

Eastern Oregon Support Services Brokerage

5th Anniversary

Annual Report 2007





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2007 Annual Report

Mission

The Eastern Oregon Support Service Brokerage represents and supports people with disabilities in Eastern Oregon to achieve control over their lives and to participate in satisfying lifestyles based on the same aspirations as all citizens.

Vision

We envision a world in which all people with disabilities are supported to be vital and integral members of their community, families, and neighborhoods, and where communities and citizens are willing to become involved in their lives.



2003 Annual Meeting participants line up for door prize tickets

Principles of Self Determination

Services of the Eastern Oregon Support Services Brokerage are based on the principles of self-determination:

Freedom: People with disabilities will have the ability, along with freely chosen family and friends, to plan their own lives, with necessary support, rather than purchase a pre-packages program.

Authority: People with disabilities will have the ability to control a certain sum of dollars in order to purchase their supports.

Support and Autonomy: People with disabilities will have the opportunity to arrange resources and personnel - both formal and informal - that will assist them to live a life in the community that is rich in social associations and contribution.

Responsibility: People with disabilities will have the opportunity to accept a valued role in a their community through competitive employment, organization affiliation, spiritual development and general caring for others in the community, as well as accountability for spending public dollars in ways that are life enhancing.

Values

Dignity and Respect: All people have an inherent right to be treated with dignity and to be respected as a whole person with regards to mind, body and spirit.

Relationships: It is essential to have a support network or circle of friends and family to provide strength and assistance. Helping people develop and maintain relationships is an ongoing process. A myriad of relationships ranging from doctors, hairdressers, and personal care attendants to best friends, family and lovers, allows people to make choices, dream, stay safe and to live the way they want.

Choice: People have the right to choose what they will do with their lives and with whom they will do it. When people need help, it is friends and family closest to them who can provide assistance.

Control: People have the power to make decisions and truly control their lives, including their finances. If services must be purchased, the people buying them, with assistance from friends and family, will determine what these services will be.

Dreaming: All people have dreams and aspirations which guide the actions that are most meaningful to them. A commitment to helping people determine their dreams, respecting those dreams, and helping to make them come true is crucial.

Contribution and Community: Everyone has the ability to contribute to their community in a meaningful way. Giving of ourselves helps us establish a sense of belonging. Opportunities to be truly involved include employment, volunteer work, membership in service clubs, artistic groups, etc.

Fiscal Conservatism: The services the present system provides are expensive and often do not meet the needs of people. If people have choice and control, they will purchase services in a way that will allow them to get what they need, pay only for what they get, make real investments, and spend money more efficiently.

Changing Roles: The role of the professional must change from working for the system to working for people. Professionals will be instrumental in helping people create more meaningful relationships, introducing them to new places and ideas, linking them with needed supports and services, removing barriers, helping dreams come true.

Whatever it Takes: The present service system is not the only answer in meeting people's needs. Self-determination requires an attitude that nothing is impossible. "No" as an answer is replaced with "How can this be done?"

Governance: All stakeholders must participate in the governance of the system as true and equal partners.

Person Centered Planning: The consumer must be empowered or represented to direct the system through planning centered around him or her as an individual.

Independence: Support brokerages should be independent of any entity that provides services or has multiple responsibilities.

History

In September 2000, a lawsuit brought against the State of Oregon was settled. In part, this lawsuit was responding to the fact that many adults with developmental disabilities were not receiving any needed supports and that available support dollars were often applied unevenly across the state. Commonly referred to as the Staley settlement, this agreement is changing how services for adults are planned and delivered. The Staley Agreement calls for "universal access" to self-directed Support Services for all adults with developmental disabilities who qualify for supports. In essence, this creates an entitlement to support services for all eligible adults with developmental disabilities built upon the principles of self-determination. Access to these support services, through Support Service brokerages, must be applied on an equitable, fair and uniform basis across the state regardless of what part of the state a person lives in. The first customers enrolled into these emerging brokerages in the fall of 2001. A statewide plan was developed that assured access to these services across the State by 2005. In 2003, as a result of the State of Oregon's budget crisis, that assurance was extended to 2009 with substantially reduced enrollments.

