

Eastern Oregon Support Services Brokerage

Annual Report 2009





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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-packages 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, general caring for others in the community, as well as accountability for spending public dollars in ways that are life enhancing.



Revelers carry on at the 2008 Annual Meeting

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, and 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.
- By June 30, 2009 no counties in Eastern Oregon report having a wait, fulfilling one of the most important requirements of the Staley Settlement.

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 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.



Umatilla local Alliance members at the 2008 Annual Meeting

Board Report

Power to the people! That would be a great theme to celebrate this last year at EOSSB. It all began with a belief that people would find their own path and achieve great things through their own determination, self direction, control of resources and choice. And it works! We have seen that support brokering triggers a power shift through fundamental respect for individuals as contributors and partners.

As we enter into our seventh year, we look forward to getting bigger and better. It takes a village to encourage and support individuals to walk this path of system transformation.

To all our program participants – Thank you for asking EOSSB to be your partner as you walk the rocky road of self determination. Your courage is inspirational.

We celebrate and value our community service providers who help make our vision reality.

Thank you to all the families who trust us to help balance choice and adventure with risk and safety.

Some of the nicest people I know just happen to be our personal agents. These great folks help plan how people can live in a home that they choose, how to earn money and respect through employment opportunities, how to make friends and how to connect to people in their own communities. Our PA's are our most valuable resource.

Jim balances the budget and is a number wizard. He keeps track of the “money in” and “money out” with accuracy and good humor.

Our EOSSB village is most ably led by our Executive Director, Bill Uhlman. Bill has the “right stuff” to navigate the complexities of the system with wit, wisdom and a great big heart. He guides us toward the common good with integrity. I respect and admire his leadership.

Congratulations to everyone for another excellent year with the Eastern Oregon Support Services Brokerage. The journey continues!

Zee Koza

EOSSB Board President



Board Members

Name	Representing	Affiliation	Term expires
Zee Koza President	Union County	Service Provider	August, 2011
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, 2011
Charlie Hammett	Umatilla County	Self-Advocate	August, 2011
Elizabeth Alwine	Umatilla County	Family Member	August, 2011
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
Denise Walters	Wallowa County	Family Member	August, 2010
Karla Colson	Grant County	Family Member	August, 2010

Board Activities

August 2008 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, 2008

- Reviewed 2008 SPD field audit and corrective action plans, updating the Strategic Plan/Quality Assurance Plan.
- Elected Officers
- Discussed upcoming self-advocacy events.

March, 2009

- Reviewed and discussed year-to-date customer, provider and community partner satisfaction survey results.
- Reviewed discussed and accepted the 2008 fiscal audit by Arens and Associates
- Reviewed flex fund spending for this year and budget forecast
- Revised budget based on increased enrollment and added Quality Assurance and Case Management Requirements
- Approved Lead Personal Agent Job Description

June, 2009

- Discussed and adopted Fiscal Year 2009-2010 budget.
- Established a nominating committee for the upcoming Annual Meeting.
- Reviewed Satisfaction Survey results.
- Reviewed and Discussed new Quality Assurance and Case management requirements

Staff

Administration

Bill Uhlman	Executive Director
Jim Yuhas	Accountant
Heather Hogan	Office Manager
Linda Jones	Bookkeeper

Personal Agents

Annabelle Hirsch, Lead Personal Agent and Baker County
Amy Eddy, Malheur County
Rene' Kesler, Baker County
and Malheur County
Sher Scribner, Harney, Grant and
Wheeler County
Lorien James, Wallowa County



Kristi Avery, Lead Personal Agent and Umatilla County
Becky Van Batavia, Umatilla County
Kristen Hughes, Morrow and
Umatilla County
Rebecca Davison-Stitzel,
Umatilla County
Rose Berg, Umatilla County
Nancy Fields, Union County



Vicki Swyers, Mid Columbia Counties
Alica Sims, Mid Columbia Counties
Heather Castro, Mid Columbia Counties



Executive Director Report

In the small town where I live, there are several families who resisted their doctor's advice and the traditional wisdom of 40 years ago. They were aided by the newly minted special education code which guaranteed their children an appropriate education, and they met frequently in living rooms, parks, and pizza parlors, supporting each other in their decision to keep their child with a disability at home and part of their community rather than sending them to state custody. While these decisions seem commonplace now, they were nothing short of courageous then. Some of these families are gone now, but many are still around and I have had the pleasure of getting to know some of them in the 17 years I have lived here. In some cases, these families have managed to obtain services for their adult children in the comprehensive system, either through group homes, supported living programs, or vocational services, but unless they experienced a severe crisis that resulted in a comprehensive placement, they only had their own inner strength and the strength of their families to make it through. There were few community services in those days for families who chose to stay together.

