Report Status - Read Only, Submitted

As you complete each section of the quarterly or annual report, please check off that section as a reminder as to what has been completed and what has yet to be done. When all report sections have been completed and have a check mark entered on this page, you may officially submit your report by pressing the “Submit” button.

☑ Basic Information
☑ Major Outcomes
☑ Consumer Involvement
☑ Research and Evaluation
☑ PAS
☑ PAS By Waiver
☑ Buyin
☑ Technical Assistance
☑ Outcomes
☑ Resources

Submit Report

Summary of report edit checks

Project Officer Name (PO)        Jeff Clopein
PO Phone Number                  410-786-7252
PO e-Mail                        jeffrey.clopein@cms.hhs.gov
Approve Date                     12/7/2011

Save Approval Information

Send Comments to Ticket To Work Administrator
Site design by Thomson Reuters

http://www.dehpg.net/TicketToWork/Status.aspx  1/23/2012
### Ticket To Work Medicaid Infrastructure Grant Report

#### Basic Information

<table>
<thead>
<tr>
<th>Grant Number</th>
<th>1QACMS030315/03</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lead Agency</td>
<td>Oregon Department of Human Services</td>
</tr>
<tr>
<td>Agency Mailing Address</td>
<td>500 Summer Street NE Salem, OR 97301-1076</td>
</tr>
<tr>
<td>Grantee Signatory</td>
<td>Erinn Kelley-Siel</td>
</tr>
<tr>
<td>Grantee Title</td>
<td>Director, Children Adults &amp; Families</td>
</tr>
<tr>
<td>Grantee Telephone Number</td>
<td>503-945-7001</td>
</tr>
<tr>
<td>Grantee Email Address</td>
<td><a href="mailto:ekelley-siel@state.or.us">ekelley-siel@state.or.us</a></td>
</tr>
<tr>
<td>Grantee Fax Number</td>
<td>503-581-6198</td>
</tr>
<tr>
<td>Project director (PD)</td>
<td>Travis Wall</td>
</tr>
<tr>
<td>PD Telephone Number</td>
<td>502-945-6262</td>
</tr>
<tr>
<td>PD Email Address</td>
<td><a href="mailto:travis.wall@state.or.us">travis.wall@state.or.us</a></td>
</tr>
<tr>
<td>PD Mailing Address 1</td>
<td>500 Summer Street NE</td>
</tr>
<tr>
<td>PD Mailing Address 2</td>
<td>Salem</td>
</tr>
<tr>
<td>PD City</td>
<td>Salem</td>
</tr>
<tr>
<td>PD State</td>
<td>OR</td>
</tr>
<tr>
<td>PD Zipcode</td>
<td>97301-1120</td>
</tr>
<tr>
<td>Name of Report Preparer</td>
<td>Ann Balzell</td>
</tr>
<tr>
<td>Preparer Telephone Number</td>
<td>503-945-5857</td>
</tr>
<tr>
<td>Preparer Email Address</td>
<td><a href="mailto:ann.balzell@state.or.us">ann.balzell@state.or.us</a></td>
</tr>
<tr>
<td>Project Website</td>
<td><a href="http://www.oregon.gov/DHS/vr/cep/">http://www.oregon.gov/DHS/vr/cep/</a></td>
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</tbody>
</table>

#### Basic Description

The Oregon Competitive Employment Project seeks to enhance the quality of life in Oregon by achieving, maintaining, and advancing the competitive and inclusive employment of persons with disabilities.

#### Major Outcomes

**Outcome 1**

**Workplan outcome**

Maintain high quality and # of Work Incentives Network (WIN) services; establish replicable service delivery model. Increase WIN-WIPA # served by 10% from 2010 baseline of 1,457; increase OVRS clients served by 10% from 2010 baseline of 505; Increase # served who obtain, maintain or advance in employment after receipt of WIN.
Core Outcome Area

Benefits Counseling and Work Incentive Programs

Collect monthly reports from all WIN staff w/info on following #’s: Intakes; Those obtaining, maintaining/advancing in employment; Average cost per consumer; Those receiving information & referral; Those receiving Work Incentive Summary (WIS) & Work Incentive Analysis (WIA); Accuracy of random sample of WIAs & WISS. Track # of referrals from OVRS. Collect key benchmarks measures. Post selected monthly aggregate data on www.win-oregon.com & http://www.oregon.gov/DHS/vr/cep/index.shtml.

Establish the WIN Workgroup as an ongoing group; Workgroup commits to meeting beyond the MIG grant by 10/31/2011; Workgroup meets 4 times by 12/31/2011; Assure OVR participation; Invite new members including VA, corrections & send them packet materials to promote use of WIN. Update job descriptions and other WIN materials and empower the Workgroup with oversight; include monthly examination of WIC data, including achievement of benchmarks as described in Quality Improvement (QI) plan.

Submit and/or collaborate with other organizations on a minimum of 2 grants to raise a minimum of $50,000 in funds to maintain and expand WIN by 12/31/2011. Work w/OVRS to put in place funding for RSA FY 10/1/2011-9/30/2011.

Conduct a minimum of 6 WIN regional and/or statewide outreach events by 12/31/2011; monthly outreach/presentations at regional VR offices & WIN presentations at state & regional OVRS conferences & meetings; presentations at Employment First events.

