

Eastern Oregon Support Services Brokerage

Annual Report 2004





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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.

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.



Union County Local Alliance members explain the meaning of Self Determination.

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.

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.
- By the end of the fiscal year, June 30, 2004, 218 people were enrolled in the Eastern Oregon Support Services Brokerage, or 62% of the projected capacity.



Board Member Charlie Hammett makes sure everything gets recorded on film

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 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.



Board member Ruth Black (who drives 417 miles round trip to get to board meetings) shares a laugh with Board President Rick Currin

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, 2004
Mike Singleton Vice-President	Malheur County	Family Member	August, 2004
Zee Koza Secretary / Treasurer	Union County	Service Provider	August, 2005
Kathleen Kim	Wallowa County	Family Member	August, 2004
Ruth Black	Harney County	Family Member	August, 2005
Charlie Hammett	Umatilla County	Self-Advocate	August, 2005
Jo Vowell	Baker County	Family Member	August, 2006
Steve Carlson	Umatilla County	Family Member	August, 2006
Michael Ray	Malheur County	Community at-large	August, 2006
Mariah Langer	Mid-Columbia	Self-Advocate	August, 2006
Dustin Wyllie	Union County	Case Management	August, 2006

Board, Staff, Customers and Family members gather for a Board Meeting at The Ascension Conference Center in Cove, Oregon.



Board Activities

August, 2004 Annual Meeting

- Annual report was distributed and reviewed by the membership.
- Board election results were announced and board members were introduced.
- Activities, good food, karaoke, and a live band were enjoyed by all.

October, 2003

- The new Staley settlement agreement and enrollment schedule, and their impact on EOSSB were reviewed and discussed.
- A Measure 30 action plan was reviewed and approved.
- Year to date Service Statistics, Customer Satisfaction Data, File Audit Data and progress toward annual goals were reviewed and discussed.
- Bylaws were revised to allow the board the discretion to remove a board member who has missed three consecutive meetings.
- New officers were elected.

- The Annual Fiscal Audit and management recommendations were approved and an action plan was established to improve internal controls.
- A plan to eliminate contracting for Fiscal Intermediary Services effective January 1, 2004 was adopted.

February, 2004

- The results of the failure of Measure 30 were discussed.
- Year to date Service Statistics, Customer Satisfaction data, File Audit data and progress toward annual goals were reviewed, discussed and approved.
- Bylaws were revised to allow ex-officio board members to accommodate special needs of the board of directors.
- The results of the SPD Licensing review were discussed. The review was very positive, with several suggestions for improvements in service proposed and adopted.
- A revised budget based on a new state contract was adopted.
- A proposal to sell Fiscal Intermediary services to counties and individuals was approved.
- A resolution to establish a line of credit for \$25,000 not restricted to the Fiscal Intermediary services function was approved.

May, 2004

- A budget for 2004-2005 was adopted.
- A Nominating committee for the 2004 board election was established.
- Plans for the 2004 Annual Meeting were discussed and approved.
- Compared EOSSB customer satisfaction data with state-wide data.

Staff

Administration

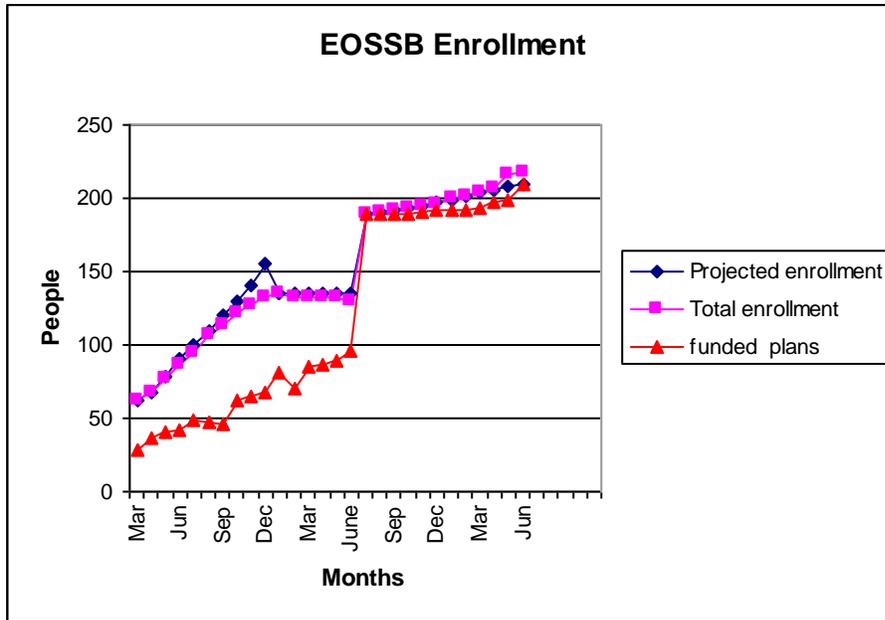
Executive Director
Bill Uhlman
Accountant
Jim Yuhas
Clerical/Accounting
Linda Jones



Personal Agents

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

Services and Supports Provided



At the end of the previous Fiscal Year (June 30, 2003), 130 people were enrolled. Enrollments had been frozen for approximately six months due to the impact of Ballot Measure 28. On July 1, 2003 (the beginning of the current fiscal year), about 60 people were transferred from vocational slots to brokerage services, resulting in new

