

# Eastern Oregon Support Services Brokerage

## Annual Report 2006





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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.



Mandy, Elizabeth and Dean discuss things at the 2005 Annual meeting

### 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.
- 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.
- By the end of the fiscal year, June 30, 2006, 259 people were enrolled in the Eastern Oregon Support Services Brokerage, or 74% of the projected capacity.



Linda on horseback at the 2006 Arc of Oregon Conference in Hood River

## 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.



Don Vandeweghe, nominating committee chair, announces board election results

**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 Community Partner	August, 2007
Zee Koza Secretary / Treasurer	Union County	Service Provider	August, 2008
Barbara Hawk	Gilliam County	Family Member	August, 2008
Charlie Hammett	Umatilla County	Self-Advocate	August, 2008
Andrew Wood	Wasco County	Self Advocate	August, 2008
Kathleen Kim	Wallowa County	Family Member	August, 2007
Laurie Stephens	Union County	Family Member	August, 2007
Don Vandeweghe	Malheur County	Family Member	August, 2007
Jo Vowell	Baker County	Family Member Service Provider	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 Activities

### August 2005 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, 2005

- Final Draft of the Five-year long-range strategic plan was approved and implemented. Copies are available by contacting the main office.
- Board Officers for FY 05-06 were elected.
- Diminishing flex funds provided by interest earned on accounts and United Way contributions were discussed. An endowment fund was created to enable private funds raised to benefit the organization in perpetuity and to increase future capacity to fund non-Medicaid customer needs.
- Success stories and service statistics were shared and discussed.



Charlie Hammett, Board member since 2002

March, 2006

- Previous year fiscal audit was accepted. The Auditors did not request any system changes or improvements to current fiscal controls.
- Guidelines for income and expenditure for the endowment fund were adopted.
- Draft expenditure guidelines from SPD were distributed and discussed, and feedback to SPD was provided.
- Customer Satisfaction data from 7/1/05 through 3/23/06 was presented and discussed. There is generally good satisfaction with services. There were many positive comments about services and Personal Agents.
- Success stories and service statistics were shared and discussed.

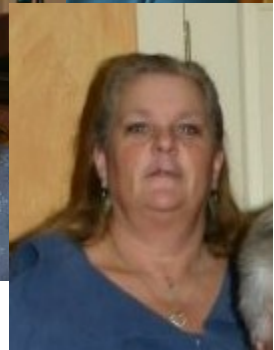
June, 2006

- A budget for the 2006-2007 fiscal year was completed and adopted.
- Plans for the 2006 Annual Meeting were finalized.
- Nominations for board members for the 2006 Annual Meeting were finalized.

### Staff

#### Administration

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



#### Personal Agents



Malheur County.....Amy Eddy  
Harney and Grant County.....Zane Cooper  
Baker County.....Colleen Grigg  
Umatilla County.....Kristi Avery, Kristin  
Hughes, and Yvonne Bowling  
Morrow County.....Kristen Hughes  
Mid Columbia Counties.....Vicki Swyers and  
Becky Garo

Wallowa County.....Barb  
McCommon  
Union County.....  
Yvonne Bowling



## Services and Supports Provided

At the end of the previous Fiscal Year (June 30, 2005), 254 people were enrolled. New Brokerage enrollments in the current year were authorized by SPD at less than two people per month (21 enrollments for the year). As of June 30, 2006, total enrollment is at 259 people, which is 76% of the way to the final target of 342 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.