Conduct monthly trainings for WIN and WIPA staff on subjects related to benefits and work incentives; Complete WIN Procedure Manual by 12/31/2011, use as a training/TA and model sustainability tool; Provide SSA/WIPA certification training for all WIN WICs by 12/31/2011. Train CIL EDs on usage/monitoring of QI tool; Hold minimum of 1 on-site training w/CIL EDs prior to 12/31/2011. WIN workgroup continues to be stakeholder group and includes OVRS and CIL ED.

Funds Budgeted Annually to Outcome

$460,000.00

Planned Completion Date

12/31/2011

Accomplishments

WIN served 456,12% over Q3, 2010. 139 obtained (36) maintained (101) advanced (2) in employment. Strategy 1: 275 enrollments. Average cost/consumer: $986; 250 received I&R; 62 received WIS/WIA; random accuracy check on 12 WIA/WIS = 93.15%; Strategy 2: DHS Administrator requested a high level meeting including WIN TA staff, to learn more about WIN and to discuss funding. 23 member Leadership Council met 9/7/11. MIG Director & WIN TA met with SSA Staff to talk about funding. Strategy 4: 35 regional and 2 statewide presentations to over 1,600. Strategy 5: 4 monthly WIC trainings: ETO, Live Office, Work Incentive plans & Dual and simultaneous entitlements. Strategy 6: 98 of the needed
<table>
<thead>
<tr>
<th>Problems/Issues</th>
</tr>
</thead>
<tbody>
<tr>
<td>130 participants signed up for the WIN study by 9/30/2011.</td>
</tr>
<tr>
<td>The poor economy continues to affect WIN’s efforts to seek funding</td>
</tr>
<tr>
<td>via legislation and/or through referral agencies. Unemployment</td>
</tr>
<tr>
<td>remained above 9% with an estimated 5 years in Urban areas to 15</td>
</tr>
<tr>
<td>years in rural areas until economic recovery.</td>
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<table>
<thead>
<tr>
<th>Status</th>
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<tbody>
<tr>
<td>On schedule</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Actual Completion Date</th>
</tr>
</thead>
</table>

### Outcome 2

Increase by 15% the number of Oregon businesses demonstrating their commitment to increasing employment of people with disabilities through their affiliation with OVRS Staffing Solutions/OVRS Employment Team by 12/31/2011 (31). Implement comprehensive education and marketing strategy to support & promote employment of persons with disabilities based on business needs of employers and the business case for competitive & inclusive employment of persons with disabilities. Pilot education plan in at least 6 regions. Create sustainability through use of TBTL by OVRS offices.

### Core Outcome Area

Employment Networking

### Strategy 1

Pilot education print campaign plan of Think Beyond the Label (TBTL) in 9 regions, with OVRS Staffing Solutions as "proud partner" by 12/31/2011; establish baseline of businesses that contact OVRS Staffing Solutions 800# as a direct result of TBTL by 12/31/2011; transfer available content of OBLN website to OVRS website and redesign to become "OVRS Staffing Solutions". Find funding to support 3 additional print or local television presentations for low to no cost to the grant.

Assist in continuation and enhancement of Live Resume events by partnering with Oregon Office of Vocational Services, Oregon Commission for the Blind, Oregon Parent Training and Information Center and Incight through 12/31/2011. Hold 4 Live Resume events by 12/31/2011, with 5 businesses & 8 jobseekers participating; host career exploration day/job fair w/10 employers, in Portland by 12/31/2011. Increase by 15% the businesses that demonstrated their commitment to OVRS Staffing Solutions (31).

### Strategy 2

Support “OVRS Staffing Solutions” and “TBTL” training for 26 OVRS field offices and 100 contract job developers. Edit and preserve web-based materials from OVRS Staffing, CEP, and TBTL websites. Work with OVRS to complete contract for the consortium to continue activities that increase the # of employers hiring people w/disabilities. Ensure that consortium has relationships in 6 pilot regions, with VR, DD, CMHP, Brokerages, CIL, and local government entities for support beyond 12/31/2011.

### Strategy 3

Ensure OVRS has contact info on Leadership Council members. Project staff & Leadership Council members will work to get Gov. Order to encourage businesses to ‘Think Beyond the Label’ & make hiring persons with disabilities a priority; & Executive Order encouraging State agencies serving persons with disabilities to create Departmental Employment First policies.
### Strategy 5

**Funds Budgeted Annually to Outcome**

$55,500.00

**Planned Completion Date**

12/31/2011

**Accomplishments**

Strategy 1: Plans were changed when CEP received $1 million in ARRA funds, for a statewide TBTL multi-media campaign. Paid ads will run 10/24/2011-12/31/2011 with collateral ads running into April in many areas. Strategy 2: 400 junior high age girls attended the Women in Trades orientation in Springfield; this event was started by CEP/OVRS Staffing and has now transitioned into a local, annual event. Strategy 3: 26 OVRS Branch Offices were contacted about the TBTL campaign and will collaborate with CEP and HDA to create a rapid response protocol. Strategy 4: The TBTL ads mention OVRS and refer to the OVRS toll free number, OVRS website and TBTL website where they are also referred to OVRS.

**Problems/Issues**

OVRS Staffing Solutions has just one staff person available to respond to calls so CEP staff must assist during the TBTL campaign. The issue is the need to transfer the rapid response protocol away from CEP before the end of the MIG.

