

# Eastern Oregon Support Services Brokerage

## Annual Report 2003





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### 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 competently and consistently supported to be vital and integral members of their community, families, and neighborhoods, and where communities and citizens will see themselves as competent and willing to become involved in the lives of people with disabilities.



Union County Local Alliance members at a Salem Rally

### 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-packaged 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 will be planned and delivered in the future. 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 has been developed which will assure access to these services across the State by 2005.

- On August 3, 2001, the Department of Human Services completed its evaluation and scoring of the proposals received in response to Solicitation #720 for Support Service Brokerages. The apparent successful awardee for the Eastern Region was the Eastern Oregon Support Services Brokerage.
- On October 30, 2001, DHS notified the EOSSB proposers that they were the apparent winner.
- 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 January 21, 2002, sufficient staff to begin operations had been hired (Eight Personal agents, 1 Accountant and 1 Secretary/Fiscal Support Staff).
- On Feb 4 and 5 all staff attended an Organization inservice training session.
- From Feb 18 through 22, staff attended a weeklong training conducted by the Self-Directed Support Training and & Technical Assistance Project of Oregon Health Sciences University.
- 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.

EOSSB is a new entity, the creation of which arose out of the fervent belief that to fulfill the emerging best practices in self-determination, a completely independent entity must be created to ensure the transfer of power and control from the current system to the individual.



## 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 members will be 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.



EOSSB members Erin and Ruth

**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. The Executive Director and Personal Agents from the region act as support staff to facilitate meetings of these local alliances 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. Personal Agents work with Local Alliances to increase the meaningful participation of families and self-advocates.

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 Membership

Name	Representing	Affiliation	Term expires
Rick Currin President	Umatilla County	Service Provider	July, 2004
Mike Singleton Vice-President	Malheur County	Family Member	July, 2004
Zee Koza Secretary / Treasurer	Union County	Service Provider	July, 2005
Charlie Hammett	Umatilla County	Self-Advocate	July 2005
Joe Carroll	Wasco County	Family Member	July, 2003
Kathleen Kim	Wallowa County	Family Member	July, 2004
Jo Vowell	Baker County	Family Member	July, 2003
Ruth Black	Harney County	Family Member	July, 2005
Steve Carlson	Umatilla County	Family Member	July, 2003
Teresa Morris	Umatilla County	Case Manager	July, 2003
Shannon Boor	Morrow County	Family Member	July, 2004
Charles Oh	Wallowa County	Self-Advocate	July, 2005

## Staff

### Administration

Executive Director Bill Uhlman  
 Accountant Jim Yuhas  
 Clerical/Accounting Rieta Liggett

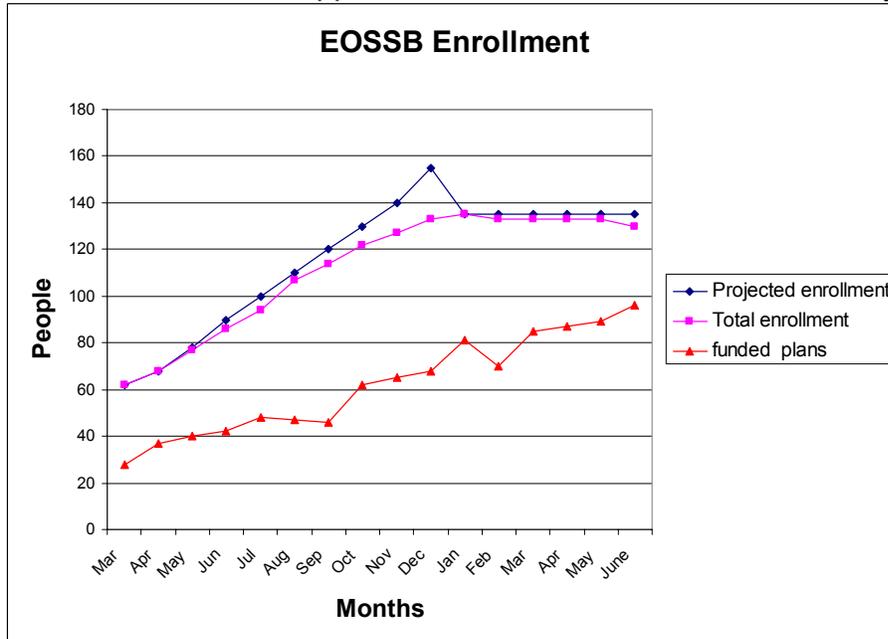
### Personal Agents

Mid Columbia Vicki Swyers  
 Jennifer Lewellyn  
 Umatilla Kristi Avery  
 Umatilla/Morrow Kristin Hughes  
 Wallowa Jean Pekarek  
 Malheur Amy Eddy  
 Union Yvonne Bowling  
 Baker Colleen Grigg  
 Harney Becky Garo