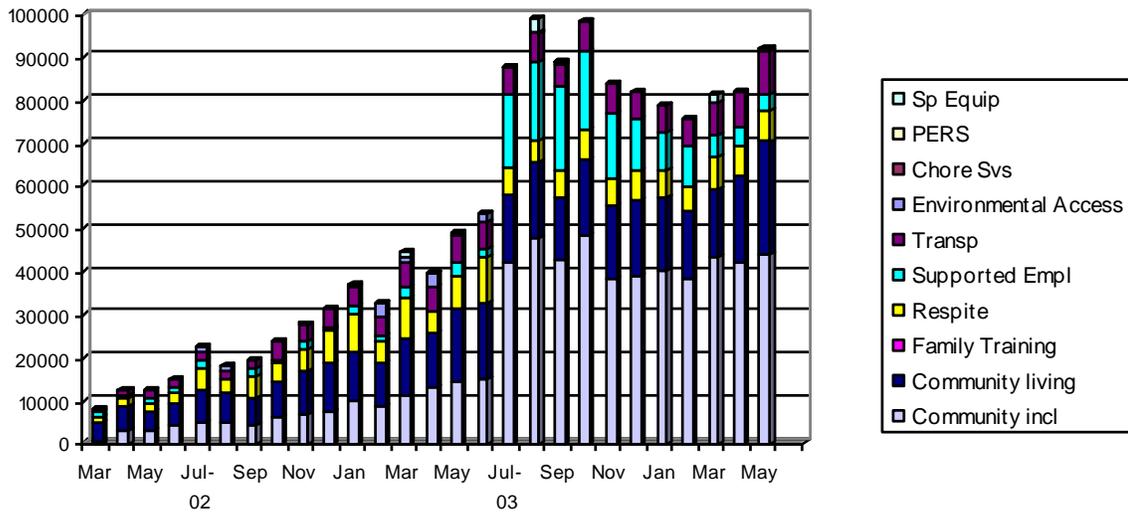
enrollments for brokerages, but no net increase in state funding. In August, 2003, the freeze on enrollments was lifted as a result of the renegotiation of the Staley Settlement. New Brokerage enrollments began at approximately two to three people per month (less than half of the original projection). In May, 2004, eleven additional people were enrolled who had been served previously in family foster care or other SPD waivers, boosting our total year-end enrollment to 218 people. Starting in July, 2004, we are scheduled to have three new enrollments per month. Although these regularly scheduled enrollments are reduced from the original Staley Settlement due to the state's budget

crisis, the transfer of individuals in Vocational slots in July of 2003 and the transfer of Dual Waiver clients in May of 2004 brings our total enrollment much closer to the original year-end target of 253 than originally anticipated. As of June 30, 2004, our enrollment is 218 people, which is 62% of the way to

our final target of 350 people enrolled. Every county in our region now reports having a wait list.

EOSSB Enrollments				
County	Beginning Enrollment March, 2002	End of Fiscal Year 2002-2003	End of Fiscal Year 2003-2004	Percent of Planned Capacity
Baker	11	12	23	88%
Grant	3	5	6	50%
Harney	1	9	11	92%
Malheur	17	18	26	54%
Morrow/Wheeler	6	8	9	53%
Umatilla	10	31	55	52%
Union	3	13	21	55%
Wallowa	2	3	7	64%
Mid-Columbia	9	31	60	83%
Total	62	130	218	62%

EOSSB Service Expenditures by Category



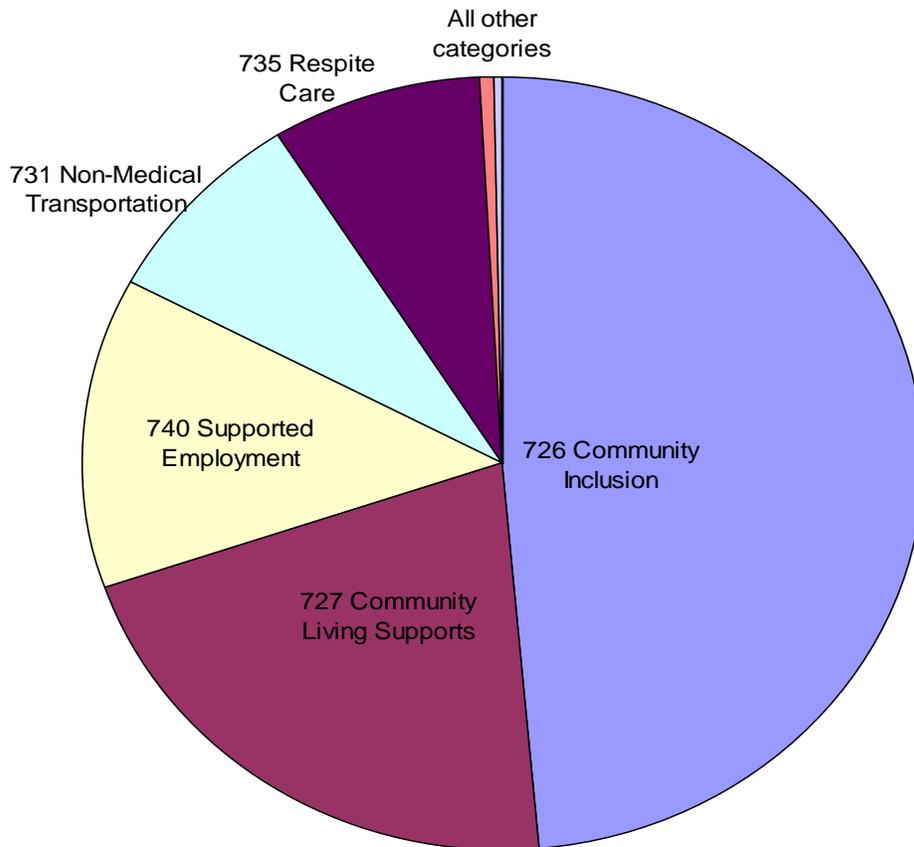
Service expenditures increased dramatically in July 2003, with the enrollment of a large



