


# ReBAR Project Timelines

 Critical Dates

 Working Dates

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<b>Goal 2: INCREASED CHOICE AND CONTROL: DEVELOPMENT OF A SELF-DIRECTED SERVICE DELIVERY SYSTEM</b>																							
<b>Objective 1: Develop or Enhance Individual Budgeting</b>																							
<b>Strategy 1: Establish communication procedures with stakeholders</b>																							
<b>Outputs:</b>																							
Communication plan with identified objectives, strategies, tasks and staff responsibilities																							
<b>Major Action Steps:</b>																							
Establish and regularly convene an "Individual Assessment/Budget Resource Team" with representation from key organizations and constituencies, including the MMIS, ISP Revision Workgroup, Oregon MIG and other Medicaid relevant initiatives, consumers, families and providers.																							
Develop a communications plan to address stakeholder interests with linkages to the Stakeholder Steering Committee, other resource teams, and other relevant Medicaid initiatives.																							
Implement strategies and tasks specified in the communication plan.																							
Schedule communications with staff in the Governor's office and the Legislature.																							
<b>Strategy 2: Select and test an individual assessment tool to support individual budgeting</b>																							
<b>Outputs:</b>																							
Individual assessment tool selected																							
Individual assessment tool adapted and tested for use in Oregon																							
Written report concerning the assessment tool test																							
<b>Major Action Steps:</b>																							
RFP & Evaluation contract																							
Identify potential tools to assess individual support needs.																							
Specify assessment tool selection criteria, including suitability for Individual Budgeting and congruence with desired policy outcomes.																							
Select an individual assessment tool that meets Oregon's essential requirements based on an evaluation of potential tools against selection criteria. Purchase Tool per requirements.																							
Identify and make necessary modifications to the selected tool in order to address Oregon's unique needs and requirements.																							

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Perform technical requirements analysis of assessment tool administration, including personnel training, logistical support requirements, administration protocol and quality control procedures.																							
Design assessment tool pilot test, including setting selection, personnel training methods and curriculum, administration protocol, selection of a statistically significant sample of individuals in order to test assessment tool, obtaining feedback from personnel concerning tool administration, and methods to analyze assessment results. Case management administering test?																							
Prepare Budget Package for legislative action to support testing the accuracy and reliability of the assessment tool during the 2007-09 biennium.																							
Run a sample of the assessment tool training curriculum, modify as necessary, and train personnel to administer the tool.																							
Select sample of individuals for assessment tool pilot test.																							
Administer Pilot																							
Compile results of assessment tool test, analyze the tool's validity and reliability, and obtain feedback from pilot test participants concerning the assessment protocol and ease of administration. (Initial Report)																							
Based on analysis of assessment tool pilot test results, modify the tool to produce the desired results and revise personnel training methods and assessment tool administration protocol as appropriate.																							
Prepare and disseminate final report concerning the results of the assessment tool pilot test																							
<b>Strategy 3: Develop Individual Budgeting methodology.</b>																							
<b>Outputs:</b>																							
Documentation of Individual Budgeting methodology																							
Procedure manual for calculating individual budget amount																							
<b>Major Action Steps:</b>																							
Specify research methods for developing methodology to calculate individual budget amount based on assessed consumer support needs, historical expenditures, and service utilization patterns.																							
Perform research and document individual budget amount calculation methodology with scenarios.																							
Draft procedure manual for calculating individual budget amount and develop I/T application to interface individual budget amount calculation tool with assessment results.																							

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Revise methodology, procedure manual and data application based on Concurrent Field Test experience. (Analysis of field tests)																							
<b>Strategy 4: Conduct Concurrent Field Test of the Individual Budgeting process and new Rate Structure</b>																							
<b>Outputs:</b>																							
Written report containing field test results																							
Impact analysis of statewide implementation based on field test results																							
<b>Major Action Steps:</b>																							
Design research protocol for Concurrent Field Test of the individual assessment tool and the new rate structure.																							
Select a minimum of two field test settings for Concurrent Field Test of the individual assessment tool and the new rate structure.																							
Conduct training for counties and providers involved Concurrent Field Test, in administration of individual assessment tool. (Participant training)																							
Complete assessments, calculate individual budget amount, and employ person-centered planning to develop Individual Support Plans and individual budgets with consumers and families in the field test settings. (Implementation of testing)																							
Document support plans, individual budgets and expenditures based on Oregon Guide to Rates for each individual.																							
Simulate provider payments in conjunction with the field test.																							
Conduct follow-up with parties (e.g., consumers, families, providers, case managers) who participated in the field test to obtain structured feedback concerning effectiveness of training, using the Rate Guide, performing assessments, and interfacing individual budgeting with Individual Support Plan development.																							
Based on review and analysis of field test results and participant feedback, make necessary modifications to training, Rate Guide, Individual Support Plan/Individual Budgeting interface, and other elements. Prep for Roll-out.																							
Perform impact analysis on individuals, services, provider organizations and the budget. (Analysis of findings)																							
Prepare and disseminate report on field test results																							