## Services and Supports Provided

EOSSB began providing support services in March, 2002, enrolling new customers according to a statewide schedule and priority system designated in the Staley Settlement and the Support Services Administrative Rule. Sixty-two people who had



previously been enrolled in the Self-Directed support program were the first to be enrolled. After that initial enrollment, approximately three to ten individuals were enrolled per month every month until new customer enrollment was frozen in January, 2003 as a result of Oregon's budget crisis. Enrollments were distributed across counties based upon

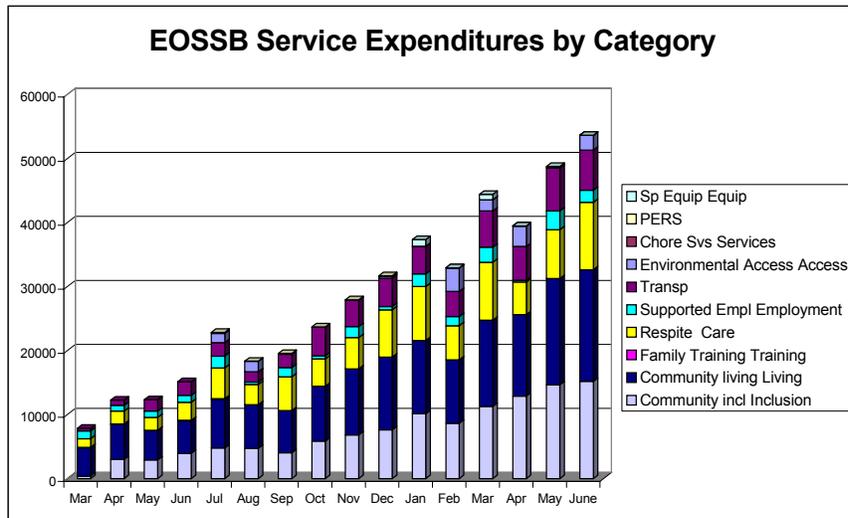
projections of the potential customer population of each county. Some counties were not able to keep up with projected enrollments while other counties had more individuals in need than originally projected. Working closely with the Staley team at the State office of Developmental Disability Services, the Brokerage was able to utilize the under

	6/30/2003 Actual	% of final county Enrollment
Mid Columbia	31	43.06%
Morrow/Wheeler	8	47.06%
Umatilla	31	29.25%
Wallowa	3	27.27%
Union	13	34.21%
Baker	12	46.15%
Grant	5	41.67%
Harney	9	75.00%
Malheur	18	37.50%
<b>Total</b>	<b>130</b>	<b>0.00%</b>

enrollment of some counties to meet the emerging needs of other counties. In general, however, as of the freeze in enrollments in January, 2003, actual enrollments were behind targeted enrollment by 23 people. By June 30, 2003, there were 130 customers enrolled, with an additional 59 engaged in the referral process and due to enter Brokerage services as of July 1, 2003. Each customer enrolled engaged in a person-centered planning process to determine support needs and had a support plan in place within three months of enrollment.

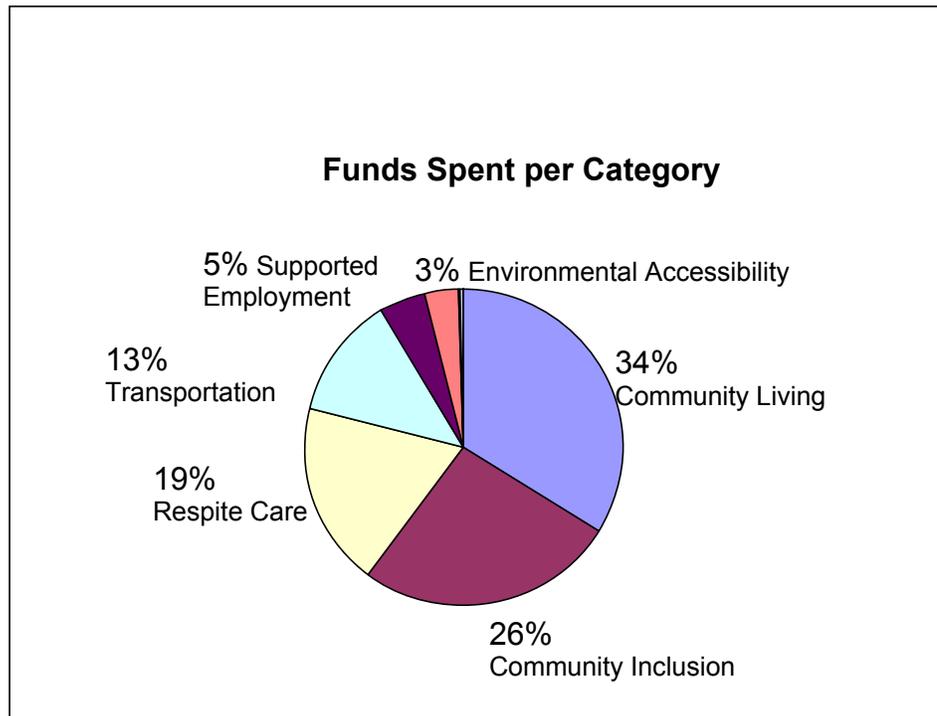
As a result of the gradually increasing enrollment and the development of individual service plans based on a process of Person Centered Planning, the amount of support funds spent increased monthly. At first, Customers were only spending about \$281 per month per plan. By the end of June, 2003, customers were spending on average \$562 per plan per month. This spending level is below the originally projected average of \$800 per person per month, but is consistent with the experience of other brokerages across the state. Total spending on support services increased gradually from \$7,876 per month in March, 2003 to \$53,630 in June