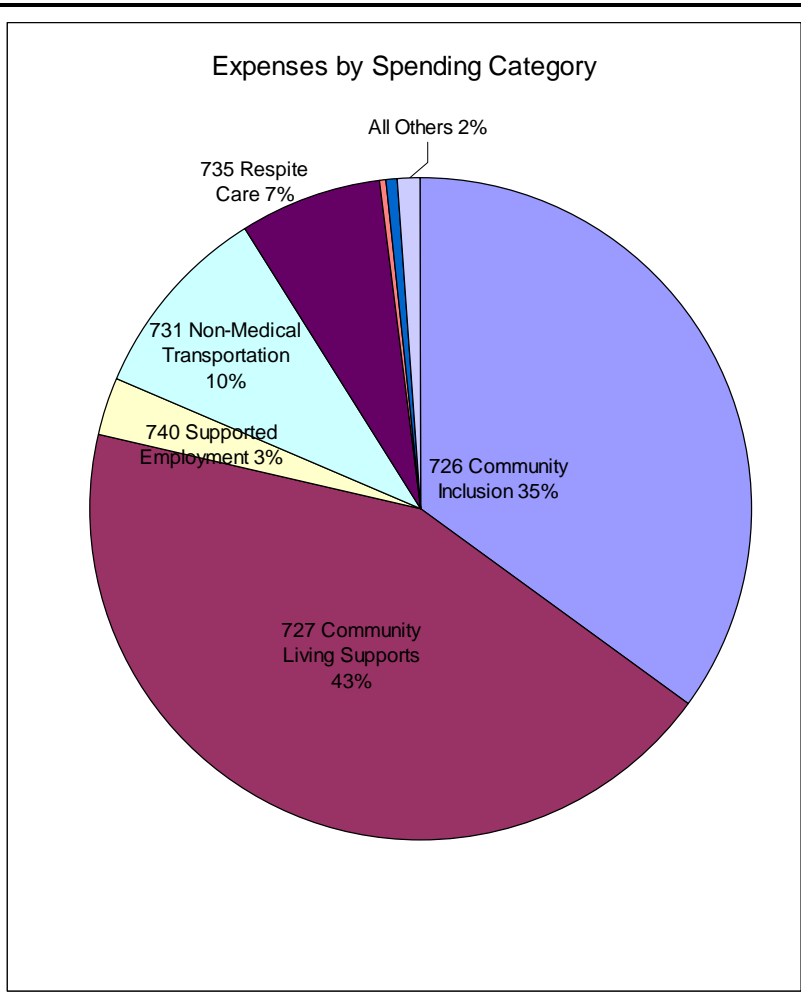
EOSSB						
Enrollments	Beginning Enrollment March, 2002	End of Fiscal Year 2002-2003	End of Fiscal Year 2003-2004	End of Fiscal Year 2004-2005	End of Fiscal Year 2005-2006	Percent of Planned Capacity
Mid Columbia	9	31	60	68	73	101%
Morrow/Wheeler	6	8	9	11	12	71%
Umatilla	10	31	55	62	63	59%
Wallowa	2	3	7	11	10	91%
Union	3	13	21	24	25	66%
Baker	11	12	23	28	28	108%
Grant	3	5	6	6	5	42%
Harney	1	9	11	12	11	92%
Malheur	17	18	26	32	32	67%
<b>Total</b>	<b>62</b>	<b>130</b>	<b>218</b>	<b>254</b>	<b>259</b>	<b>76%</b>

Service expenditures have increased each year in proportion to the increased enrollment. This year, the increase in expenditures was disproportionately large due to the absorption of the PC 20 program, which transferred approximately \$200 per person per month from that program into customer budgets when supports with Activities of Daily Living are required. A total of \$1,862,963 was spent in support services for the current year (a 37% increase over last year). The average spending per plan has also increased from \$527 per person per month at the end of FY 04-05 to \$617 per person per month at the end of FY 05-06, again, due to the absorption of the PC 20 program.



Trampas attends his first EOSSB annual meeting in 2005





43% 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.

35% 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.

7% 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**

The past year has brought many exciting changes for me. I was privileged to follow Jennifer Lewellyn as Personal Agent for the Mid Columbia area when she resigned in December 2005. I had previously been working as Personal Agent in Harney and Grant counties. I really enjoyed the families where I used to work and miss being part of their lives. But I have found the families in the Mid Columbia area to be warm and welcoming and wonderful to work for.



Personal Agent  
Becky Garo

This past year I have been able to meet the folks I work for and their families. We have continued the plans Jennifer, the individual customer and families put together to meet individual needs.

We have added new customers to our area and some have moved away or moved into other supports. Our goal is to work towards greater skill development, attaining goals, and assisting people to achieve independence over their lives.

For each customer this looks different as we take a look at individual lives. That is the exciting part!!

