

Eastern Oregon Support Services Brokerage

Annual Report 2008





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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 are supported to be 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.



Baker County Local Alliance members enjoy a monthly pot luck luncheon

Values

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

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

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

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

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

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

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

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

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

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

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

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

History

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

Historical Highlights:

- On December 14, 2001, a contract with DHS/SPD was signed and the Executive Director was hired.
- On December 24, 2001, funding was received to begin operations.
- On March 1, 2002, EOSSB staff began serving the first group of 62 customers.
- Approximately 5 to 10 customers per month were enrolled every month through January, 2003 when enrollments were frozen due to Oregon's fiscal crisis.
- In July, 2003, 59 new customers enrolled, transferring funding and services from county controlled slot based services to brokerage services under the Support Services Administrative rule.
- In August, 2003, new enrollments were resumed, but at a rate of two to three per month, which was much lower than originally planned in the Staley Settlement. This decrease was due to the failure of Measure 28.
- In May of 2004, eleven individuals transferred from the physical disability waiver of SPD to Support Services, through brokerages.
- In July, 2005, the PC 20 program was absorbed by brokerages for brokerage customers, resulting in approximately a \$200 per month plan increase for customers who require supports with Activities of Daily Living.
- During the 2006-2007 fiscal year, individuals in the Supported Independent Living Program (SILP) were required to choose between Supported Living Services and entry into Brokerages. 10 people entered EOSSB from SILP and the SILP program was eliminated state-wide. By fiscal year-end, 298 people were in support services through EOSSB.
- During the 2007-2009 Biennium, the first Cost of Living increase was granted to customers, providers and brokerages since the inception of Support Services in Oregon.

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.

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



Umatilla County Local Alliance members enjoy an annual camping trip

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

Isn't it great to have friends? Some of our very best friends are the people we get to know in the Eastern Oregon Support Services Brokerage. We've seen new faces and tremendous growth in the program. All are welcome and it just seems to get better and better every year.

We appreciate all the folks who choose to live and work with the supports provided by EOSSB. They make brave, empowering and exciting decisions about how they choose to live their lives. They are the reason this brokerage was formed six years ago. They remain an inspiration by the way they keep focusing on the road ahead.

As always, special thanks go out to all the personal agents. They are creative, wise and dedicated. Jim and Linda keep the numbers and words accurate and organized in the Hood River office. The glue of the EOSSB is our Executive Director, Bill Uhlman. He leads us with honor, good humor, wisdom and intelligence. I am convinced that our sterling record of service has been because of his leadership.

We shared heartbreak this last year at the sudden death of Rick Currin, one of the founding members of our brokerage and the EOSSB President of the Board. Rick's vision and positive attitude helped shaped this organization. We continue to honor Rick's spirit by coming together as an EOSSB community and celebrating our connections to each other.

It's been six excellent years for EOSSB! Congratulations and Happy Anniversary to us all.

Zee Koza

EOSSB Board President

Board Members

<u>Name</u>	<u>Representing</u>	<u>Affiliation</u>	<u>Term expires</u>
Rick Currin President (until November, 2007)	Umatilla County	Service Provider	
Zee Koza President (from March, 2008)	Union County	Service Provider	August, 2008
Mike Singleton Vice-President	Malheur County	Family Member Community Partner	August, 2010
Kathleen Kim Secretary/Treasurer	Wallowa County	Family Member	August, 2010
Barbara Hawk	Gilliam County	Family Member	August, 2008
Charlie Hammett	Umatilla County	Self-Advocate	August, 2008
Jo Vowell	Baker County	Family Member	August, 2009
Steve Carlson	Umatilla County	Family Member	August, 2009
Mariah Langer	Mid-Columbia	Self-Advocate	August, 2009
Dustin Wyllie	Union County	Case Management	August, 2009

Board Activities

August 2007 Annual Meeting

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

November, 2007

- Reviewed 2007 SPD field audit and corrective action plans, updating the Strategic Plan/Quality Assurance Plan.
- Elected Officers
- Discussed upcoming self-advocacy events.