of 2003. For the entire period, \$448,180 was spent in 10 different categories. The most funds (34%) were spent in the category of Community Living skills. Next was Community Inclusion at 26%. Respite Care represented 19% of spending and



transportation came in at 13% of spending. The remaining 8% consisted of Special Equipment, Chore Services, Environmental Accessibility, Supported Employment, Personal Emergency Response Systems and Family Training. The spending categories of Occupational Therapy, Physical Therapy, Special Diets, Speech

and Hearing and Homemaker services were not used. These services were provided to some individuals, but paid for through the customer's medical card or through Personal Care services arranged by our Personal Agents.



## Local Alliance Support

### Mid-Columbia Local Alliance

In the Mid-Columbia area our local alliance, The Arc of the Mid-Columbia was established in April, of 2002. Our membership area includes Hood River, Wasco, Sherman, and Gilliam Counties.

In the past year, we have created a list of accomplishments:

- Our Chapter received two awards from the Arc of Oregon: The Five Point Chapter Award recognizing our chapter for its organization and development and the Communication Award.
- We have received \$3,100. in membership dues, donations and fundraising projects. We have used these funds to pay expenses such as board liability insurance, affiliation fee with national Arc, membership dues to the State Arc; sponsorship for our local Special Olympics, supplies and refreshments for social and educational activities, and other operating costs.
- We now have a membership of 56+.
- Sponsored Trainings/Programs such as: “Guardianship, Advocacy and Planning Services”, and an IEP Workshop by COPE.
- Organized and ran a Garage Sale to benefit the Arc and local Transition Program.
- Connected self-advocates to their community and Resources by providing an opportunity to meet with people, such as: Director from Columbia Gorge Center, local provider organization, and John Mabrey, State Representative.
- Met new people and socialized with old friends.
- Shared information about mutual concerns.
- Hosted an ice-cream social with the Executive Director of the Arc of Oregon.
- Participated in consumer satisfaction groups with the Mid-Columbia Center For Living, the local DD Program.
- Published a newsletter every other month.
- Enjoyed picnics, pizza parties and some good laughs together.



Personal Agents Vicki Swyers and Jennifer Lewellyn

### Union County Local Alliance

Union County holds their Local Alliance meeting every month for customers to learn more about self determination and self advocacy and how to apply it to their lives. For the June meeting, customers invited their family members and friends and gave an update on what they have learned and the trainings and



Union County Local Alliance Members describe what self-determination means to them.

workshops that they have been involved with and are planning to attend. Refreshments were served and display tables showed the activities and projects of customers. Two providers gave an overview of their services and customers told of their social events calendar and how they choose their weekly activities. Customers planned and conducted the meeting. Attendance at the meeting was approximately 32 people. The Union County Local Alliance has also rallied at the Capitol giving input to Measure 28 and the importance of services to people with disabilities. They have also attended a training on Self Advocacy from SAAL. The Union County local alliance has given opportunities for customers to grow as individuals and to exercise their rights and responsibilities as members of their communities.

### **Harney County Local Alliance**

In Harney County we have an active and productive Alliance. We have held meetings monthly (or close to that) for a year. We have met as a group to discuss Brokerage business with our customers, community partners and families. During our local alliance meetings we have partnered with the Life Span Respite program to more efficiently meet needs. Out of this time we have decided that one of our most pressing needs is to create opportunities for social activities and interaction. We have arranged swimming parties at the local swimming pool, picnics in the park, cookie decorating and painting activities, and recently one of our most enjoyable activities, an alliance dance with other county members (from La Grande and Ontario). These activities give opportunities for people to work on socialization and relationship building skills. It is a fun way to work on becoming part of our communities, as all types of people are included. We have a wonderful, cooperative group and it's a privilege to work along side of them.



