

Eastern Oregon Support Services Brokerage

Annual Report 2005





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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 supported to be vital and integral members of their community, families, and neighborhoods, and where communities and citizens are willing to become involved in their lives.



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 are planned and delivered. The Staley Agreement calls for "universal access" to self-directed Support Services for all adults with developmental disabilities who qualify for supports. In essence, this creates an entitlement to support services for all eligible adults with developmental disabilities built upon the principles of self-determination. Access to these support services, through Support Service brokerages, must be applied on an equitable, fair and uniform basis across the state regardless of what part of the state a person lives in. The first customers enrolled into these emerging brokerages in the fall of 2001. A statewide plan was developed that assured access to these services across the State by 2005. In 2003, as a result of the State of Oregon's budget crisis, that assurance was extended to 2009 with substantially reduced enrollments.

Historical Highlights:

- On December 14, 2001, a contract with DHS/SPD was signed and the Executive Director was hired.
- On December 24, 2001, funding was received to begin operations.
- On March 1, 2002, EOSSB staff began serving the first group of 62 customers.
- Approximately 5 to 10 customers per month were enrolled every month through January, 2003 when enrollments were frozen due to Oregon's fiscal crisis.
- In July, 2003, 59 new customers enrolled, transferring funding and services from county controlled slot based services to brokerage services under the Support Services Administrative rule.
- In August, 2003, new enrollments were resumed, but at a rate of two to three per month, which was much lower than originally planned in the Staley Settlement. This decrease was due to the failure of Measure 28.
- In May of 2004, eleven individuals transferred from the physical disability waiver of SPD to Support Services, through brokerages.
- By the end of the fiscal year, June 30, 2005, 254 people were enrolled in the Eastern Oregon Support Services Brokerage, or 73% of the projected capacity.



Kathy, Edna and Mandi attending a self-advocacy conference

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.



Charlie Hammett, one of the first board members elected, continues to serve on the board of directors today

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

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

Board Report

Board Members

Name	Representing	Affiliation	Term expires
Rick Currin President	Umatilla County	Service Provider	August, 2007
Mike Singleton Vice-President	Malheur County	Family Member	August, 2007
Zee Koza Secretary / Treasurer	Union County	Service Provider	August, 2005
Kathleen Kim	Wallowa County	Family Member	August, 2007
Laurie Stephens	Union County	Family Member	August, 2007
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
Barbara Hawk	Gilliam County	Family Member	August, 2005
Charlie Hammett	Umatilla County	Self-Advocate	August, 2005

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.
- Satisfaction survey results were discussed and prizes awarded from a drawing for those who submitted surveys over the past year.
- Activities, good food, and a live band were enjoyed by all.

November, 2004

- Previous year fiscal audit was accepted and management improvements were adopted.
- Five-year long-range strategic planning was begun, including review of previous goals and outcomes, customer satisfaction survey results, and SPD field audit. Preliminary goals were proposed and adopted.
- Success stories and service statistics were shared and discussed.

March, 2005

- Five-year long-range strategic planning was continued, including review of compliance goals in response to SPD field audit, service provider satisfaction survey, and provider satisfaction survey. Additional long range goals were established.



Board member Steve Carlson whoops it up with daughter Janelle at the 2004 annual meeting

- Supported employment agreement with Eastern Oregon Vocational Rehabilitation was discussed and approved.
- Implementation of intermediate level supplement to base funding was reviewed.
- Flex fund spending was reviewed.
- Success stories and service statistics were shared and discussed.
-

June, 2005

- A five-year strategic plan was completed and unanimously adopted.
- A letter from all brokerages to the Staley Implementation Group was discussed and approved, outlining unaddressed problems as perceived by brokerage directors.
- A budget for the 2005-2006 fiscal year was completed and adopted.
- Plans for the 2005 Annual Meeting were finalized.
- Success stories and service statistics were shared and discussed.