This is a wonderful, rewarding job and I am so very grateful to be a part of the lives of my customer, their families and the community partners I am getting to know.

Becky Garo

### **Union County**

Customers, Provider Agencies, Employee's and Voc Rehab Division have been busy working together to make life happen around here. Since Spring ISP's have been active as customers are making choices that reflect their needs and goals. Family members continue to be involved and supportive as they help their son or daughter through meetings and paperwork.

Some of us have attended out of town trips this year. We are all looking forward to the next trip which will be at Wallowa Lake. This gives customers opportunities to meet people outside of their day to day network.

We are also looking forward to SAAL coming to our area to do a workshop for customers. Union County is moving full speed ahead with customers and family members at the wheel. I just hope I can keep up with everyone.



Personal Agent  
Yvonne Bowling

Yvonne Bowling



Personal Agent  
Zane Cooper

### **Harney and Grant County**

In December, we said a fond farewell to Becky Garo and welcomed Zane Cooper as the Personal Agent for Grant and Harney Counties. We welcomed him in the best way we knew how, with a Pizza Party! Nearly every customer came out to say good bye to Becky and to welcome Zane. It was a great start, and Zane soon discovered that , being from a small town, he already knew many of the people at the party. Since then, he has spent much of his time getting to know new faces and new plans.

## **Wallowa County**

Wallowa County EOSSB would like to extend a fond farewell to Jean Pekarek and offer heartfelt thanks for her years of hard work and service. Her dedication, commitment, enthusiasm, and endless hours given selflessly to the Brokerage are greatly appreciated by all who knew her! Her's will be big shoes to fill but I'm thankful for this opportunity and I look forward to working with EOSSB, it's customers, and the many valuable people who offer their resources in this community.

Wallowa County and EOSSB customers started an Autism group in January of this year called Fun With Friends Club. We meet the first Friday of each month from 3:30 to 5:30 at the Wallowa Family Youth Center. Each month we bring a different theme to the group in a relaxed environment. This provides a format for peer interaction to aid social skill building, and an opportunity for families to network and feel supported in their community.

Many customers have been seen enjoying their independence and summer activities in Wallowa County. Some enjoyed the annual Car Show which sported more than 300 vintage vehicles this year. We've had eager participants attend the Lostine Flea Market, bowling activities, Saturday Market , and shopping/swimming trips to LaGrande.



Personal Agent  
Barb McCommon

We continue to have customer interest in both employment and housing areas and are thankful to work with Vocational Rehabilitation and Northeast Oregon Housing Authority. At this point in time, there are three employed customers in Wallowa County, two of which are on their second and third year of employment respectively. We are blessed with qualified and caring job coaches and providers in this county!

The 3rd annual Self Advocacy Conference will be held in Joseph, Oregon on September 5th, 6th and 7th, with the theme being, "People First." We have several customers who have attended this in the past and are looking forward to the fun! It is a wonderful opportunity to share some time with peers in a safe and friendly environment!

Barb McCommon

## **Umatilla, Morrow and Wheeler Counties**

We have many fun and positive things that have taken place over the last year. The local alliance group for these counties consists mainly of very motivated self-advocates. They have come up with great ideas for activities that promote independence and lots of social opportunities. In order to fund these activities they have worked hard to come with wonderful and creative fundraisers. So far in 2006 they

have earned over \$700.00 in monies to help pay for some of the activities that they want. Pretty Awesome!

One annual event we now have is a group camping trip. This was the third year for this event, with over 35 individuals attending. It just keeps growing each year.

We were also able to get several tickets donated for the 2006 Pendleton Round-up



Personal Agent  
Kristi Avery

Rodeo. A big thank you goes to the Round-Up Association for this generous donation. We are looking forward to a great day at the rodeo.

The local alliance group also started a craft club in the Hermiston area and are working on some really neat things.

As a whole, PA's and customers are looking hard at other resources to help str-e-e-e-tch those dollars or fund for those much needed items that we may not be able to purchase with support service funds.

We are all continuing to work with other agencies to group resources and promote teamwork.