number of people who previously were in vocational slots. Many of their slot payments were over \$800 per month. It was required that those payments be reduced to \$800 per month as plan anniversary dates were encountered, resulting in a reduction in spending between November, 2003 and April, 2004. However, with new enrollments and increased service availability, spending on individual plans by the end of the fiscal year reached \$91,000 per month. The current average spending per plan is \$465 per month.

Dean and his family worked with a local hospital to carve out job duties that Dean was good at. They hired their own job coach and Dean now works 20 hours per week.

Expenses by Spending Category



49% 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.

21% of all Support Funds were spent on Community living supports which included staff employed to provide assistance with personal skills such as eating, bathing, dressing, and mobility.

13% of funds were spent on Supported Employment to assist individuals to find, get and keep competitive jobs in the community.

8% of funds were spent on transportation.

8% of funds were spent on respite care.

The remaining 1% was spent on items such as specialized medical equipment, environmental accessibility, chore services and homemaker services.

Local Alliance Support

Mid-Columbia Local Alliance

The Arc of the Mid-Columbia (our local alliance), has monthly board meetings and some type of event or training most months of the year. Personal Agents Vicki Swyers and Jennifer Lewellyn and two brokerage customers are board members of the Arc of the Mid-Columbia. Below are some of the social activities and trainings the board has organized:



Personal Agent
Jennifer Lewellyn

- July: Picnic and Bingo.
- Oct: Jennifer Lewellyn presented information on Brokerages, including how to be an employer.
- Nov: Sternwheeler ride.
- Dec: Co-sponsored Holiday party with Columbia Gorge Center.
- Feb: Julie Saldivar presented information on services offered by the Mid-Columbia Center for Living, followed by a dance and party.
- Mar: Writers Workshop Training presented by Michael Bailey.
- Apr: Oregon Trust Fund training presented by Mitch Teal.
- May: Annual membership meeting, Dinner and Bingo.



Personal Agent
Vicki Swyers

The number of providers supporting our customers has doubled since Dec 2003.

The most celebrated event this year was the marriage of two of our customers. It all started when they shared a ride with their provider to an Arc meeting. Amazing what Transportation can do for you!!!

Union County Local Alliance



Union County Local Alliance members describe their latest project to assembled family members.

We have attended several out of town conferences to learn more about Self-Advocacy and to increase independence when away from home. Every trip is an adventure: customers help each other whenever needed. This has created “peer support” which gives opportunities for learning and mentoring. We attended and presented at the Oregon Arc Conference in Eugene. We attended the Direct Supports in-service in Corvallis. We have registered for the Willamette Lake Workshop coming in September and are considering attending the Wellness Conference again in Portland this fall.

Our Local Alliance continues to meet on a monthly basis with all kinds of agenda items. Customers, family members and providers attend the meetings

and keep them active and interesting.

Harney and Grant County Local Alliance

Being a Personal Agent in Grant and Harney Counties is a challenge with the miles to cover and extensive customer needs. When I thought about the annual report and what I would want to relay to others about this past year the most important thing to me was this question: what difference is being made in the lives of the customers & families that I serve?

- We have supported 2 customers to see the possibilities and act on the dream of

living on their own, as well as providing support for other customers in their second year of independent living.

- We have assisted our customers in getting involved in their local communities, participating in local events and going to camps of their choice.
- Completing household modifications that improve a persons living situation is a great accomplishment. We were successful in receiving the Fairview Housing Grant to do accessibility modifications to a customer’s bathroom making it



Gavin’s entrepreneurial spirit is a welcome sight all over the Burns-Hines area in the summertime

possible for him to take showers in his own home.



Personal Agent
Becky Garo

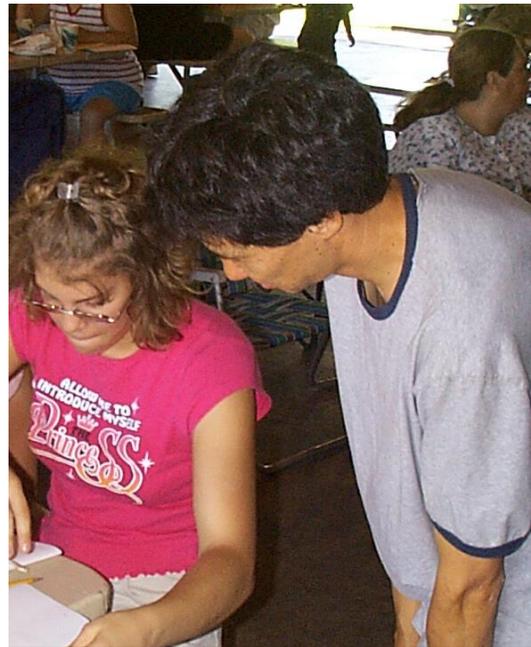
- Communication is something we often take for granted. But when I see a customer talking with the assistance of a device for the first time in years it is very rewarding.
- Many people I work with have gotten jobs, learned new living skills, increased parenting skills, feel like they are a part of their communities, and tell me they are just plain happier people.

