

# Executive Order Stakeholder Policy Group

## Meeting Minutes

January 23, 2014

Time: 12:30-4:30

Location: State Fire Marshall  
4760 Portland Rd NE, Salem, OR 97305  
Mt Hood Conference Room

**Facilitator: Mike Maley**

### **Members Present:**

- Pat Zullo - Clackamas Developmental Disabilities Program - Counties
- Jessica Leitner - Edwards Center – Service Providers
- Stephaine Taylor - DHS – Vocational Rehabilitation
- Jan Sansom - Lebanon School District - Education
- Sarah Drinkwater - Assistant Superintendent – Special Education
- Cynthia Owens - Oregon Council on Developmental Disabilities – Family Members
- Jordan Ohlde - Oregon Self Advocacy Coalition – Self Advocates
- Jaime Daignault - Oregon Council on Developmental Disabilities – Self Advocates
- Roberta Dunn - Family and Communities Acting Together – Family Members
- Chris Burnett - Oregon Rehabilitation Association (ORA)
- Ross Ryan - Oregon Self Advocacy – Self Advocates
- Liz Fox - Oregon State Rehabilitation Council – Vocational Rehabilitation
- Representative Sara Gelser - Oregon Legislature

### **On the phone:**

- Sydney Shook - Families Connected – Family Members
- Dacia Johnson - Oregon Commission for the Blind – Vocational Rehabilitation

### **Members Absent:**

- Bill Uhlman, Eastern Oregon Support Service Brokerage - Support Service Brokerage
- Dan Peccia, Self-Determination, Inc. - Support Service Brokerage

- Ed Krankowski, Portland Public Schools – Education
- Jordana Barclay, Oregon Workforce Partnership – Workforce Systems
- Marcie Ingledue, The Arc Oregon - Advocacy Organization
- Rebecca Cader, Oregon Self Advocacy – Self Advocates
- Sara Jane Owens, Association of Oregon Community Mental Health Programs –Counties
- Seth Johnson, Opportunity Foundation of Central Oregon – Service Providers
- Corissa Neufeldt – DHS Employment First
- Angela Yeager – DHS Employment First
- Senator Lee Beyer, Oregon Legislature – Oregon Senate

### **Guests:**

- Julie Huber – ODDS Policy Analyst
- Paloma Sparks – Oregon Legislature – Senator Beyer, Policy Analyst
- Eleshia Ledridge – DHS – ReBAR Program
- Michelle Markle - Portland Public Schools
- Andre Harboe – DHS – Employment First
- Ava Bartley – DHS – Employment First

### **Introductions**

Ava Bartley has joined the Employment First team as the QA/QI Analyst.

### **Review of Agenda – Mike**

Primary focus of the meeting is to review the initial data report and discuss application and ideas as we move forward in implementing the Executive Order. We will review the minutes from last meeting and as requested have updates from the departments and operating committees. Plus any other comments and updates members want to make.

Review of last month’s meeting minutes:

- No changes or additions were noted.
- A question about how teachers can be involved in the Outreach and Awareness activities was deferred until Sarah Drinkwater was present to address this issue. This will be addressed at today’s meeting.
- The request that a flow chart or information about work groups involved in implementing the Executive Order will be addressed at today’s meeting.
- An organizational chart of the project management structure was distributed and discussed. This included the steering body, cross-agency working team

and six (6) workstream groups. A handout of other associated work groups or committees was distributed and discussed. This handout includes an overview of the:

- State Advisory Council on Special Education (SACSE):
  - State Transition Service Advisory Committee
  - State Rehabilitation Council (SRC)
  - Employment Services Policy and Practice Work Group
  - Transition Agency Coordinating Team (TACT)
  - OVRs-ODDS Memorandum of Understanding (MOU) work group
  - ReBAR Stakeholder Group
- Subsequent discussion points included:
    - SACSE has specific functions, including making recommendations for special education services. The next meeting will be held in Redmond to highlight some of the programs happening in that area.
    - Sarah Drinkwater noted the next meeting of the SACSE will be held in Redmond to highlight some of the programs happening in that area.
    - Sarah also indicated the state transition services advisory committee may have a different name. She will clarify and inform the group.
    - Stephanie Taylor with VR indicated a current priority of the SRC is helping develop the VR state plan. In addition to participating in the development of state policy, the SRC conducts customer satisfaction survey and participated in a comprehensive needs assessment. Mike noted the SACSE and SRC have specific authorities that need to be recognized as this Policy Group discusses strategies and policies. This may require coordination and communication with these particular groups.
    - Stephanie provided an update on efforts to implement the Governor's Executive Order on revising State's workforce system. The Employment Services Policy and Practice Work Group, used to be known as the SIG2 employment group. The intent of this workgroup is to engage individuals and organizations involved at the practice level to get their feedback and perspective on policy and practices issues and change proposals. The TACT was formally established with the transition MOU but was a working group prior to that time. Currently the TACT is reviewing its current operating structure again under the new Project Management structure adopted by DHS to avoid duplication of efforts and assure coordinated actions.
- VR-ODDS MOU group hasn't met in recent months in lieu of the Project Management organization. This group may be revitalized as a review of the

VR-ODDS memorandum of understanding takes place. ReBAR stakeholder group-long standing project to look at how service rates are structured. Now they are looking at rates that relate to employment services.

There was a suggestion that DHS provides three-ring binders for everyone on the Policy Group with all this general information in them. The general consensus was the preference was to instead have information easily accessible electronically instead.

Question: Was there anything on what the self-advocates will be doing as we go through these steps, or an advocate's point of view?

Answer: Mike indicated there is a clear desire and need for self-advocate participation in this employment first initiative. There is self-advocate membership or involvement in work groups and discussion forums. But more efforts will be made in this area. Next week there is a meeting with a self-advocacy group to talk more about this.

#### **Update from Vocational Rehabilitation (VR) – Stephaine Parrish Taylor**

Stephaine reported:

- Working on the VR State Plan is a current priority and consuming a lot of staff effort.
- VR is continuing to implement the first round of supported employment training for VR staff. This training is getting good reviews.
- VR is coordinating with the University of Oregon on the application for a research grant to start to build an integrated approach for improving the long-term employment outcomes for students with I/DD. This model will include life skills training, family supports, and early work experiences. It will place a VR counselor in the classroom.

Question: Will the control group and the other group be on the same campus?

Answer: Stephaine: No, they will be at different schools.

Concern was expressed about having the two of these together that it will skew the data. Stephanie responded that is one of the concerns being addressed in the grant application.

- VR gearing up for phase 2 of the supported employment training.
- VR continues to fill the added counselor positions that were funded. Three remain to be hired. VR is drafting revisions to its supported employment policies and will be presenting to the SRC sometime this spring.

Question: ODE has hired someone for transition, is VR hiring someone else?

Answer: Stephanie: Yes, Ann Balzell has been hired as a policy analyst focusing on services to people with I/DD. Also, Robert Costello, who is one of the field services managers, will also focus on VR policy and practices for individuals with I/DD.

### **Update from Oregon Department of Education (ODE) – Sarah Drinkwater**

Sarah reported:

- ODE has adopted administrative rules to support implementation of the Executive Order. The rules have been distributed to school districts.
- ODE has filled the Transition Liaison position with the selection of Heather Lindsey. Heather came from VR and is familiar with the Employment First initiative and Executive Order. This position is to focus in addressing the ODE requirements in the Executive Order.
- Mitch Kruska has been hired to the director position. He will work with Sally Simich, Heather and others in supporting high school transition services.
- In development is a Request for Proposals (RFP) regarding the development of the Parent Training Institute called for under the Executive Order. February is the target for distributing the RFP.

Regarding the question for how teachers can get involved: Sally Simich already has some interaction with this by creating a transition resource booklet. Also, at the end of the school year there are some funds to help train the teachers on transition.

Question: What is Mitch's official title?

Answer: Sarah: It is Director of Education Programs, Secondary Transition & Assessment

Question: Who can apply for the RFP?