Then in 2000, the same year that Fairview Training Center closed, a group of families filed a class action lawsuit with the state of Oregon for equal access to Medicaid services on behalf of Medicaid-eligible adults with developmental disabilities who had spent years on long wait lists for services. They were granted a settlement by the courts (called the Staley Settlement) that guaranteed access to limited services to support adults with disabilities who live in their own homes or in their family homes. Under the service design of the Staley Agreement, support brokerages (like EOSSB) provide planning support and help adults with developmental disabilities link with community resources and locate and purchase needed services, such as job development or assistance for personal care needs. These services have been gradually rolling out since 2002 and over 5000 people currently receive support services through Oregon's support brokerages.

Well, it is time to celebrate, because an important milestone has been reached! After 7 years of Brokerage operation, and for some people, 40 years of waiting, there are no counties in Eastern Oregon that report a wait list for Support Services through Eastern Oregon Support Services Brokerage. Effective July 1, 2009, there is no "order of enrollment" or quota of enrollments for eastern Oregon counties. Instead, once an adult is determined eligible for services, and chooses to get supports from a brokerage, and meets certain other criteria, they may be enrolled in brokerage services within 90 days.

This is the fulfillment of one of the most important requirements of the Staley Lawsuit Settlement Agreement!

We have waited a long time for this moment. For the families who chose to stay together over the last 40 years, and for all the families and individuals who have come along since, this celebration is for you!

**Bill Uhlman
Executive Director**

Services and Supports Provided

At the end of the previous Fiscal Year (June 30, 2008), 322 people were enrolled. New Brokerage enrollments in the current year averaged 5.5 people per month. As of June 30, 2009, total enrollment is at 388 people. Our original roll out capacity was 350. As of June 30, 2009, the wait list for Brokerage Services in Eastern Oregon has been eliminated.

Enrollments	Beginning Enrollment March, 2002	Jun 30 2003	Jun 30 2004	Jun 30 2005	Jun 30 2006	Jun 30 2007	Jun 30 2008	Jun 30 2009
Baker	11	12	23	28	28	30	35	41
Grant	3	5	6	6	5	5	5	6
Harney	1	9	11	12	11	11	12	11
Malheur	17	18	26	32	32	35	40	47
Morrow/Wheeler	6	8	9	11	12	15	14	20
Umatilla	10	31	55	62	63	76	87	102
Union	3	13	21	24	25	31	28	40
Wallowa	2	3	7	11	10	9	10	10
Mid Columbia	9	31	60	68	73	86	91	110
Total	62	130	218	254	259	298	322	388

Current Fiscal year moves:

In	100	Out	34
Wait List	89	Death	3
Intra Brokerage	8	Intra Brokerage	9
Inter Brokerage	2	Inter Brokerage	4
		Exit the system	6
		Comp 300	8
		Comprehensive	3
		Refused service	1
		Found ineligible	0

Starting July 1, 2008, the enrollment schedule increased to approximately 7 per month. In the twelve months of the fiscal year, with backfills of pre-existing vacancies, we have experienced entries of approximately 8 people per month. However, in that eight month period 34 people have left, including eight to non-crisis comprehensive services.

Service expenditures have increased each year in proportion to the increased enrollment. A total of \$3,109,290 was spent in support services for the current year (a 19% increase over last year). The average spending per plan changed slightly from \$721 per person per month at the end of FY 07-08 to \$703 per person per month at the end of FY 08-09.

44% 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.

36% 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.

11% of funds were spent on non-medical transportation.

6% of funds were spent on respite care.

2% of funds were spent on Supported Employment to assist individuals to find, get and keep competitive jobs in the community.

The remainder (approximately 1%) 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

Umatilla, Morrow and Wheeler Counties

The Umatilla County Local Alliance has been focusing on activities. We have been meeting about monthly. Currently, we are working on fundraising to help pay for the annual camping trip that continues to grow every year. This year, 50 people will be attending.

Self-advocates attend and discuss what self-advocacy means and what activities they would like to see available. Attending the Round Up Rodeo is also a popular event and tickets have been requested for this year again. Self-Advocates are also hoping to make it to a hockey game in the Tri Cities this winter. Next year, we are hoping to put together another workshop on self-advocacy and trainings for providers. We hope this can take place in March or April.

Personal Agents continue to work with local advisory groups to develop and provide needed services and opportunities in these communities. Several customers have found jobs or volunteer positions through their own determination, help from family members, help from personal agents and the coordination of several agencies and businesses. We hope to continue to meet and plan new and creative activities for everyone.