**Status**

On schedule

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### Outcome 3

Increase employment by 12/31/2011 of people entering competitive employment who are diagnosed with serious mental illness (25% more than 2010 # of 535). Support sustainability by advising and providing technical assistance to the Oregon Supported Employment Center for Excellence (OSECE) and the mental health supported employment program now funded by OVRS and AMH. Ensure sustainability for supported employment evidence-based mental health practices in Oregon through expansion and growth of Employment Peer Mentor (EPM) groups for people diagnosed with serious and persistent mental illness.

### Workplan outcome

**Core Outcome Area**

Employment Supports: Supported Employment

**Strategy 1**

Expand Employment Peer Mentors (EPM) pilot from 4 to 6 groups by 12/31/2011. Increase annual total # of consumers trained in the model, receiving EPM services and # employed by 25% from a 12/31/2010 baseline. Participate in regular meetings between PSU staff and peer mentors. Project staff will continue dialogue w/AMH on methods of funding EPM.

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http://www.dehpg.net/TicketToWork/ReportDetail.aspx 1/23/2012
Strategy 3
Develop & validate EPM curriculum fidelity scale by 12/31/2011. The Project will provide fiscal & programmatic support for development of scale & assist in coordination of efforts Hold statewide conference for all Peer Groups & MH professionals to plan next stage of implementation & replication of curriculum.

Strategy 4
By 12/31/2011: Assist EPM sites in becoming EN under TTW & vendors through OVRS (increasing funding to CMHPs and sustainability of EPM; Assist EPM groups to develop alternate sources of funding; Continue discussions with AMH on payment of EPM either through Medicaid or another funding source.

Strategy 5
Support a report on EPD and seek approval from Seniors and Persons with Disabilities Division on portability of assets after retirement or leaving job due to illness. Train 16 mental health supported employment CMHPs and 20 peer employment mentors about EPD by 12/31/2011.

Funds Budgeted Annually to Outcome
$210,382.00

Planned Completion Date
12/31/2011

Accomplishments
Total # served by OSECE & OVRS 2,933 - OSECE = 692; OVRS = 2,241. 112 new jobs. Strategy 1: # of OSECE supported programs = 18, OSECE advisory group met 1 time. Strategy 2: EPM participation up to 13 peer-run groups (19 peers) & is partnering with SAMHSA funded Project Open; EPM peer mentors worked with 100 peers (12% working or advancing education); 12 programs statewide have contacted OSECE about becoming IPS SE agency & joining OSECE’2 webinars plus weekly TA conference calls in Q3. Strategy 3: Manual in final draft (see Products Q1. Strategy 4: Consultant chosen to work with EPM sites re EN status; participate in ongoing advisory groups. Strategy 5: TA who recently worked at CMS met with ODC’s MBI (EPD) committee; and at joint Medicaid meeting with DHS, AMH, and SPD admin and staff.

Problems/Issues
Key staff left AMH, a setback to timelines set by EPM to have approval for their manual/curriculum by 12/31/2011.

Status
On schedule

Actual Completion Date

Outcome 4
Increase employment by 12/31/2011 of yearly total of people entering competitive employment who are diagnosed with a developmental disability (10% more than 2010 VR ORCA database baseline of 320). Ensure sustainability of Employment First Policy for individuals with Developmental Disabilities through SPD supports for Employment First (EF) policy accomplished through rate restructure and other changes in policy and procedures. Assure stability and fidelity of EF Project through statewide outreach, inclusion of families & advocates, and education of stakeholders.

Workplan outcome
Employment Supports: Supported Employment

Core Outcome Area
Continue participation in DD Employment Task Force; OR Rehabilitation Association’s Customized Employment group; Supported Employment Leadership Network; Seniors & People w/
<table>
<thead>
<tr>
<th><strong>Strategy 1</strong></th>
<th>Disabilities Division's employment work group; establish a committed permanent workgroup to provide oversight and advise EF project by 12/31/2011.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Strategy 2</strong></td>
<td>Contract w/ W.I.S.E to develop 9 pilot regions with partnerships of VR, County and Brokerage DD, WIN by 6/15/2011. Establish 9 regional team projects; train &amp; provide TA to regional teams as needed; each team establishes regular meeting schedule and protocols by 12/31/2011. Collect monthly data and quarterly reports about projects. Develop and send to all stakeholders: monthly news, updates about programs, news and updated data reports for the website <a href="http://www.dhs.state.or.us/dd/supp_emp/">http://www.dhs.state.or.us/dd/supp_emp/</a>.</td>
</tr>
<tr>
<td><strong>Strategy 3</strong></td>
<td>By 12/31/2011: Provide programmatic &amp; fiscal support for statewide employment education, training and support on competitive employment for people with DD and groups like business owners, schools, state and county employees; develop strategies for increasing long term training/TA capacity.</td>
</tr>
<tr>
<td><strong>Strategy 4</strong></td>
<td>Develop a Peer Advocate EFP component team with a minimum of five trained Self-Advocates as Leaders (SAAL) participants who will conduct statewide outreach for participants, families and friends. Present 9 regional trainings for 100 consumers of DD services, family members and caregivers by 12/31/2011.</td>
</tr>
<tr>
<td><strong>Strategy 5</strong></td>
<td>Support a report on EPD designed for stakeholders of the DD system and seek approval from Seniors and Persons with Disabilities (SPD) Division on portability of assets after retirement or leaving job due to illness. Train 9 regional teams and 12 peer advocates about EPD by 12/31/2011. Continue support of DHS as TTW EN.</td>
</tr>
</tbody>
</table>

| **Funds Budgeted Annually to Outcome** | $216,618.00 |
| **Planned Completion Date** | 12/31/2011 |