Staff

Administration

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

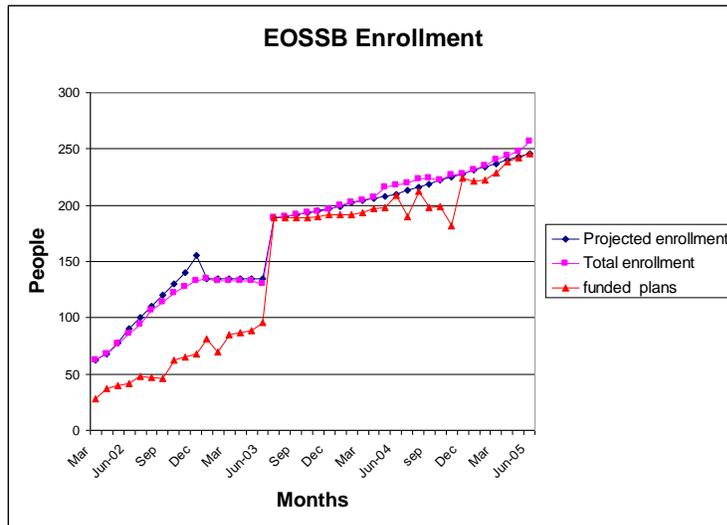


Personal Agents

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, 2004), 218 people were enrolled. New Brokerage enrollments in the current year were authorized at approximately three people per month (less than half of the original projection in the Staley Settlement). Near the end of the fiscal year, ten additional enrollments were authorized and utilized. As of June 30, 2005, total enrollment is at 254 people, which is 74% of the way to the final target of 350 people enrolled. Nearly every county in our region now reports having a wait list. Counties that cannot fill a brokerage vacancy in a particular month have traded vacancies with other counties to



address individual needs while generally keeping to the annual and monthly enrollment schedule. The uneven distribution of enrollments across counties is due to the inability of some counties in past years to fill all vacancies, and due to state policy that prohibits vacancies created by people leaving Brokerage services from being filled.

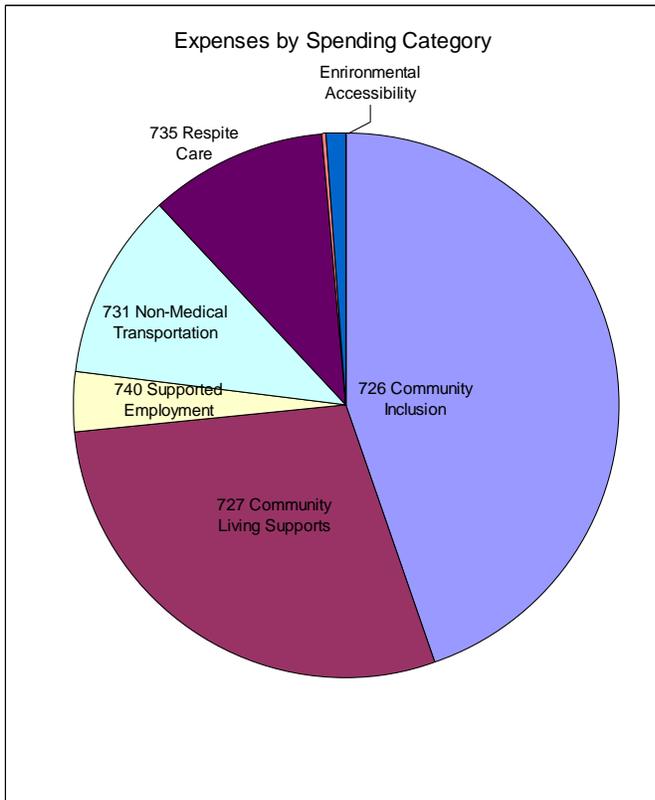
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EOSSB Enrollments					
	Beginning Enrollment March, 2002	End of Fiscal Year 2002-2003	End of Fiscal Year 2003-2004	End of Fiscal Year 2004-2005	Percent of Planned Capacity
Mid Columbia	9	31	60	68	94%
Morrow/Wheeler	6	8	9	11	65%
Umatilla	10	31	55	62	58%
Wallowa	2	3	7	11	100%
Union	3	13	21	24	63%
Baker	11	12	23	28	108%
Grant	3	5	6	6	50%
Harney	1	9	11	12	100%
Malheur	17	18	26	32	67%
Total	62	130	218	254	74%

Service expenditures have increased each year in proportion to the increased enrollment and total \$1,361,073.09 for the current year. The average spending per plan has also increased from \$465 per person per month at the end of FY 03-04 to \$527 per person per month at the end of FY 04-05.