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Draft user-friendly guides to person-centered planning and individual budgeting for (a) individuals and families and (b) professionals. Solicit feedback from potential users and revise guides based on feedback.																							
Based on Concurrent Field Test, assess impact of proposed policies and procedures on individual choice and portability.																							
Based on Concurrent Field Test, make necessary revisions to draft policies and procedures, guides, and training curriculum.																							
<b>Goal 5: CREATION OF A SYSTEM THAT MORE EFFECTIVELY MANAGES THE FUNDING FOR LONG TERM SUPPORTS THAT PROMOTE COMMUNITY LIVING OPTIONS</b>																							
<b>Objective 1: Develop and implement more effective Rate-Setting methods</b>																							
<b>Strategy 1: Establish communication procedures with stakeholders</b>																							
<b>Outputs:</b>																							
Communication plan with identified objectives, strategies, tasks and staff responsibilities.																							
<b>Major Action Steps:</b>																							
Establish and regularly convene a "Rate Setting Resource Team" with representation from key organizations and constituencies, other relevant departments such as DHS Budget Development and DHS Rate Setting, the MIG and MMIS Replacement Project and consumers, families, providers.																							
Develop a communications plan to address stakeholder interests with linkages to the Stakeholder Steering Committee, other resource teams, and other Medicaid initiatives.																							
Implement strategies and tasks in communication plan.																							
Schedule communications with staff in the Governor's office and the Legislature. (Presentations)																							
<b>Strategy 2: Select a rate-setting tool appropriate for services in Oregon</b>																							
<b>Outputs:</b>																							
Rate-setting tool selected																							
Rate-setting tool adapted for use in Oregon																							
<b>Major Action Steps:</b>																							
RFP and Evaluation contract																							
Identify potential tools to structure cost finding and Rate-Setting processes.																							
Specify Rate-Setting tool selection criteria, including suitability for Oregon's intended uses and congruence with desired policy outcomes.																							

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Select a Rate-Setting tool that meets Oregon's requirements based on the evaluation of potential tools against selection criteria.																								
Identify and design necessary modifications to the tool to meet Oregon's requirements and unique																								
Conduct technical requirements analysis to identify how the assessment tool and new rate structure will be linked to provider payments through MMIS.																								
<b>Strategy 3: Restructure service rates</b>																								
<b>Outputs:</b>																								
New rates for services.																								
Completed Oregon Guide to Rates documenting the rates and process used to establish them.																								
<b>Major Action Steps:</b>																								
Define services and allowable costs.																								
Collect and analyze provider cost data. (Cost study)																								
Develop and document proposed rates. (Rate setting)																								
Develop methodology to test proposed rates across a sample of people currently receiving services and service providers.																								
Analyze impact of proposed rates using a significant sample of people currently receiving services and service providers. Provide information for legislature for preliminary rates for services.																								
Based on analysis, calibrate the tool to produce the desired results using data from the sample.																								
Issue proposed final rates based on results of analysis and Concurrent Field Test, modify Oregon Guide to Rates as necessary.																								
<b>Strategy 4: Develop procedures to implement new Rate Structure</b>																								
<b>Outputs:</b>																								
Written procedures for applying the Oregon Guide to Rates to Individual Budgeting																								
<b>Major Action Steps:</b>																								
Define links between Individual Budgeting and applying the Oregon Guide to Rates.																								
Draft instructions for applying the Oregon Guide to Rates to Individual Budgeting and authorizing expenditures from consumer developed individual budgets.																								
Modify instructions based on Concurrent Field Test results. (Analysis field test)																								
Review other Medicaid initiatives to assure compatibility and coordination.																								