PA Kristen Hughes reviews a customer file to fulfill the quality assurance plan



In memory of Rick Currin, founding Board member and Board President 2002-2007

March, 2008

- Reviewed and discussed year-to-date customer, provider and community partner satisfaction survey results.
- Elected Officers (due to the passing of our Board President, Rick Currin)
- Reviewed discussed and accepted the 2007 fiscal audit by Arens and Associates
- Reviewed flex fund spending for this year and budget forecast

June, 2008

- Discussed and adopted Fiscal Year 2008-2009 budget.
- Established a nominating committee for the upcoming Annual Meeting.
- Reviewed Satisfaction Survey results.

Staff

Administration

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

Personal Agents

Malheur County.....Amy Eddy, Rene' Kesler
Harney and Grant County...Zane Cooper
Baker County.....Annabelle Hirsch
Umatilla County.....Kristi Avery, Kristin Hughes, Becky VanBatavia
Morrow County.....Kristen Hughes
Mid Columbia Counties.....Vicki Swyers, Alica Sims, Jennifer Lewellyn
Wallowa County.....Barb McCommon, Lorien James
Union County..... Nancy Fields



	Bill		Jim		Zane		
Annabelle	Rene'	Becky	Amy	Alica	Barb	Kristi	Kristen
	Nancy				Lorien	Jennifer	



Services and Supports Provided

At the end of the previous Fiscal Year (June 30, 2007), 298 people were enrolled. New Brokerage enrollments in the current year were authorized by SPD at an average of 2.5 people per month (30 enrollments for the year). As of June 30, 2008, total enrollment is at 322 people. Our original roll out capacity was 350. Due to increasing wait lists in nearly every county, we have been authorized to increase capacity to 429 by June 30, 2009. Nearly every county in our region now reports having a wait list.

Enrollments	Beginning Enrollment March, 2002	Jun 30 2003	Jun 30 2004	Jun 30 2005	Jun 30 2006	Jun 30 2007	Jun 30 2008	2009 Roll-out Projection
Baker	11	12	23	28	28	30	35	46
Grant	3	5	6	6	5	5	5	7
Harney	1	9	11	12	11	11	12	14
Malheur	17	18	26	32	32	35	40	62
Morrow/Wheeler	6	8	9	11	12	15	14	19
Umatilla	10	31	55	62	63	76	87	108
Union	3	13	21	24	25	31	28	39
Wallowa	2	3	7	11	10	9	10	13
Mid Columbia	9	31	60	68	73	86	91	121
Total	62	130	218	254	259	298	322	429

Current Fiscal year to date moves:

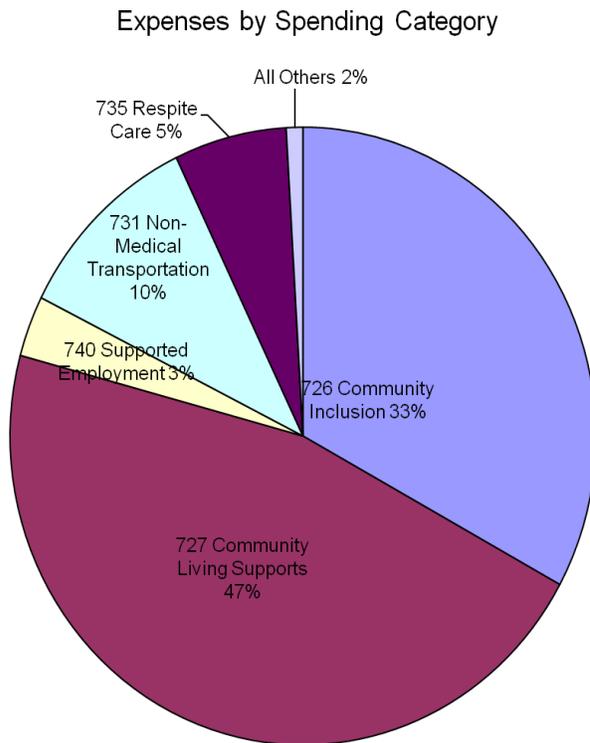
In	55	Out	31
Wait List	46	Death	2
Intra Brokerage	5	Intra Brokerage	5
Inter Brokerage	4	Inter Brokerage	5
		Exit the system	4
		Comp 300	1
		Comprehensive	11
		Refused service	2
		Found ineligible	1

Although 55 new people have been enrolled, the net increase is only 24 people because 31 people moved out for the reasons indicated in the chart to the left. As of June 30, 2008, there are six vacancies caused by people exiting the brokerage that are waiting to be back filled.