Historical Highlights:

- On December 14, 2001, a contract with DHS/SPD was signed and the Executive Director was hired.
- On December 24, 2001, funding was received to begin operations.
- On March 1, 2002, EOSSB staff began serving the first group of 62 customers.
- Approximately 5 to 10 customers per month were enrolled every month through January, 2003 when enrollments were frozen due to Oregon's fiscal crisis.
- In July, 2003, 59 new customers enrolled, transferring funding and services from county controlled slot based services to brokerage services under the Support Services Administrative rule.
- In August, 2003, new enrollments were resumed, but at a rate of two to three per month, which was much lower than originally planned in the Staley Settlement. This decrease was due to the failure of Measure 28.
- In May of 2004, eleven individuals transferred from the physical disability waiver of SPD to Support Services, through brokerages.
- In July, 2005, the PC 20 program was absorbed by brokerages for brokerage customers, resulting in approximately a \$200 per month plan increase for customers who require supports with Activities of Daily Living.
- During the 2006-2007 fiscal year, individuals in the Supported Independent Living Program (SILP) were required to choose between Supported Living Services and entry into Brokerages. 10 people entered EOSSB from SILP and the SILP program was eliminated state-wide. By fiscal year-end, 298 people were in support services through EOSSB.



EOSSB Members rally for services at the State Capitol in 2003

Governing Body and Organizational Structure

Membership: The EOSSB is a not-for-profit membership organization. The membership consists of all individuals served and their families, as well as interested others from advocacy groups, service providers, interested community members, and case management entities. The membership has a majority of family members and self-advocates.

Board of Directors: The board of directors consists of 12 to 15 people, with at least a simple majority of families and self-advocates. In its first year of operation, the Board of Directors was comprised of two founding members (the original incorporators), and one representative selected from each of the existing Self Directed Support groups in the region. Board members drew lots to establish one, two and three year terms. In subsequent years, starting with the first Annual Meeting in August of 2003, new board



Board, staff, and members at Kimsey Commons in Cove, Oregon, 2004

members were elected at an annual meeting by the membership using a process that facilitates the meaningful participation of self-advocates. A nominating and elections process is specified in the By-laws of the EOSSB that ensures family and self-advocate representation, as well as regional representation on the Board of Directors.

Local Alliances: In addition to the annual meeting and Board of Directors described above, the membership has the opportunity to work together to plan and develop local service delivery expansion, as well as to advise the Board of Directors through regular regional meetings. These Local Alliances are made up of members of the organization in the region, and just like the membership and the board of directors, are composed of a majority of families and self-advocates. Personal Agents from the region act as support staff to facilitate meetings and ensure information gets to the Board of Directors in situations where a local alliance may not have representation on the Board of Directors. Local Alliances also function to assist in the planning and development of local service delivery and capacity, and to review data and make recommendations regarding satisfaction with services and other quality assurance measures. Local alliances relate to the organization through Personal Agents from the region and representation on the Board of Directors. The Board of Directors and the Local Alliances collaborate in the oversight and implementation of a quality assurance process.

The membership, through its elected board of directors sets organization policy. The Executive Director is responsible for hiring and supervision of staff and the day to day operation of the organization. The Board of Directors, in concert with the Local Alliances, reviews satisfaction data and other quality assurance measures and approve plans for continuous improvement of services. The board collaborates with its membership through the local alliances to plan and develop local service delivery expansion.

Board Report

Board Members

Name	Representing	Affiliation	Term expires
Rick Currin President	Umatilla County	Service Provider	August, 2007
Mike Singleton Vice-President	Malheur County	Family Member Community Partner	August, 2007
Zee Koza Secretary / Treasurer	Union County	Service Provider	August, 2008
Barbara Hawk	Gilliam County	Family Member	August, 2008
Charlie Hammett	Umatilla County	Self-Advocate	August, 2008
Andrew Wood	Wasco County	Self Advocate	August, 2008
Kathleen Kim	Wallowa County	Family Member	August, 2007
Laurie Stephens	Union County	Family Member	August, 2007
Jo Vowell	Baker County	Family Member Service Provider	August, 2009
Steve Carlson	Umatilla County	Family Member	August, 2009
Mariah Langer	Mid-Columbia	Self-Advocate	August, 2009
Dustin Wyllie	Union County	Case Management	August, 2009

Board Activities

August 2006 Annual Meeting

- Annual report was distributed and reviewed by the membership.
- Board election results were announced and board members were introduced.
- Satisfaction survey results were discussed and prizes awarded from a drawing for those who submitted surveys over the past year.
- Individuals described their Brokerage experiences to the group.
- Activities, good food, and a live band were enjoyed by all.

November, 2006

- Reviewed 2006 SPD field audit and corrective action plans, updating the Strategic Plan/Quality Assurance Plan.
- Reviewed discussed and accepted the 2006 fiscal audit by Arens and Associates
- Discussed upcoming self-advocacy events.

March, 2007

- Reviewed and discussed year-to-date customer, provider and community partner satisfaction survey results.
- Elected officers
- Reviewed flex fund spending for this year and budget forecast

June, 2007

- Discussed and adopted FY-07-08 budget.
- Reviewed, discussed, and adopted potential actions to take as a result of Community Forums held throughout the region.
- Established a nominating committee for the upcoming Annual Meeting.

