

Meeting Notes

Executive Order 13-04 Statewide Policy Group

Date: September 17, 2013

Time: 12:30 – 4:30

Location: Cherry Ave Training Center

3414 Cherry Ave. NE, Suite 150

Salem, OR 97303

Fort Rock Room

Facilitator: Mike Maley, DHS Employment First Coordinator

Note taker: Corissa Neufeldt, DHS Employment First Project Manager

Members Present:

- Bill Uhlman, Eastern Oregon Support Service Brokerage - Support Service Brokerage
- Cynthia Owens, Oregon Council on Developmental Disabilities – Family Members
- Dacia Johnson, Oregon Commission for the Blind – Vocational Rehabilitation
- Dan Peccia, Self-Determination, Inc. - Support Service Brokerage
- Ed Krankowski, Portland Public Schools - Education
- Jaime Daigault, Oregon Council on Developmental Disabilities – Advocacy Organization
- Jan Sansom, Lebanon School District - Education
- Jessica Leitner, Edwards Center – Service Providers
- Jordan Ohlde, Oregon Self Advocacy Coalition – Self Advocates
- Jordana Barclay, Oregon Workforce Partnership – Workforce Systems
- Liz Fox, Oregon State Rehabilitation Council – Vocational Rehabilitation
- Marcie Ingledue, The Arc Oregon - Advocacy Organization
- Patrice Botsford, Director of ODDS (on the phone)
- Rebecca Cader, Oregon Self Advocacy – Self Advocates
- Roberta Dunn, Family and Communities Acting Together – Family Members
- Ross Ryan, Oregon Self Advocacy Coalition– Self Advocates
- Sara Jane Owens, Association of Oregon Community Mental Health Programs –Counties
- Sarah Drinkwater, Assistant Superintendent –Special education
- Seth Johnson, Opportunity Foundation of Central Oregon – Service Providers
- Sydney Shook, Families Connected – Family Members

Members Absent:

- Pat Zullo, Clackamas Developmental Disabilities Program – Counties
- Representative Sara Gelser, Oregon Legislature – Oregon House of Representatives

- Senator Lee Beyer, Oregon Legislature – Oregon Senate
- Stephaine Parrish Taylor, Oregon Department of Human Services – Vocational Rehabilitation
- Tim Kral, Oregon Rehabilitation Association – Service Providers

Guests:

- Erinn Kelley-Siel, Director Department of Human Services (DHS)
- Rob Saxton, Deputy Superintendent- Oregon Department of Education (ODE)
- Charlie Phillips, Partnerships and Community Living;
- Julie Huber, ODDS Policy Analyst

12:30 – 12:45 Introductions

12:45 – 1:00 Welcome by Erinn Kelley-Siel, Director of DHS and Rob Saxton, Deputy Superintendent- ODE

Erinn Kelley-Siel - opened with expressions of gratitude for member's time and willingness to participate in such an important matter. She hi-lighted two unique challenges for this group:

- 1). Expectations – she noted the importance of having high expectations for those involved, including young children. Recognizing that having expectations is not sufficient, research indicates need to also have supports in place.

This group has the charge of creating and setting high expectations. The group has leadership support from the Governor and legislature. The Legislature has approved approximately \$10 million toward the employment first initiative. It is important to recognize the Group members may have diversity in perspectives and different opinions, which is one of the reasons each of the members were selected. This may result in challenging discussions but hopefully yield positive and productive input for DHS and ODE to reflect on. DHS and ODE want to hear the different perspectives.

Two legislators are not able to attend today but during 1:1 meeting with them, hope to be able to more deeply inform them of what this initiative is, what the concerns, challenges and goals are. The Legislators are very excited to be engaged and learn.