Special Olympians from Eastern Oregon compete in two states

Service expenditures have increased each year in proportion to the increased enrollment. A total of \$2,615,708 was spent in support services for the current year (a 19% increase over last year). The average spending per plan has also increased from \$640 per person per month at the end of FY 06-07 to \$721 per person per month at the end of FY 07-08.



47% 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.

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

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

5% of funds were spent on respite care.

3% of funds were spent on Supported Employment to assist individuals to find, get and keep competitive jobs in the community.

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

Local Alliance Support

Mid-Columbia

We have been working together with Vocational Rehabilitation and several customers over this past year. Most of our customers are beginning the process with VR, and excited about pursuing their job goals. With The Dalles community growing, new businesses are opening, and will be offering job opportunities.

The Arc of the Mid-Columbia: Alica Sims is on the Board of Directors, and on the Social and Leisure committee. She will work with other members to develop, organize, and run



Mid Columbia PA
Jennifer Lewellyn

parties and gatherings. It is very important to our customers to have this resource of fun! Friendship Club in The Dalles continues to meet once a month on the 2nd Saturday of the month. They are thinking about how to expand to create a Friendship Club in Hood River too. The Arc sponsored a “Monster Ball”, “Putting on the Ritz” Valentine’s Dance and a “Ho’Down”. Many of our Brokerage customers are important contributors to the Arc’s mission. The Arc also has clothing bins now where people can donate clothing directly to The Arc of the Mid-Columbia.



Mid Columbia PA
Vicki Swyers

Vicki and Alica are active with The Mid-Columbia Caregivers Group. It is a group of organizations with the common need of finding care providers to serve their clients. They received a grant from Mid-Columbia Economic Development District which they used to purchase an advertisement for providers. It is running on the big screen in Hood River Cinema Theater. The group’s mission is to recruit and share providers. Membership with The Dalles Fitness and Sports Club amongst our customers has increased! We are so proud of our customers for recognizing the health and social benefits of exercise at the club. We are also grateful to the Fitness Club for offering people with disabilities a discounted rate.

Grant, Harney and Southern Wheeler County

This year has been a very exciting and eventful year for EOSSB customers in this area. New experiences and increased independence continued to help us grow and make us more active in our communities. Our customers have accomplished many things over the last year. We had customers with the help of supportive family and providers, travel all around the area (Bend, La Grande, Pendleton etc...) to learn new skills and experience aspects of life unavailable in our smaller communities. We had several customers integrate further into their own towns by moving out and thriving in their own homes. So far everyone who has moved out on their own has been very successful. We have had numerous examples of customers improving their skills



PA Zane Cooper



Courtney’s Grand
Champion Lamb

around home, including cooking, helping with chores as well as caring for children and pets. Many of our customers continue to thrive in their jobs. We have customers working in such diverse activities as Child care, library assistants, food service, and grocery store clerks, janitorial and even radio announcing. We even have several customers who already own their own business or are in the process of starting one. Many of our customers contribute to their communities through volunteer activities such as Church groups, senior centers and food banks, all benefiting from their generosity. The life of a brokerage customer is not all work and no play. We have enjoyed many community

activities. We have several customers involved with 4-H, including a leader in the dog club and a reserve grand champion lamb at the county fair. Special Olympics continue to be a very popular activity and we had many customers excel in a number of sports including Track and Field, Basketball and Bowling. We had several customers plan and go on exciting vacations all around the northwest and even one lucky person who went to Hawaii. County and family sponsored activities also remain very popular opportunities to socialize with peers. The hard work of our customers along with the support of family, friends and providers has continued to bring more independence to our customers. We have had many exciting happenings over the last year and see greater examples in the years to come.