Answer: Sarah: Anyone who feels they can fulfill the requirements of the RFP. You have to be connected with ORPIN.

Question: Is the professional development for all transition teachers, special education teachers or who?

Answer: Sarah: It could be a combination, but ODE is focusing on seniors, or 18-21 age groups.

Question: Are substitutes provided within that too?

Answer: Sarah: Yes.

**Update and Discussion about task force: High School and Post-Secondary Transition Success for Students with Disabilities Task Force - Representative Sara Gelser**

- This task force came out of last legislative session. It is not specific to people with intellectual and disabilities but certainly includes that population. The task is looking at the challenges for people with disabilities in receiving high school diplomas.
- Task Force meetings have included stories from several different people indicating issues with how things like class credits are recorded, including credits for modified classes. Another story addressed how the standards for allowing accommodations for students in classwork and testing can be inconsistent and cause issues.
- Some of the issues identified can also create problems with students applying for financial aid for post-secondary school opportunities

There is a bill this session that can be amended to help address some of the identified concerns. The resolution to the concerns may take some time and efforts in future legislative sessions to resolve.

Comment: In high school in California, this person indicated he was able to complete all the classes, but in Oregon it is much harder to complete classes.

Response: Rep. Gelser: The standards in California have probably changed since he graduated, but it is much harder in Oregon. The students today are required to do a lot more than our parents and grandparents were required to do.

Discussion continued about concerns in the inconsistency in policy and practice and the importance of having a high school diploma in obtaining employment.

**Update from Office of Developmental Disability Services (ODDS) – Lea Ann Stutheit**

- ODDS is working on revisions to the Medicaid home and community-based service waivers regarding employment services. A new staff person has been added to the waiver and state plan work which will help in completion of this work.
- An additional policy analyst to support Employment First efforts is in the process of being hired.

- The pilot for the Career Development Plan will be implemented soon. This will help improve the process as it relates to being integrated into the Individual Support Plans (ISP).

Question: Are you using this plan as a form of discovery?

Answer: Julie Huber: One of the mandated parts of the career development plan is a vocational assessment. We are using the term ‘employment profile’ instead for a vocational assessment. This will be the basis of the career development plan.

Question: So when talking about this system, are you putting the means to pay for this in the waiver?

Answer: Lea Ann: Yes. The plan is for discovery to be a specific service. Eleshia Ledridge with ReBAR, this is something we are working on with the ReBAR rate structure also.

Question: What does the training look like for the pilot of the plan? How does the Person Centered Plan play into the discovery for the employment profile?

Answer: Lea Ann: Julie will be doing a webinar to talk about the pilot. This will happen first before the pilots go out. They won’t be going out to do extensive training yet, once the one ISP and the work plan are complete, and then there will be extensive training. PCP is not a form or document; it’s an approach and wanting to include people in the process. The one ISP is slated to be out July 1.

Question: What if you already know what you want to do and you don’t want to go through all the ISP steps? If someone is intimidated by the process? What if we separate the ISP’s?

Answer: Lea Ann: The ISP process provides for the individual to decide who is on the team. The only required person is the case manager. Other than that the individual chooses. Also, if the person already knows what they want to do, they just need to have the conversation with the case manager; they don’t need to sit down with them and fill out the form.

Question: Which group will cross-pollinate the different groups? The ISP between the IEP, etc.?

Answer: Mike: The TACT group would be focal group for that, addressing policies and practices to make sure the various individual service plans are coordinated. The transition pilot currently in place might also provider some helpful ideas.

Question: If everyone has the best of intentions, if you identify in passing something in one system that isn't working with something else, is there a plan within the group for how and when the next step will be taken?

Answer: Mike: That's where the project management work structure/flow chart comes into play. The steering body would have the ultimate responsibility to make sure these kinds of conflicts are resolved. Julie: We will also be working with the ODEP contract with something called Vision Quest. This actually covers policy and waiver alignment through discussion with national experts and other state representatives. Mike: We have also rejoined the Supported Employment Leadership Network through NASSDS. This is a network of approximately 25 states with the goal of advancing the Employment First agenda. This is another resource to address policy and procedure alignment.

