

Assessment Tool Recommendation

Recommendation:

The Individual Assessment/Budget Resource Team recommends that Oregon select the Supports Intensity Scale (SIS) as the assessment tool that will be used to determine Comprehensive Waiver individual budget amounts and restructure payment rates based on individual support needs.

Background

The Team was charged with recommending an assessment tool upon which to base individual budget amounts and tie provider rates to individual support needs. To that end, the Team developed assessment tool selection criteria (attached). The team reviewed several assessment tools that other states employ for like purposes.

Basis of the Recommendation

The Team recommends that Oregon select the SIS for the following reasons:

- The SIS *directly* assesses the type, frequency, and amount of support and assistance that a person needs to accomplish important every day community living activities. In contrast, other tools require making inferences about the extent and type of support a person might need. Direct assessment of support needs is congruent with the project's goals and objectives.
- The SIS is based on contemporary values in supporting people with developmental disabilities in the community. The SIS focuses on support needs and properly leaves it to the person-centered planning process to identify strategies to address such needs.
- The SIS is designed to contribute to and enhance person-centered planning processes. Other assessment tools have not proven to be useful in supporting service planning.
- The SIS has sound psychometric properties, including construct validity and reliability. The SIS has been reviewed independently and found to be a well-designed instrument. Therefore, Oregon can be confident that SIS assessment results will provide a solid basis for determining individual budget amounts and provider rates tied to support needs.
- The SIS is a nationally-recognized assessment tool. A respected independent organization (the American Association on Intellectual and Developmental Disabilities - AAIDD) assembled a team of highly qualified authors to construct the SIS using rigorous instrument design methods.
- Even though the SIS was released less than two years ago, six other states (CO, GA, LA, PA, UT, WA) already have adopted the SIS as their basic assessment tool. Local developmental disabilities authorities in several states and some provider organizations have also adopted the SIS. Going forward, this expanding SIS user

- base will be a valuable resource for Oregon. AAIDD actively supports the exchange of information among SIS users.
- There are important resources available to SIS users. These include user manuals, “train the trainer” support from AAIDD, and the capability to enter SIS results into a web-based application that can generate a wide variety of reports. SIS data also can be downloaded from AAIDD to support ReBAR project activities.
- SIS out-of-pocket acquisition and ongoing costs are about the same as comparable instruments.
- So far, there has been only limited application of the SIS to funding. These experiences have been positive. The SIS is sufficiently robust to support funding applications.

The Team reviewed other several other assessment tools, including the Inventory for Client and Agency Planning (ICAP). The Team did not find that any of these other tools are superior to the SIS from either a design or application perspective. The Team believes that the SIS is the best assessment tool that is available to serve project goals and objectives. AAIDD is working on but has not finalized a version of the SIS for use with children and youth under age 16. However, the current tool can be adapted for children and the final children’s tool is not expected to be appreciably different.

The Team acknowledges that the SIS requires somewhat more time to administer correctly than some other tools. However, the difference is not great. Proper SIS administration also demands that personnel be well-trained. If the SIS is selected, there must be a commitment by SPD to secure the resources necessary to ensure its proper administration.

Going Forward

Should the Team’s recommendation be accepted by the ReBAR Steering Committee and SPD, the team will address the following topics:

- **Supplementing the SIS.** Some states have decided to add items to the SIS for various reasons. In October, the Team will consider the pros and cons of Oregon’s supplementing the SIS to improve its utility in determining individual budget amounts and/or supporting rate restructuring. The Team will consider the items that other states have added and their rationale as well as other items that Oregon might need to add. The Team will report its findings and recommendations about adding items to the Steering Committee/SPD. Should additional items be recommended, their actual utility in supporting project goals and objectives will be assessed during the project’s Pilot Test.
- **SIS Administration.** The Team also will consider various strategies for administering the SIS in Oregon as part of the Pilot Test design. The topics that the Team will consider include (but are not necessarily limited to): (a) who should administer the SIS; (b) the infrastructure for administering the SIS; and, (c) strategies to ensure that the tool is administered accurately.