Babe folds towels at his new job



45% 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.

29% 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.

4% of funds were spent on Supported Employment to assist individuals to find, get and keep competitive jobs in the community.

11% of funds were spent on transportation.

10% of funds were spent on respite care.

1% was spent on environmental accessibility.

The remainder (less than 1%) was spent on items such as specialized medical equipment, environmental accessibility, chore services and homemaker services.



Kristi Avery discusses Umatilla County happenings at a Board Meeting



Rick and his favorite PA and service provider

Local Alliance Support

Mid-Columbia Local Alliance

Representatives from Mid-Columbia agencies such as Vocational Rehabilitation, The Brokerage, the County DD Service Agency, and the Schools, all of whom serve young adults with disabilities, have been meeting to discuss how we can improve services to students that will need support as they transition from school to adult living in the community. We discussed what is currently going on, what we would like to see happen in the future, and what barriers we are currently experiencing. After collecting this information, we developed goals to facilitate a smoother, person centered approach to transitions. We will be creating a resource book for agencies



Personal Agent
Jennifer Lewellyn

and schools to aid in understanding what each of us offers to our customers or students. We will be meeting every other month to continue to develop a more cohesive team. Two important points all members of the Mid Columbia Transition Network agreed on is that Transition Planning needs to begin early, and that Person Centered Planning must be incorporated in the Transition Process.



Personal Agent Vicki Swyers

Union County Local Alliance

We have been holding dances periodically in the community and inviting individuals in Foster Care, Group Homes and SILP. These have given us opportunities to stay in touch with people that are not in our day to day lives as well as make new friendships. We also attend People First meetings in Pendleton and have introduced ourselves to



the Arc of Umatilla Co. which meets in Hermiston. We attend several workshops through out the year on different topics and enjoy traveling together as each trip is such an adventure. We are looking forward to our next workshop in Cascade Locks where we will learn about Personal Boundaries and Self Advocacy.

Union County customers have been busy with their Employee's and Provider Organizations and have been able to accomplish many things through their ISP's.



Personal Agent
Yvonne Bowling

Family members continue to be involved and supportive to customers. They attend most of the meetings with customers and help track the ISP activities and budget matters.

I continue to try and keep up with all the ISP revisions as people's lives are constantly changing and moving forward. We have developed a good working relationship with Vocational Rehabilitation Division, North East Oregon Housing Authority, Social Security Administration and Seniors and People with Disabilities. It's been a good year, I enjoy the program as it gives people opportunities to expand their relationships and become involved in their community. Empowerment is a Good Thing!

Harney and Grant County Local Alliance

This has been an eventful year for customers in Grant and Harney counties – many customers have come closer to their dreams and achieved many goals they set for themselves. Moving out of family homes into an independent living situation for the first time is a wonderful, exciting step. Two of our customers achieved this goal. Supporting them and their families with this “scary” step is one of our goals. Assisting customers to find and keep a job can also be a challenge in a small community, but has been successful for many customers. Watching one customer in particular realize a life goal of being able to go to Disneyland with TRIPS was a great feeling of satisfaction for me as a personal agent. What wonderful people I am privileged to work with. Thank you customers and families for a great year.



Personal Agent
Becky Garo

Wallowa County Local Alliance

Personal goals continue to be the driving force behind both positive changes in Wallowa County customers' lives as well as in local community resources. Customers are enjoying increased independence at home whether they live with others or on their own, and are spending more time in the community working, running errands, and following their interests. As brokerage enrollment and the demand for services have grown, so has the number of available providers. Customer interest in employment and housing options has lead to strengthened relationships and increased service from the LaGrande-based Vocational Rehabilitation and Northeast Oregon Housing Authority.