**Accomplishments**

OVRS served 686 individuals with DD and 174 w/TBI. Strategy 1: EF staff participated in monthly meetings of all established groups. Strategy 2: 6 of 9 EF teams met 1 time w/EF staff attending. 3 teams meet regularly, have workgroups and created plans. Community meetings will not be held in 2011 because of budget constraints at SPD and because the legislature reinstated ATE. Strategy 3: RFP for statewide training has been postponed until SPD budgets are resolved. WISE distributed 8 emailed EF messages with best practice information. Strategy 4: Advocates, peers and families will be part of the planning and implementation of 9 community meetings during 2012, if CEP is granted a no-cost grant extension. Strategy 5: TA from NCHSD via conference calls with ODC's MBI (EPD) committee

**Problems/Issues**

Budget setbacks had devastating effect on EF projects. Agencies lowered their budgets for a 3rd time during Q3 and there is talk of further reductions during Q4 and beyond. Key staff have left SPD and it will take time to sort out the staff changes and develop working relationships.

**Status**

Behind schedule

**Actual Completion Date**

12/31/2011
<table>
<thead>
<tr>
<th>Workplan outcome</th>
</tr>
</thead>
<tbody>
<tr>
<td>Develop and utilize a high level Governor's Employment Initiative to sustain and expand MIG initiated supported employment gains in systems changes; increase MIG promoted supported employment gains by 5% in current targeted areas; expand the target population to include ACA establishment of a new Medicaid group; utilize MIG expertise to prevent barriers to employment for all current and future Medicaid participants by advising Governor's office, committees and commissions about potential issues as decisions are made about healthcare coverage during this crucial transition period.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Core Outcome Area</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employment Supports: Supported Employment</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Strategy 1</th>
</tr>
</thead>
<tbody>
<tr>
<td>Participate in meetings between DHS, OHA, Governor's Staff &amp; other agencies where Medicaid usage decisions are made. Continue to support the MBI Workgroup &amp; assure that it will remain after MIG. Participate in Committees and workgroups where decisions about Medicaid Waiver requests and State Plan Amendments are made, including Long Term Care, Dual Eligible, Medical Homes, CCOs.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Strategy 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>Establish a Governor's Employment Initiative with a workgroup and designated staffing, that has the mandate to create both a state plan for increasing employment of targeted groups and a strategy to implement the plan.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Strategy 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>For purposes of the Governor's Initiative, expand the target population to include disadvantaged, including returning vets, long term unemployed, people of color, TANF recipients. Use this inclusion to create stronger and lasting partnerships including Worksource Oregon to ultimately increase employment options and sustain employment efforts for people with disabilities.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Strategy 4</th>
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<tbody>
<tr>
<td>Use MIG expertise and TA from experts in the field, to inform partners and other stakeholders about decisions and ramifications of Medicaid and ACA decisions. Research best employment practices in state and nationally; include model development or expansion in strategic planning and to sustain increases in employment.</td>
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<tr>
<th>Strategy 5</th>
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<tr>
<td>Funds Budgeted Annually to Outcome: $224,596.00</td>
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<table>
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<tr>
<th>Planned Completion Date</th>
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<tr>
<td>12/31/2011</td>
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<table>
<thead>
<tr>
<th>Accomplishments</th>
</tr>
</thead>
<tbody>
<tr>
<td>This quarter CEP applied for and received supplemental MIG funding for this initiative. Strategy 1: 2 Meetings between CEP and DHS precipitated a meeting between CEP/OVRS/DHS/Governor's Office staff as this project was planned and the request for supplemental MIG funding completed and submitted. One major accomplishment is the ownership jointly felt by the DHS Administrator and Staff of the Governor's Office. Strategy 2: Hiring staff is in process. Strategy 3: DHS Administrator presented project information to the Governor's Workforce Board. Strategy 4: HDA has begun to advise this project and has met with CEP and partner staff.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Problems/Issues</th>
</tr>
</thead>
<tbody>
<tr>
<td>General issues around start up of a large project when faced with a short timeline.</td>
</tr>
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</table>

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<tr>
<th>Status</th>
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<tbody>
<tr>
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http://www.dehpg.net/TicketToWork/ReportDetail.aspx 1/23/2012
# Consumer Involvement

## Consumer 1

<table>
<thead>
<tr>
<th>Name of Group</th>
<th>MIG Leadership Council</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Role</strong></td>
<td>Exists solely to interact with and on behalf of the MIG</td>
</tr>
<tr>
<td><strong>Relationship to Grant</strong></td>
<td>Provide the MIG with advice and direction; act as QA/QM oversight committee to WIN; participate in all MIG initiatives' sustainability efforts. Transition in 2011 to sustainability workgroups.</td>
</tr>
<tr>
<td><strong>Percent of Members with a Disability</strong></td>
<td>25.00%</td>
</tr>
<tr>
<td><strong>Hours Spent Last Quarter (Approximate)</strong></td>
<td>50</td>
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## Consumer 2