Question: As you're talking about some of these different groups, there are still so many different workgroups, how do we bring all of them together and do you think there are too many and should we consolidate any?

Answer: Mike: You always have to have your eye out for duplication of work. The project planning structure will be the most helpful, but also, the various opportunities for stakeholder involvement is important.

Question: Will there be any opportunity for public feedback of the waiver before it goes to CMS?

Answer: Lea Ann: Probably, there are several different groups that it has to go through first.

Question: Along with the career development plan pilot, you were hoping to get samples of budgets?

Answer: Julie: Yes, as you fill out the career development plan, you will request so many hours of discovery and that is what you would put on the service plan. From a program planning aspect we want to see that the flow works.

#### **Update on ReBAR rate model –Eleshia Ledridge**

- Will be completing a survey in the month of February. Once completed the data analyzed the rate model updated. At the same time they are working with the waiver and policy team, along with this pilot they should be able to get the information they need. Hoping to present a draft to the stakeholders in March.

Question: So 40 hours is going to be allotted for discovery?

Answer: Eleshia: Not necessarily. That was just an example, that question hasn't been answered yet.

Comment: This is a very linear, static process. Discovery is a developmental process with a lot of planning. Hoping this is talked about and conveyed as you train people. Also, a lot of people's life experiences haven't offered them a lot of exposure, even with very good questioning, how will discovery accommodate for this?

Question: What kind of data are you collecting through the survey?

Answer: Eleshia: A lot. Most of it relates to individual supported employment. If a person did receive discovery, how many hours did they receive? More employee data, how many appointments, how many hours in face to face service is provided, phone calls etc...

Comment: Don't want to have discovery such a closed-in box, that sometimes you can't get down to the nitty gritty until you find a connection with a business.

Comment: We haven't successfully identified our silo issue. Is there a presumption that it will be discovered at school, and then VR? Is there a time when discovery co-exists?

Comment: There is tons of discovery that schools are doing, families are doing a lot of work The hope is that there will be a person in the schools that will consolidate all of these things.

Comment: There is a huge missed opportunity if we don't align what we are doing in the schools afterward. To have common instructional and assessment methodology. Wanting to minimize the assessments.

Mike: These comments are reflective of the fact that the process of discovery is a central component to the work.

## **Break**

### **Presentation of Data Report – Andre Harboe**

The draft report was distributed. Mike indicated this data report, and improvements to it, is something we will be talking about in upcoming meetings as well. While this initial report is a picture of where we are currently to meet the EO, expectations we believe we are positioned to do more detailed analytical work to help in our future discussion regarding strategy and policy. This is also due to

the fact we now have a data sharing agreement with the Department of Education and the Employment Department. Combined with the data we get from VR and ODDS, we can now put together a more complete data set for analysis purposes.

Andre reported:

- This is an initial draft, we will be working to continue to update and refine it. We would like feedback from the group members and what you want this report to look like. If there are any comments on the formatting or anything else, open for suggestions.
- This draft starts with the background of the Executive Order and how this report is required, including a lot of the Order's language. There are specific areas where additional work is necessary for fuller reporting, including self-employment and complaints and grievances. Mike also noted we need to make sure we have a consistent definition of what self-employment is.
- Andre included the NAICS codes (North American Industry Classification System) in this data report. In addition to describing the industry settings where people work, he uses these codes to help determine integrated versus non-integrated setting for data reporting purposes.

Question: What is the change in supported employment number in 2012?

Answer: Andre: this data was pre-EO and could only go back so far back; this could be due to the economy. Mike noted from September to September, there might be some seasonal employment factors reflected in the results.

Question: What about the people who didn't have a job coach?

Answer: Andre: That information isn't included in the data from ODDS. We will cover that a little farther down in the document. The best data we can do is from the Employment Department from the UI (unemployment insurance) and to see how many people were captured there. Hoping to get more accurate data from the revisions to the ODDS payment system and working on a data sharing agreement with the Department of Revenue to possibly gather I-9 information.

