

# 2014 Annual Report

JULY 1 2013 TO JUNE 30 2014



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## Vision

*We envision a world in which all people are supported to be members of their community, families, and neighborhoods, and where communities and citizens are willing to become involved in the lives of the people we support.*



## 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.*



Maria rides through her neighborhood on a bike purchased with flex fund support

*“We are committed to helping people determine their dreams, respecting those dreams, and helping to make them come true.”*

# Principles of Self-Determination

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

**Freedom:** People 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 will have the ability to control a certain sum of dollars in order to purchase their supports.

**Support and Autonomy:** People 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 will have the opportunity to accept a valued role in a their community through competitive employment, organization affiliation, spiritual development, 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. We are committed to helping people develop and maintain relationships.

**Choice:** People have the right to choose what they will do with their lives and with whom they will do it.

**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. We are committed to helping people determine their dreams, respecting those dreams, and helping to make them come true.

**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.

**Fiscal Conservatism:** We believe that 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.

**Whatever it Takes:** 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 develop-

mental disabilities built upon the principles of self-determination. Access to these support services, through Support Service brokerages, is 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. And while budgetary constraints prevented that from occurring on schedule, over 7800 people are now served by Support Service Brokerages, including 465 in Eastern Oregon Support Services Brokerage.

**Board and staff gather in 2013 to celebrate the retirement of CFO Jim Yuhas**



## Organizational Structure

**Membership:** 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.

**Local Alliances:** The membership has the opportunity to work together to plan and de-

velop 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. Local Alliances function to assist in the planning and development of local service delivery and capacity. 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 implementa-

tion 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.

**“Local Alliances function to assist in the planning and development of local service delivery and capacity.”**

*“There is no greater joy than to celebrate the successes of our people.”*

*Steve Carlson  
Board President*



# Board President Report

Wow! What a great year! Progress has been made on assuring our clients receive their well deserved independence and dignity!

Quality of life has been our mission and goal and we feel blessed to have such great people. Our staff enjoys the challenge of meeting needs and fulfilling our mission, serving those who depend on us for a quality life.

In these times of potential budget cuts and staff reductions, we have maintained a high quality person centered base of support. It is a privilege to be part of an organization that focuses

on people. Anyone who attends our annual meeting knows that we are about person-centered programs.

There is no greater joy than to celebrate the successes of our people. We look forward to another year of moving forward and focusing on positive client achievement and personal improvement!

Respectfully,

Steve Carlson  
EOSSB Board President

## Board Members

<u>Name</u>	<u>Representation</u>	<u>Term</u>
Steve Carlson, President	Family Member—Wasco County	2015
Barbara Hawk, Vice Pres	Family Member—Gilliam County	2014
Kathleen Kim, Sec/Treas	Family Member—Wallowa County	2016
Julie Kay Dudley	Family Member—Union County	2016
Mariah Langer	Self Advocate—Hood River County	2015
Josephine Vowell	Family Member—Baker County	2015
Julie Wynn	Self Advocate—Umatilla County	2015
David Russell	Self Advocate—Umatilla County	2014
Charlie Hammett	Self Advocate—Umatilla County	2014
Zee Koza	Service Provider—Union County	2014

# Board Activities

## September 2013 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. Activities, good food, and a live band were enjoyed by all.

## October, 2013

Staff, customers, and board members shared good things happening in their region since the last meeting. The Board adopted a revised budget based on final definite revenue projections. The implementation of the K-plan was described and discussed so that board members would understand the changes occurring, including elimination of funding caps, in-

creased enrollment cap of 465, creation of a functional assessment tool to determine service hours, and the implementation of choice among case management providers.

## March, 2014

Staff, customers, and board members shared good things happening in their region since the last meeting. The fiscal audit for fiscal year 2012-2013 was reviewed and approved after reconciliation with the 2013 annual report. The development of a corrective action plan for the 2012 Field Review was presented and discussed. Final interviews for the Associate Director position were conducted by the Board of Directors. The work plan and workload created by the implementation of the Adult Needs Assessment for every customer was discussed.