Staff

Administration

Executive Director
Bill Uhlman
Accountant
Jim Yuhas
Clerical/Accounting
Linda Jones

Personal Agents

Malheur County.....Amy Eddy
Harney and Grant County.....Zane Cooper
Baker County.....Annabelle Hirsch
Umatilla County.....Kristi Avery, Kristin Hughes, and Yvonne Bowling
Morrow County.....Kristen Hughes
Mid Columbia Counties.....Vicki Swyers and Becky VanBatavia
Wallowa County.....Barb McCommon
Union County..... Yvonne Bowling



EOSSB Staff

Standing: Kristi Avery, Jennifer Lewellyn (returning in 2007), Zane Cooper, Kristen Hughes, Becky Van Batavia, Jim Yuhas, Amy Eddy, Bill Uhlman, Yvonne Bowling
Sitting: Alica Sims (new in 2007), Annabelle Hirsch, Barb McCommon, Vicki Swyers
Not captured: Linda Jones

Services and Supports Provided

At the end of the previous Fiscal Year (June 30, 2006), 259 people were enrolled. New Brokerage enrollments in the current year were authorized by SPD at an average of 3.5 people per month (42 enrollments for the year). As of June 30, 2007, total enrollment is at 298 people, which is 87% of the original roll-out projection. Nearly every county in our region now reports having a wait list. Counties that cannot fill a brokerage vacancy in a particular month have traded vacancies with other counties to address individual needs while generally keeping to the annual and monthly enrollment schedule. The uneven distribution of enrollments across counties is due to the inability of some counties in past years to fill all vacancies, and due to state policy that prohibits vacancies created by people leaving Brokerage services from being filled.

EOSSB Enrollments	Beginning Enrollment March, 2002	Jun 30 2003	Jun 30 2004	Jun 30 2005	Jun 30 2006	Jun 30 2007	Original Roll-out Projection
Baker	11	12	23	28	28	30	26
Grant	3	5	6	6	5	5	12
Harney	1	9	11	12	11	11	12
Malheur	17	18	26	32	32	35	48
Morrow/Wheeler	6	8	9	11	12	15	17
Umatilla	10	31	55	62	63	76	106
Union	3	13	21	24	25	31	38
Wallowa	2	3	7	11	10	9	11
Mid Columbia	9	31	60	68	73	86	72
Total	62	130	218	254	259	298	342

Current Fiscal year to date moves:

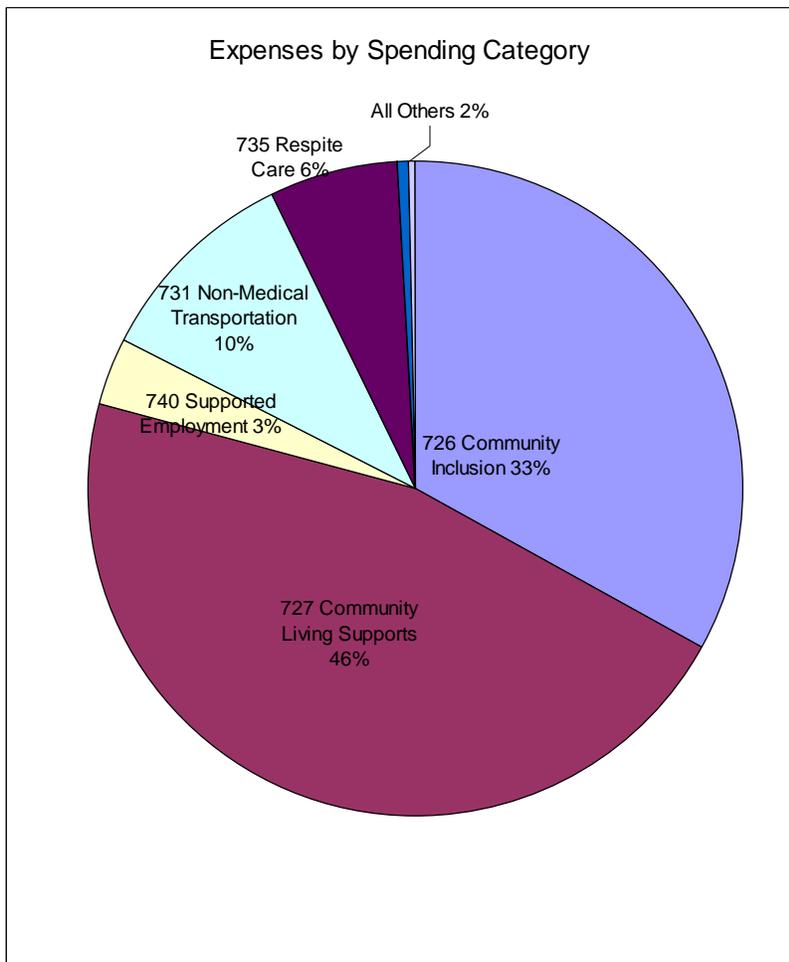
In	68	Out	29
Wait List	47	Death	8
Intra Brokerage	4	Intra Brokerage	4
Inter Brokerage	7	Inter Brokerage	3
SILP	10	Exit the system	7
		Comp 300	4
		Comprehensive	3