Several customers are taking advantage of job development through VR while another is working to purchase her own home through NEOHA's Home Ownership program.

Wallowa County's local alliance of EOSSB customers, their families, friends, and providers recently attended the second annual Local Alliance picnic at Wallowa Lake. The day was full of sun, sand, good food, and the opportunity to enjoy each others' company and ideas. But Alliance members don't just show up for the fun. They also continue to work on our local Disability Service Advisory Council and Lifespan Respite group.



Personal Agent
Jean Pekarek

Umatilla, Morrow and Wheeler County Local Alliance

Over the past year we have continued to work with Voc. Rehab and CAPECO to assist our customers to find and keep jobs. Kristi Avery is happy to report that several of her customers have found jobs over the past year. With the help of Vocational Rehabilitation and the CAPECO PWI Grant (Project With Industries) positive relationships have been developed with many businesses, and customers are working in jobs related to their interests. Teamwork is the key.



Personal Agent
Kristen Hughes

Our local alliance group has become a driving force behind fundraising for 2 camping trips planned this summer. A group of self-advocates began attending and planning activities and fundraisers. We cleaned 132 horse stalls in May at the Walla Walla fairgrounds and earned \$462 with a matching grant for a total of \$924.

On July 30th we held a carwash and earned another \$200. We had an individual who had heard about our camping trip last year who donated \$100 to us for our trips. Our first camping trip was in July and we went to Lost Lake up by Hood River. It was a lot of fun and everyone had a great time. We had about 26 people all total in our camp. Many family members join in and it is a great way to get to know others. Our camping trip in August is going to be up at Jubilee Lake and everyone is looking forward to it. Most of those to our first camping trip will be there and more have expressed interest.

Through the hard work of the self-advocates involved with the Local Alliance, a van was donated to the Umatilla County Arc, by Scott of Scott's Cycle in Hermiston. The van needs a little work, but we hope to have it ready for next summer. Grants have been written to help with these costs. Our local alliance continues to work on the transportation problem we have in this area. We have written grants and done some fundraising.



Malheur County Local Alliance

People in Malheur County have been very busy. The partnership with EOCIL for community inclusion has been a great success this past year. The Christmas party last year was a great success. Idaho Power donated funds to be able to purchase nice gifts for each participant. New shoes, bedding, cd's, and clothing were among some of the Christmas presents. EOCIL also had Boise radio stations donate 18 tickets to the Lonestar concert. Another fun trip was to Boise to the professional wrestling show. Besides these great adventures there have been trips to Salem to participate in working with technology that will assist people with disabilities in the future. Many local events such as participating in the DC Superstar Olympic Bowling also occurred. We had several customers who received awards this past year.



Daniel Registers to vote

Many relationships have developed due to the group activities that customers direct and choose to be involved with. There has been an engagement, friends who maintain their relationships outside of brokerage supported activities and several dating relationships have also developed.



Amy Eddy
Personal Agent

Highlights of the year:

- Lorena received a gold medal with her name engraved in the back for saving a drowning child at the swimming pool.
- Carolyn moved into her own apartment this year.
- Irene made a giant leap and moved to Ontario from Nyssa and feels safe and is very happy with her new home.
- David has a job in the community working at the bowling alley.
- Richard is employed at Red Apple and receives notes of thanks and appreciation from customers for his service.

There have been so many wonderful, positive changes in people's lives. We are looking forward to the upcoming exciting year!

Baker County Local Alliance

Baker County Local Alliance and community members 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. New members are always welcome. The group meets the second Tuesday of the month at the Baker County Library from 5:30-7:00 pm.

Customers, with their families and providers, have been planning their own regular activities, chosen and led by the self-advocates. Activities this year have included picnics, shopping trips out of town, fishing, camping, bowling, swimming, visiting the Flea Market and watching the Miner's Jubilee parade in Baker City. Upcoming activities include a trip to the Oregon Trail Interpretive Center, participating in National Night Out, attending the annual picnic and the Round Up in Pendleton.