- 2). Stay “out of the weeds”- this may seem be contradiction to the name of the group. Erinn acknowledged the term Policy group in hindsight may not have been accurately named because the policy has been set. The Group's role has been set in the Executive Order, which Mike will discuss

later. The Group really should be considered more of an Executive Implementation team. Several other groups working with the departments on the “in the weeds” discussions. This group’s job is to work with the Departments on whether the work each is doing, is working. Try to stay at a strategic high level, an Executive level.

Rob Saxton – also reinforced expressions of gratitude for member participation. He also noted that in education ODE is trying to think about how to put together a pre-k to 12 education system. Looking at a variety of stages and how to improve, particularly around various points of transition in a student’s life. One of the areas focusing on high school transition. This is important to ensure a smooth transition from high school to work. ODE wants all students in Oregon to have the opportunity to be successful. He believes the work this Group is doing is vital to helping inform ODE’s work.

1:00 – 2:00 Background and Review of Executive Order

Mike highlighted the following portions of the Executive Order 13-04.

Purpose:

Mike noted two areas within the Executive Order that really exemplify purpose of the initiative and Executive Order. These were:

- last paragraph of the first section *Providing Employment Services To Individuals With Intellectual And Developmental Disabilities ...* “Improving Oregon’s delivery of employment services, with the goal of achieving integrated employment for individuals with intellectual and developmental disabilities, consistent with their abilities and choices, will benefit individuals with disabilities, their families, our communities, the economy and the state.”
- text under *Now Therefore, It is Hereby Directed and Ordered*, “...improve Oregon’s system of designing and delivering employment services to those with intellectual and developmental disabilities toward fulfillment of Oregon’s Employment First Policy, including a significant reduction over time of state support of sheltered work and an increased investment in employment services.”

Section I – Definitions:

Mike reviewed a few of the definitions, including:

- “Sheltered Workshop”
- “Employment services”
- “Career development plan”
- “Integrated employment setting”

Section II Target Populations:

The Order separates out the “working age adults” and “transition aged adults”. Sarah Drinkwater from ODE noted that in Spec Education, there is not a clear or commiserate class of individuals categorized or defined as I/DD like in DHS services. Under ODE, there are different categories of disabilities such as *other health impaired, autism, intellectually disabled*, etc. This presents challenges regarding how to collect data for the Executive Order purposes.

Question regarding the term “working age adults”. Roberta Dunn asked if the intent of using the term “working age adults” is to suggest transition age adults still in school are only receiving pre-vocational services vs. vocational/employment services? Sarah and Mike responded by saying no, this was not the intent. Schools are not required to find people jobs. We want to collaborate to try and get students jobs prior to leaving school.

Section IV - Sheltered Workshops:

The following conditions were noted:

- By July 1, 2014, ODDS and OVRS shall no longer purchase or fund voc. Assessments for individuals with I/DD that occur in sheltered workshops.
- By July 1, 2015, ODDS and OVRS shall not longer purchase or fund sheltered workshop placement for: transition age youth with I/DD, working age adults, and any working age adults who are already using ODDS and OVRS services who are not already working in sheltered workshops.

Section IV- Employment Services Provided Through ODDS and OVRS:

- Expectation to have evidence based practices
- Hi-lighted the targeted numbers of individuals to receive employment services.

Section V-Career Development Planning:

Mike reviewed the Order’s stated expectations and use of policies and practices regard career development planning. This includes policies based on the “presumption that all individuals in the ODDS/VR target populations are capable

of working in an integrated employment setting”. Julie Huber provided an update on where DHS is at with this requirement, including:

- Anticipating a January 2014 rollout.
- This might involve a pilot processes

Question: Is there any discussion/coordination with Office of Developmental Disability Services about integrating with the ISP process? Julie - Yes. We are also working with Education to integrate with IEP, and VR with IPE.

Comment: Roberta Dunn expressed concern that it really seems the career development planning should start at school. However, if ODE is not required to have career development plans then could create a bigger chasm for students leaving school. Sarah responded while a career development plan not required but explained a Summary of Performance is. ODE is working on enhancing this or trying to figure out how to utilize this better as it relates to the Employment First policy and Executive Order requirements.