Although 68 new people have been enrolled, the net increase is only 39 people. Next Fiscal Year, it will be possible to backfill all but inter-brokerage exits, so that net increases will accumulate faster.

Service expenditures have increased each year in proportion to the increased enrollment.



A total of \$2,195,736 was spent in support services for the current year (an 18% increase over last year). The average spending per plan has also increased from \$616 per person per month at the end of FY 05-06 to \$640 per person per month at the end of FY 06-07.



46% of all Support Funds were spent on Community Living Supports which included employees to provide assistance with personal skills such as eating, bathing, dressing, and mobility.

33% of all Support Funds were spent on Community Inclusion, which included instruction in skills to participate in activities to facilitate independence and promote community inclusion in community settings of a person's choice.

10% of funds were spent on non-medical transportation.

6% of funds were spent on respite care.

3% of funds were spent on Supported Employment to

assist individuals to find, get and keep competitive jobs in the community.

The remainder (approximately 2%) was spent on items such as specialized medical equipment, environmental accessibility, physical therapy, personal emergency response systems, special diets, chore services and homemaker services.

Local Alliance Support

Mid-Columbia

The Arc of the Mid-Columbia is for residents of the Hood River, Wasco, Sherman, and Gilliam county area as well as for members everywhere who join our local chapter. Our membership continues to grow and is quite active. The local group has developed a friendship club that meets on a regularly scheduled Saturday afternoon. Individuals gather to visit with friends and meet new friends; we play games, visit, watch a movie and have refreshments. Another great event



Personal Agent Vicki Swyers

that has occurred for a few years is "Puttin' on the Ritz" Valentine Dance. It is co-sponsored by our local alliance, The Arc of the Mid-Columbia, with Beta Sigma Phi Sorority, Community Action Program and Life-span Respite Care. The Dalles Elks club served up a Prime Rib Dinner with all the fixings, dessert and long stem rose for each dinning party. Music, photos and door prizes were a smash. These are just a couple of events that occur this year. The news letter or flyer is sent monthly, be sure to check out the up-coming events page.



Personal Agent Becky VanBatavia

Grant County

It was a very active and successful year for our customers in Grant County. Many customers continued working hard in their chosen jobs and some found new employment in our community. Jobs our customers enjoyed included working in local restaurants, libraries, grocery stores, the local food bank, and radio stations just to name a few. Special Olympics has become very active in our area over the last two years thanks to excellent leadership and participation. Highlights include great finishes at the state tournaments in Basketball and Track & Field this year. The amazing array of activities our customers enjoy include horse back riding, raising registered dogs, riding ATV's, Snowmobiling, 4-H, Bicycling and much more. Many customers have also enjoyed the regular activities sponsored by the Grant County Center for Human Development. Recent activities have included trips to the Fossil Beds, day trips to local camping areas for picnics and hiking and craft activities and lunches at the center. The customers and their families have also been very active in trying to develop new recreational and vocational activities in our local area. Much time and energy has been put into this new organization promising great opportunities in the near future.



2006 State Special Olympics Basketball team from Grant County

Harney County

Harney County has been very active and vibrant over the last year. Our customers have been working hard to develop their job skills and opportunities. Some of our customers are working through their local school district; they have been working hard on their chosen vocations like child care and janitorial jobs. Our customers who have graduated have moved on to enjoy working in such occupations as Daycare, customer service and even running their own Ice Cream business. All of our customers have wonderful hobbies including 4-H, Traveling, Bicycling, Fishing and camping. Many enjoy activities sponsored by local churches or clubs. These include camping, swimming and even motorcycling. There have also been great activities regularly sponsored by the local alliance. These have included Holiday parties, Dances and swimming parties. There has been a great deal of interest and organizational meetings by customers and their supporters to find more activities and vocational opportunities for our customers. The determination of this group will make for wonderful new choices for our customers in Harney County.