## June, 2014

A budget for the next fiscal year, July 2014 through June 30, 2015 was discussed and adopted. With Zee Koza requesting to retire as board president, Board Elections were held: Steve Carlson was Elected president, Barbara Hawk elected vice-president and Kathleen Kim elected secretary-treasurer. A nominating ballot for the upcoming annual meeting was also developed. Proposed statewide changes for the upcoming Biennium were explained and debated, including: Provider payment system changes, contract payment system changes, elimination of enrollment caps, and other policies.



**Board member**  
**Julie Wynn**



**Board member**  
**David Russell**



**Board member**  
**Charlie Hammett**

# Executive Director Report

## Small, Personal, Local...

Back in 2001, when Zee Koza, Rick Currin and I crafted the proposal that became EOSSB, we and the other brokerages across Oregon were committed to building organizations that were small, and to services that were personal and local. That was certainly a challenge for us, since the eastern Oregon region covers almost 47% of the territory of Oregon. However, we did it by ensuring that Personal Agents live in or near the communities they serve. They work from their homes instead of from a regional office, have local telephone numbers and actively develop resources in their local communities. They are accustomed to going to where our customers and families are instead of having our customers come to their office. While they have a home office, their actual office frequently seems to be their car, and their meeting rooms often are living rooms and coffee shops.

As the service delivery system and Oregon's brokerages have grown, many of the forces of change have worked against remaining small, personal and local. Half of all brokerages support over 600 customers, and of the 7,805 people served by brokerages in Oregon, only 1565 people experience a brokerage as small or smaller than ours. There is now a one-size-fits-all need assessment that determines what services an individual receives, Personal Support Workers and Independent contractors now belong to the largest labor union in the state and one of the largest in the

country, and the rules that govern our support delivery system come from the federal government, giving less and less control to our policy oversight body (our Board of Directors). Soon there will be a one-size-fits-all ISP (individual Support Plan) for everyone receiving services from children to brokerage customers to people receiving comprehensive supports. And as any personal support worker or independent contractor can attest, the movement to one fiscal intermediary (payroll service) for every provider in the state has subjected them to more bureaucracy than they ever experienced when those duties were performed by us.

So much for small, personal and local.... Or is it?

Our personal agents are still committed to living and working in the communities they serve. They are still committed to developing local resources. Our staff believe in people having the right to choose what they will do with their lives and with whom they will do it. They are dedicated to empowering people to direct their supports through planning centered around them as an individual. And they are still committed to helping people determine their dreams, respecting those dreams, and helping to make them come true.

While everything around us gets bigger, more impersonal and one-size-fits-all, our staff remain committed to providing the best personal and local supports possible!

*“While everything around us gets bigger, more impersonal and one-size-fits all, we are committed to remaining small, personal and local”*



**Bill Uhlman, Executive Director**

## EOSSB Staff



**Bill Uhlman, Executive Director:** Bill was born in Inglewood, Ca. He grew up in a military family and moved every few years throughout the US and Canada. He frequently drives 2000 to 3000 miles per month for work throughout our eastern Oregon region. He has four grown children and six grandchildren, all living in Oregon, as well as a stepson still living at home and going to college. When not working, he likes cooking, travel, and golf.

**Laura Noppenberger, Associate Director:** Laura grew up on the East Coast and spent several years traveling the US before finally settling on the West Coast. She fell into the social service field quite by accident, but knew the moment she began supporting people to be successful she had found her calling. Laura splits her time between being a ½ time Personal Agent and a ½ time Associate Director which requires juggling many priorities. Laura loves to read, spend time with her daughter who just started kindergarten, and enjoys driving to new places.



**Eric Fauth, Chief Financial Officer:** Eric is a life-long Oregonian who was born and raised in Albany and has lived in Monmouth, Klamath Falls and now Hood River. After schooling and starting as an accountant, he took a few years off to be a stay-at-home dad for his two boys and has been pleased to be welcomed back into the workforce by the EOSSB staff. He now enjoys seeing the world with his wife through his children's eyes.

**Linda Jones, Office Manager:** Linda was born in Washington and raised in the Hood River Valley as an orchardist daughter. Her favorite things about working for EOSSB is the wonderful caring people she works with! When she is not at work she enjoys riding her motorcycle and dancing to country music. She became a grandma 2 years ago so he is the new joy in her life!



