

Executive Order Stakeholder Policy Group

Meeting Minutes

December 5, 2013

Time: 12:30-4:30

Location: Winema SDA 3 Conference Room
4074 Winema Place NE Bldg. 53, Second floor, Salem 97305

Facilitator: Mike Maley

Members Present:

- Bill Uhlman, Eastern Oregon Support Service Brokerage
- Dan Peccia, Self-Determination, Inc – Support Service Brokerage
- Jessica Leitner, Edwards Center – Services Providers
- Chris Burnett, Oregon Rehabilitation Association (ORA)
- Seth Johnson, Opportunity Foundation of Central Oregon – Service Providers
- Jordan Ohdle, Oregon Self Advocacy Coalition
- Cynthia Owens, Oregon Council on Developmental Disabilities – Family
- Dacia Johnson, Oregon Commission for the Blind – Vocational Rehabilitation
- Stephanie Taylor-Parrish, DHS – Vocational Rehabilitation
- Sydney Shook, Families Connected – Family Members
- Roberta Dunn, Family and Community Together – Family Members
- Jaime Daignault, Oregon Council on Developmental Disabilities - Advocacy
- Ross Ryan, Oregon Self Advocacy Coalition – Self Advocates
- Pat Zullo, Clackamas Developmental Disabilities Program – Counties
- Liz Fox, Oregon State Rehabilitation Council – Vocational Rehabilitation

Members on the phone:

- Representative Sara Gelser, Oregon Legislature – Oregon House of Representatives

Members Absent:

- Marcia Ingledue, The Arc Oregon – Advocacy Coalition – Self Advocated
- Ed Krankowski, Portland Public Schools – Education
- Sarah Drinkwater, Assistant Superintendent – Special Education
- Jan Sansom, Lebanon School District – Education
- Senator Lee Beyer, Oregon Legislature – Oregon Senate
- Jordana Barclay, Oregon Workforce Partnership – Workforce Systems
- Rebecca Cader, Oregon Self Advocacy – Self Advocacy
- Sara Jane Owens, Association of Oregon Community Mental Health Programs – Counties
- Trisha Baxter, Office of Developmental Disability Services (ODDS)

Guests:

- Paloma Sparks, Oregon Legislature – Senator Beyer, Policy Analyst
- Julie Huber, ODDS Policy Analyst
- Ann Balzell, DHS – Vocational Rehabilitation
- Michelle Markle, Portland Public Schools
- Robert Castello, DHS – Vocational Rehabilitation
- Angela Yeager, DHS – Employment First
- Andre Harboe, DHS – Employment First
- Corissa Neufeldt, DHS – Employment First
- Josiah Barber, DD Council

Introductions

Review of Agenda

Mike indicated a majority of the agenda is based on the key deliverables required in the Executive Order. Therefore, much of the time will be presentation and updates from DHS and ODE staff and feedback from the group. He also indicated that after January more attention will be given to broader policy and strategy discussions in line with the Policy Group's charge as outlined in the Order.

Review of last months meeting minutes

- Mike noted that on the bottom of page 5, we captured the discussion initiated by Rep. Gelser about outcomes related to high school transition services.
- He also commented that the notes are written to keep track of broad discussion points and comments. However, if the group feels the minutes in order to be helpful need to be written at a different detail level, to please let us know so we can have a discussion about that.
- No changes to these minutes as distributed were noted.

Vocational Rehabilitation Update – Stephanie Taylor

- Ann Balzell has been hired as the VR policy analyst. Her full time focus will be implementing the VR portion of the integrated employment plan and other VR related aspects of the EO. Anne is familiar with many of the issues, needs, and opportunities through her recent work on the VR's Medicaid infrastructure grant.
- Supported employment training is being finalized and will be delivered to VR staff as well as community partners. There will be two phases of this training.
- Question: who will be the identified community partners; will they be county case management of brokerage personnel? Answer - Both.
- Question: Will the training be tied to the training and technical assistance with the employment first teams? Answer – Yes.