Zane Cooper, Personal Agent
for Grant and Harney Counties

Wallowa County

It has been a busy and successful year in Wallowa County! In January, our Executive Director visited our community as we held a forum celebrating the Brokerage's fifth year anniversary. We had a pizza party, had great attendance and shared many thoughts about "what we should stop doing," "start doing," and "keep doing" to benefit this program. Our local alliance continues to support the, "Fun with Friends Club." This is an Autism/Aspergers group which meets monthly to enjoy a variety of activities and to establish and maintain the growth of community ties as well as friendship/relationships. I would like to thank the Wallowa Valley Family Youth Center who allows us to use their facility, as well as for their donation of tickets to the Chief Joseph Days Rodeo. We are grateful for your continual support! We have lost a "dear" customer to Comp 300 and would like to wish Charlie the best, knowing that this program will allow him more support while increasing his personal independence. In addition we would like to welcome two new customers to the brokerage, Anita and Katie! "KUDO'S" to Stephan for his fabulous job with writing movie reviews and being featured in the quarterly newsletter! We look forward to many more reviews. Wallowa County shared in the great attendance at the SAAL (Self Advocates As Leaders) Valentine dance in La Grande! Many thanks to Sharon and Wallowa Valley Center for Wellness for their donation of not only the bus but the driver. Friendships that had been formed at September's Wallowa Valley Lake Retreat were revisited at the dance. It was a joy to see so much energy and talent in one room. It has been a wonderful year and I'm thankful for my customers, providers, PA's and Brokerage staff, for your commitment and all you do to enhance this program.



Personal Agent Barb
McCommon

Umatilla, Morrow and Wheeler Counties

The Local Alliance remained busy with fundraisers and the annual camping trip, which grows each year. This summer we had about 35 campers. Our camping trip was at Jubilee Lake and our customers had a good time swimming, fishing, hiking, and eating S'Mores. We have not chosen next years site or date but people are already asking for it. More fundraisers are planned. A group will be attending the Round-Up Rodeo in Pendleton on Sept 13th, as we received a donation of 25 tickets this year. Many of our customers are also involved in helping with Arc activities and are on the Arc board. There are several activities and dances planned each year. The Arc Convention is also a very popular event. EOSSB flex fund assisted several individuals with the fees so that they could attend. There is already a large group of self-advocates planning to go to the convention next year at the coast. Our customers have increased their community participation and have formed and supported a year round bowling group that has almost doubled in size from two years ago.



Fishing and camping at Jubilee Lake



Personal agent Kristi Avery

Customers are also actively looking for business or employment opportunities. Over the past year we have continued to work with Voc. Rehab and CAPECO to assist our customers to find and keep jobs. Many have found volunteer positions that they love and they do not have to worry about losing social security benefits. Others have found jobs that fit their interests and they monitor their hours and income, so they do not lose benefits. Two customers have found jobs in Umatilla County without assistance and one person found a job with assistance from the local provider agency. EOSSB customers continue to grow and experience new things. We are looking forward to another exciting year.



Personal agent Kristen Hughes

Malheur County

The Malheur County customers who have been part of EOSSB for the past several years or more have very fulfilled lives! This past year renewing plans has caused some dilemma's as people's lives are so full that the brokerage funds can't cover such active lives! Wow, what an accomplishment! The flip side of that is many natural resources have developed throughout the growth and expansion of life experiences and those natural resources have stepped in to enable people to continue such fulfilling lives. Many customers have found full time jobs in the community, other's have found new jobs. New friendships are being developed and voices of independence and choices of life are being demonstrated through group activities with EOCIL. Customers are requesting activities of their choice and hosting lunches, etc. at their homes. New customers continue to flow into the Brokerage and are excited to enhance their lives. They are ready to jump in and start a life of more independence and watching their dreams come true as they hear stories of other's already living their dreams.



Personal Agent Amy Eddy

Baker County

Customers, with their families and providers, have been planning their own regular activities, chosen and led by the customers. Activities this year have included picnics, shopping trips out of town, fishing, camping, bowling, swimming, visiting the Flea Market and watching the Miner's Jubilee parade in Baker City, going to the Pendleton Water Park, line dancing, playing Bingo, card games, bowling, playing pool, aerobic swimming, ceramics classes, going to the Boise Zoo, visiting local museums and learning about history, participating in National Night Out, sponsored by the police department, attending People First meetings and dances in LaGrande, and learning to comparison shop and clip and use store coupons. Many customers have shown an

interest in learning how to cook (more than just TV dinners) and have been working with their providers to make their own meals. The providers have also been working with the customers to make side dishes for the monthly EOSSB luncheons. Some of our customers have been learning how to use the computer to e-mail their families that live far away. We are expanding our network with each other and learning about each other. It has been a busy and productive year for us in Baker County.



Personal Agent Annabelle Hirsch



Local Alliance Picnic in the Park

Executive Director's Report

Happy fifth Anniversary!