Personal Agent Becky Garo

### **Wallowa County Local Alliance**

This past year the Wallowa County local alliance has worked to further Self-Determination and improve the availability and quality of DD services both locally and around the state. The alliance, formally called the Wallowa County DD Council, grew out of the former Self-Directed Supports committee and plays a dual role by providing input to both EOSSB and the county-run Family Support program. Members have also supported and strengthened the efforts of other DD groups such as the Disability Service Advisory Council, Lifespan Respite, and Self Advocates As Leaders by serving on their boards. Our most challenging effort of the year was riding the wave of state budget issues and keeping people informed about how they could influence the outcome. The most



Members of Wallowa Local Alliance

rewarding was developing more opportunities for recreation. The alliance resurrected Wallowa County Special Olympics after a 9 year hiatus. The 12 member track team competed in the regional meet in Milton-Freewater with several athletes going on to the state competition in Eugene. We also worked together to start a new social group, Shooting Stars, where friends can meet on a weekly basis to have fun and plan other social activities.

### **Umatilla County Local Alliance**



Personal Agent  
Kristi Avery

The Umatilla County Local Alliance has been involved with a variety of activities. They focused on quality assurance regarding brokerage services and resource development. They have held some informal meetings which allowed social opportunities for customers. Most recently, they have been concentrating on the transportation issues in our community. They have been doing research, networking and grant writing. They hope that within a year or two there will be some type of affordable transportation services available to individuals with disabilities. They have coordinated many of their efforts with the Arc of Umatilla County.

### **Baker County Local Alliance**

The Baker County Local Alliance has been involved in a number of activities during the first year of sharing our lives together. The list of involvement for our self-advocates is impressive! Our participation is a great balance of social activities, as well as self-advocacy. We have:

- gone fishing, bowling, picnicking, swimming, shopping in La Grande and Ontario
- gone to the rodeo
- decorated and ridden in a float in the Miner's Jubilee Parade
- held a Christmas party--cooked pizza, decorated cookies, played games & drove around to see the lights
- held a voter registration party
- attended rallies and lobbied for Measure 28
- attended Policy meetings in Salem
- participated on local and regional boards
- attended Self-Advocates as Leaders Training in Ontario
- attended Self-Advocacy training at Wallowa Lake
- hosted a Job Fair to recruit new providers



Personal Agent  
Colleen Grigg

Customers in Baker County are one of a kind! They are more than willing to give back to their community and help others with developmental disabilities speak up and advocate for their needs and life goals. Way to go Baker County Alliance members!

## President's Report

As I look back over the past year, I am amazed at how much has been accomplished by the organization. In one year's time, we have built a viable organization serving a host of individuals and their families in Eastern Oregon. Starting from scratch, the Eastern Oregon Support Services Brokerage has been developed through the extraordinary efforts of a number of dedicated persons. In particular, the staff persons have been exemplary in their efforts during some impossibly trying fiscal times. I would particularly like to thank Bill Uhlman for his inspired leadership in developing the organization and keeping an even keel during the past year. I will always remember his quote, "Don't panic until I put my house on the market." Fortunately for all of us, that event never transpired. There were many milestones accomplished over the past year that included the nuts and bolts of establishing a corporate entity from the ground up. I am most proud of the organization's continuing focus on customer satisfaction. Many times in the rush to do the mundane tasks necessary to establish a corporation, customer satisfaction gets lost in the shuffle. Bill and his staff have not wavered from the task of providing quality support services to our customers. For that vision and dedication I am most grateful. I look forward to the next year with the hope that we can maintain our current supports and continue to serve a growing number of persons in our region.



Rick Currin  
Board President

## Executive Director's Report

*"We envision a world in which all people with disabilities are competently and consistently supported to be vital and integral members of their community, families, and neighborhoods, and where communities and citizens will see themselves as competent and willing to become involved in the lives of people with disabilities." - EOSSB Vision Statement.*

Imagine for a moment, a rubber band stretched between our vision and current reality. The farther apart, the more tension on the rubber band. Rather than being a bad thing, however, this tension can be the source of a great deal of creative energy. But there are two possible ways for tension like this to resolve itself: pull reality toward the vision or pull the vision toward reality. Which occurs will depend on whether we hold steady to our vision.

On the one hand, our reality seems to consist of the nearly constant threat of elimination of our jobs and services, embodied in five special sessions of the legislature, the failure of Measure 28, and a State budget shortfall of several billion dollars for the year we are now starting. Much of our creative energy seems to be devoted to just staying alive. Hardly a week has gone by since last October without advocates exhorting us to call, write, and rally to preserve the services upon which so many people depend. Sometimes it seems that the rubber band that connects us to our vision will break under the load and the vision will be lost.

But there is another reality, a reality that is daily being pulled toward our vision. In LaGrande, a local alliance is run entirely by self-advocates. In Burns, a family now has a wheelchair ramp and other modifications to enable their daughter to live a better life at home. In The Dalles, a customer can live on her own because she has hired a personal assistant to help her with budgeting and daily activities. In Ontario, a customer has moved into her own home because of the supports she receives to be independent. There are now 130 such stories, fueled by a passionate and talented staff and guided by a board that believes in the dream of self-determination for all.