Kristi Avery, Kristen Hughes, Becky VanBatavia, Rose Berg and Rebecca Davison-Stitzel

Wallowa County

Wallowa County has been busy this past year. We are growing in our creativity of events to do. We call ourselves "Fun With Friends" and that is exactly what it is. We are enjoying spending time with others in our community and our peers. We have carved pumpkins, decorated Christmas cards, had luncheons, gone to the fire station, bowling, miniature golfing and done many things in our community. The participants in Fun with Friends chose what events we do



monthly. They brainstorm ideas and then the group takes a vote. Each month leads to something new and exciting for us to try. Line dancing, the rodeo and activities with the Baker County Local Alliance await us in the future. The group is excited to share Wallowa County with others and equally excited to venture out into other areas to see what they have to offer them. One thing that I have noticed as group lead is no matter what the activity, everyone just enjoys being together and sharing memories. Friendships are formed and ties to the community are made. These are things that we last forever and help our population be integrated into their community.

Lorien James

Mid-Columbia

This past year we have continued to work closely with The Vocational Rehabilitation Department to get services for our customers. We have several individuals in plan and on the verge of moving ahead with job development. Although services have been slower than one would like we have made some progress. One of our customers has completed a community based job assessment that will better determine the employment supports he will need and another has passed the exam for his learner's permit which will eventually eliminate the transportation hurdle that is often the biggest barrier in our rural communities. We have also gained a valuable resource through a grant provided by Mid-Columbia Council of Government. Mr. William Larson, our local Disabilities Navigator, is not only very experienced in accessing employment supports for folks with disabilities but, is an excellent trouble shooter for attaining "out of the norm" medical and living supports that our customers may need. Last, but certainly not least Alica Sims will continue to be on the board of our local Arc chapter over the next year. Our memberships continue to grow, more of our customers are not only attending Arc events but participating in the planning stages, volunteering at the functions, getting involved in the monthly meetings as self advocates and taking on responsibilities of their Friendship Club. We would like to take this opportunity to thank all of our wonderful providers that assist our customers on a daily basis to reach their goals, integrate into their communities and overall to live the richer and fuller lives that they deserve.

Vicki Swyers, Heather Castro and Alica Sims

Grant, Harney and Southern Wheeler County

Some new and exciting developments have been happening this past year for our EOSSB customers. In Grant County, a new agency, called VAULE ADDED, opened in June and is dedicated to helping people with developmental disabilities. They offer job skills training, transportation, community inclusion, living supports, recreational activities and much more. The agency has a Thrift Store (Sue-Z-Q's) and they will soon be opening a "Tea" café where customers can work with the public.

County and family sponsored activities remain very popular with our customers as a way to socialize and have fun. Recently, in Harney County, the families and customers put together a garage sale as a way to make money for extra-special events. The garage sale was a success, not only financially, but because it brought everyone together working towards a common cause. I recently took a survey asking each customer what their greatest accomplishment had been during this past year. The

common theme I found was that each individual had achieved more independence, whether it was through learning new cooking skills, riding a horse, volunteering, maintaining their own household, integrating into their communities, exercising, getting married, using their wheelchair less, getting their own golf cart, or finding a job. With the help and support from their families, friends and providers, each individual continues to overcome barriers and gain new skills. When I work with these fine people, a quote always comes to my mind: "You can never fail if you never give up."

Many of our customers also received free fishing licenses so a day of fishing and fun is just around the corner! We have picnics and swimming parties planned and our hope, for this coming year, is to integrate our separate communities by having activities which are centrally located. We are all looking forward to new experiences and overcoming new challenges this coming year. It is a true joy to work with all the customers and I respect each and every one of them. The same goes for their families, friends, providers and the communities who help them meet their goals.

Sher Scribner



**In memory of Theodore (Ted) Henriques. 1989-2009
You will be missed**

Union County

Union County has been busy; we welcomed 9 new customers, 3 transfers into Union county and sadly 2 transfers out of Union county and 2 exits. Thank you Lorien James from Wallowa for all your help couldn't have done it without you. Rebecca Davison-Stitzel is going to assist with 5 of Union county customer's.

People in Union County have been enjoying the People 1st dances and Barbecues; they



have become a big hit with everyone. This is a time when everyone gets to see old and new friends they haven't seen in a while. Union and Wallowa county Local Alliances have been getting together to do different activities, such as Chief Joseph Days. We had a great time there and in Aug we are going to Wallowa Lake for a pot luck, fishing and games. Everyone is excited and talking about the People 1st camp out in Sept. and the EOSSB Picnic in Aug. Customers have been doing a lot of community based activities with their employee's. Activities are chosen and driven by the customers themselves. Some of the things that we have been doing are: Bowling (in Baker city or Pendleton, now that our Bowling Center has closed), miniature golf, Bingo, crafts, Hog Wild Days, the River Feast in Elgin, shopping at Bazaars, and going to the Union County Fair.