Section VI - Training:

The following conditions were noted:

- By July 1, 2014 DHS must establish competency-based training standards for certain providers of employment services. Mike indicated we have been and plan to continue providing training in several areas that address this condition.
- By July 1, 2016 DHS will only purchase employment services from agencies or providers qualified to provide these services under the new standards.

Legislature gave DHS additional funds for training and technical assistance. Strategies to use these funds will be discussed at an upcoming Policy Group meeting.

Section VII-Outreach and Awareness:

- January 1, 2014, must have Outreach and informational education program launched. This program has specific areas that must be addressed. Corissa Neufeldt gave a brief update on progress. ODDS, VR, and OCDD are working on this program.

Section VIII-Provider Capacity:

Mike noted that VR and ODDS must make efforts to ensure there are enough qualified providers of employment services. Capacity needs and strategies to address these needs will be part of upcoming Policy Group agendas.

Section IX- State Agency actions:

Mike reviewed the required actions and status of the following requirements.

- 1). VR and ODDS will update policies and administrative rules. Work is being done in these areas, including the development of a new rule based on the Executive Order.
- 2). Hire an Employment First Coordinator. This task is complete.
- 3). Engage training and technical assistance providers. A contract with the Washington Initiative for Supported Employment is in process. Additional discussions about training and technical assistance will be held with the Policy Group.
- 4). Have an Integrated Employment plan by November 1st. A draft is being worked on and will be reviewed for comment by the Policy Group at the next meeting.

Section X- Education Provisions:

Sarah Drinkwater reviewed and explained the ODE specific portion (Section X) of the Order. Sarah reiterated that the term or definition of I/DD does not have a commiserate definition in education, therefore using definition that may be broader but meets intent of capturing this population. She noted:

- ODE will be developing a technical assistance network through transition specialists who will be deployed across the state. Positive because this will be a support for transition services and school districts.
- ODE will be working on a parent communication component that will provide ongoing communication for parents and students.
- ODE will be putting out a posting for an educational specialist to oversee this work.
- Like DHS, ODE is also going through a bit of rule revision to incorporate Executive Order into ODE rules.

Section XI-Interagency Collaborations:

Mike noted we currently have a Memorandum of Understanding between ODE, VR and ODDS. The existing MOU between VR and ODDS will need to be updated prior to January 2014.

Section XII- Quality Assessment and Improvement and Section XIII- Data Collection and Reporting :

Mike noted that the Order requires that:

- Certain data elements must be collected. It is expected that data elements additional to those specified will be available.
- A quality initiative program must be developed by 7/1/14.
- The Policy Group has specific expectations in reviewing data and quality assurance information and making recommendations based on the reviews.

General Question: Ed Krankowski asked about plan for engaging the business community. The Order does not seem to speak to this. Mike responded we understand this is an important aspect and are engaging the Workforce system as a partner. When we get to reviewing the Integrated Work plan, there are strategies for addressing and engaging the business community and engagement of this partner will be an ongoing topic for discussion.

2:15 – 3:00 Review of Proposed Charter and Meeting Logistics

Discussion:

Mike reviewed the draft charter for the Group's consideration. He noted:

The charter reflects the role of Group is strategic not operational as discussed in Erinn Kelley-Siel's remarks. DHS and ODE is not coming to group for prior approval of all policy and practice matters – though the Group will be kept informed of these matters for consideration in their strategic discussions

Question: Jessica Leitner asked if minutes and meetings are open to the public? Mike responded that community members may attend meetings and the minutes will be posted, probably through our websites. Jessica suggested adding clarification to the Charter that Policy group's recommendations are just that - not binding.