The rubber band-like tension between our vision and current reality is a tremendous source of creative energy. We must continue to use that energy to propel us toward our vision of a world in which all people with disabilities are vital and integral members of our communities, families, and neighborhoods.



Bill Uhlman  
Executive Director



## Financial Report

December, 2001 through June 2003

Audit Pending

<b>Revenue</b>	<b>Total Budget</b>	<b>Actual Revenue and Expense</b>	<b>Percent of Budget</b>
DD 148 Brokerage Operations	895787	895783	100%
DD 149 Support Services	498008	498008	100%
DD 57 Start-up	149517	133043	89%
Memberships	500	185	37%
Rent	5200	2600	50%
Interest	3000	12069	402%
<b>Total Revenue</b>	<b>1552012</b>	<b>1541688</b>	<b>99%</b>
<b>Expenses</b>			
Salaries	569906	553827	97%
Other Payroll Expenses	156001	147121	94%
<b>Total Salaries and Expenses</b>	<b>725907</b>	<b>700948</b>	<b>97%</b>
Board & Local Alliance Support	17850	12519	70%
Rent and Utilities	19250	17862	93%
Travel	50850	74425	146%
Supplies	36859	33819	92%
Telephone/Communications	31300	32358	103%
Professional Fees	11000	8222	75%
Postage	4500	5399	120%
Insurance	13500	11165	83%
Training and Materials	12160	10058	83%
Misc	5000	3285	66%
Printing/Copying	4600	276	6%
Dues, licenses, publications	10200	7093	70%
<b>Total Services and Supplies</b>	<b>217069</b>	<b>216481</b>	<b>100%</b>
Support to Individuals-Contracted	507928	447686	88%
Support to Individuals-Flex fund	5700	5297	93%
Subcontracted Services	28900	32202	111%
Small Equipment	21942	14295	65%
Equipment Purchases	31566	26887	85%
Operating Reserves	13000	39775	306%
<b>Total Other Expenses</b>	<b>609036</b>	<b>566142</b>	<b>93%</b>
<b>Total Expenses</b>	<b>1552012</b>	<b>1483571</b>	<b>96%</b>
<b>Net (revenue- expenses)</b>	<b>0</b>	<b>58117</b>	

## Balance Sheet (Combined – All departments)

Audit Pending

	<u>6/30/2003</u>
<b><u>Assets</u></b>	
Checking - US Bank	50,837
Checking - Fiscal Agent Serv Dept	1,000
Petty Cash - Operating Budget	100
Travel Advances	200
Money Market Account - US Bank	39,976
Money Market Accounts - Wash. Fed Sav.	6,855
Investments - DD149	
Acumen Bank Account - DD149	41,712
Prepaid Expenses	5,295
Subtotal - Current Assets	145,974
Furniture and Equipment	41,182
Less: Accumulated Depreciation	(41,182)
Net Furniture and Equipment	
<b>Total Assets</b>	<b>145,974</b>
<b><u>Liabilities and Equity</u></b>	
Support Service Liabilities - current month	35,299
Payroll Liabilities	12,782
Other Payables	
Funds Returnable to State	58,118
Total Liabilities	106,199
Net Income or (Loss) Current Year:	
Dept. 57 Start Up	
Dept. 148 Operating Expense	30,218
Dept. 149 Support Services	
Dept. 999 Other Business Services	9,557
Subtotal - Current Year Income/(Loss)	39,775
Total Equity	39,775
<b>Total Liabilities and Equity</b>	<b>145,974</b>



Accountant Jim Yuhas

## Budget FY 03-05

Tentatively approved (waiting for final legislative approval of Brokerage funding)

	FY 03-04 Proposed Budget	FY 04-05 Proposed Budget
<b>Revenue</b>		
DD 148 Brokerage Operations	641,984	641,984
DD 148 FI amount	45,000	53,820
DD 149 Support Services	1,879,996	1,879,996
Memberships	0	0
Rent	0	0
Interest & Donations	12,000	12,000
<b>Total Revenue</b>	<b>2,578,980</b>	<b>2,587,800</b>
<b>Expenses</b>		
Salaries	402,916	417,722
OPE	124,904	131,612
<b>Total Salaries and Expenses</b>	<b>527,820</b>	<b>549,334</b>
Board & Local Alliance Support	8,000	8,000
Rent and Utilities	12,000	12,000
Travel	55,700	60,100
Supplies	12,800	12,800
Telephone/Communications	24,000	24,000
Professional Fees	5,000	5,000
Postage	3,600	3,600
Insurance	7,500	7,500
Training and Materials	5,000	5,000
Misc	2,000	2,500
Printing/Copying	1,000	1,000
Dues, licenses, publications	5,000	5,000
<b>Total Services and Supplies</b>	<b>141,600</b>	<b>146,500</b>
Support to Individuals-Contracte	1,879,996	1,879,996
Support to Individuals-Flex fund	12,000	12,000
Subcontracted Services	5,000	0
Equipment Purchases	7,534	5,000
Operating Reserves	5,030	-5,030
<b>Total Other Expenses</b>	<b>1,909,560</b>	<b>1,891,966</b>
<b>Total Expenses</b>	<b>2,578,980</b>	<b>2,587,800</b>
<b>Net (revenue- expenses)</b>	<b>0</b>	<b>0</b>