There is a great network of providers in these counties as well. These are folks

that help our customers really make things happen in their lives. Friendships and supports are ever increasing thanks to all of these wonderful individuals.

Customers are employed, moving out on their own, enjoying new activities, making new friends, starting families and so many other positive things.

We are thankful for all of these things and look forward to another together.



Personal Agent  
Kristen Hughes

### **Malheur County**

Wow! What an exciting year for Malheur County! We have had so many great events happen. EOCIL has taken Brokerage customers on yet, another exciting year of independence and growth socially. Customers not only got involved with the annual Christmas party, dinners, movies and the Diamond Rio concert, but EOSSB customers suggested and assisted in organizing such events. EOCIL has been a vital service to promote such confidence, voices and independence in the social aspects of our community and customers.

WITCO and VR have worked hard with customers and have successfully placed and/or promoted people to work out in the community. Jobs at Wal-mart, our local Bowling Alley, Red Apple and Jack-in-the-Box are just to name a few. Both providers are working hard and coming up with creative strategies to make it work for our customers.



There have been relationship and friendship building this past year, too. Exciting and long lasting friendships have developed with many customers and with the growth of voice and independence customers are maintaining these relationships.

All providers in Malheur County, from agencies to domestic employees and all in between have grown and are providing essential services to our customers. In turn our community is becoming more and more educated and integrated with EOSSB. A successful year in many aspects. We look forward to this years exciting journey!

### **Baker County**

Customers in Baker County continued to grow personally, socially and vocationally and reached a number of personal goals this year! We celebrated a number of graduations from high school with many starting new chapters of their lives by moving into their own apartments! One couple finalized the purchase of their first house with the assistance of the Home of Your Own program. How exciting!!!



Personal Agent  
Amy Eddy

Others have partnered with Vocational Rehabilitation and TEC to work at jobs in the community—earning a “real” paycheck working with agencies such as Oregon Parks and Recreation Department. Customers have also received skills training from Step Forward Activities, Inc. and on-the-job training from other community partners such as Safeway, Inc. and The Dragonfly...their motivation...”helping people and making MONEY!” 😊



Personal Agent  
Colleen Grigg

Baker County customers have been extremely active with social activities in the past 12 months. Many of our customers and their families have been involved in Special Olympics. One of our customers attended the Special Olympics ski competition in Bend and came home with 3 gold medals! Way to go!! Other customers have been learning new games, such as bocci, and are planning to form a bowling league this fall. Customers participated in a variety of social activities throughout the county and with others from neighboring counties. Activities included picnics, BBQ’s, shopping, BINGO, trips to Wildhorse, building and riding on a float in the Miner’s Jubilee Parade, camping, fishing, travel to the Oregon coast, etc.

While most of our year was filled with fun, our Baker County Brokerage “family” also mourned the loss of one of our customers, Bill Lethlean. Bill was actively involved in the community as part of the “chain gang” for football games including the East-West Shrine Game. Bill will also be remembered for his kind nature and dedication to his family, from caring for his father to helping his grandfather at the In-and-Out. Our thoughts will be with Bill’s family now and in years to come.

## Executive Director's Report

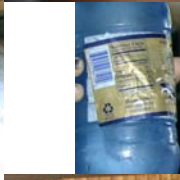
2006 is our fourth year of existence supporting people with developmental disabilities in eastern Oregon to be vital members of their community. It is a good year to consider why we are here and reflect on how things have changed and how they have stayed the same. Back in 2002, we were fond of saying that we were riding a locomotive at 60 miles per hour while building it and laying the track at the same time. In 2003 we were totally distracted by budget cuts that made us wonder whether the reality of threatened funding would make us lose sight of our vision forever. By 2004, a renegotiated Staley Settlement had given us a new life that enabled us to focus once again on helping people live self determined lives. It delayed full roll out from 2005 to 2009 and resulted in a near glacial pace of new enrollments, but it enabled us to once again look to the future. By 2005, the board and staff had developed a new five-year quality assurance plan with goals designed to maintain compliance with the benchmarks set by the state, but more importantly, to bring our world closer to our vision of a world where people have they life they want, living where they want, and have vital lives doing what they want to do. In 2006, there is much evidence that our daily reality continues to move toward our vision of self-determined lives. Customers respond to our satisfaction survey that they feel listened to (84%), receive the supports needed to reach their goals (91%), and are supported by EOSSB (93%), support staff (90%), and their families (88%) when they want to make changes in their lives. 99% say their Personal Agent supports them with reaching their life choices. 91% feel the same about their family and 93% feel that way about their support staff. While there are many measures that tell us we are approaching our vision (see our Quality Assurance Plan and Report for mind-numbing details), this level of satisfaction and the faces of the people we support tell the real story.