- Regarding the member list it was noted that Senator Lee Beyer and Rep. Sarah Gelser from the Oregon Legislature could not make this meeting but anticipate they will be very active members. Tim Kral from the Oregon Rehabilitation Association is retiring imminently and will be replaced by Chris Burnett, the new Executive Director. The United Cerebral Palsy Association of Oregon and Western Washington will not be participating on the Group as earlier mailings has indicated.
- Decisions will be by consensus for now unless later determined need more formal decision making process. Group agreed.

- Reviewed the relationships with the other Groups listed in Charter.

Question- does it make sense to have a Workforce Systems listed? After discussion it was agreed that this made sense.

It was suggested adding statement in the Charter addressing when members might send representatives- representatives are encouraged, however, if a member sends a representative because the member himself/herself cannot attend, the group can't be spending time bringing representatives up to speed. Jessica recommended adding in Charter - member is responsible for sending an "informed" representative. Group agreed.

The meeting schedule was discussed. DHS initially would like to meet monthly while activity is getting launched and can hopefully move to every other month or quarterly. Clarified the intent is for this group to be long term.

It was suggested the minutes be posted in a public location such as website so members can refer their constituency to them rather than having to be responsible for sending each inquiring party the minutes. Mike confirmed- minutes will be posted on website.

General Questions:

- 1) Will this group be projecting costs? Mike response no, not exactly, but may be recommending strategies that have cost implications.
- 2) How long will this group be meeting? Mike responded the group is intended to be long term- ongoing. It was recommended language be added to the Charter clarifying that this group will continue meeting through implementation, and include if members need to leave group, there is an expectation that members find a suitable replacement to recommend to DHS and ODE directors. Ultimately up to ODE and DHS Directors to appoint. Group agreed to these recommendations.

3:00 – 4:00 Discussion about progress measures, outcomes and metrics

Mike indicated this agenda item was to begin discussions on the outcomes and measures to be part of the Integrated Service plan and to more generally help gauge progress in implementing the Executive Order. He suggested the discussion be held in two parts. These were to (1) review current data and (2) discuss future outcome statements and measures.

Mike reviewed several spreadsheet handouts made available to the group

(1) “Summary: Integrated Employment Services” Spreadsheet: Table reflects data from Comprehensive Services and Support Services. (Note: comprehensive services means and individual is receiving both funded residential and employment services through ODDS). This spreadsheet provides data on integrated employment outcomes (number and percentages served) in both comprehensive and support services. Both individual and group integrated services are included for the period of September 2010 to March 2013.

(2) “Summary of Facility Based Work” spreadsheet: This provided data on the use of facility based work in both Comprehensive and Support services for the period of September 2010 to March 2013.

(3) “Summary-Non Work Option” spreadsheet: Provided information on non-work services provided individuals for the period of September 2010 to March 2013 in the Comprehensive service system.

Question: Is there any funding differences between non-work and integrated employment? Does the data reflect any impact based on the economy? Mike response no to both questions.

It was suggested that DHS perhaps look at the overlay of the economy and age.

Question: Is there any indication of “path of least resistance”? Mike response- Data suggests no because data appears to be relatively flat.

Question/Comment: Ross Ryan did not see any data regarding transportation. This is an important component for successful employment. Mike response - correct, the data does not reflect transportation as this is separate, but very important, issue at this time. Group acknowledged transportation is important but understands not part of the charge or focus for this group at this time.

Question: Has there ever been a time in Oregon when there was success? Mike and other members response - in the early to mid- 90s when there was a lot of federal funding and focus on increasing supported employment. Oregon data as it was kept and based on who was receiving community services at that time would show a higher percentage of people in community services receiving supported employment than today. Mike response - this question brings us back to having a detailed Integrated Work Plan that the Policy group reviews. We know what

history is , what today is, how do we move forward? What are the new measures we put in so we can determine if we are making progress?

Additional data is from VR was shared. This data will be reviewed and discussed at the next meeting.