<table>
<thead>
<tr>
<th>Name of Group</th>
<th>Supported Employment Developmental Disabilities Task Force</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Role</strong></td>
<td>Independent committee comprised of consumers; developmental disability advocacy, professional and provider groups seeking to revitalize state's DDSE efforts.</td>
</tr>
<tr>
<td><strong>Relationship to Grant</strong></td>
<td>Partners in initiatives related to SE for people with DD.</td>
</tr>
<tr>
<td><strong>Percent of Members with a Disability</strong></td>
<td>16.00%</td>
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<tr>
<td><strong>Hours Spent Last Quarter (Approximate)</strong></td>
<td>50</td>
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## Consumer 3

<table>
<thead>
<tr>
<th>Name of Group</th>
<th>CORIL, HASL, EOCIL, ILR, LILA, SPOKES and SILC</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Role</strong></td>
<td>Centers for Independent Living holding WIN contracts and State Independent Living Council.</td>
</tr>
<tr>
<td><strong>Relationship to Grant</strong></td>
<td>Partners in WIN and stakeholders</td>
</tr>
<tr>
<td><strong>Percent of Members with a Disability</strong></td>
<td>75.00%</td>
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<td><strong>Hours Spent Last Quarter (Approximate)</strong></td>
<td>200</td>
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## Consumer 4

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<thead>
<tr>
<th>Name of Group</th>
<th>Work Incentives Network Work Group</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Role</strong></td>
<td>Assist WIN by acting as QA/QM oversight committee: make recommendations for system changes and provide input on infrastructure; assist in sustainability efforts.</td>
</tr>
<tr>
<td><strong>Relationship to Grant</strong></td>
<td>MIG work group</td>
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<tr>
<td><strong>Percent of Members with a Disability</strong></td>
<td>43.00%</td>
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### Consumer 5

<table>
<thead>
<tr>
<th>Name of Group</th>
<th>Oregon Disabilities Commission &amp; Employed Persons with Disabilities Subcommittee</th>
</tr>
</thead>
<tbody>
<tr>
<td>Role</td>
<td>Partner with Seniors and People with Disabilities (SPD) to improve EPD program and ensure quality services; advise SPD on revisions to EPD policy and procedures; educate public about EPD.</td>
</tr>
<tr>
<td>Relationship to Grant</td>
<td>Partners and stakeholders</td>
</tr>
<tr>
<td>Percent of Members with a Disability</td>
<td>53.00%</td>
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<tr>
<td>Hours Spent Last Quarter (Approximate)</td>
<td>10</td>
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### Consumer 6

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<thead>
<tr>
<th>Name of Group</th>
<th>Employer Engagement Work Group</th>
</tr>
</thead>
<tbody>
<tr>
<td>Role</td>
<td>Assist in planning and implementing state employer engagement and education strategy tied to in-state marketing campaign.</td>
</tr>
<tr>
<td>Relationship to Grant</td>
<td>MIG work group</td>
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<tr>
<td>Percent of Members with a Disability</td>
<td>17.00%</td>
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<td>Hours Spent Last Quarter (Approximate)</td>
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### Consumer 7

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<thead>
<tr>
<th>Name of Group</th>
<th>Oregon Supported Employment Center for Excellence Advisory Board</th>
</tr>
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<tbody>
<tr>
<td>Role</td>
<td>Provide recommendations and guidance on Center activities.</td>
</tr>
<tr>
<td>Relationship to Grant</td>
<td>Partners and stakeholders</td>
</tr>
<tr>
<td>Percent of Members with a Disability</td>
<td>25.00%</td>
</tr>
<tr>
<td>Hours Spent Last Quarter (Approximate)</td>
<td>20</td>
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### Consumer 8

<table>
<thead>
<tr>
<th>Name of Group</th>
<th>Office of Developmental Disabilities Services (ODDS) Employment First Policy</th>
</tr>
</thead>
<tbody>
<tr>
<td>Role</td>
<td>Provide recommendations and advice on training and roll out of ODDS Employment First Policy</td>
</tr>
<tr>
<td>Relationship to Grant</td>
<td>Partners and stakeholders</td>
</tr>
<tr>
<td>Percent of Members with a Disability</td>
<td>34.00%</td>
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</table>
Hours Spent Last Quarter (Approximate) 150

Research and Evaluation

Research 1

<table>
<thead>
<tr>
<th>Report/Study Name</th>
<th>WIN Study to Determine Impact of WIN and Factors That Differentially Determine the Impact of WIN</th>
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</thead>
<tbody>
<tr>
<td>Portland State University, RRI, will use interviews, file reviews, and state employment records to determine the impact of WIN. This is a stand-alone research project conducted through 12/31/11. This study will look at what is working and will be used to revise the WIN protocols, as needed.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Status</th>
<th>Ongoing</th>
</tr>
</thead>
<tbody>
<tr>
<td>Report Location</td>
<td>Report will be published on OR MIG website in Q1, 2012 -- interview documents submitted as work products</td>
</tr>
<tr>
<td>Brief Summary of Findings</td>
<td>This study will be done on 400 WIN clients enrolled during Q4, 2010 &amp; Q1, 2011. Included in this evaluation are: earnings from wages, length of employment, hours worked, participant concerns regarding work/benefits. The study will also look at how WIN service outcomes differ across 4 comparison groups: WIN I&amp;R only; WIN I&amp;R + OVR; WIN comprehensive only; WIN comprehensive + OVR; phone interviews will be done with 30 clients from each of the 4 groups (120). VR staff will also be interviewed. This project will not just give us numbers, but will look at best practices.</td>
</tr>
</tbody>
</table>