**Vicki Swyers, Personal Agent Mid Columbia:** Vicki is a native of Hood River Valley, "It's all good in the Hood". She has a wonderful partner, three adult children and one teenager (learning to drive) yikes. She has two pretty awesome grandsons that she really enjoys spending time with. She also cares for her father to assure life in the Hood is good for him. Vicki likes to be active; she enjoys garden/flower therapy, bike riding, walks, card or board games and spending time with family and friends. Vicki has worked in this line of work for 30+ years; she too fell into this line of work accidentally. From Sheltered workshops to group homes to Brokerage services "Lots of CHANGES". She says she like to learn and overcome challenges. It is a great reward to assist and watch others become self-supporting.

**Heather Castro, Personal Agent Mid Columbia:** Heather was born in Portland Oregon and grew up in Eastern Oregon. While in high school Heather coached Special Olympics Swim teams, and has been invested in this field ever since. Heather and her husband have a combined family of seven children; the eldest is in high school while the youngest just began Kindergarten. When she is not working she enjoys spending time with her family, camping, going to the beach, and spending time in the mountains. Heather looks forward to many more years of enjoyment, learning, and supporting our customers.





**Alica Sims, Personal Agent Mid Columbia:** Alica army brat born in Munich Germany lived in eight states before settling in Bend as a young adult. She realized her passion and career path as teacher's aide/youth transition specialist at Madras High School then four years at Opportunity Foundation of Central Oregon expanding services in Jefferson and Crook counties. When not working, self indulgence as a human being versus a human doing. She likes what she does because it gives her a role in seeing customers become self advocates towards managing support needs to meet their goals.

**Annabelle Hirsch, Lead Personal Agent, Baker and Malheur Counties:** Annabelle was born and reared in Astoria, Oregon . She got into this field after working with students in a multi-age classroom setting. She loves to see customers meet their goals and experience fulfilling lives. When she has free time she and her family fish, hunt, hike and enjoy the outdoor and nature. Annabelle has a husband, Mike, 7 children and 12 grandchildren.



**Morgan Gilda, Baker County:** Morgan was born in Eastern Oregon and raised in the California Bay Area. Now after 25 years in California she has returned to Eastern Oregon and lives in Baker City with her two small children ages 3 and 1. She began work after college in California with small children teaching preschool, graduated to addictions counseling, and then moved on to work as a Personal Agent with EOSSB. She loves working with people; it brings her true joy to be in the social service industry where she gets to live her passion of helping others every day.

**Robin Christy, Personal Agent Harney, Grant and Wheeler Counties:** Robin was born in Port Hueneme, California, and then lived in Coloma, Michigan until 2<sup>nd</sup> grade. When she was in Kindergarten, Robin's mom worked in the middle school Special Education room, where Robin enjoyed going and playing with the "big kids." During 2<sup>nd</sup> grade, Robin's family moved to Tillamook, Oregon. After completing High School, Robin attended 7 colleges from Oregon to New Jersey and back to Oregon where she wrapped it all up at Portland State University. Robin now lives in the wilds of Eastern Oregon, and, although she is a city girl, she loves the wide open spaces of the counties she serves with her job. Robin loves to cook (and eat!), sew, and shop.



**Amy Eddy, Personal Agent Malheur County:** Amy was born and raised in Ontario, Oregon. She moved around and lived in Idaho, Washington and Oregon. She started social work right out of high school. She has done several different things in between but social has always drawn her back. She loves serving people. Amy loves watching people grow, expand and learn. She loves photography. She takes her camera with her wherever she goes. Amy's family is her heart and soul. She is devoted to them and loves them with everything she has and more.

**Lorien James, Personal Agent Wallowa County:** Lorien is married with two girls. They enjoy the outdoors, motorcycle riding, and snowmobiling. They own a Yamaha and Honda dealership which gives them many opportunities to ride, travel and race. Her dad got her into riding and is blessed to share her passion with her children. Racing is their current adventure, her family just drove to Tennessee to support her husband at the Motocross Nationals and now her four year old has started racing. They are excited for adventures ahead.