In celebration of our fifth anniversary of services, we held community forums in towns across our region to ask customers, providers and community partners what they think about our services after five years of operation. And although we send out annual satisfaction surveys to all of these people, the turnout was great (approximately 190 people), and the number of suggestions and comments were substantial (over 200). We started the conversation asking three questions: What should we keep doing (things that you really like)? What should we stop doing (Things that really bug you)? What should we start doing (things you would like to do)? Here is where we held the forums and how many people came:

- Milton-Freewater, **(15 people)**
- Baker City, **(10 people)**
- Ontario, **(23 people)**
- LaGrande, **(5 people)**
- Joseph, **(10 people)**
- Burns, **(20 people)**
- Heppner, **(3 people)**
- Hermiston, **(35 people)**
- Pendleton, **(12 people)**
- The Dalles, **(30 people)**
- Hood River, **(16 people)**
- John Day, **(10 people)**



Community Forum in Malheur County

Some things people really like:

- Relationship with their PA
- Annual meeting/picnic/dance
- Group activities with people from other counties
- Annual Self-advocacy retreat
- Stability of brokerage providers and staff
- EOSSB values, particularly self-determination
- For people to have choices and make decisions for themselves
- Programs and paperwork are well explained

Some things people don't like:

- Distance to activities such as friendship club, special Olympics, annual picnic
- Can't find behavior specialists to come to our community
- When providers don't get their timesheets and paperwork in on time
- Our community is not very accepting

Some things people would like us to start doing (or do differently):

- Find a way to help providers to be better trained and to afford to go to trainings
- Make more community inclusion and group activities available
- Want cell phones paid for
- Want more mileage funds with less restrictions
- Would like to have some services without having to be present
- More jobs, job training and assistance finding jobs
- More providers who will “stick with it”
- Broaden the use of flex funds to have more funds and fund more things
- Take classes in cooking, money handling, budgeting, computers, reading
- Investigate “home of your own” foundation grants
- Community newsletter for local community awareness
- Better transition plans for school age customers
- More support for family members of brokerage customers

Our Board of Directors then reviewed all of the suggestions and comments and targeted the categories of provider training and development, technology dissemination, and better communication of activities as tasks to add to our strategic goals. All comments are available for review at the annual meeting or by requesting them from our main office.

Full roll-out is in our sights! After five years of extremely slow growth resulting from Oregon’s budget woes (including a period of time where all enrollments were frozen), we are finally scheduled to be at full capacity by June 30, 2009. Even better news, is that with the legislative approval of the 2007-2009 DHS budget, EOSSB will be funded to a capacity of 400. This is an expansion of our original planned capacity of 342 people, and results from the continued demand for Support Services in Eastern Oregon. Based on the funds available for a brokerage with capacity of 400, we have hired two additional Personal Agents to handle the increased capacity and maintain what we consider to be our optimal caseload. While the Personal Agent to customer ratio in SPD’s model budget is one Personal Agent to 48 customers, when we developed our original Brokerage proposal for Eastern Oregon, we considered 1:37 to be an optimal case load and structured our organization accordingly. Although inflationary pressures and a difficult revenue picture have eaten into that ratio slightly, at the end of the 2007-2009 biennium, we intend to have 10.4 full time equivalent staff, for an average caseload of one Personal Agent to 38.5 customers. That is still 24% lower than the caseload in the state’s model budget. It is our opinion that a smaller caseload for each Personal Agent means higher quality of service, greater customer satisfaction, and lower staff turnover ratio. And, indeed, our customer satisfaction results show that we have maintained a very high level of satisfaction, our field audits and certification reviews show a high level of service quality, and our Personal Agent turnover rate is a remarkable 7.5% averaged over the past five years.

So let’s celebrate five full years of fulfilling our vision. And let us make sure that the next five years continue to bring self-determined lives to the people we support in the great state of (Eastern) Oregon!

Bill Uhlman, Executive Director

Financial Report (audit pending)