Department of Education Update – Mike Maley for Sarah Drinkwater

- ODE will be filling a position of Transition Liaison. This position will be responsible for implementing the ODE requirements specified in the Executive Order.
- After the Transition Liaison position is hired and on board, ODE will also be hiring the 8 part time transition specialist that will be placed around the state, the Liaison will be supervising those 8 positions.
- ODE is finalizing administrative rules related to implementing the Order. They need to be reviewed and improved by the State Board of Education.
- ODE and DHS are also working on getting a data sharing agreement. This agreement is necessary to share data and complete the data/reporting requirements of the Order.
- Question: Besides the data sharing, can each Department see each other's information so there isn't double work being done? Answer: The information shared will be used to match the student pool with employment services delivered by ODDS or VR. But this is a first step and we will see what other data may eventually be shared.
- Question: Where in the process is the defining of I/DD? Answer: We can only send information on students we know to be eligible for I/DD services. It does not tell us about students who may be eligible should they apply for I/DD services.
- Question: How about going to college and then looking for a job? Answer: We do have to make sure we keep the conversation to cover both a job after school and/or post secondary schooling. Representative Gelsner also commented about the task force she chairs or looking at transition services including post- secondary schooling or employment.

Other Updates – Mike Maley

- Angela Yeager is now on board as the Communications Officer and is working with the communications teams to finalize the communication plan.
- Andre Harboe is now on board as the Data and Research Specialist and is working on compiling information and expanding our data sources.
- Interviews for other positions have been completed and checking references now. This will round out our team.
- Interviews for other positions of Quality Assurance Specialist and Policy Analyst have been completed and checking references now. This will round out the Employment First team.
- The Plan of Care system, as an improvement to the ODDS service billing and payment system, is in process and scheduled for implementation in July. This should be a good source of data for employment services.
- APD and ODDS are also looking at the development and implementation of an electronic case management system. This is still quite some time off. But when completed will be another good source of data.
- Question: For communications and outreach/awareness, are we looking at using either existing tools or new tools? Answer: Both.

- General comments and discussion about marketing the importance of a marketing campaign, especially with family members and businesses, and this is a topic that should be consistently discussed with the policy group. Stephanie commented that work is progressing in dealing with backlogs for work opportunity tax credits and in other ways to make tax credits available. She also updated the group on other workforce redesign efforts are underway and will keep the group updated on continuing efforts.
- Patrice Botsford with ODDS has announced her retirement so Trisha Baxter will be stepping in to fill that role and will be the ODDS representative on the policy group.
- Working is progressing on “single ISP” for ODDS and on the Career Development Plan
- Work on the revisions to the Home and Community based waivers and associated work such as the Administrative Rules are proceeding. The implementation dates are still targeted for July 1, 2014.
- Work on the employment service rate structure through ReBAR is proceeding. One area of focus is on finalizing the rate structure individual supported employment services.
- Question: Where will the added data come from to finalize the individual supported employment rate? Answer: The plan is to do a survey of service providers.
- Question: Will the individual supported employment rate structure allow for flexibility in work hours such as weekends or evening? Answer: Yes.
- Question: In revising the ISP will there be work to look at IEPs and IPEs and cross walk or somehow integrate these tools. There is concern that these tools will be different. Answer: Not directly in terms of revising all the tools but there are discussions about how to make sure common goals and activities are in sync.
- Comment that ISP need to be more person centered in their approach. Mike reponded this is the continuing goal to make sure the process is person centered.
- Question: Can Medicaid dollars be used to support employment related services for kids under the age of 18? Answer: Not the way the waivers are now configured or planned. The waiver services regarding employment will be for adults, people over 18.
- Stephanie commented there is a lot of discussion and activity related to the reauthorization of the Rehab Act, but there is proposed language of concern. VR has submitted comments and Stephaine is willing to discuss this matter with those interested. Contact her directly if anyone wants to discuss.