State Plan PAS

<table>
<thead>
<tr>
<th>State Plan PAS for Adults with Disabilities</th>
<th>Yes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Location</td>
<td>Outside, including job site</td>
</tr>
<tr>
<td>Hours Allowed Per Month</td>
<td>Less than 40</td>
</tr>
<tr>
<td>Population Limited To (List)</td>
<td>OHP, GA, OSIPM</td>
</tr>
<tr>
<td>Included Services (List)</td>
<td>Provide assistance in ADLs, contract RN services</td>
</tr>
<tr>
<td>Are PAS Consumer Directed</td>
<td>Yes</td>
</tr>
<tr>
<td>Number Served with Mental Illness</td>
<td>644</td>
</tr>
<tr>
<td>Number Served with Developmental Disabilities</td>
<td>306</td>
</tr>
<tr>
<td>Number Served with Physical Disabilities</td>
<td>1027</td>
</tr>
<tr>
<td>PAS by Waiver(s) for Adults with Disabilities</td>
<td>Yes</td>
</tr>
</tbody>
</table>
### PAS by Waiver

#### PAS Waiver 1

<table>
<thead>
<tr>
<th>Brief Description of State Plan</th>
<th>Support Services (643)</th>
</tr>
</thead>
<tbody>
<tr>
<td>State Plan Number</td>
<td>0375</td>
</tr>
<tr>
<td>Is Waiver Statewide</td>
<td>Yes</td>
</tr>
<tr>
<td>Does Waiver Include Buy-In</td>
<td>Yes</td>
</tr>
<tr>
<td>Is This an Independence Plus Waiver</td>
<td>No</td>
</tr>
<tr>
<td>Location</td>
<td>Outside, including job site</td>
</tr>
<tr>
<td>Hours Allowed Per Month</td>
<td>Unlimited, based on need</td>
</tr>
<tr>
<td>Population limited To (List)</td>
<td>Persons diagnosed with DD who meet ICF/MR LOC</td>
</tr>
<tr>
<td><strong>Included Services (List)</strong></td>
<td>Respite; Supported Employment Services; Environmental Accessibility Adaptations; Non-Medical Transportation; Chore Service; Personal Emergency Response systems; PT/OT; Special Diets; Support Services Brokerages; Emergent Services; Community Inclusion; Community Living; Specialized Medical Equipment.</td>
</tr>
<tr>
<td>Are PAS Consumer Directed</td>
<td>Yes</td>
</tr>
<tr>
<td>Number Served with Mental Illness</td>
<td></td>
</tr>
<tr>
<td>Number Served with Developmental Disabilities</td>
<td>6336</td>
</tr>
<tr>
<td>Number Served with Physical Disabilities</td>
<td></td>
</tr>
</tbody>
</table>

#### PAS Waiver 2

<table>
<thead>
<tr>
<th>Brief Description of State Plan</th>
<th>Comprehensive Waiver (640)</th>
</tr>
</thead>
<tbody>
<tr>
<td>State Plan Number</td>
<td>OR0117.RO4.00</td>
</tr>
<tr>
<td>Is Waiver Statewide</td>
<td>Yes</td>
</tr>
<tr>
<td>Does Waiver Include Buy-In</td>
<td>Yes</td>
</tr>
<tr>
<td>Is This an Independence Plus Waiver</td>
<td>No</td>
</tr>
<tr>
<td>Location</td>
<td>Outside, including job site</td>
</tr>
<tr>
<td>Hours Allowed Per Month</td>
<td>Unlimited, based on need</td>
</tr>
<tr>
<td>Population limited To (List)</td>
<td>Persons diagnosed with DD who meet ICF/MR LOC</td>
</tr>
<tr>
<td><strong>Included Services (List)</strong></td>
<td>Respite; Habilitation (Day, Residential, Prevocational, Supported</td>
</tr>
</tbody>
</table>
### Included Services (List)
- Employment
- Environmental accessibility Adaptations
- Non-Medical Transportation
- Specialized Medical Equipment and Supplies
- Family Training
- In-Home Support Services
- Crisis/Diversion Services
- PT/OT/Speech

### Are PAS Consumer Directed
Yes

### Number Served with Mental Illness

### Number Served with Developmental Disabilities
6773

### Number Served with Physical Disabilities

---

### PAS Waiver 3

<table>
<thead>
<tr>
<th>Brief Description of State Plan</th>
<th>Aged and Physically Disabled Waiver</th>
</tr>
</thead>
<tbody>
<tr>
<td>State Plan Number</td>
<td>0185.90R2</td>
</tr>
<tr>
<td>Is Waiver Statewide</td>
<td>Yes</td>
</tr>
<tr>
<td>Does Waiver Include Buy-In</td>
<td>Yes</td>
</tr>
<tr>
<td>Is This an Independence Plus Waiver Location</td>
<td>In home and medical appointments only</td>
</tr>
<tr>
<td>Hours Allowed Per Month</td>
<td>Unlimited, based on need</td>
</tr>
<tr>
<td>Population limited To (List)</td>
<td>Seniors and people with physical disabilities</td>
</tr>
</tbody>
</table>