Fiscal Year: July 1, 2006 to June 30, 2007

	FY 06-07	FY 06-07	Deviation	FY 07-08
	Budget	Actual	from 06-07	Budget
Revenue				
DD 148 Brokerage Operations	717,680	717,680	0	865,487
DD 149 Support Services	2,499,259	2,195,735	-303,524	2,914,337
FI Services	20,940	18,000	-2,940	16,200
Interest Income	6,000	16,770	10,770	6,000
United Way	1,250	1,250	0	1,250
Misc Income	0	744	744	0
Total Revenue	3,245,129	2,950,179	-294,950	3,803,274
Expense				
Payroll Expenses(salaries)	420,836	418,465	-2,371	499,247
Payroll Taxes & Benefits	117,834	116,853	-981	148,481
Total Salaries and Expense	538,670	535,318	-3,352	647,728
Board/Volunteer Support	7,385	7,341	-44	7,400
Dues and Subscriptions	4,742	3,306	-1,436	4,742
Insurance	10,986	8,607	-2,379	7,412
Miscellaneous	2,427	1,877	-550	2,427
Postage and Delivery	5,356	7,104	1,748	6,537
Printing and Copying	0	0	0	0
Professional Fees	10,165	9,807	-358	11,450
Rent	12,600	12,512	-88	13,200
Telephone/Communications	26,547	23,667	-2,880	35,925
Training - Staff	3,424	4,021	597	5,040
Travel	82,984	75,564	-7,420	95,921
Office Supplies	15,403	14,296	-1,107	17,675
Total Services and Supplies	182,019	168,102	-13,917	207,729
Support to Individuals	2,499,259	2,195,735	-303,524	2,914,337
Fiscal Intermediary Expense	13,398	12,684	-714	13,122
Flex fund and transportation	7,250	9,444	2,194	7,250
Equipment Purchases	4,400	2,374	-2,026	10,000
Operating Reserves	133	26,522	26,389	3,108
Total Other Expenses	2,524,440	2,246,759	-277,681	2,947,817
Total Expense	3,245,129	2,950,179	-294,950	3,803,274
Net (Revenue - Expense)	0	0	0	0

Flex Fund Report

The Medicaid entitlement of Support Service funds meets many needs of the individuals we support. However, many legitimate needs cannot be met through such governmental funding sources. In January of 2003, the Board established a policy and procedure to enable spending of non-governmental funds (such as membership dues, interest earned, **United Way** funds and private donations) to support customer needs. The operational guidelines for the use of the fund are as follows:

Funding requests are made by Personal Agents.

Requests are granted if the following conditions are met:

- Funds are available and within the budget established
- The funds requested are for services and supports that are not covered by DD 149 (Support Services) or any other available governmental or community service.
- The request fulfills a part of an Individual Service Plan
- The request is not in excess of \$300 or the aggregate of funded requests for any individual shall not exceed \$300 per year.

If competing requests exceed the funds available, requests are prioritized in the following manner:

1. The request meets health/safety needs
2. The request meets shelter needs
3. The request promotes community inclusion
4. All other requests.

In FY 2006-2007, \$8,426 in Flex Funds were expended on behalf of our customers.

Examples of approved Flex fund requests:

<u>Item</u>	<u>Purpose</u>	<u>Cost</u>
medic alert necklace	allergy to bees	57.90
Moving expenses	evicted from apartment	300
Mouth guard to prevent tooth grinding	not covered by medicaid	300
dental work	not covered by medicaid	300
coronary risk reduction program at hospital	maintain health, lose wt, keep diabetes under control	52
Wallowa Lake Self Advocacy workshop	Community inclusion	35
Membership to TD fitness club for 12 months	community inclusion and healthy lifestyle	120
Apartment deposit	to move from crisis services to own apartment	300
HUD housing Application	moving into own apt from family home	35
Apartment Deposit	moving into own apt from family home	250
Bike	mobility, independence inclusion, work	250
new bike tires	transportation around town	24
Lift for van and WC tie downs	community access	300
fingerprints	to get new job	45
GED fee and math book	education for employment	39
medications not covered by medicaid	for incontinence	133.88
emergency food and laundry money	To be healthy and safe in apt	50



United Way

EOSSB is a private, not for profit corporation under section 501 (c) 3 of the Internal Revenue Code. Donations to the EOSSB Flex-fund are tax deductible.

Quality Assurance

Customer Satisfaction

All customers receive a satisfaction survey with a stamped, self-addressed envelope on the anniversary of their plan year.

- 37% were filled out by the individual receiving services.
- 59% were filled out by another on behalf of the individual but from the perspective of the individual receiving services.
- 3% were completed by a significant other of the individual receiving services.
- 127 out of 248 surveys were returned for a return rate of 51%.