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



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## Financial Report (audit pending)

Fiscal Year: July 1, 2005 to June 30, 2006

	FY 05-06	FY 05-06	Deviation	FY 06-07
	Budget	Actual	from 05-06	Budget
<b><u>Revenue</u></b>				
DD 148 Brokerage Operations	717,687	717,687	0	717,680
DD 149 Support Services	1,784,584	1,869,028	84,444	2,163,763
FI Services	10,020	14,925	4,905	20,940
Interest Income	1,000	6,542	5,542	6,000
United Way	1,250	1,250	0	1,250
Misc Income		3,097	3,097	0
<b>Total Revenue</b>	<b>2,514,541</b>	<b>2,612,529</b>	<b>97,988</b>	<b>2,909,633</b>
<b><u>Expense</u></b>				
Payroll Expenses(salaries)	427,794	427,923	129	420,836
Payroll Taxes & Benefits	117,643	111,378	-6,265	117,834
<b>Total Salaries and Expense</b>	<b>545,437</b>	<b>539,301</b>	<b>-6,136</b>	<b>538,670</b>
Board/Volunteer Support	10,822	6,998	-3,824	7,385
Dues and Subscriptions	3,902	4,027	125	4,742
Insurance	11,853	10,525	-1,728	10,987
Miscellaneous	3,461	1,969	-2,852	2,427
Postage and Delivery	4,484	5,075	591	5,356
Printing and Copying	0	0	0	0
Professional Fees	6,000	9,820	3,820	10,165
Rent	12,000	11,928	-72	12,600
Telephone/Communications	23,630	24,938	1,308	26,547
Training - Staff	2,933	3,869	936	3,424
Travel	72,767	78,117	5,350	82,984
Office Supplies	15,750	14,505	-1,245	15,403
<b>Total Services and Supplies</b>	<b>167,602</b>	<b>171,771</b>	<b>2,409</b>	<b>182,020</b>
Support to Individuals	1,784,584	1,869,028	84,444	2,163,763
Fiscal Intermediary Expense	6,116	5,617	1,261	13,398
Flex fund and transportation	2,250	13,562	11,312	7,250
Equipment Purchases	4,500	1,920	-2,580	4,400
Operating Reserves	4,052	11,330	7,278	132
<b>Total Other Expenses</b>	<b>1,801,502</b>	<b>1,901,457</b>	<b>101,715</b>	<b>2,188,943</b>
<b>Total Expense</b>	<b>2,514,541</b>	<b>2,612,529</b>	<b>97,988</b>	<b>2,909,633</b>
<b><u>Net (Revenue - Expense)</u></b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>



## Flex Fund Report

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

Funding requests are made by Personal Agents.

Requests are granted if the following conditions are met:

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

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.

\$ 11,747 was spent in flex fund and **United Way** requests this fiscal year. There was \$6,542 interest earned on accounts in the same period. Below are examples of some funded requests:

dog kennel for dog while customer was in hospital	emergency assistance	12.00
swim pass	health and community inclusion	110.00
coronary risk reduction program at hospital	maintain health, lose wt, keep diabetes under control	66.75
Dating and boundaries workshop	community inclusion	35.00
cell phone card	to arrange healthcare and appointments	50.00
medication not covered by medical card	non allowable medical expense	31.49
Diabetes vitamin supplement	to stay healthy and control diabetes	26.98
Dental work, teeth cleaning bill	no money to pay for dental work	300.00
used math book for BMCC class	math skills are important	74.00
Microwave	independent cooking	75.00
emergency moving expenses	move from abusive home	300.00
Rent	rent money stolen	280.00
Arc Oregon Conf registration		95
Incontinence briefs	maximize attendance and involvement in community	109.9
Exercise bike	health and fitness	124.99
Registration for direct supports conference	Community inclusion and self determination	135



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.

