having walked in the same footsteps and believes that

through hard work and determination anything is possible.

About Orion Associates:

Orion Associates provides management services for both related and unrelated, for profit and non-profit organizations.

We work primarily with companies that administer social services, including those that serve people with disabilities, the elderly, and their families. Orion Associates has a unique philosophy of service reflected in our Vision and Mission and our Code of Ethics.

We are proud of our history of providing quality services for the past three decades. Orion Associates has been recognized for its growth, commitment to a healthy workplace and commitment to volunteerism by many organizations and media including Minnesota Business, Twin Cities Business Journal, INC Magazine, Forbes and others.

Interview conducted by: Lynn Fosse, Senior Editor CEOCFO Magazine

CEOCFO: Ms. Thomley, would you give us an overview of Orion Associates and what do you do?

Ms. Thomley: Orion Associates is a management organization. We provide management services to both related and unrelated organizations for profit and nonprofit. The services we provide are primarily to social service agencies.

CEOCFO: Is this nationwide?

Ms. Thomley: We are based out of Minnesota but we currently provide services in several other states. We have been expanding nationally and have been in Utah for many years as

well as Tennessee, Ohio, Oklahoma and Louisiana.

CEOCFO: Can you tell us about the services you provide?

Ms. Thomley: The management services are primarily human resource management, financial services, programmatic related to social services. In our related companies we probably cross the entire range of service types that a social service agency might provide from residential homes to case management services to in-home support for families with special needs whether it be serving the elderly or children with disabilities. We also provide psychological services. On a national level we are providing services to assist people in managing their Medicare and Medicaid dollars. We are bridge between the government and the individuals receiving funding. The service is technically called a fiscal intermediary where we provide services so that the person can administer their own funds.

CEOCFO: Who are your customers?

Ms. Thomley: Our customers are individuals but we contract for services with the state. We also sell services to many other companies who maybe are starting out; they are a smaller organization and they may not have the ability to have their own human resources department so they need help with hiring or they need help in setting up licensing. The type of work we do is highly regulated; there are licenses required for just about everything we do. It is not always easy to navigate. For some organizations we do all their financial services from payroll to paying taxes to accounting.

CEOCFO: How large of an organization do you have, where do

your providers come from, what sets your organization apart and what do you look for in the skills of your people?

Ms. Thomley: If you were to look at how large our organization is, if you look at all our related entities and you look at our national programs it is around 5,000 employees. In human service work a lot of people are part-time so that is grossly inflated in that sense. If we are working in another state the people we hire are going to come from that state and we will follow all the licensing and regulations. As far as skills are concerned, it depends on the reason they are being hired but if they are coming to work at one of the companies that provides psychological services, obviously they need to be licensed to provide those services.

If they are in a company that provides social services and they are going to be a social worker they need that degree. In human resources they are going to have that background. What maybe makes us different is we have a nonprofit called Headwaters Relief Organization that individuals regardless of where they are in our organization or whatever state they might be in, they can choose to be involved in our volunteer efforts. Many people come to work with us because of Headwaters Relief; it is a disaster relief organization comprised of volunteers. We work all over the country and we have footprints in New Orleans where we run a free mental health center. What we are known for is our community contribution. One percent of our management staff volunteer in the community. Three years prior it was 97%. We give people paid time off to volunteer for any activity of their choice. Social services as a general rule are not well paid positions and we really look to do other things to attract people. Our upper management staff have been with us for many years in

fact most of those individuals came right out of college. It is not because we pay them that well. The other kinds of benefits we offer them like being able to bring their children to work and an onsite supplemented daycare for their kids or an open-door policy for pets. In fact our CFO has a doggie door. These are the kinds of things that keep people in this industry. It is the ability to be supportive in creating positive community change and that is what makes us unique.

CEOCFO: Where will future growth come from for your company?

Ms. Thomley: We have never stopped growing even in the difficult times a few years ago. We continued to grow and never had to lay anyone off. What

“We have been extremely fortunate in our growth and development; that is in part because of the talented people who choose to work with us and our ability to create an organization that focuses on services to others and community commitment.”- Rebecca Hage Thomley

has allowed us to grow is quality which is important to us. We are accredited in certain areas and have that high standard. In every company that we are directly related to, we are experiencing growth. The big growth for us currently has been on a national level with this particular service where we are going to assist in managing those Medicare and Medicaid dollars. It is a newer type of service. Sometimes we are starting services in states where there was an assisting organization doing it for some time, The state is looking for an organization that is more user-friendly or more connected to the people that want to use the service.

CEOCFO: Has the new healthcare bill affected the company either negatively or positively; how does it look for you?

Mr. Thomley: Not negatively. For some people there rates may go down, not in a dramatic way. We are a social agency so for us the idea of everyone having access speaks to our heart. It has had no negative effect on us at this point.

CEOCFO: Do you ever see the need for funding?

Mr. Thomley: We have always been self-funded; with this expansion nationally for the first time we have had to go out and seek funding. There was a period of time when we were concerned about what we were going to be able to do, but we ended up with some good bank partners here. I think that we are still going to face that in the future because we were always

with a small bank and now we are moving to a regional bank. If we continue to grow at this level, we will be dealing with the issue of funding again. Since 2000 when I took over, the organization has grown twenty times. I think that our history has spoken well for us so we have been able to partner with banks to obtain the funding we needed.

CEOCFO: Why pay attention to Orion Associates?

Ms. Thomley: We have been extremely fortunate in our growth and development; that is in part because of the talented people who choose to work with us and our ability to create an organization that focuses on services to others and community commitment. The direct benefit we have felt as a result of these activities is tremendous growth and opportunities. Often when people are choosing to come and work with us or to purchase services from us, the first thing they say is that they know what we have done for others.