## Flex Fund Report

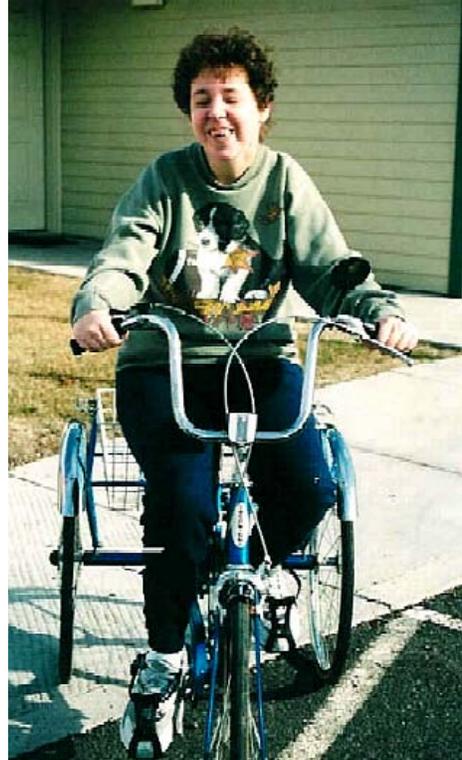
The Medicaid entitlement of Support Service funds meets many needs of the individuals we support. However, it has become clear that many legitimate needs cannot be met through such governmental funding sources. At the January 2003 board meeting, the board established a policy and procedure to enable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

Funding requests shall be made by Personal Agents. Requests shall be granted if the following conditions are met:

- Funds are available and within the budget established (5,700.00 through June 30, 2003).
- 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 \$500 or the aggregate of funded requests for any individual shall not exceed \$500 per year.

If competing requests exceed the funds available, requests shall be 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.



\$5,297 was spent in flex fund requests. Below are examples of some funded requests:

- |  |          |
|--|----------|
| • 3 wheel bike   | \$150.00 |
| • Electric toothbrush                                  | \$108.98 |
| • Self-Advocates as Leaders conference in Salem        | \$175.45 |
| • Athletic club fees for exercise and socialization    | \$480.00 |
| • Talk Trac Plus, a wrist mounted communication device | \$109.00 |
| • 1:1 tutoring to teach computer use in the home       | \$500.00 |
| • Registration and fee for weight watchers class       | \$212.00 |
| • HUD application to reduce apartment rent             | \$ 86.00 |

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 were surveyed in December, 2002. Beginning in March, 2003, customers were surveyed at the end of the month of their plan anniversary date. There were 10 questions to the survey. A complete copy of the results with all comments is available by contacting the EOSSB office.

- 46% were filled out by the individual with disabilities receiving services.
- 44% were filled out by another on behalf of the individual with disabilities but from the perspective of the individual with disabilities.
- 10% were completed by a significant other of the individual receiving services.
- 98 out of 171 surveys were returned for a return rate of 57%

1. The personal agent listens to my needs and understands me.  
Yes 97 (99%) No 0 Somewhat 1

2. My plan says what I want it to say.  
Yes 85 (88%) No 3 Somewhat 9

3. I am happy with the services I get.  
Yes 91 (93%) No 3 Somewhat 4

4. The services I receive are helping me meet my goals.  
Yes 83 (86%) No 3 Somewhat 11

5. I feel supported when I want to make changes.  
Yes 79 (84%) No 3 Somewhat 12

6. I know what to do when I am unable to resolve disagreements about my plan or services.  
Yes 70 (78%) No 8 Somewhat 12

7. I feel better about my life because of the services I receive.  
Yes 89 (91%) No 3 Somewhat 6

8. I feel supported by the people in my life.  
Yes 95 (97%) No 1 Somewhat 2

9. Are you satisfied with where you live?  
Yes 82 (84%) No 5 Somewhat 11

## 10. What would you change about your services?

My services are very good, I wouldn't make any changes, thank you more time with p. and PA.

Not a thing, I believe it helps quite a bit

I would just like to find someone who would continue the job. Sometimes it is hard to find work, the employers do not want to pay minimum wage.