The customers and families that I work for are very courageous people and I have been privileged to become a part of their lives and assist them in finding whatever it is that they need to become independent and happy with their lives.

Wallowa County Local Alliance

This past year, customer goals have been the driving force behind both positive changes in individuals' lives as well as in local DD services in general. On a personal level customers have changed living situations, become employed, and have spent free time pursuing their interests. As a result, the county-wide pool of available providers has increased, the relationship with service partners has strengthened, and community awareness of customer needs has improved. Last winter a "DD Think Tank" was formed to explore the range of resource development needs in Wallowa County and ways to meet them. After breaking for the summer, the Think Tank will resume meeting to select and begin work on a single project.

Our local alliance gatherings this past year have focused on social activities. Most recently customers, family, friends, and providers had a picnic at Wallowa Lake where everyone had the opportunity to share experiences, dilemmas, and solutions in addition to having a good time. Alliance members continue to be involved in the Disability Service Advisory Council, Lifespan Respite, and Self-Advocates as Leaders as well as the DD Think Tank.



Wallowa Local Alliance member
Charlie Oh exchanges information
with another EOSSB member.

Umatilla, Morrow and Wheeler County Local Alliance



Personal Agent Kristi Avery describes Local Alliance activity to the Board of Directors

The Umatilla County Local Alliance has been focusing on transportation issues. They have written two grants, attended local transportation meetings and attended trainings related to transportation development. Currently, they are working to bring together individuals and agencies that have an interest/need in this area.

Other groups that have developed out of the Umatilla/Morrow and Wheeler Local Alliances are the self-advocacy groups. This began with a dinner meeting at Abby's in Pendleton. Self-advocates attended and discussed what self-advocacy means and what activities they would like to see available. Next, a workshop on self-advocacy was put together by EOSSB Board of Director's member, Charlie Hammett. Peggie Beck and Kristi Avery assisted with the planning. It took place in March and was a lot of fun and had a good turnout. We hope to make this an annual event. Out of these events, activity planning

groups developed. There is one for Morrow and Wheeler Counties and one for Umatilla County. Many self-advocates wanted to go on a camping trip. The activity planning groups decided to do a fundraising carwash to pay for the trip. Kristen Hughes and Kristi Avery helped out. It was very successful, earning \$200.00 in just 4 hours. The camping trip is scheduled for August 21st and 22nd, 2004.

CAPECO of Umatilla County received a large grant called the Project With Industries (PWI) Grant. The goal is to assist individuals with disabilities to gain employment. Many EOSSB customers are receiving employment related services through this grant. Kristi Avery is also a member of the advisory council for this board.

Malheur County Local Alliance

In Malheur County, we worked to develop a relationship with a new provider agency, Eastern Oregon Center for Independent Living (EOCIL) which has offered group activities that have resulted in great success for consumers making friends. Many consumers have reached goals getting jobs in the community, making friends, living independently, and creating relationships.



Personal Agent Amy Eddy hands out raffle tickets at the 2003 Annual Meeting

Our Malheur county family hosted a big, fun BBQ and dance. We had music, dancing, and invited other community partners and Local Alliance members. WITCO donated food and services. It was a great success and will become a yearly event.



Jay and Sarah from LaGrande at a recent gathering.

Baker County Local Alliance

Baker County recently celebrated the accomplishments and goals reached by EOSSB customers at a picnic at Geiser-Pollman park in Baker City.

Customers and providers shared their successes from moving into their own apartment to maintaining a “real” job in the community. Customers have had a busy year attending meetings and trainings, camping, going to parades, shopping, etc. One customer was recently selected to attend a micro-enterprise training in Boise, provided by nationally known presenters who work with individuals with challenging behaviors. She learned about self-employment, profitable business choices and business etiquette. She is now working with Vocational Rehabilitation to build her business plan and start her production soon!



Carlin was queen of Karaoke at the 2003 Annual Meeting

We are excited about the start-up of an Autism Support Group to provide an opportunity for sharing of experiences and challenges, as well as to support families with trainings and information. Customers, with their families and providers, have decided to start planning their own regular activities, usually monthly, chosen and led by self-advocates. In addition, we are attempting to offer a Boundaries and Dating class this fall,

in which customers will learn about personal space, media messages, how to ask someone to go to lunch, to dance, etc. If there is enough interest, classes will be offered for men only and women only, similar to the model from Ontario.

Executive Director's Report

Do you remember the scene in "Dr Zhivago" where the good doctor walks through the snow and finds parked on a siding the steam locomotive of the revolutionaries. He is both afraid and in awe of the power represented by that engine as it belches steam and smoke – it seems to be alive. The cold still silence of the mountains in winter is suddenly shattered by the shrill train whistle that blows with authority and power. After a frightening verbal exchange, the train heads out and the Russian Revolution takes hold, changing Dr. Zhivago's life – and the lives of all Russians.

Well, it might not be the Russian revolution, but we are riding on just such a revolutionary train, one that will change all our lives, and one that inspires fear and awe in many who watch it come down the track. This is the locomotive of Self Determination, and it gathers speed and power with each mile it travels. Where is this train going? It is transferring power and control from the system to the individual. It cannot be stopped as it moves us closer to our vision. A vital feature is that we are building our locomotive as we ride in it, assembling the framework of Oregon's vision of Self-Determination as we go.