Wallowa County



Wallowa County PA
Barb McCommon

The Wallowa County Local Alliance has been involved in a variety of activities this past year. We continue to gather monthly for our “Fun with Friends Group”. Our meetings have grown and kept a steady group of friends who seem committed to be together. Whether this involves a project, a walk on the beach or a bowling day it is always a pleasant experience for everyone in attendance. This is a great opportunity for people to continue learning socialization skills and be able to build on their relationships at the same time. Several Brokerage customers attended the SAAL Retreat at Wallowa Lake last September. This was another contribution from SAAL for customers to get on-going training in Self-Advocacy, gather together in a safe environment and enjoy the out-doors. The quarterly dances held in La Grande are always a hit and well represented by customers in our county as well. In such a small community

it has been a challenge to find new dedicated providers for our customers. I am pleased to say that we have several qualified providers who joined our team this year and we welcome you!

Union County

Union County has been very busy, with customers and their providers doing community activities, these activities are chosen and driven by the customers themselves. Some of the things that Union County has been doing are: Bowling, miniature golf, Bingo, crafts, Hog Wild Days, the River Fest in Elgin, shopping at Bazaars, going to the Union County Fair, meeting once a month with their Baker County friends to visit and do community activities together, going to the People 1st dances in La Grande and Baker City, People 1st Barbecue, where they had a great time connecting with all their friends that they haven’t seen for a while. We have gone to the Health and Wellness Conference in Portland and learned a lot about good nutrition and the importance of exercise. The excitement right now is the EOSSB Barbecue and the Wallowa Lake camping trip. In the mist of our busy



Union County PA
Nancy Fields

lives we have had to say good bye to two of our friends, Amanda went into comprehensive Services, where she will get the extra care that she needs and Lindsay relocated to Baker City. Union County will miss both of them. We have also welcomed 3 new customers: Autumn, Jerome, and Bill, and they are excited to join in all the activities and meet new friends. We are also starting the Local Alliance up again, we have chosen Umatilla, Morrow and Wheeler Counties as our role models, we will be doing fund raisers, to help pay our expenses for all the different activities and events we would like to go to. We will also try to connect with our role models if they are doing and going to the same activities/events that we have chosen to do. We are very excited to see what the next year will bring with all the new happenings in Union County.

Baker County



Baker County PA
Annabelle Hirsch

We've been very busy in Baker this year. We have 37 customers, 27 providers and 2 independent contractors. We are developing our own chapter of People First and hosted our first dance on May 8, 2008. We had committees to get all facets of the dance organized. We had a decorating, food, prizes, set up and tear down, and DJ committee. We greeted people at the door, helped them sign in for prizes, served the food, and helped clear the tables. We were in charge of the event, had help from our providers and contractors when needed and we learned a lot! We have monthly luncheons that include a business meeting and reporting time before the lunch and it's a great way to socialize and keep in touch with each other. Our next luncheon we will have a guest speaker to talk about the People First self advocate retreat that's coming up in September. We have community partners come

to the luncheons as well. We are making the food, sometimes with provider help, setting up and cleaning up after the luncheon. It's great to choose what to make, and present the food potluck style and share with each other. It's great to see the growth that we are experiencing and we enjoy sharing our food, learning and presenting new dishes that we make.

15 of our customers are involved with Special Olympics as athletes; there are 39 athletes in Baker County. We went to the State competition in June and were part of the 1200 athletes state wide. We also put together a float and we were in the Miner's Jubilee parade and got 1st place in our category. We have been working with VR and 7 of us are working in the community within the past year. We have 3 customers that are actively looking for jobs and the help from VR gives us advantages so we can get work that is meaningful to us. We also have 6 customers working at Step Forward doing the tasks of making state plastic bags and ink cartridge refills. Some of the activities we do with our providers and contractors are fishing trips, shopping in LaGrande, Ontario, and Boise, joining in line dancing, ceramics, painting, aerobic swim,



Sheri Brings home the
Gold at the 2008 State
Special Olympics

bowling, tours, going to the Pendleton water park, Lehman Hot Springs, golf, exercise programs at YMCA and Curves, camping and picnicking.