(4) Data Projection Spreadsheets:

The team reviewed three spreadsheets projecting utilization. These were:

- Summary: Integrated Services Projections:
- Projected Wage and Hours Worked:
- Projected Weekly Hours Worked:

The projections in these spreadsheets assumed that the scheduled number of people receiving employment services in the Executive Order would:

- All obtain individual community-based employment
- All employment would be above minimum wage and
- All employment would be at least 10 hours per week, and of those, half would be 20 or more hours per week.

Using this data and assumptions the spreadsheet provided projection over the next 5 years.

Key Performance Measures (KPMs)- Legislatively required KPMs:

Mike also handed out a spreadsheet reflecting a legislatively approved KPM that reflects total integrated employment by percentages. The Group is asked to project utilization percentages and targets based on this KPM. This will be an agenda item for future discussion.

Mike made the following recommendations for Outcome Statements:

- 1). Increase the percentage of Adults with IDD who receive ODDS services who are working in individual integrated employment settings.
- 1.b). Increase the number of Adults with IDD who receive ODDS services who are working in individual integrated employment settings.
- 2). Increase the percentage of adults with IDD who receive ODDS services who are working in individual integrated employment settings that receive pay at or above minimum wage.
- 3). Increase the percentage of adults with IDD who receive ODDS services who are working in individual integrated employment setting that work more than 10 hours per week.

- 3b). Increase the percentage of adults with IDD who receive ODDS services who are working in individual integrated employment setting that work more 20 hours or more per week.

Comments/Discussion on outcome statements and metrics

Group discussions and comments related to:

- Are we being aggressive enough in projections? Don't see goal around infrastructure building and capacity. Mike responded we will be looking at this later.
- Going back to the Employment Services Definition? Would data reflect the services received? Mike responded no, for these particular outcomes the data just reflects jobs obtained vs. those engaged in employment services. Although data on employment services delivered will be eventually provided, but not as a proposed outcome statement.
- In reviewing VR data, it appears there are more people raising their hand and wanting employment than what we have set as goals. How do we reconcile these numbers?

Question: Do these projections match up with the anticipated impact of capacity building?

- Can we reflect both what the minimum requirement is and what the "goal" is from that min. point? Is this too ambitious in these early stages and should we just stick with Executive Order expectations/numbers until the systems change efforts start to take effect?
- Where does Oregon fit nationally? Based on latest national figures Oregon is in the top 3rd of all states for integrated employment.
- Jessica Leitner suggested adding back in the group data since integrated employment is defined as both individual and group employment. Mike clarified we will still keep data on group supported employment and will show it but the priority for this Policy Group in terms of outcomes would be individual integrated employment.
- Are these the right measures and are these the right goals?
- Do we look more at short term goals – say over next 2 years?
- Do we consider making the statement of everyone should receive employment services? Is this a precursor to then hopefully achieving placement data?
- Can we add data tracking for measuring capacity?

Recommendations and Decisions:

- Group agreed proposed outcomes made sense – Outcomes are clear and simple and reflect high level.
- Group ultimately agreed through consensus that the proposed percentage goals made sense for now but wanted to continue the discussion and review about whether they should be raised.
- Group agreed goals should be broken down to 2 year increments.
- Hold individual integrated employment as priority.
- Continue to track the group data because it is included in the definition of the integrated employment but we reflect the most desired is individual employment.

Follow-Up actions: Jessica Leitner suggested members talk to their constituencies and come back with feedback.

4:00 – 4:30 Next Meeting(s)

October – Oct. 24th 12:30pm-4:30pm

- Review and Adopt Charter
- Review VR data presented at 9-17-13 mtg.
- Review the Draft Integrated Work Plan
- Review the Career Dev. Plan

December 5th – 12:30-4:30pm

- review Communication Plan, including Outreach and Awareness information

Follow-Up actions:

- Make sure someone from VR is available to interpret the VR data
- Meeting Notes will be posted on DHS website