### Included Services (List)
- Adult Day Care
- Environmental Accessibility Adaptations
- Transportation
- Adult Residential Care (Foster Care, Assisted Living, Residential Care Facilities)
- Home-Delivered Meals
- Specialized Living Services
- In-Home Services
- Community Transition Services

### Are PAS Consumer Directed
Yes

### Number Served with Mental Illness

### Number Served with Developmental Disabilities

### Number Served with Physical Disabilities
28300

---

### Buy-In

<table>
<thead>
<tr>
<th>Buy-In Status</th>
<th>Adopted the buy-in</th>
</tr>
</thead>
<tbody>
<tr>
<td>Program Name</td>
<td>Employed Persons with Disabilities (EPD)</td>
</tr>
<tr>
<td>Implementation Date</td>
<td>2/1/1999</td>
</tr>
<tr>
<td><strong>State Legislative Authority</strong></td>
<td>N/A</td>
</tr>
<tr>
<td><strong>Federal Authority</strong></td>
<td>Balanced budget act of 1997</td>
</tr>
<tr>
<td><strong>Income Eligibility</strong></td>
<td>Up to 250% FPL</td>
</tr>
<tr>
<td><strong>Income Eligibility (Other)</strong></td>
<td>N/A</td>
</tr>
<tr>
<td><strong>Countable Income for Eligibility</strong></td>
<td>Gross (before taxes)</td>
</tr>
<tr>
<td><strong>Does Countable Income for Eligibility Include Spousal Income</strong></td>
<td>No</td>
</tr>
<tr>
<td><strong>Method for Counting Earned Income</strong></td>
<td>Other (specify below)</td>
</tr>
<tr>
<td><strong>Method for Counting Earned Income (Other)</strong></td>
<td>SSI methodology, IRWEs, BWEs, EIE, Approved acnts</td>
</tr>
<tr>
<td><strong>Method for Counting Unearned Income</strong></td>
<td>Other (specify below)</td>
</tr>
<tr>
<td><strong>Method for Counting Unearned Income (Other)</strong></td>
<td>Excluded for eligibility, counted for liability</td>
</tr>
<tr>
<td><strong>Web Site for Additional Information</strong></td>
<td><a href="http://egov.oregon.gov/DHS/spwpd/empserv.shtml#epd">http://egov.oregon.gov/DHS/spwpd/empserv.shtml#epd</a></td>
</tr>
</tbody>
</table>

**Work Requirement**

**Resource (Asset) for Individual Limit - Enter 2000, or Other Amount**

| | 5000 |

**Resource Limit Includes Spousal Resources**

| | No |

**Additional Savings Accounts are excluded**

| | Yes |

**Additional Savings Accounts are Portable (After Leaving the Buy-In)**

| | No |

**Cost-Sharing Policy**

| | Premium |

**Cost-Sharing Policy (Other)**

| |

**Premium Payments Begin At**

| | Other (specify) |

**Premium Payments Begin At (Other)**

| | Other (specify) |

**Method to Calculate Monthly Premiums, Co-Pays, or Other Cost Sharing**

| | <$681.00: 0; $681.00-$907.99= $50; $908-2,269.99= $100; >$2,270 = $150 |

http://www.dehpg.net/TicketToWork/ReportDetail.aspx 1/23/2012
<table>
<thead>
<tr>
<th>Medicaid Eligibility Review</th>
<th>Other (specify)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Medicaid Eligibility Review (Other)</td>
<td>3-12 mos: stability of employment, income, other</td>
</tr>
<tr>
<td>Enrollees at Beginning of Year</td>
<td>1348</td>
</tr>
<tr>
<td>Enrollees at Beginning of Year MI</td>
<td></td>
</tr>
<tr>
<td>Enrollees at End of Quarter</td>
<td>1498</td>
</tr>
<tr>
<td>Enrollees at End of Quarter MI</td>
<td></td>
</tr>
<tr>
<td>Major Outreach Activities (Up to 3)</td>
<td>WIN Coordinator co-trains w/EPD Mgr. quarterly EPD training for SPD staff; EPD included in all WIN trainings: EPD flyers available for VR clients.</td>
</tr>
</tbody>
</table>

### Technical Assistance Outcomes

#### TA Outcome 1

<table>
<thead>
<tr>
<th>TA Outcomes</th>
<th>Work Incentives Network curriculum will include 1 module on financial literacy.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Strategy</td>
<td>Provide TA and guidance on development and implementation of financial literacy training for WIN curriculum. The plan is to create a Training component for WIN counselors that also functions as a tool for counselors to use with WIN consumers.</td>
</tr>
<tr>
<td>Provider</td>
<td>NCHSD</td>
</tr>
<tr>
<td>Planned Completion Date</td>
<td>12/31/2011</td>
</tr>
<tr>
<td>Actual Completion Date</td>
<td></td>
</tr>
<tr>
<td>Accomplishments</td>
<td>Met with IDA program Director for CASA to discuss plan for development of financial literacy knowledge within WIN. We will partner with CASA in strategic planning and possibly in implementation of our plan.</td>
</tr>
<tr>
<td>Problems</td>
<td>Knowledge about what is available throughout Oregon is needed and we need to step back and collect that data. We lacked a partner in this effort.</td>
</tr>
<tr>
<td>Status</td>
<td>On schedule</td>
</tr>
</tbody>
</table>