This year, our revolutionary locomotive survived the effects of two failed ballot measures, while managing to enroll over eighty new customers. We more than doubled the number of service providers over last year and increased the dollar volume of services received by 261%, or over two and a half times the volume of the year before. We have maintained a high level of customer, community partner, and provider satisfaction. Our Board of Directors has maintained a quorum at nearly every meeting, and has developed excellent working relationships with each other and with the staff. We became a United Way Agency, which will enhance our already successful "Flex Fund" to provide services and supports that people need but that do not fit into the Medicaid spending categories we are otherwise required to adhere to.

Self-Determination is all about making it possible for people to fulfill their own dreams and aspirations, dreams of holding a job, dreams of having or being part of a family, dreams of changing one's life. For example:

- Dean and his family had a dream of him working at a hospital and eventually living on his own. With the help of a service provider that shared his dream and did not focus on barriers, they secured the job they wanted. One dream down, one to go...
- Linda had two dreams, she wanted weight loss surgery so that she could be healthy again and she wanted to get married. After being first rejected for the surgery, she persevered and eventually undertook the surgery and all the lifestyle changes necessary to make it a success. She is now married to another brokerage customer. They are exploring new dreams together...

We are committed to helping people to determine their dreams, we are committed to respecting those dreams, and we are committed to helping to make those dreams come true. Our revolutionary locomotive is fueled by these dreams. All Aboard! This train is leaving the station.

Bill Uhlman
Executive Director

Financial Report (audit pending)

Fiscal Year: July, 2003 - June, 2004

Budget

Fiscal Year: July, 2004 - June, 2005

			deviation	
	FY '03-04	FY '03-04	from '03-04	FY '04-05
Revenue	Budget	Actual	Budget	Budget
DD 148 Brokerage Operations	701,369.00	703,396.46	2,027.46	717,584.92
DD 149 Support Services	1,890,690.00	1,890,690.00	0.00	1,962,849.00
Memberships/FI Services	0.00	1,017.00	1,017.00	4,815.00
United Way	0.00	0.00	0.00	950.00
Interest	12,000.00	5,818.00	-6,182.00	8,400.00
Total Revenue	2,604,059.00	2,600,921.46	-3,137.54	2,694,598.92
Expenses				
Salaries	402,916.38	410,278.97	7,362.59	420,560.76
OPE at 28.5% of Salaries	124,904.08	113,448.55	-11,455.53	119,859.82
Total Salaries and Expenses	527,820.46	523,727.52	-4,092.94	540,420.58
Board & Local Alliance Suppo	9,800.00	13,033.98	3,233.98	10,822.00
Rent and Utilities	12,000.00	11,262.00	-738.00	12,000.00
Travel	55,700.00	61,039.82	5,339.82	67,634.00
Supplies	14,800.00	14,510.53	-289.47	15,000.00
Telephone/Communications	24,000.00	27,275.16	3,275.16	28,800.00
Professional Fees	10,000.00	16,783.43	6,783.43	8,000.00
Postage	3,600.00	4,197.07	597.07	4,076.00
Insurance	7,500.00	10,287.59	2,787.59	10,391.00
Training and Materials	5,000.00	2,194.96	-2,805.04	2,933.00
Misc	2,000.00	3,107.88	1,107.88	3,461.00
Printing/Copying	1,000.00	29.60	-970.40	307.00
Dues, licenses, publications	5,000.00	4,503.45	-496.55	5,202.00
Total Services and Supplies	150,400.00	168,225.47	17,825.47	168,626.00
Support to Individuals	1,890,690.00	1,890,690.00	0.00	1,962,849.00
Fiscal Intermediary Expense	0.00	111.00	111.00	0.00
Flex fund and transportation	12,000.00	5,663.00	-6,337.00	9,350.00
Subcontracted services	10,606.00	10,606.00	0.00	0.00
Equipment Purchases	7,534.00	1,167.00	-6,367.00	5,000.00
Operating Reserves	5,009.00	0.00	-5,009.00	8,353.34
Total Other Expenses	1,925,839.00	1,908,237.00	-17,602.00	1,985,552.34
Total Expenses	2,604,059.46	2,600,189.99	-3,869.47	2,694,598.92
Net (revenue-expenses)	-0.46	731.47	731.93	0.00

Note: Support to individuals includes unspent funds returned to State

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, 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.

\$5,628 was spent in flex fund requests this fiscal year. Below are examples of some funded requests:

<u>Item/Purchase</u>	<u>Purpose</u>	<u>Cost</u>
moving expenses	Cannot do by herself due to surgery	241.95
gym membership	To be healthier and for community inclusion	432.00
turner syndrome membership	Family needs information about their daughter's disability	45.00
cleaning supplies	A person of limited means requires assistance to take better care of apt to keep lease from being terminated	20.00
Chiropractor	Assistance with motor skills and movement reduces seizure activity. Medicaid will not cover chiropractor	280.00
psoriasis shampoo (year's supply)	Person with a skin condition. Oregon Health Plan (OHP) does not cover	144.39
prepaid cell phone plan	For emergency contact and to arrange care of his son	50.00
Direct support conf registration/room	To learn self advocacy skills, and to meet her Community inclusion goal	141.00
carpet cleaning rental and stain remover	To prevent eviction from apartment so she can continue to live where she lives	26.00
exercise at Columbia Court Club	A person with Prader Willy Syndrome (an eating disorder) to exercise and be healthy	300.00
new mattress	Due to frequent incontinence	300.00
dust mite covers and air filter	For a person with allergies and sinus	230.00