How to fill out the forms better explanation would help. Its good now but a little better clarification would help.

c. would like it explained to him what the brokerage pays for and what voc rehab pays for concerning his employment

14 people said "nothing"

5 people said "nothing at this time"

3 people said "I am happy with your service"

The only problem we've encountered is that its usually difficult to make phone connections with our agent and with our hired employee

Add more services

Make the time sheets and mileage forms easier to fill out and understand

Have a more concrete schedule of activities and goals with the providers

come spring, mom will still be taken care of him but he'll move out into his own apt.

I'm not sure cause I don't know if I would yet!

I would like to meet about my plan and go over some changes

Nada, todo esta bien (Survey and response in Spanish)

Everything is great don't need to change anything

My only complaint has been the length of time required to get approval of our caregiver - not your fault

look forward to new programs

Wouldn't change anything but look forward to new programs, etc.

At this point we don't have any ideas for change

Can't think of anything right now.

Less paperwork, regulations

give us our own trip money at least

I want to see PA once a week for lunch and I want her to take me to LaGrande once a month

Nothing, we are so blessed to have these services

Have my caregiver spend more time with me

Nothing because my life has gotten better through the years

PA is very helpful. Keeps herself and us informed. The monthly activities are well planned and enjoyed by all.

She is only a phone call away, with personal visits, too. We feel very lucky to have her.

## Community Partner Satisfaction Survey

A Community Partner Satisfaction Survey was sent to 35 people. This survey was completed by 13 members of the case management community, four members of the vocational rehabilitation community and one member of the advocacy community. Eighteen of 35 or 51% of all surveys were returned.

1. In my observations, brokerage personnel treat their customers with respect.  
Yes 18 (100%) No 0 Somewhat 0

2. How effective are brokerage personnel in furthering their mission?  
Very effective 11 (65%) Somewhat Effective 6 Not effective 0

3. How would you assess your working relationship with brokerage personnel?  
Excellent 14 (78%) Good 3 Fair 1 Poor 0 Strained 0

4. Are Brokerage staff knowledgeable about local community resources?  
Yes 16 (89%) No 0 Somewhat 2

5. Do brokerage staff have a competent understanding of Support Services Benefits?  
Yes 16 (89%) No 0 Somewhat 2

6. Do Brokerage staff know and work well with other agencies, service providers, and individuals in the community?  
Yes 16 (94%) No 0 Somewhat 1

7. Things I like about the Eastern Oregon Support Services Brokerage.  
I appreciate having PA as a working partner in supporting the clients in the area  
very client centered  
Individuals are treated as people with real input into their plans  
Very approachable, good advocate for the DD population  
Potential to provide mentoring, job coaching and assistance to locate and apply for jobs. I provided basic training to staff in 2002  
Easy to contact staff. People trying to do well  
I appreciate how thoroughly everything is handled & the way that local input was gathered by The Executive Director and what a caring and professional job you are all doing  
Provides much needed supports. Individuals and families get to decide on supports to fit their needs  
Brokerage now can do things and provide services that there was no money for previously  
Very friendly, personable, as well as knowledgeable of client and disability  
services have been developed and delivered on an individualized basis that meets the specific needs of ea consumer  
PA works very hard to get all the benefits for people she can. She keeps current with plans and explains them to us  
From everything I've heard, it's the best brokerage in the state  
Friendly PA's

8. Things I dislike about the Eastern Oregon Support Services Brokerage.  
unsure of the purpose, mission, list of services the staff provides  
length of time before services start + the void in support while trans from CM type services to brokerage

I don't like the thought of these services possibly ending after all the great work you've done to get them rolling so well. That part is very frustrating.  
Folks are spread pretty thinly  
nothing!  
I can't think of any

**9. Suggestions for improving Brokerage services:**

keep up the excellent job  
see #7  
I really can't think of any improvements. Thanks so much to all of you!  
I guess get your name out there more. A lot of people still seem "afraid" of enrolling.  
none  
some training (additional) more people (employees)  
None at this time. We have been very satisfied with services to date  
Can't think of anything!!  
Add a "not Applicable" item to this form for folks like me who have only limited contact with the brokerage  
Do person centered planning before meeting with rehab counselor to plan

**Service Provider Satisfaction Survey Data**

This survey was completed by nineteen employees of a customer of EOSSB, eight independent contractor working for a customer of EOSSB and nine provider agencies working for a customer of EOSSB. Thirty-six of 86 surveys sent or 42% were returned.