Personal Agent
Colleen Grigg

Many customers have shown an interest in learning how to cook (more than just TV dinners) and have been working with their providers to make their own meals. The Local Alliance is planning to have a cooking party for the new chefs to show off their skills and share their treats with others!

More interest has been shown for the offering of a Boundaries and Dating class which we will hopefully be able to offer this fall, in which customers will learn about personal space, media messages, how to ask someone to go to lunch, to dance, etc.

If you are interested in attending any of the above events, or need any additional information, contact your provider or your personal agent--call Colleen at 403-0775 or Camille at 523-3646.



Participants at the 2005 Second Annual Self-Advocacy conference in Pendleton

Executive Director's Report

This year, our board and staff worked together to develop a five year strategic plan designed to bring us closer to our vision, a vision in which all people with disabilities will be supported to be vital and integral members of their community, and where communities are willing to become involved in the lives of people we support. We started out by attempting to describe for ourselves what the world would look like if we reached that vision. Here are some of the things that we think the world would be like if our vision were fulfilled:

- Getting services and supports that people need to live in their community wouldn't be a struggle – it would be an expected happening.
- There is no longer a label attached to these services and supports.
- There is no distinction between what is expected of people with disabilities and others. All people get what they need regardless of disability.
- Supports would enable people to do things for themselves and would mean less about “doing for” people.
- People would “have a life”, living where they want to live and doing what they want to do.
- People are no longer served in segregated settings unless it is a freely chosen association of peers. People with disabilities would be expected to be where ever anyone and everyone else is. There would be no exclusions.
- All services will be contractually based on Person Centered Planning and Self-Determination - This includes the education system and the DD comprehensive service system.
- People with disabilities no longer expect to be treated differently (or worse) than other people, there is no more “Special”, and there is equality, not preferential treatment. Social Darwinism would be an enigma.
- The state power structure asks what people want and need rather than developing rules that restrict or reduce needed services. How services should look is determined by customer need and not by arbitrary policy that does not account for those needs.
- There would be sufficient funds to support the vision, including ways to bridge the gap between what people need and what is allowable through Medicaid.
- Self advocates would be in leadership positions throughout the organization, the service delivery system and our communities.

Once we could describe our vision, we then developed goals to bring us closer to it. We created goals to support self advocates to become community leaders. We created goals to assist people who want to be employed to get jobs. And we created goals to better connect the people we support to their communities and to service providers. In a world in which bureaucratic restrictions sometimes seem to strangle the very life out of us, it is important to keep firmly focused on our vision. Our five year strategic plan is designed to do just that. Contact me if you would like a copy.

Bill Uhlman
Executive Director

Financial Report (audit pending)

Fiscal Year: July 1, 2004 to June 30, 2005

	FY 04-05	FY 04-05	Deviation	FY 05-06
	Budget	Actual	from 04-05	Budget
Revenue				
DD 148 Brokerage Operations	717,585	717,585	0	717,687
DD 149 Support Services	1,962,849	1,361,073	-601,776	1,784,584
FI Services	4,815	8,762	3,947	10,020
Interest Income	8,400	16,626	8,226	1,000
United Way	950	950	0	1,250
Misc Income		1,208	1,208	
Total Revenue	2,694,599	2,106,204	-588,395	2,514,541
Expense				
Payroll Expenses(salaries)	420,561	417,254	-3,307	431,778
Payroll Taxes & Benefits	119,860	109,483	-10,377	118,015
Total Salaries and Expense	540,421	526,737	-13,684	549,793
Board/Volunteer Support	10,822	10,363	-459	10,822
Dues and Subscriptions	5,202	4,019	-1,183	3,902
Insurance	10,391	9,267	-1,124	12,253
Miscellaneous	3,461	2,888	-573	4,821
Postage and Delivery	4,076	6,426	2,350	4,484
Printing and Copying	307	0	-307	0
Professional Fees	8,000	10,320	2,320	6,000
Rent	12,000	11,444	-556	12,000
Telephone/Communications	28,800	24,818	-3,982	23,630
Training - Staff	2,933	4,602	1,669	2,933
Travel	67,634	72,705	5,071	72,767
Office Supplies	15,000	15,984	984	15,750
Total Services and Supplies	168,626	172,835	4,209	169,362
Support to Individuals	1,962,849	1,361,073	-601,776	1,784,584
Fiscal Intermediary Expense		4,769	4,769	0
Flex fund and transportation	9,350	15,032	5,682	2,250
Equipment Purchases	5,000	4,104	-896	4,500
Operating Reserves	8,353	21,654	13,301	4,052
Total Other Expenses	1,985,552	1,406,632	-578,920	1,795,386
Total Expense	2,694,599	2,106,204	-588,395	2,514,541
Net (Revenue - Expense)	0	0	0	0