Several of us went to the Mega Conference in Portland and had a great time. We learned about emergency preparedness and how to be a good Self Advocate.

Exciting tidbits about Union county customers: Several of our customers have been connecting with VRD for help in starting their own business. This has proven to be a very long process. Sam A would like to sell his merchandise. He knits and felts hand bags, back packs, hats and scarf's. He does beautiful work. I hope he brings some to the EOSSB picnic to sell. Tod W would like to open a video game store. Mike L has been working for McDonalds for over 20 years. He was featured in the news paper last year. Mandi D was elected to be Vice President on our People 1st board, last Sept, she is doing a great job. That pretty much sums up everything that is going on in Union County at this time.

Nancy Fields

Malheur County

This year has seen much growth for us. We now have two Personal Agents in Malheur County and over 45 customers and hopefully more to come. We are working hard at starting our Alliance Group, have had several meetings and have been putting our heads together trying to get it off the ground. We've been invited to Baker for their next Alliance meeting and I'm sure it will spark more excitement and give us more ideas about our own group.

We also hosted an EOSSB Valentines Dance this year. We invited customers from EOCIL, Witco and Lifeways to come and asked everyone to bring a food item they wanted to share. The Alliance group decided they wanted to do something for the community at the same time and so we asked everyone to bring canned foods that we could take to the food bank. We hired guys to do music and lights and everything was a success! The food was great! The decorations the Alliance Group made were Great! The music was great! And everyone wants to have more dances ... so we are going to work on it.



Our own Robyn F made it to the Special Olympic games in Boise! Man can she play HOCKEY! She worked hard to get there with her team. We wanted to share pictures with everyone because we are so proud of her. She was supported by her family and friends but especially her mom and her husband. Robyn put in a lot of time and hard work and received lots of support. She said she had gobs of fun and would do it again. Robyn also received many gifts for participating... a team outfit and a couple of Jackets and of course we can't forget her amazing Medal! Way to go Robyn – GREAT JOB from all of us!

On a more business note... We can't thank all the Agencies, Independent Contractors (yes that's new too) and all of our customers' Domestic Employees and families enough for all the support and teamwork. Our customers have had more opportunities and they continue to grow stronger and more independent because of the effort you put in and the work you do. Thank you sincerely.

Amy Eddy and Rene' Kesler

Baker County

We have had a busy and fun year in Baker County. Our customers have many opportunities to learn new things, like cooking, taking more responsibility for self care, joining in activities like Special Olympics, People First and EOSSB functions.



In May, we hosted a People First dance along with Mountain Valley Mental Health. We made chili, side dishes and had a potato bar. We decorated the Community Connections building. We had 114 people come for this event. People from other counties come and joined us. We had people from Malheur, Union, Grant and Umatilla counties travel to the dance. It was great seeing friends we haven't seen for a while.

In May, we had regionals for Special Olympics track in Hermiston. We competed with other counties, got to visit friends, and enjoyed the day.

In June, we went on a fishing trip in Richland at Hewlitt Park. Mountain Valley Mental Health staff Ellie Spangler and Donna Helman made the arrangements and brought a picnic for all of us to share. The weather was beautiful, and people fished and visited. It was a great time.



We also have monthly EOSSB luncheons. More and more customers are making side dishes to share at the luncheons. We have between 30 and 50 people come to the luncheons. We have a business meeting before the luncheons and share what is happening in our lives, events coming up and any changes occurring that we need to be informed about. It's always fun for us to get together, visit, eat and enjoy each others' company.

Our customers are getting out in the communities in eastern Oregon more and report that they feel less isolated and doing more activities that make them feel empowered.