1. Do you know all the things that EOSSB services can do for you?

Yes 87 (71%) Not Sure 29 (24%) No 6 (5%)

2. I feel that people in EOSSB who support me, listen to me.

All the time 106 (85%) Sometimes 18 (15%) Not at all 0 (0%)

3. My plan says what I want it to say.

Yes 115 (93%) Not Sure 9 (7%) No 0 (0%)

4. I am happy with the supports and services I get.

Very Happy 112 (90%) They're Okay 11 (9%) Not Happy 1 (1%)

5. The support and services I receive are helping me to get what I want, to reach my goals.

Yes 115 (94%) Not Sure 8 (6%) No 0 (0%)

6. Are there supports and services that you need and don't get?

Yes 23 (19%) Not Sure 25 (21%) No 70 (59%)

7. Do you feel safe?

All the time 109 (86%) Most of the time 16 (13%) Not really 1 (1%)

8. When I want to make changes, People support me.

Personal Agent	Yes 109 (96%)	No 4 (4%)	Sometimes 1 (1%)
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Support Staff	Yes 89 (92%)	No 6 (6%)	Sometimes 2 (2%)
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Family	Yes 98 (89%)	No 7 (6%)	Sometimes 5 (5%)
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Friends	Yes 90 (89%)	No 8 (8%)	Sometimes 3 (3%)
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Others	Yes 45 (78%)	No 6 (10%)	Sometimes 7 (12%)
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9. I know what to do when I have a disagreement with EOSSB or staff person

Yes 82 (70%) Not sure 27 (23%) No 8 (7%)

10. I feel better about my life because of the supports and services I get from EOSSB.

A lot better 105 (85%) A little better 15 (14%) No better 1 (1%)

11. People in my life support me with reaching my life choices.

Personal Agent	Yes 110 (95%)	No 0 (0%)	Sometimes 6 (5%)
Support Staff	Yes 88 (93%)	No 3 (3%)	Sometimes 4 (4%)
Family	Yes 100 (92%)	No 5 (5%)	Sometimes 4 (4%)
Friends	Yes 87 (89%)	No 5 (5%)	Sometimes 6 (6%)
Others	Yes 43 (78%)	No 4 (7%)	Sometimes 8 (15%)

12. I am happy with my life.

All the time 76 (61%) Most of the time 45 (36%) Not really 3 (2%)

13. Are you satisfied with where you live?

Very Happy 104 (83%) It's Okay 19 (15%) Not Happy 3 (2%)

Community Partner Satisfaction Survey

A Community Partner Satisfaction Survey was sent to xx people in February, 2007. This survey was completed by 14 members of the case management community, and 7 members of the vocational rehabilitation community. Twenty-two of 46 or 48% of all surveys were returned.

1. In my observations, brokerage personnel treat their customers with respect.

Yes 18 (86%) No 1 Somewhat 2

2. How effective are brokerage personnel in furthering their mission?

Very effective 11 (50%) Somewhat Effective 9 Not effective 2

3. How would you assess your working relationship with brokerage personnel?

Excellent 9 (41%) Good 5 Fair 6 Poor 0 Strained 2

4. Are Brokerage staff knowledgeable about local community resources?

Yes 14 (70%) No 0 Somewhat 6

5. Do brokerage staff have a competent understanding of Support Services Benefits?

Yes 18 (86%) No 1 Somewhat 2

6. Do Brokerage staff know and work well with other agencies, service providers, and individuals in the community?

Yes 12 (63%) No 2 Somewhat 5

Service Provider Satisfaction Survey Data

This survey was completed by 102 employees of customers of EOSSB, 13 independent contractors working for customers of EOSSB and 6 provider agencies working for customers of EOSSB. 121 surveys of 315 sent were returned for a return rate of 38%.

1. In my observations, brokerage personnel treat their customers with respect.
Yes 111 (95%) No 1 Somewhat 5

2. How would you assess your working relationship with your customer with disabilities.
Excellent 81 (68%) Good 35 Fair 3 Poor 0 Strained 0

3. How would you assess your working relationship with brokerage personnel.
Excellent 68 (59%) Good 36 Fair 8 Poor 4 Strained 0

4. Are payment procedures efficient and timely?
Yes 110 (95%) No 2 Somewhat 4

5. Do brokerage staff have a competent understanding of Support Services Benefits.
Yes 90 (93%) No 2 Somewhat 5

6. Do Brokerage staff know and work well with other agencies, service providers, and individuals in the community?
Yes 75 (97%) No 1 Somewhat 1

2005-2010 Quality Assurance Plan

The following items are available upon request in the updated 2005-2010 Quality Assurance Plan (the document is approximately 40 pages):

- Strategic Planning/Quality Improvement process
- Statewide Brokerage Benchmarks and EOSSB Baseline
- Quality Improvement Goals and Outcomes
 - Compliance Goals
 - Strategic Goals
- Customer Satisfaction results including comments on each question.
- Customer Satisfaction results compared across years and with statewide data
- Community Partner and Provider Satisfaction results including comments on each question

Eastern Oregon Support Services Brokerage

PO Box 329
(1216 C St)
Hood River, OR 97031

Phone 541 387 3600
1 866 387 3601

Fax 541 387 2999

Email info@eossb.org

Website www.eossb.org