Update with the TACT Group

- Mike indicated the TACT is using several work groups to implement its work.
- Jaime indicated the group is looking at what is happening at the national level as well is working well within Oregon. She also indicated that there is active planning going on regarding communications, marketing, and messaging.
- Mike commented that one key discussion area is how to address the notion of “discovery” within school settings and services.

Working Age Policy and Practice Group

- Mike indicated that the current priorities for this group are the engagement in discussions about waiver changes and the administrative rules. This group will be involved in our rules group.

General discussion about the need to clarify the role and focus of the various groups engaged in employment first structure we have been talking about. Maybe something of a visual nature would help. Also a simple straightforward way to make reports on the various activities being implemented. Corissa commented that her role as Project Manager is to construct a project plan that identifies and tracks the various activities and is used to communicate to stakeholders and report status. We are still in the process of completing all this work and making sure it is up to date. One suggestion is to provide a simple summary of each group and their major focus, perhaps relating it to the Policy Group's charter.

Integrated employment plan

Mike reviewed changes to the Plan, based on last meetings discussions. He noted that this Plan is a living document and will be subject to ongoing changes and improvements.

Core Competencies and Training Standards – Employment Specialists (handout)

Mike provided some background to the information provided. The most recent contract with the Washington Initiative for Support Employment (WISE) has been training to develop supported employment professionals. These particular trainings have been based on the APSE standards. The core competencies listed on the handout are based on that recent training experience as well as the APSE standards. Mike believes these core competencies are consistent with other national similar national standards.

- Question: Will these standards relate to VR as well? Answer: Yes, as they related to specific functions and service populations.
- Question: Will these documents be made available to schools? Answer: Yes, they will be posted and made available.
- Question: How do people access the trainings? Answer: WISE will be publicizing the trainings and access will be through them.

Mike commented that the next steps are to make design the structure to verify the qualifying of professionals in regard to the specific standards.

There was discussion about how the supported employment professionals trained under these standards/competencies how will relate to the qualifying of VR vendors. Several questions were identified and more follow-up on this topic will occur.

- Question: Will these competences be considered in the rate setting conversations or other support for these groups and providers? Answer: To a degree, in the ReBAR model the rate for job coaches was increased as a recognition higher level of training and expectations.

Services Coordinators and Personal Agent Core Functions (handout)

Mike discussed these handouts represent the core competencies regarding employment related services that we would incorporate into our trainings of services coordinators and personal agents. There will be some initial specific trainings on these core competencies through the WISE contract. These employment related competencies will also be incorporated into a broader array of core competency training modules made available all services coordinators and personal agents through work being done through the Oregon Technical Assistance Corporations (OTAC).

- Question: What are the timelines for these trainings? Answer: The specific trainings through WISE will be conducted throughout the course of the biennium. They will be announcing the schedule shortly after the New Year. The projected date for OTAC to complete the overall core competencies is December 2014. The specific module for employment core competencies is to be completed by September 2014. We don't know at this point the schedule for implementing training based on the new core competency training modules.
- Question: Will this training be mandatory? Answer: The training through WISE will not be mandatory, though we hope to train as many people as possible. The goal is that every CDDP and Brokerage has staff trained. Our understanding is that the training through the OTAC new core competencies modules will be mandatory similar to what happens with eligibility specialists for example.

Outreach and Awareness Plan – Corissa Neufeldt

Corissa explained that the Executive Order section 7 requires this plan. Our target population is people receiving services through ODDS and VR, but this plan also includes a school aged component. The plan has 3 phases:

- **Phase 1** is explaining the activities and tools that we would have available January 1st.
- **Phase 2** – This is what we hope to accomplish between now and June 2014. This has work to be done, including materials to be developed and web sites to be enhanced. There are hyperlinks within this document.
 - Comment: The web sites are too complicated, and this is important information. Need to simplify.
 - Question: How can we give feedback? Other groups may be compiling something similar and would like to include some of this information. Answer: Provide feedback to Angela Yeager, implementing this plan falls under her area of responsibility. There is a communication workgroup that will be a focal point for implementing the plan. We want to coordinate will all other parties that might be doing something similar so we can avoid duplicative efforts.
 - Question: How can we engage the teachers with this? Answer: We would like to hold off answering that until Sarah Drinkwater is in attendance and can answer more fully from an ODE standpoint.