**Kristi Avery, Lead Personal Agent, Umatilla County:** Kristi was born in Kennewick WA and lived there for 12 years, before moving to Eastern Oregon. She moved to Salem OR and went to school and worked there. She started working with individuals with disabilities at a company called Spruce Up Enterprises in the vocational program. Kristi later moved back to Eastern Oregon and continued to work in the same field. When not working she enjoys most outdoor activities and spending time with her pets.



**Kristen Hughes, Personal Agent Umatilla and Morrow Counties:** Kristen was born and raised in Baker City except for 3 years in Pendleton and then Wyoming. She has 3 brothers who live in Bend, Idaho, and Utah. She has 8 nephews and one niece, with another baby on the way. She has a great niece and another great on the way. Kristen got into this field while living in Idaho when she was looking for a part time job. She likes seeing the changes we help make, hopefully for the good. Kristen likes to camp and visit with her family when she is not working. She spends her time in the evenings doing logic problems and 25 X 25 Sudoku puzzles, the rest are too easy and boring.



**Michael Swanson, Personal Agent Umatilla County:** Michael was born in Oakland, California and raised in Portland, Oregon. He really enjoys the face to face interactions with his customers and watching them progress. He has twin nephews and a beautiful niece that has complete control of him. When he isn't working he volunteers at local school districts helping at risk youth and enjoys watching college and professional basketball games, most notable the Portland Trail Blazers and Duke University.



**Jessica Horton, Personal Agent Umatilla County:** Jessica was born and raised in Hermiston Oregon. She got into this field of work by volunteering during high school for an extracurricular activity then started work at a provider agency for employment services for 7 years. Jessica began working for EOSSB as a personal agent in August 2014. She loves working in this field because of how motivating it is while helping individuals become successful within their own lives. When Jessica isn't working she is focused on her 2 year old daughter and spending time with family and friends.



**Ellie Spangler, Personal Agent Umatilla and Union Counties:** Ellie was born in Butler Pennsylvania to a large family, with 7 siblings and 72 cousins. When not working she enjoys growing flowers, natural history and annoying the neighbors with her ukulele practice (could be worse, it used to be the violin!). She enjoys working with people and being able to help them be successful and independent, the big smiles by the customers are the payoff for this job!

**Nancy Fields, Personal Agent Union and Baker Counties:** Nancy was born in Tacoma Washington, and grew up in many small logging communities. She worked for New Day Enterprises for 10 years as on line staff and then Job Developer. In 2002 she became an Independent Contractor and worked with EOSSB Customers, In 2007 she became a Personal Agent for EOSSB in Union County. Nancy enjoys interacting with the people she serves more than anything. There is never a dull moment and there is always something new to learn and there is always more than one way to do things. Nancy loves spending time with her grandson's, going camping, jet skiing, and huckleberry picking in the mountains. Her son, daughter in law and 2 grandsons are moving to La Grande in October, which will be a whole new exciting chapter for her.



# Customer Satisfaction Report



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

- 49% were filled out by the individual receiving services.
- 46% were filled out by another on behalf of the individual but from the perspective of the individual receiving services.
- 5% were completed by a significant other of the individual receiving services.

172 out of 408 surveys were returned for a return rate of 42%.

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

Yes 132 (77%) Not Sure 31 (18%) No 7 (4%)

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

All the time 145 (87%) Sometimes 18 (11%) Not at all 3 (2%)

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

Yes 162 (95%) Not Sure 6 (4%) No 2 (1%)

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

Very Happy 151 (90%) They're Okay 15 (9%) Not Happy 2 (1%)

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

Yes 158 (93%) Not Sure 7 (4%) No 4 (2%)

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

Yes 26 (17%) Not Sure 38 (25%) No 89 (58%)

7. Do you feel safe?

All the time 149 (89%) Most of the time 15 (9%)  
Not really 4 (3%)

*“Individuals must be empowered or represented to direct the system through planning centered around him or her as an individual.”*