Many of us are already signed up to go to the Wallowa Lake People First self advocate retreat in September. We are practicing a line dance for the talent show, singing and getting geared up for this event. It is a lot of fun to get together, visit with our friends from other counties, and the dances and Casino night are always fun. This year there will be activities to choose from like horseback riding, parasailing and boat rentals, riding the tram, and go cart rentals, so we're saving up for the activities we want to do. We have the afternoons off to visit, play volleyball, basketball, soccer, board games, take nature walks and go shopping in Joseph. It has been a productive year for us in Baker County and we hope to see you at the annual EOSSB picnic in LaGrande on August 23, 2008.

Umatilla, Morrow and Wheeler Counties

Each year seems to offer more opportunities and activities for EOSSB customers. Several customers are looking for employment or would like to change jobs. One



Personal Agents Kristi Avery, Kristen Hughes and Becky VanBatavia

customer is successfully working on getting his own business going through training with a local business. What an exciting experience. The Arc of Umatilla County offers fun activities each year. Many of our customers help with and attend these fun events.

The Umatilla County local alliance teams up with Morrow/Wheeler County each year to assist self-advocates to plan summer activities and



fundraisers to help pay for them. Car washes seem to be the most popular fund raiser so far. This year's annual camping trip was held at Wallowa Lake over the 4th of July. There were so many things to do, we did not have time to get to everything. We will be taking a one day trip to the Portland Zoo the end of August, as we have been given a pass by the Zoo for 20 people to attend. In September we will be going to the Round-Up Rodeo, tickets are donated by the Pendleton Round-Up Association each year. We continue to work on solving some of the transportation issues that all of our rural areas experience. When we all work together it seems that we are able to go a lot further.

Financial Report (audit pending)

Fiscal Year: July 1, 2007 to June 30, 2008

	FY 07-08	FY 07-08	Deviation from 07-08	FY 08-09
<u>Revenue</u>	<u>Budget</u>	<u>Actual</u>	<u>Budget</u>	<u>Budget</u>
DD 148 Brokerage Operations	865,487	865,606	119	884,540
DD 149 Support Services	2,914,337	2,615,708	-298,629	3,516,663
FI Services	16,200	13,650	-2,550	13,000
Interest Income	6,000	18,297	12,297	6,000
United Way	1,250	441	-809	441
Misc Income	0	2,772	2,772	0
Total Revenue	3,803,274	3,516,474	-286,800	4,420,644
<u>Expenses</u>				
Payroll Expenses (salaries)	499,247	524,870	25,623	528,918
Payroll Taxes & Benefits	148,481	146,408	-2,073	160,368
Total Salaries and Expenses	647,728	671,278	23,550	689,286
Board/Volunteer Support	7,400	9,409	2,009	9,400
Dues and Subscriptions	4,742	3,469	-1,273	4,031
Insurance	7,412	7,015	-397	7,412
Miscellaneous	2,427	3,232	805	3,600
Postage and Delivery	6,537	7,510	973	6,733
Professional Fees	11,450	11,650	200	12,750
Rent	13,200	13,063	-137	13,640
Telephone/Communications	35,925	27,233	-8,692	30,536
Training - Staff	5,040	2,902	-2,138	3,780
Travel	95,921	72,445	-23,476	82,492
Office Supplies	17,675	18,603	928	19,089
Total Services and Supplies	207,729	176,531	-31,198	193,463
Support to Individuals	2,914,337	2,615,708	-298,629	3,516,663
Fiscal Intermediary Expense	13,121	13,643	522	13,768
Flex Fund, transport & other	7,250	14,061	6,811	6,441
Equipment Purchases	10,000	0	-10,000	0
Operating Reserves	3,109	25,253	22,144	1,023
Total Other Expenses	2,947,817	2,668,665	-279,152	3,537,895
Total Expenses	3,803,274	3,516,474	-286,800	4,420,644
<u>Net (Revenue- Expenses)</u>	0	0	0	0

Flex Fund Report

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

Funding requests are made by Personal Agents.