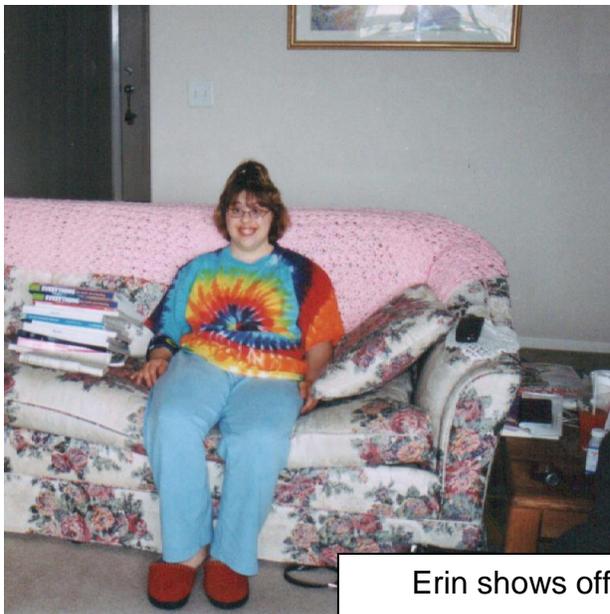
computer software - Jaws	surgery. Dr recommends but OHP will not cover it.	
moving expenses	Software to aid a person with a visual impairment	300.00
tandem bike	Emergency situation – abusive spouse	300.00
Furniture	community inclusion for a person who cannot ride a bike on her own, exercise	350.00
60 water exercise classes	First apartment for a person who is moving out on their own	300.00
Swim passes	health, balance, and to overcome fear of water	300.00
Direct support conf registration/room	Health, Community inclusion	30.00
	To learn self advocacy skills, and to meet her Community inclusion goal	141.00

EOSSB is proud to announce that we recently became a United Way Agency in Hood River County. Starting July, 2004, an additional \$950 will be available in that county to supplement existing Flex funds.



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.



Erin shows off her own apartment

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 originally 10 questions to the survey. Beginning in March, 2004 three additional questions were added. A complete copy of the results with all comments is available by contacting the EOSSB office.

- 45% were filled out by the individual with disabilities receiving services.
- 53% were filled out by another on behalf of the individual with disabilities but from the perspective of the individual with disabilities.
- 2% were completed by a significant other of the individual receiving services.
- 58 out of 213 surveys were returned for a return rate of 27%

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

Yes 28 (47%) Not Sure 25 (42%) No 6 (10%)

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

All the time 54 (92%) Sometimes 2 (3%) Not at all 3 (5%)

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

Yes 53 (90%) Not Sure 5 (8%) No 1 (2%)

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

Very Happy 46 (81%) They're Okay 8 (14%) Not Happy 3 (5%)

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

Yes 48 (84%) Not Sure 6 (11%) No 3 (5%)

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

Yes 12 (21%) Not Sure 21 (36%) No 25 (43%)

7. Do you feel safe?

All the time 8 (67%) Most of the time 3 (25%) Not really 1 (8%)

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

Personal Agent	Yes 48 (89%)	No 3 (6%)	Sometimes 3 (6%)
Support Staff	Yes 38 (83%)	No 2 (4%)	Sometimes 6 (13%)
Family	Yes 43 (86%)	No 1 (2%)	Sometimes 6 (12%)
Friends	Yes 37 (86%)	No 2 (5%)	Sometimes 4 (9%)
Others	Yes 23 (85%)	No 2 (7%)	Sometimes 2 (7%)

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

Yes 45 (80%) Not sure 9 (16%) No 2 (4%)

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

A lot better 44 (80%) A little better 9 (16%) No better 2 (4%)

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

Personal Agent Yes 47 (90%) No 1 (2%) Sometimes 4 (8%)

Support Staff Yes 38 (84%) No 2 (4%) Sometimes 5 (11%)

Family Yes 42 (81%) No 2 (4%) Sometimes 8 (15%)

Friends Yes 37 (82%) No 1 (2%) Sometimes 7 (16%)

Others Yes 20 (77%) No 2 (8%) Sometimes 4 (15%)

12. I am happy with my life.

All the time 30 (51%) Most of the time 24 (41%) Not really 5 (8%)

13. Are you satisfied with where you live?

Very Happy 46 (78%) It's Okay 10 (17%) Not Happy 3 (5%)

13. What would you change about the support and services you get, other areas you want to grow in, or dreams you want to explore?

I want to lose weight to reach my goal but it is very hard

He wants his bills paid. They are always way past due and keep calling and a friend paid it and never was reimbursed.

she a friend helping with my son and me. She helps with work and happy. I call she call back.

Want to go to cosmetology school

The services are good. Need more money so can be involved in more programs.

I don't anticipate any changes at this time but I will keep my PA informed

I would get to travel more and play bingo more and go out to eat with my friends

I haven't been with you very long so I don't know what my dreams are

no change

To find a job I'm happy in and to be able to make new friends to do things with and to be more independent

no change

Driving, new ear aids

I can't think of any

because PA does a very good job at helping me and making things happen

It would be nice to actually do my plan

Get service from you and help find jobs

not applicable for C or me

Less restrictions on meeting personal & social needs

too new

I like to get married someday

Need to work on what we have personally

More education other jobs

I'm not sure right now

For personal care giver to be more reliable showing up for work. To have a "big" brother to go to sport games, fishing - take wt lifting classes at college.