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

Personal Agent	Yes 145 (92%)	No 7 (4%)	Sometimes 5 (3%)
Support Staff	Yes 123 (93%)	No 4 (3%)	Sometimes 5 (4%)
Family	Yes 136 (90%)	No 8 (5%)	Sometimes 7 (5%)
Friends	Yes 117 (87%)	No 8 (6%)	Sometimes 9 (7%)
Others	Yes 66 (75%)	No 8 (9%)	Sometimes 14 (16%)

9. I know what to do when I have a disagreement with EOSSB or staff person

Yes 150 (91%) Not sure 14 (8%) No 1 (1%)

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

A lot better 136 (83%) A little better 24 (15%) No better 4 (2%)

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

Personal Agent	Yes 146 (94%)	No 6 (4%)	Sometimes 4 (3%)
Support Staff	Yes 126 (93%)	No 6 (4%)	Sometimes 4 (3%)
Family	Yes 137 (91%)	No 9 (6%)	Sometimes 4 (3%)
Friends	Yes 114 (85%)	No 13 (10%)	Sometimes 7 (5%)
Others	Yes 60 (67%)	No 13 (15%)	Sometimes 14 (16%)

12. I am happy with my life.

All the time 102 (64%) Most of the time 53 (33%) Not really 4 (3%)

13. Are you satisfied with where you live?

Very Happy 132 (80%) It's Okay 25 (15%) Not Happy 7 (4%)



# Services and Supports

Enrollments	Mar	Jun	June	June	June	June	June						
	1 2002	30 2003	30 2004	30 2005	30 2006	30 2007	30 2008	30 2009	30 2010	30 2011	30 2012	30 2013	30 2014
Baker	11	12	23	28	28	30	35	41	45	48	40	39	41
Grant	3	5	6	6	5	5	5	6	10	13	13	15	12
Harney	1	9	11	12	11	11	12	11	12	13	15	14	16
Malheur	17	18	26	32	32	35	40	47	52	54	49	46	47
Morrow/ Wheeler	6	8	9	11	12	15	14	20	22	24	17	20	16
Umatilla	10	31	55	62	63	76	87	102	114	118	112	115	143
Union	3	13	21	24	25	31	28	40	41	47	48	49	55
Wallowa	2	3	7	11	10	9	10	10	12	14	13	11	11
Mid Columbia	9	31	60	68	73	86	91	110	116	125	113	117	122
<b>Total</b>	<b>62</b>	<b>130</b>	<b>218</b>	<b>254</b>	<b>259</b>	<b>298</b>	<b>322</b>	<b>388</b>	<b>424</b>	<b>456</b>	<b>420</b>	<b>426</b>	<b>463</b>

Throughout most of the current fiscal year, EOSSB had a contracted capacity of 465. Because of bureaucratic delays enrolling new people once vacancies become known, we have generally had an actual enrollment slightly below 465.

A total of \$5,206,314 was spent in support services for the fiscal year July 1, 2013 to June 30, 2014. This was an increase of \$827,819 from the previous year. The increase was due to the implementation of the K-plan which eliminated budget caps and replaced them with an Adult Needs assessment. Additional increases occurred due to increases in

Personal Support Worker wages as negotiated in the Collective Bargaining Agreement between SEIU and the State of Oregon.

87% of all Support Funds were spent on Community Living and Inclusion Supports which included service workers and contractors employed to provide assistance with personal skills such as eating, bathing, dressing, and mobility.

9% of funds were spent on non-medical transportation.

3% of funds were spent on respite care.

1.4% of funds were spent on Sup-

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

The remainder (less than 1%) was spent on items such as specialized medical equipment, environmental accessibility, physical therapy, personal emergency response systems, special diets, chore services and homemaker services.