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Integrate revised Rate Structure and procedures as appropriate with other Medicaid initiatives, including the MMIS Replacement Project and relevant departments of DHS and the State DD Program.																				
Develop a comprehensive statewide Roll-out Plan that (a) fully integrates elements of all goals and objectives and (b) contains recommended timelines, necessary ongoing resources and capabilities, necessary policy changes, and projected costs.																				
Refine the Roll-out Plan in consultation with the Governor's Office and the Legislature.																				
Begin system-wide infrastructure & business changes																				
Post-grant Roll-out of selected elements																				
Develop Budget Package for legislative action to initiate Roll-Out during the 2009-2011 biennium.																				
<b>Goal 3: COMPREHENSIVE QUALITY MANAGEMENT SYSTEMS</b>																				
<b>Objective 1: Develop and implement a quality management strategy</b>																				
<b>Strategy 1: Establish communication procedures with stakeholders</b>																				
<b>Outputs:</b>																				
Communication plan with identified objectives, strategies, tasks and staff responsibilities																				
<b>Major Action Steps:</b>																				
Establish and regularly convene a "Quality Management Resource Team" with representation from key organizations and interests, including representation from QA/QI RCSC grant, the MIG, the DD Quality Assurance Committee, DD Licensing Section, the DD Waiver Section of DHS, consumers, families, providers.																				
Develop a communications plan to address stakeholder interests with linkages to the Stakeholder Steering Committee, other resource teams, and other relevant Medicaid initiatives.																				
Implement strategies and tasks in communication plan.																				
Schedule communications with staff in the Governor's office and the Legislature.																				
<b>Strategy 2: Select outcome/performance indicators and measures</b>																				
<b>Outputs:</b>																				
Documented set of outcome/performance indicators and measures related to Goals 2 and 5																				
Policies and procedures concerning implementation of indicators and measures																				
<b>Major Action Steps:</b>																				

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RFP & Evaluation Contract																				
Identify candidate outcome/performance indicators and measures associated with Individual Budgeting/Individual Support Plan development and Rate-Setting.																				
Select test set of outcome/performance indicators and measures.																				
Identify and develop data acquisition methods to support implementation of indicators and measures, including drawing from existing QM efforts and data sources.																				
Implement test set of outcome/performance indicators in conjunction with Individual Budgeting/Rate-Setting Concurrent Field Tests conducted in conjunction with Goals 2 and 5.																				
Based on evaluation of field test experience and finalization of interface of Individual Budgeting/Individual Support Plan development and Rate-Setting methods, modify outcome/performance indicators and/or data acquisition methods.																				
Develop policies, databases, and procedures necessary to implement indicators and measures.																				
<b>Strategy 3: Integrate Goal 3 components into statewide Roll-Out plan</b>																				
<b>Outputs:</b>																				
Roll-out Plan completed																				
Budget Package developed for legislative action																				
<b>Major Action Steps:</b>																				
Integrate indicators, measures, and reporting into overall HCBS Quality Management Strategy.																				
Develop a comprehensive statewide Roll-out Plan that (a) fully integrates elements of all goals and objectives and (b) contains recommended timelines, necessary ongoing resources and capabilities, necessary policy changes, and projected costs.																				
Refine the Roll-out Plan in consultation with the Governor's Office and the Legislature.																				
Begin system-wide infrastructure & business changes																				
Post-grant Roll-out of selected elements																				
Develop Budget Package for legislative action to initiate Roll-Out during the 2009-2011 biennium.																				
<b>Objective 2: Develop and routinely disseminate quality management reports to key entities and</b>																				
<b>Strategy 1: Design quality management reports</b>																				
<b>Outputs:</b>																				
Master quality management report/data base																				

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Customized quality management reports to meet specific user needs																																						
<b>Major Action Steps</b>																																						
Design master quality management report/data base that encompasses outcome/performance indicators and measures and is coordinated with other HCBS waiver QM reporting.																																						
Collaborate with consumers and families to design reports that are understandable and useful for them, including employing alternate formats																																						
Consult with other users to identify their specific information needs, requirements, and desired report formats.																																						
Design customized periodic reports and methods of querying the data base to meet user-defined information needs.																																						
Develop guide and instructions for user-initiated data-base queries																																						
Produce initial set of customized reports and solicit user feedback.																																						
Modify reports based on user feedback.																																						
<b>Strategy 2: Dissemination Methods</b>																																						
<b>Outputs:</b>																																						
Dissemination schedule																																						
User distribution list																																						
<b>Major Action Steps:</b>																																						
Establish master schedule for disseminating reports via the web, in printed form, and in alternate formats.																																						
Coordinate master schedule with the dissemination of other HCBS QM reports.																																						
Establish user distribution list that includes e-mail notification of the availability of reports and provide for periodic updating of the distribution list.																																						
<b>Objective 3: Periodically evaluate the Quality Management Strategy</b>																																						
<b>Strategy 1: Integrate grant QM activities into the operation of the overall HCBS waiver QMS</b>																																						
<b>Outputs:</b>																																						
Policies and procedures to implement QMS																																						
<b>Major Action Steps:</b>																																						
Develop necessary policies, procedures and databases to implement QMS during Roll-Out.																																						

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Coordinate policies, procedures and data bases to ensure compatibility and consistency with overall HCBS waiver QMS.																				
Integrate evaluation of grant QM elements into evaluation of overall QMS																				