Flex Fund Report

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

Funding requests are made by Personal Agents.

Requests are granted if the following conditions are met:

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

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

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

\$ 13,954 was spent in flex fund and **United Way** requests this fiscal year. Below are examples of some funded requests:

<u>Item/Purchase</u>	<u>Purpose</u>	<u>Cost</u>
treadmill	to continue to exercise/lose wt	300.00
first aid/CPR classes	be a part of her community/help others	42.00
fan in room to keep from overheating	live comfortable in family home	34.99
Hair cuts/shaves	needs assistance looking clean cut	40.00
Bed	currently sleeping on floor	300.00
conference registration	to be self employed	20.00
annual pool fees	stay healthy, loose weight, keep employed	169.00
conference registration	to be self employed	20.00
Rental of Uhaul to move to Woodburn	To be where he wants to be	323.00
weight watchers fee	to stay healthy	300.00
dollars and cents software	money management skills	105.00
temp assistance with rent and utilities	Due to lost job	200.00
Indoor exercise bike	To stay healthy	300.00
ID card renewal	To be able to cash checks	29.00
food	emergency need	119.04
self advocacy conference	community inclusion	45.00
coronary risk reduction program at hospital	maintain health, lose weight, keep diabetes under control	66.75



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

Quality Assurance

Customer Satisfaction

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

- 36% were filled out by the individual with disabilities receiving services.
- 58% were filled out by another on behalf of the individual with disabilities but from the perspective of the individual with disabilities.
- 6% were completed by a significant other of the individual receiving services.
- 85 out of 177 surveys were returned for a return rate of 48%.

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

Yes 45 (54%) Not Sure 32 (39%) No 6 (7%)

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

All the time 76 (93%) Sometimes 4 (5%) Not at all 2 (2)

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

Yes 76 (89%) Not Sure 8 (9%) No 1 (2%)

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

Very Happy 75 (88%) They're Okay 7 (8%) Not Happy 3 (4%)

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

Yes 77 (92%) Not Sure 6 (7%) No 1 (1%)

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

Yes 16 (19%) Not Sure 24 (30%) No 43 (52%)

7. Do you feel safe?

All the time 74 (88%) Most of the time 10 (12%) Not really 0 (0%)

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

Personal Agent	Yes 72 (92%)	No 1 (1%)	Sometimes 5 (6%)
Support Staff	Yes 55 (89%)	No 1 (1%)	Sometimes 6 (10%)
Family	Yes 88 (86%)	No 3 (12%)	Sometimes 9 (2%)
Friends	Yes 53 (83%)	No 3 (5%)	Sometimes 8 (13%)
Others	Yes 28 (78%)	No 1 (3%)	Sometimes 7 (19%)

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

Yes 69 (84%) Not sure 12 (15%) No 1 (1%)

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

EOSSB.