Requests are granted if the following conditions are met:

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

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

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

In FY 2007-2008, \$12,414 in Flex Funds were expended on behalf of our customers.

Examples of approved Flex fund requests:

Item	Purpose	Amount
exercise equipment	to gain strength	300.00
Vacuum Cleaner, dishes, cleaning supplies	maintain apt to pass inspection	59.99
special shoes	exercise with bursitis and bunions	56.00
annual pool fees	activities and health	265.00
recumbent bike	fitness and independence	300.00
Computer class at BMCC	basic computer skills for employment	76.00
crisis counseling	assistance with depression	300.00
diabetes supplies	to be healthy	100.00
Apartment Deposit	Prevent crisis and to live independently	300.00
bike	lose weight	300.00
Acupuncturist	assistance with motor skills	300.00
Deposit and first mo rent at new apt	to live on her own	300.00
bike	uses for all transp and wore out other	189.00
3 wheeled bike	balance, exercise, diabetes	300.00
scrubs	work clothes due to increased hrs	60.00
Bike	transp and community inclusion	289.56
Glasses replacement	medicaid wont cover less than one year	169.00



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

Quality Assurance

Customer Satisfaction

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

- 41% were filled out by the individual receiving services.
- 57% were filled out by another on behalf of the individual but from the perspective of the individual receiving services.
- 2% were completed by a significant other of the individual receiving services.
- 144 out of 322 surveys were returned for a return rate of 45%.

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

Yes 93 (66%) Not Sure 37 (26%) No 11 (8%)

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

All the time 118 (84%) Sometimes 19 (14%) Not at all 3 (2%)

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

Yes 127 (96%) Not Sure 5 (4%) No 0 (0%)

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

Very Happy 127 (91%) They're Okay 11 (8%) Not Happy 2 (1%)

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

Yes 130 (94%) Not Sure 8 (6%) No 1 (1%)

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

Yes 24 (18%) Not Sure 37 (27%) No 74 (55%)

7. Do you feel safe?

All the time 117 (85%) Most of the time 16 (12%) Not really 4 (3%)

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

Personal Agent	Yes 125 (94%)	No 4 (3%)	Sometimes 4 (3%)
Support Staff	Yes 100 (86%)	No 6 (5%)	Sometimes 10 (9%)
Family	Yes 120 (92%)	No 5 (4%)	Sometimes 5 (4%)
Friends	Yes 104 (89%)	No 5 (4%)	Sometimes 8 (7%)
Others	Yes 72 (83%)	No 7 (10%)	Sometimes 9 (10%)

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

Yes 111 (80%) Not sure 24 (17%) No 3 (2%)

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

A lot better 119 (87%) A little better 14 (10%) No better 4 (3%)

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

Personal Agent	Yes 127 (95%)	No 3 (2%)	Sometimes 4 (3%)
Support Staff	Yes 97 (87%)	No 5 (5%)	Sometimes 9 (8%)
Family	Yes 122 (92%)	No 4 (3%)	Sometimes 6 (5%)
Friends	Yes 102 (89%)	No 5 (4%)	Sometimes 8 (7%)
Others	Yes 67 (85%)	No 6 (8%)	Sometimes 6 (8%)

12. I am happy with my life.

All the time 80(58%) Most of the time 51 (37%) Not really 7 (5%)

13. Are you satisfied with where you live?

Very Happy 112 (81%) It's Okay 20 (15%) Not Happy 6 (4%)

2005-2010 Quality Assurance Plan

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

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

Eastern Oregon Support Services Brokerage

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

Phone 541 387 3600
1 866 387 3601

Fax 541 387 2999

Email info@eossb.org

Website www.eossb.org