Conferences closer to home

I would change nothing about services I get. I would like to do more acting.
 Am very satisfied with our services
 nothing at this time
 get a different job, go back to school so I can learn how to read & write better, to study driving manual to get my permit & then driving license
 nothing at this time
 Would like my own place someday, would like a dog breeding business, would like more friends my age
 go shopping a little more, go to movies sometimes
 nothing, don't know
 everything is good the way it is
 To move out in the country so I can take care of more sick and abandoned animals
 C has one more year in public schools. Our hope for her is to have a job in the community that she enjoys and will someday live independently and have friends.
 No changes
 I would change where I live. My dream is to have a ranch or live in the country so my kids can have horses, dogs, cats. I want to own my own park some day.
 Want to learn how to do my own checks, want to be more outgoing when I am out with friends.
 I am not depressed. I miss being with SO helping him. I want to be able to go to X with PA
 No changes
 I am not happy that I am not getting help with voc rehab

Community Partner Satisfaction Survey

A Community Partner Satisfaction Survey was sent to 35 people. This survey was completed by 6 members of the case management community, one member of the vocational rehabilitation community and four not identifiable community partners. Twelve of 35 or 34% of all surveys were returned.

1. In my observations, brokerage personnel treat their customers with respect.
 Yes 12 (100%) No 0 Somewhat 0

2. How effective are brokerage personnel in furthering their mission?
 Very effective 9 (82%) Somewhat Effective 2 Not effective 0

3. How would you assess your working relationship with brokerage personnel?
 Excellent 8 (67%) Good 4 Fair 0 Poor 0 Strained 0

4. Are Brokerage staff knowledgeable about local community resources?
 Yes 9 (82%) No 0 Somewhat 2

5. Do brokerage staff have a competent understanding of Support Services Benefits?
 Yes 11 (92%) No 0 Somewhat 1

6. Do Brokerage staff know and work well with other agencies, service providers, and individuals in the community?
 Yes 10 (83%) No 0 Somewhat 2

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

It helps support clients above what we can offer
Really like the PA's for our county
PA is one of the best I have ever worked with
They provide the long term support enabling OVRS to work w/ folks who require those services
PA is such an advocate for her clients
Approachability of Executive Director. Client focused approach
EOSSB staff provide excellent services, are very thorough, conscientious. I like the clear reports, & updates & I especially like how well you all seem to get along and enjoy your work together

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

nothing

9. Suggestions for improving Brokerage services:

Faster enrollment procedure. Slowness is causing a new wait list to be made.
It was wait lists that brought the Staley lawsuit.
more openings
Mutual training with VR 1yr. We have invited each other to our own meetings.
Yet conflicts in calendars have been a problem. More relationship building should be sustainable in coming year as EOVR becomes fully staffed
None at this time

Service Provider Satisfaction Survey Data

This survey was completed by 38 employees of customers of EOSSB, seven independent contractors working for customers of EOSSB and nine provider agencies working for customers of EOSSB. Fifty-four surveys sent were returned.

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

Yes 53 (96%) No 1 Somewhat 1

2. How would you assess your working relationship with your customer with disabilities.

Excellent 38 (70%) Good 15 Fair 1 Poor 0 Strained 0

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

Excellent 34 (67%) Good 13 Fair 4 Poor 0 Strained 1

4. Are payment procedures efficient and timely?

Yes 45 (87%) No 1 Somewhat 6

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

Yes 43 (91%) No 0 Somewhat 4

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

Yes 36 (90%) No 0 Somewhat 4

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

They provide services that have been needed in our area for a long time
Great personal attention
Our relationship is pretty new - but I especially like our representative staff person
The services you and all brokerages provide for disabled adults!!
Staff is great!
I think it's awesome that these special needs people are able to get some individual help
Very concerned about the individuals they are representing. Making sure they receive all services available.
It give us a chance to take our child places because we know we will get paid for it
I like the way the customers are being assisted - communicated with, updated and aid given when called upon
nice people easy to get along with
The way they answer my questions and get back to me in a timely matter when they have to look answers up.
competent staff
A good program for my son
They treat all people with respect
Customers make their own choices on what to purchase
they take an interest in their clients
Very Professional, courteous and knowledgeable staff
Customers are receiving services, brokerage staff & admin interacts well with customers & partners, the rotation of community activities.
courtness (courteseyness?)
I like that people who would otherwise have nothing have the help and support they need.
It is very necessary for some individuals to receive this kind of help
When the job is done it is satisfying
It gives customers more opportunity to receive the services they need
The work that is done to encourage better quality of life through independence. Keep up the good work!
The fact that you are there and able to help
Director is approachable and often reachable. Area rep is very knowledgeable about this area and her client's needs.
PA is very personable
I really appreciate the information they always send or update
services they provide to the customers
I like everything

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

Do the meetings always have to revolve around "food"?
none yet
Not enough PA's for our area
Just that they are new and are still working the bugs out
None
Don't think it is fair if you take your child somewhere and you only get paid by the hour and not mileage
Not having meetings for providers once in a while for updates - problem solving, etc
long meetings not understanding all the services that can be provided
I just wish payments could be a little quicker
none
nothing
The federal and state interference with your good work
Customers receiving \$320 per month in funding

don't have any dislikes

none

None noted

none

I am a care provider through SDS I didn't even know you existed until I was involved with the family of a customer.