Question: The NAICS codes are used when the employer reports the wages?

Answer: Andre: Yes-the employer reports their wages and the employer is identified by their employer code and the NAICS.

Question: So this includes non-disabled employees also?

Answer: Andre: We grabbed all of ODDS recipients within a certain time period, and broke it down from there, so these are only ODDS recipients.

Question: Are there still working aged adults that are receiving case management services only?

Answer: Andre: Yes, so this report would capture those individuals as well.

Question: Why don't these percentages add up to 100 percent?

Answer: Andre: Because people can have multiple services.

Question: Are people participating in a time study included in this report?

Answer: Andre: This is covered to some extent in the next paragraph in the ODDS data.

Question: Group supported employment-there is an issue related to this because this is a potential implementation strategy for stakeholder groups. Is there a way to drill into the group data here a little more?

Answer: Andre: Yes, but limited to the data we currently have at this point.

Comment: Integrated employment doesn't always mean above minimum wage or better. You could be receiving integrated employment, but be receiving piece rate based pay.

Question: Could you do group or individual supported employment for wage and hour analysis?

Answer: Andre: Yes, you can break it down by group or individually

Comment: With hours that low in order to make EF a success-we will have to look at community inclusion and what a meaningful day looks like with these individuals.

Comment: Concern expressed about recent drafts of expenditure guidelines not meeting provider costs for service delivery urging ODDS to reconsider.

General discussion about what is a meaningful day, how services are monitored from a program and regulatory standpoint, the impact of transitioning from old service expectations to new, and relationship to capacity needs, use of community resources, and the role of K plan services. A discussion on next steps regarding the data report followed.

Regarding complaints and grievances, Ava will be working on this area and in her workstream. Stephaine noted the Client and Assistance program is another program that collects and tracks complaints.

Question: What is the difference between a grievance and a complaint?

Response: Ava: Varies by agencies and different definitions for each. We will work on this in our workstream.

Question: For Graph 1 on page 9 can we include the people enrolled in services but we don't know what employment services they are receiving, regardless of waiver participation?

Answer: Andre: I will include that in the next report somehow; only used the categories included for this report because the EO requires it.

Question: Can we have a further breakdown in the age of people served and wages.

Answer: Andre: I will continue work on this and refine the information.

Comment: We need to include information on ethnicity. VR does have this data.

- With the new waivers and the Plan of Care we will eventually have the utilization data more quickly. Then we will have to figure out how to get the wage data and ability to do more analysis. We would like group feedback on which is the most important things to report in this analysis?
- We will compile a wish list for things that can be listed in the next report- will send this out to everyone for more feedback.

Question: Can we share this with others?

Answer: Andre: We plan to update this draft report in the next few weeks for wider distribution. While can't prevent anyone from distributing today's draft, we would prefer people not distribute this particular one and wait until we officially distribute the next edit in the next few weeks. That way we don't have different versions out.

Question: About brokerage data, is there a wish list for getting better brokerage data?

Answer: Andre: We believe that with the changes in the billing and payment systems for July and the addition of Employment Department data we will get similar employment service data for both the comprehensive and support services.

Comment: There are people in residential services on the comp side that don't receive day services. Those who receive Medicaid that only receive case management are not on any waiver.

Comment: Mike: Regarding all the comments and questions, our thought is to make the data reporting and analysis an ongoing part of the Policy Group agenda. And start using this data report and subsequent analysis to start information, our future strategic and policy discussions as well as framing the next generation of reports.

**Next Meeting:**

**Wednesday March 5th, same location.**

**Follow up Action Items:**

- Sarah Drinkwater to send out official name of State Transition Service Advisory Committee

Items to add to next data report if possible:

- Add something more around group supported employment and wages if possible
- Include the adults enrolled in services but not receiving day/employment services.
- Wanting to include the age of VR recipients included in Table 3 (page 10)
- Include ethnicity data reported.