- 48% were filled out by the individual receiving services.
- 47% were filled out by another on behalf of the individual but from the perspective of the individual receiving services.
- 5% were completed by a significant other of the individual receiving services.
- 118 out of 242 surveys were returned for a return rate of 49%.

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

Yes 65 (56%) Not Sure 39 (33%) No 13 (11%)

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

All the time 96 (84%) Sometimes 16 (14%) Not at all 2 (2)

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

Yes 102 (89%) Not Sure 13 (11%) No 0 (0%)

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

Very Happy 95 (83%) They're Okay 16 (14%) Not Happy 4 (3%)

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

Yes 106 (91%) Not Sure 6 (5%) No 4 (3%)

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

Yes 24 (23%) Not Sure 25 (24%) No 57 (54%)

7. Do you feel safe?

All the time 101 (88%) Most of the time 14 (12%) Not really 0 (0%)

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

Personal Agent	Yes 101 (93%)	No 5 (5%)	Sometimes 3 (3%)
Support Staff	Yes 77 (90%)	No 7 (8%)	Sometimes 2 (2%)
Family	Yes 86 (88%)	No 6 (6%)	Sometimes 6 (6%)
Friends	Yes 77 (86%)	No 4 (4%)	Sometimes 9 (10%)
Others	Yes 43 (83%)	No 3 (6%)	Sometimes 6 (12%)

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

Yes 78 (69%) Not sure 27 (24%) No 8 (7%)

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

A lot better 97 (86%)    A little better 16 (14%)    No better 0 (0%)

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

Personal Agent	Yes 104 (99%)	No 1 (1%)	Sometimes 0 (0%)
Support Staff	Yes 82 (93%)	No 4 (4%)	Sometimes 1 (1%)
Family	Yes 88 (91%)	No 4 (4%)	Sometimes 5 (5%)
Friends	Yes 82 (90%)	No 2 (2%)	Sometimes 7 (8%)
Others	Yes 47 (87%)	No 2 (4%)	Sometimes 5 (9%)

12. I am happy with my life.

All the time 66 (57%)    Most of the time 46 (40%)    Not really 3 (3%)

13. Are you satisfied with where you live?

Very Happy 92 (81%)    It's Okay 19 (17%)    Not Happy 3 (3%)

### **Community Partner Satisfaction Survey**

A Community Partner Satisfaction Survey was sent to xx people in February, 2006. This survey was completed by 9 members of the case management community, and 7 members of the vocational rehabilitation community. Sixteen of 45 or 36% 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 6    Not effective 1

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

Excellent 6 (43%)    Good 6    Fair 1    Poor 2    Strained 0

4. Are Brokerage staff knowledgeable about local community resources?

Yes 10 (77%)    No 0    Somewhat 3

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 (60%) No 2 Somewhat 4

### **Service Provider Satisfaction Survey Data**

This survey was completed by 76 employees of customers of EOSSB, 12 independent contractors working for customers of EOSSB and six provider agencies working for customers of EOSSB. Ninety-four surveys of 312 sent were returned for a return rate of 30%.

1. In my observations, brokerage personnel treat their customers with respect.  
Yes 89 (96%) No 0 Somewhat 4

2. How would you assess your working relationship with your customer with disabilities.  
Excellent 66 (71%) Good 25 Fair 2 Poor 0 Strained 0

3. How would you assess your working relationship with brokerage personnel.  
Excellent 55 (60%) Good 30 Fair 5 Poor 2 Strained 0

4. Are payment procedures efficient and timely?  
Yes 88 (96%) No 0 Somewhat 4

5. Do brokerage staff have a competent understanding of Support Services Benefits.  
Yes 77 (96%) No 1 Somewhat 2

6. Do Brokerage staff know and work well with other agencies, service providers, and individuals in the community?  
Yes 56 (93%) No 0 Somewhat 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



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