1. In my observations, brokerage personnel treat their customers with respect.  
Yes 36 (100%) No 0 Somewhat 0

2. How would you assess your working relationship with your customer with disabilities.  
Excellent 26 (79%) Good 7 Fair 0 Poor 0 Strained 0

3. How would you assess your working relationship with brokerage personnel.  
Excellent 24 (67%) Good 12 Fair 0 Poor 0 Strained 0

4. Are payment procedures efficient and timely?  
Yes 31 (94%) No 1 Somewhat 1

5. Do brokerage staff have a competent understanding of Support Services Benefits.  
Yes 29 (88%) No 0 Somewhat 4

6. Do Brokerage staff know and work well with other agencies, service providers, and individuals in the community?  
Yes 28 (97%) No 1 Somewhat 0

7. Things I like about the Eastern Oregon Support Services Brokerage.  
Everything

Flexibility in services which can be provided to clients  
It has been a pleasure working with you and your staff. Your organization has been a welcomed resource.  
They take care about all of their people  
Nice, very easy to work with  
PA is excellent to work with  
Some of the PA's have children or relatives with special needs which gives them better insight to help customers needs  
You treat people with respect (PA and PA are the best!)  
That my sister has someone in her court that can get people to listen  
Our rep is local and any questions are answered in a timely manner  
I was a very short term provider. Do not have much experience with brokerage  
If they don't have the answer they will find one. They keep everyone filled in on what's going on in the community and the brokerage  
The staff get paid on time  
Professional  
It helps bring a person of DD out into the world  
concerned consumer is not receiving services as stated in the plan  
No problems  
They treat everyone fair  
Support given to the one I support  
The independence the customers get to have - they make their own decisions  
I am so glad you are here to help better the lives of the clients. Keep up the good work  
The People!

**8. Things I dislike about the Eastern Oregon Support Services Brokerage.**

Not a thing  
It can be difficult at times to get a hold of the local rep  
I don't like the pay periods. I wish it could be every week instead of twice a month  
none  
I wish I could have more hours to spend with my employer (your customer)  
Cant think of anything  
none  
none  
Lack of partnership with our center  
none  
none  
The time sheets were inconvenient to get signed 2 times a month  
none  
The way it is funded (Measure 20 looms behind us with fetid breath)

**9. Suggestions for improving Brokerage services:**

I have no suggestions for improvement  
Give me a phone number where I can actually reach PA  
changing the pay periods  
Hire more people who have a disabled family member, they understand your customers needs better.  
They also understand what the family's go through.  
It is hard to improve on the best  
nothing at this time  
utilize our center, include us as "partner"  
none  
More \$\$  
Input from the firm from time to time.  
Just keep on - you're doing great

## Annual Goals for FY 03-04

Track the frequency and content of plan revisions to demonstrate that customers are assisted to make desired changes in plans. Reduce the frequency of customers stating they are unaware of what to do about unresolved disagreements regarding plans of service.

Provide uninterrupted support to customers transitioning from county case management to the brokerage. Ways to smooth transition include asking the customer and the case manager what things the CM is doing for the customer, and immediately writing a plan to carry elements of the Family Support plan of incoming 18 year old customers while a more comprehensive plan is developed. (Community Partner Satisfaction Survey #8)

Increase public awareness of EOSSB by working in conjunction with partners to educate community on brokerage services. (Community Partner Satisfaction Survey #9)

Ensure there is evidence that significant risks were considered in development of all new or revised plans.

Increase the quality of Long term goals and strengthen the relationship between ISP goals and the long term goal or stated needs in the person centered plan.

Ensure that there is evidence regarding how the individual will be assisted to monitor quality of supports. Define desired quality of supports in provider agreements. Monitor quality of supports during quarterly review.

Revise contracts with providers to contain consistent necessary language and outcome oriented goals.

Create Resource Development Plans for EOSSB and in each county that accomplish the following:

Increase provider availability and quality.

Accomplished by:

- Provider education
  - Skill Development
  - Values training
- Provider recruitment
- Consumer education
  - Educating and empowering consumers to be more informed providers

Tracked by:

- Increase number and variety of available providers in each county
- Expanded resource guide on website
- Satisfaction of customers with providers
- Satisfaction of providers with EOSSB
- Provider attendance at Provider Training Sessions

Promote a planning process that is effective and customer friendly (create a simple system that works).

Accomplished by:

- Revise forms and processes to contain more consumer friendly language
- Promote more flexibility in using the planning process
- Ensure availability of documents translated to Spanish

Tracked by:

- Consumer satisfaction
- Revision in forms
- Availability of translated documents

Develop a functional working relationship with Vocational Rehabilitation.

- Maximize tapping into VR resources for customers.
- Assist VR Counselors to be willing to support any of our customers who desire competitive or supported employment.
- Develop a workable referral process with VR for customers who desire competitive or supported employment.
- Assist VR counselors to honor customer choice of service providers

Accomplished by:

- Formal and informal meetings with VR counselors and administrators
- Education of VR counselors and administrators
- Sharing employment success stories with VR counselors and administrators.

Tracked by:

- Consumer satisfaction with employment efforts
- Customers are allowed to choose from available and qualified service providers
- Amount of VR resources utilized
- Training sessions in supported employment attended by VR counselors

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