Annabelle Hirsch and Rene' Kesler

Financial Report (audit pending)

Fiscal Year: July 1, 2008 to June 30, 2009

			Deviation	
	FY 08-09	FY 08-09	from 08-09	FY 09-10
<u>Revenue</u>	<u>Budget</u>	<u>Actual</u>	<u>Budget</u>	<u>Budget</u>
DD 148 Brokerage Operations	884,540	922,271	37,731	1,062,579
DD 149 Support Services	3,516,663	3,109,290	-407,373	3,812,496
FI Services	13,000	13,715	715	14,000
Interest Income	6,000	14,622	8,622	6,000
United Way	441		-441	400
Misc Income	0	672	672	
Total Revenue	4,420,644	4,060,570	-360,074	4,895,475
<u>Expenses</u>				
Payroll Expenses (salaries)	528,918	554,454	25,536	637,239
Payroll Taxes & Benefits	160,368	165,897	5,529	216,717
Total Salaries and Expenses	689,286	720,351	31,065	853,956
Board/Volunteer Support	9,400	10,212	812	12,000
Dues and Subscriptions	4,031	3,794	-237	3,500
Insurance	7,412	7,376	-36	8,000
Miscellaneous	3,600	4,261	661	4,500
Postage and Delivery	6,733	7,420	687	7,400
Professional Fees	12,750	16,642	3,892	13,218
Rent	13,640	13,401	-239	14,300
Telephone/Communications	30,536	29,932	-604	33,589
Training - Staff	3,780	2,822	-958	3,500
Travel	82,492	80,456	-2,036	88,000
Office Supplies	19,089	18,774	-315	20,616
Total Services and Supplies	193,463	195,090	1,627	208,623
Support to Individuals	3,516,663	3,109,290	-407,373	3,812,496
Fiscal Intermediary Expense	13,768	13,803	35	14,935
Flex Fund, transport & other	6,441	12,696	6,255	9,600
Equipment Purchases	0	4,910	4,910	
Operating Reserves	1,023	4,430	3,407	
Total Other Expenses	3,537,895	3,145,129	-392,766	3,837,031
			0	
Total Expenses	4,420,644	4,060,570	-360,074	4,899,610
Net (Revenue- Expenses)	0	0	0	-4,135

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.
- 5.

In FY 2008-2009, \$12,696 in Flex Funds were expended on behalf of our customers. Examples of approved Flex fund requests:

Item	Purpose	Amount
past due electric bill	to remain in apartment	136.58
Wallowa Lake Self Advocacy workshop	community inclusion conference	37.5
mattress and box springs	to furnish apt	75
work clothing	for new job	126.76
apt deposit	to live on her own	250
exercise equipment	health	100
Gait Belt	to assist with walking	13
sanitary pads	emergency purchase	16.99
nutritionist	weight loss/diabetes	202.92
deposit for safe apartment	to be safe	300
TD fitness club membership	community integration and exercise	120
work clothes and shoes	to keep her job	110
GED Books	wants to graduate hs	46
medical alert bracelet	for seizure disorder	20
rent and deposit on new apt	to get away from abusive relatives	300

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.

- 40% were filled out by the individual receiving services.
- 56% were filled out by another on behalf of the individual but from the perspective of the individual receiving services.
- 4% were completed by a significant other of the individual receiving services.
- 108 out of 356 surveys were returned for a return rate of 30%.

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

Yes 67 (65%) Not Sure 31 (30%) No 5 (5%)

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

All the time 89 (84%) Sometimes 17 (16%) Not at all 0 (0%)

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 97 (91%) They're Okay 8 (7%) Not Happy 2 (2%)

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

Yes 94 (89%) Not Sure 10 (9%) No 2 (2%)

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

Yes 22 (22%) Not Sure 24 (24%) No 54 (54%)

7. Do you feel safe?

All the time 94 (89%) Most of the time 10 (9%) Not really 2 (2%)

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

Personal Agent	Yes 86 (86%)	No 7 (7%)	Sometimes 7 (7%)
Support Staff	Yes 71 (86%)	No 6 (7%)	Sometimes 6 (7%)
Family	Yes 74 (83%)	No 9 (10%)	Sometimes 6 (7%)
Friends	Yes 69(82%)	No 9 (11%)	Sometimes 6(7%)
Others	Yes 40 (66%)	No 13 (21%)	Sometimes 8 (13%)

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

Yes 88 (85%) Not sure 13 (13%) No 2 (2%)

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

A lot better 87 (82%) A little better 17 (16%) No better 2 (2%)

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

Personal Agent Yes 94 (94%) No 5 (5%) Sometimes 1 (1%)

Support Staff Yes 85 (97%) No 3 (3%) Sometimes 0 (0%)

Family Yes 78 (86%) No 10 (11%) Sometimes 3 (3%)

Friends Yes 77 (88%) No 8 (9%) Sometimes 3 (3%)

Others Yes 47 (82%) No 6 (11%) Sometimes 4 (7%)

12. I am happy with my life.

All the time 65(61%) Most of the time 40 (37%) Not really 2 (2%)

13. Are you satisfied with where you live?

Very Happy 89 (83%) It's Okay 15 (14%) Not Happy 3 (3%)

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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