- Question: This isn't unique to education. What will be the internal communication strategies to get everyone involved? Answer: We intend to message to all parties. Page 3 addresses communications to field professionals.
- **Phase 3** – collaboration and getting the message out to younger families. Page 8 is the business outreach. There is a lot that has to happen.

Each phase identifies the strategic tools and what will be available for families. This plan is embedded in the overall communication plan being developed by Angela, Also planned is a QA and QI process to track how this outreach and education plan is working.

Career Development Plan Update – Julie Huber

Julie:

- Reviewed some changes to the forms since reviewed at the last meeting.
- Updated discussions with the team working on the ISP for ODDS to make sure the plans for the career development plan and ISP are in coordinated.
- Question: Section 4, refers to the summary of, but students aren't receiving this until they are leaving transition so how can this tool best be used? Answer: Julie will discuss this further with Roberta Dunn.
- Question: What about people who are ready to leave transition and going into college? Answer: This would go into the 'action plan' section of the ISP.
- Comment: This is really important to planning on the education side.
- Comment: Concerned if we don't have these key questions on the front page, if someone is going through the ISP, it won't get to this level.
- Comment: Schools are already doing some of this work and this is where they could help
- Comment: 40% of the clients right up front don't want employment, this should not be forgotten.
- Question: What are the thoughts for rolling this out? Answer: We will be rolling out through a pilot process and then in conjunction with the total ISP rollout by July 1, 2014.
- Comment: In the roll out we need to be cautious about everything else that is rolling out at the same time and doesn't want this to get lost.
- Comment: Suggest piloting in ATE services and not only the sheltered workshops
- Comment: Suggest instead of state wide pilot, that we only do people who are willing to do it voluntarily.
- Question: How do you have a healthy conversation about encouraging people to work? Answer: This will be part of the training with Services Coordinators and Personal Agents. We also have some tools developed in past training efforts that will be helpful.

Training and Technical Assistance Plans – Mike Maley

Mike explained the Legislative appropriated for training and technical assistance is about \$8.55 million assuming federal matching funding. In general, these funds are targeted for provider

transformation and capacity building. The plan is to issue an RFP for the provider transformation piece and a series of smaller RFP's for the capacity building work. Mike did note that the plan to initially use resources from our contract with federal Office of Disability Employment Policy (ODEP) to initiate the provider transformation work will not take place. This is because federal resources we were counting on are no longer available.

- Question: Will ATE's be included in the provider transformation work? Answer: Not directly. The focus is on agencies providing facility based employment services with the goal helping transform their organization model and services to community-based settings.

In regard to the capacity building funds, Mike indicated the tentative plans were to:

- Extending the WISE contract to the end of the biennium.
- Put more resources into implementing the communication and the outreach and awareness
- Provide specific training to Services Coordinators and Personal Agents on the career development plan.
- Awareness level trainings to a broad array of stakeholder on the new terminology (customized employment, discovery, etc.) and new processes (career development plans, etc.)
- Other strategies to quickly increase capacity in areas such as job coaching and development.
- Comment: Make sure the communication and outreach/awareness activities are adequately resourced.
- Comment: Suggesting an idea to help schools educate families to add for this list. To make sure families and the actual individuals get the information they need.
- Comment: In regard to capacity building, should consider a method to help provider entities get people to existing trainings and reimburse for those expenses.

Next meeting will be January 23rd 12:30-4:30.

Follow up Items:

- Question for Sarah Drinkwater from Sydney Shook regarding the Outreach and Awareness-how can we get the teachers involved?
- Jessica Leitner and Roberta Dunn asking for some kind of flow chart of which employment related groups work on which parts of the policy/plan. What are their purposes/tasks?