I feel you can get lost in the shuffle, if a person with disability didn't have a family member to keep things going

contradictory. Unsure of what we can or can't do

nothing

PA is often so busy that it is difficult to get a hold of her

Good job

nothing much to dislike

none

9. Suggestions for improving Brokerage services:

Not at this time. I feel the brokerage is doing a wonderful job of serving our needs at this time. Keep up the great work.

Adding PA's to our area. PA is overloaded that she is spread so thin. It is not fair to the other customers who need her time too.

I think the whole breakdown of services rendered has a few kinks.

They should pay for everything that you do with your child no matter what it is.

Outline of customers and what is expected for the ones a provider is working with

Explain services to individuals better and before meetings

except for answer number 8 everything's fine

none

nothing

Time. It will take time to sort out the system and have it running smoothly

none

Advertising more. Maybe try a caregiver/employee training. I would love more information on the brokerage services & possibility of becoming a brokerage staff member myself. Knowledge is a good thing. I'm constantly looking for ways to learn more and better myself.

Maybe the work load is too much for an individual. It can be weeks or even months before any contact.

Usually we have to call. (not all the time).

Same rules for everyone. Be clear on what is wanted - not so evasive.

None needed as far as I can see.

Allow PA to set up a phone system whereby she can differentiate between clients and providers.

everything is great now

Annual Goals for FY 03-04

Goal: 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.

Outcome 1: At the beginning of the fiscal year, there were 189 people with active plans. At the end of the year, there were 209 people with active plans. During the year, each plan was revised once per year on the annual plan date. In addition, mid year plan revisions occurred 267 times. On average, in addition to the annual plan renewal, each plan was revised 1.3 times in the year.

Outcome 2: Last fiscal year 78% of survey respondents stated they knew what to do when unable to resolve disagreements about plans or services. This fiscal year, 80% of survey respondents stated they knew what to do. The number of people who stated

they did not know what to do decreased from eight to two, while the people who were not sure was reduced from twelve to nine.

Goal: 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 case manager 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)

Outcome: Four new referrals were 18 year olds. Three of the four had plans in place on the first month of service to ensure smooth transition from Family Support Plans. In the Community Partner survey last fiscal year, there were comments regarding frustration with the length of time before services start and the void in support during transition from Case Management services and Brokerage services. In the current fiscal year, there were no such comments.

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

Outcome: Brokerage presentations were made at the Rural Health Summit in LaGrande, and at the Oregon Vocational Special Needs Conference in Hood River. Activities described in the Local Alliance section of this report also served to educate community partners.

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

Outcome: Of 45 audits of customer files, 35 adequately considered significant risks in the development of plans, five considered risks, but needed improvements, four had no risks to assess, and one did not adequately consider significant risks.

Goal: 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.

Outcome: Of 45 audits of customer files, Twenty-eight, or 62% had strong relationships between ISP goals and the long term goal in the Customer Goals Survey. Staff acted on this information to improve quality.

Goal: 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.

Outcome: Evidence that individuals assisted in monitoring the quality of supports increased from 37% of files reviewed in the previous fiscal year, to 59% in the current year.

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

Outcome: Contracts were revised to contain necessary and consistent language.

Goal: Create Resource Development Plans for EOSSB and in each county to Increase provider availability and quality.

Outcome:

	July, 2003			June, 2004		
	Count	Volume	Average	Count	Volume	Average
Vendors	12	\$38595.13	\$3216.26	33	\$44854.59	\$1359.23
Employees	65	\$12937.99	\$199.05	133	\$68046.10	\$511.62
Total	77	\$51533.12	\$669.26	166	\$112900.69	\$680.12

The total number of providers paid in June 2004 was 166, up from 77 in July, 2003. This is a 215% increase. The resource guide on the Brokerage Website (www.eossb.org) has been expanded to include additional vendors and service providers. According to the Customer Satisfaction survey, 84% of customers are very happy with the supports and services they receive and only 12% feel there are supports they need but do not get. According to the Provider Satisfaction Survey, 98% of providers rate their working relationship with brokerage staff as Good to Excellent.

Goal: 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

Outcome: According to the Customer Satisfaction Survey, 81% of respondents are very happy with the Services and supports they get, and only 5% say they are unhappy. In the past year, the Entry Packet was revised to make it more user friendly. Additionally, the Customer Service Agreement, the Intent to Receive Funds Form and the vendor time sheet were all revised to make them more user friendly. All customer documents have not yet been translated into Spanish.

Goal: 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

Outcome: EOSSB has participated in a state-wide planning process that includes stakeholders from brokerages, OVRs, SPD and consumer representation, designed to create policies and guidelines and training to accomplish all of the above. The group met monthly throughout the Fiscal Year. The policies and guidelines are complete and are to be introduced to Brokerage Directors and VR Branch Managers in September of 2004. From those efforts, local implementation plans are to be created. As indicated in the Community Partner satisfaction survey, there remains much work to do to develop a good working relationship with local VR staff. The following comments from the survey illustrate the point: "Mutual training with VR should occur 1xyr. We have invited each other to our own meetings. Yet conflicts in calendars have been a problem. More relationship building should be sustainable in coming year as EOVR becomes fully staffed."

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