A lot better 69 (84%) A little better 12 (15%) No better 1 (1%)

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

Personal Agent	Yes 69 (92%)	No 2 (3%)	Sometimes 4 (5%)
Support Staff	Yes 59 (89%)	No 2 (3%)	Sometimes 5 (8%)
Family	Yes 69 (88%)	No 3 (4%)	Sometimes 6 (8%)
Friends	Yes 57 (88%)	No 2 (3%)	Sometimes 6 (9%)
Others	Yes 31 (81%)	No 3 (8%)	Sometimes 2 (6%)

12. I am happy with my life.

All the time 48 (57%) Most of the time 35 (42%) Not really 1 (8%)

13. Are you satisfied with where you live?

Very Happy 69 (82%) It's Okay 13 (15%) Not Happy 2 (2%)

Community Partner Satisfaction Survey

A Community Partner Satisfaction Survey was sent to 42 people in January, 2005. This survey was completed by 11 members of the case management community, and 5 members of the vocational rehabilitation community. Sixteen of 42 or 38% of all surveys were returned.

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

Yes 14 (93%) No 0 Somewhat 1

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

Very effective 6 (46%) Somewhat Effective 7 Not effective 0

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

Excellent 6 (43%) Good 8 Fair 0 Poor 0 Strained 0

4. Are Brokerage staff knowledgeable about local community resources?

Yes 9 (69%) No 0 Somewhat 4

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

Yes 14 (100%) No 0 Somewhat 1

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

Yes 9 (75%) No 0 Somewhat 3

Service Provider Satisfaction Survey Data

This survey was completed by 74 employees of customers of EOSSB, 12 independent contractors working for customers of EOSSB and eight provider agencies working for customers of EOSSB. Ninety-four surveys of 258 sent were returned for a return rate of 36%.

1. In my observations, brokerage personnel treat their customers with respect.
Yes 92 (98%) No 0 Somewhat 2

2. How would you assess your working relationship with your customer with disabilities.
Excellent 67 (71%) Good 24 Fair 3 Poor 0 Strained 0

3. How would you assess your working relationship with brokerage personnel.
Excellent 57 (61%) Good 32 Fair 5 Poor 0 Strained 1

4. Are payment procedures efficient and timely?
Yes 85 (90%) No 0 Somewhat 9

5. Do brokerage staff have a competent understanding of Support Services Benefits.
Yes 73 (95%) No 1 Somewhat 3

6. Do Brokerage staff know and work well with other agencies, service providers, and individuals in the community?
Yes 60 (95%) No 0 Somewhat 3

Quality Improvement Results (FY 2003-2004 and FY 2004-2005)

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.

2004 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 renewed 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.

2004 Outcome 2: in 2003, 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.

2005 Outcome1: By June 30, 2005 there were 246 active plans. During the year, mid year plan revisions occurred 254 times. In addition to the annual plan renewal, plans were revised an average of 1 time per year.

2005 Outcome 2: 89% of customers report that their plan says what they want it to say and 92% report that their Personal Agent supports them when they want to make changes in their plan. The percentage of people who report that they know what to do to resolve disagreements decreased to 70%.

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)

2004 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.

2005 Outcome: Twelve new referrals were 18 year olds. Six required and received plans in place within one month to ensure smooth transition from Family Support Plans. There were no comments in the 2005 Community Partner survey or the Customer Satisfaction survey regarding frustration with a gap in service delivery for people turning 18 with Family Support Plans.

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

2004 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.

2005 Outcome: Brokerage presentations were made to the following organizations: Oregon Vocational Special Needs Conference, First Annual Provider Fair in Hood River, SPD Field Workers in The Dalles, Eastern Oregon Case Manager's in Pendleton, Self Advocacy Conference in Pendleton, The Arc of The Mid-Columbia, and the Eastern Oregon Vocational Rehabilitation staff. A "Did you know" section has been added to the Quarterly newsletter describing services available through the Brokerage.

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

2004 Outcome: Of 45 internal 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.

2005 Outcome: The field review conducted by SPD on a random sample of customer files determined that 65% of files met the standard for assessment of risk and individual safety planning. Of 47 internal audits of customer files, 17% did not have risks, 74% adequately considered significant risks in the plan, 4% did not adequately address risks, and 4% needed some improvement.

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.