Annual Meeting crowd 2013

# Financial Report-July 1, 2013 to June 30, 2014

## Financial Report (audit pending) Fiscal Year: July 1, 2013 to June 30, 2014

*“We believe that 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.”*

	<b>FY 13-14 Budget</b>	<b>FY 13-14 Actual</b>	<b>Deviation from 13-14 Budget</b>	<b>FY 14-15 Budget</b>
<b>Revenue</b>				
DD 148 Brokerage Operations	1,358,634	1,358,545	-89	1,358,634
DD 149 Support Services	4,890,580	5,206,314	315,734	759,576
FI Services	3,500	18,605	15,105	0
Interest Income	1,500	683	-817	668
Misc Income	0	2,363	2,363	1,390
<b>Total Revenue</b>	<b>6,254,214</b>	<b>6,586,510</b>	<b>332,296</b>	<b>2,120,268</b>
<b>Expenses</b>				
Payroll Expenses (salaries)	750,396	704,548	-45,848	759,111
Payroll Taxes & Benefits	312,300	291,843	-20,457	320,073
<b>Total Salaries and Expenses</b>	<b>1,062,696</b>	<b>996,391</b>	<b>-66,305</b>	<b>1,079,184</b>
Board/Volunteer Support	15,500	13,239	-2,261	15,500
Dues and Subscriptions	3,500	5,230	1,730	6,500
Depreciation (equipment)	10,000	4,054	-5,946	15,000
Insurance	10,000	9,449	-551	10,000
Miscellaneous	4,500	4,890	390	5,000
Postage and Delivery	9,000	9,667	667	9,000
Professional Fees	21,500	20,655	-845	21,500
Rent	15,000	14,616	-384	15,000
Telephone/Communications	32,000	30,680	-1,320	32,000
Training - Staff	5,000	5,987	987	7,500
Travel	77,000	78,078	1,078	77,000
Office Supplies	17,200	20,769	3,569	22,000
<b>Total Services and Supplies</b>	<b>220,200</b>	<b>217,314</b>	<b>-2,886</b>	<b>236,000</b>
Support to Individuals	4,890,580	5,206,314	315,734	759,576
Fiscal Intermediary Expense	2,400	10,003	7,603	0
Flex Fund, transport & other	4,260	4,601	341	4,000
Contingency funds	74,078	151,887	77,809	41,508
<b>Total Other Expenses</b>	<b>4,971,318</b>	<b>5,372,805</b>	<b>401,487</b>	<b>805,084</b>
<b>Total Expenses</b>	<b>6,254,214</b>	<b>6,586,510</b>	<b>332,296</b>	<b>2,120,268</b>
<b>Net (Revenue- Expenses)</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>

# 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.

Several years ago, the State of Oregon changed the manner in which they do business with Support Service Brokerages, resulting in a substantial reduction in our ability to earn interest off of our accounts. Consequently, the majority of the flex funds expended this

year came from prior year reserves. The flex fund will eventually run out of money at the current rate of expenditures. Therefore Flex Funds in the current year and upcoming years are generally restricted to emergency expenditures only, to ensure that basic health and safety needs that cannot be met through regular funding are met.

In FY 2013-2014, \$1,436 in Flex Funds were expended on behalf of our customers. Approximately \$10,000 remains.

Additionally \$1,024 was spent from local fundraising for special local projects.

## 2011-2015 Quality Assurance Plan

The 2011-2015 Quality Assurance Plan is available upon request (the document is approximately 40 pages). It evaluates seven key result areas and describes corrective actions when benchmark levels are not met.

**Key Result Area #1: Customer Planning is person centered and based on the principles of self determination**

**Key Result Area #2: Services provided have clear outcomes, meeting customer needs, protecting**

**health and safety, and adhering to cost effective criteria**

**Key Result Area #3: Targeted Case Management activities accurately reflect activities of Assessment, Care Planning, Referral and linking, Monitoring and Followup, and Direct Service Delivery**

**Key Result Area #4: Providers and Staff will be well qualified to provide services**

**Key Result Area #5: Services will result in a high level of customer satisfaction**

**Key Result Area #6: Self Advocates and family members will be in leadership roles in both local alliances and board of directors**

**Key Result Area #7: EOSSB will be a great community partner.**



**Eastern Oregon Support Services  
Brokerage**

PO Box 329  
Hood River, OR 97031

Phone: 541 387 3600  
Fax: 541 387 2999  
[info@eossb.org](mailto:info@eossb.org)

In every county across eastern Oregon, there are people who have been able to fulfill their dreams of living in their own homes, living with their families with the supports they need, and having jobs in the community that meet their needs.

Support services have empowered people to speak up for what they want, plan for the future, and create their own lives.

Inside are some of their stories.