2004 Outcome: Of 45 internal 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.

2005 Outcome: The field review conducted by SPD on a random sample of customer files determined that 75% met the standard for the quality of assessment and corresponding plan development. Of 47 internal audits of customer files, Forty-one or 87% had strong relationships between ISP goals and the long term goal in the Customer Goals Survey. The remainder required corrective action.

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.

2004 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.

2005 Outcome: Evidence that individuals assisted in monitoring the quality of supports continued to increase from 59% of files reviewed in the previous fiscal year, to 64% in the current year.

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

2004 Outcome: Contracts were revised to contain necessary and consistent language.

2005 Outcome: All contracts with provider organizations contain necessary and consistent language. Contracts were again revised, this time to be consistent across all brokerages.

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

	FY 02-03	FY 03-04	FY 04-05	FY 04-05	FY 04-05
	#	#	#	Volume	Average
Vendors	12	33	78	\$427290	\$5478.08
Employees	65	133	161	\$932588	\$5792.47
Total	77	166	239	\$1359878	\$5689.87

2004 Outcome:

The total number of providers paid in June 2004 was 166, up from 77 in July, 2003. This is a 115% 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.

2005 Outcome: The total number of providers paid in June 2005 was 239, up from 166 in July, 2004. This is a 44% increase. According to the Customer Satisfaction survey, 88% of customers are very happy with the supports and services they receive and 19% feel there are supports they need but do not get. According to the Provider Satisfaction Survey, 94% 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

2004 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.

2005 Outcome: According to the Customer Satisfaction Survey, 88% of respondents are very happy with the Services and supports they get, and only 4% say they are unhappy.

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

2004 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 1x/yr. 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."

2005 Outcome: EOSSB and EOVR signed an interagency agreement designed to implement an eight step supported employment process for mutual customers. EOSSB and EOVR director and manager delivered a one day training to all staff of both agencies to implement the agreement and develop commitment to work together on implementation. Teams agreed to meet annually to discuss progress and refine techniques. Twenty three of the 186 EOSSB customers in the EOVR region were served by EOVR in the fiscal year (12%). Of those customers, 30% were successfully employed. No data or agreement exists for the Mid-Columbia VR office.

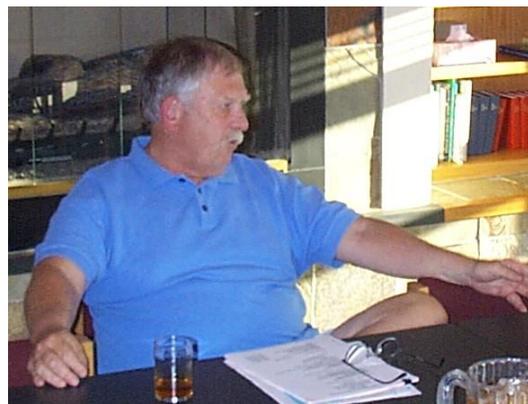
Vocational status survey as of 6/30/05:

	#	%
Customers included in survey	233	95.10%
Customers in school (pursuing academics and not vocational supports)	12	5.15%
Customers currently employed without paid supports	39	16.74%
Customers currently in sheltered employment	43	18.45%
Customers currently in supported employment	22	9.44%
Customers currently seeking employment (signed up with OVRS or getting ready to)	44	18.88%
Customers (unemployed) who have expressed they are not interested in employment	85	36.48%
Reasons not interested in employment:		% of unemp
Lack of knowledge/exposure to employment	7	8.24%
Concerns about losing benefits	2	2.35%
lack of support personnel to help find and keep a job	0	0.00%
Family members do not encourage employment	34	40.00%
Retired	15	17.65%
Other	23	27.06%

Quality Assurance Plan

The following items are available upon request in the 2005-2006 Quality Assurance Plan

- Customer Satisfaction results including comments on each question.
- Customer Satisfaction results compared across years and with statewide data
- Community Partner and Provider Satisfaction results including comments on each question.
- 2005 Quality Improvement Process
- Statewide Brokerage Benchmarks and EOSSB Baseline
- 2005 Quality Improvement Goals
 - Compliance goals
 - Strategic Goals



Self-Advocates and family members share their stories with members of the board of directors

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