#### TA Outcome 2

<table>
<thead>
<tr>
<th>TA Outcomes</th>
<th>Provide technical assistance to MIG staff who coordinate Work Incentives Network (WIN) program</th>
</tr>
</thead>
<tbody>
<tr>
<td>Strategy</td>
<td>Provide work incentives and infrastructure assistance, particularly in development of policies and procedures and revision of quality assurance/quality enhancement plan.</td>
</tr>
<tr>
<td>Provider</td>
<td>NCHSD</td>
</tr>
<tr>
<td>Planned Completion Date</td>
<td>12/31/2011</td>
</tr>
</tbody>
</table>
**Actual Completion Date**

Benequal is now part of WIN protocol, one assurance of the quality of WIN services. Our TA provider has worked with WIN to encourage cross-agency funding post MIG and the DHS Administrator hosted a discussion with AMH, SPD, and other administrators; this is the first of a series of promised discussions. Our TA provider participated in a meeting (10/21/2011) between SSA staff, the CEP/MIG Director, and WIN staff where funding of benefits planning was discussed. A second meeting, with Dan O'Brien attending is planned as soon as schedules allow.

**Problems**

In 2011, WIN had to establish a waiting list and have worked for a couple of months to eliminate the wait. WIN continues to get referrals from staff who think they are sending their client to a job developer. Two WICs left their positions and have been replaced.

**Status**

On schedule

---

**TA Outcome 3**

**TA Outcomes**

Provide TA as requested by Employed Persons with Disabilities (EPD), Oregon’s Medicaid Buy-In program) workgroup/MIG staff on restructuring of program.

**Strategy**

Provide feedback and TA based on information from EPD workgroup and knowledge of other states’ Buy-In programs.

**Provider**

NCHSD, CWD

**Planned Completion Date**

12/31/2011

**Actual Completion Date**

TA was provided by a former CMS staff person, who met with the EPD Committee (HDA staff are ongoing members of that committee). That TA provider then met with a cross agency Medicaid study team about EPD and other issues faced by Oregon during ACA. The committee has been in touch by email since that meeting and plan to have a phone conference call, next quarter, to strategize next moves.

**Problems**

The Medicaid Lead in SPD has announced her retirement, delaying our proposed meeting. There are so many Medicaid decisions and discussions that it is difficult to schedule another.

**Status**

Behind schedule

---

**TA Outcome 4**

**TA Outcomes**

Provide TA in identifying alternate sources of funding for sustainability including assistance on specific foundation and federal grant applications.

**Strategy**

Provide technical support/review of grant applications; provide overview/description of implementation research to CEP staff; technical support & facilitation for using the drivers & assist with creation/utilization of an implementation blueprint for sustainability of initiatives.

**Provider**

NCHSD
### Planned Completion Date
12/31/2011

### Actual Completion Date

### Accomplishments
EF, with OVRS, applied for the Transition Grant that was due in September. This grant would enable EF to fund training and TA throughout the state, concentrating on transitioning students, a high priority group. We have studied three RFPs and found them to not be a close enough match to our most immediate need, WIN funding.

### Problems
We have studied three RFPs and found them to not be a close enough match to our most immediate need, WIN funding. EF did not receive the transition grant they applied for in September.

### Status
On schedule

### TA Outcome 5

#### TA Outcomes
Facilitate national campaign activities, including corporate and federal agency sponsorship; and assist with state specific planning activities as requested.

Facilitate planning/implementation activities w/ MIG state partners including annual conference; act as lead on obtaining corporate/federal funding; develop customized process/tools to identify gaps & strengths in state & local systems; assist w/ product development & stakeholder support.

#### Provider
NCHSD

#### Planned Completion Date
12/31/2011

#### Actual Completion Date

#### Accomplishments
NCHSD facilitated development of a fulfillment plan to coordinate with Oregon's million dollar TBTL media campaign. This plan will, on the short term provide a means to quickly reply to employers and job seekers and to also provide longer term follow up. A data base will be developed for each group. Long term plans are to use databases and followup as an engagement tool with employers and a recruitment tool for job seekers.

#### Problems
Issues around use of the job ready listing in ORCA must be resolved in order to have a centralized immediate job ready pool. OVRS outreach staff are working with Branch Managers to encourage VR counselors to use the job ready listing.

#### Status
On schedule

### TA Outcome 6

#### TA Outcomes
Assist with research and evaluation planning; Support cross-state sharing and comparisons.

#### Strategy
Continue to provide suggestions for research and projects based on monthly TA calls with Oregon. Provide information on opportunities to share research with other states; provide information on opportunities to combine research efforts with other states.

#### Provider
NCHSD

#### Planned Completion Date
12/31/2011
<table>
<thead>
<tr>
<th>Actual Completion Date</th>
<th>9/30/2011</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Accomplishments</strong></td>
<td>NCHSD continues to facilitate cross-state sharing as the opportunity arises, but their efforts with Oregon have become more targeted to specific strategic planning and goal attainment for the CEP/MIG projects. The CEP/MIG will continue to reach out to other MIG projects, particularly benefits planning.</td>
</tr>
<tr>
<td><strong>Problems</strong></td>
<td>Now that the MIG is ending, emphasis of our TA is shifting to sustaining projects.</td>
</tr>
<tr>
<td><strong>Status</strong></td>
<td>On schedule</td>
</tr>
</tbody>
</table>

**TA Outcome 7**

| **TA Outcomes** | MIG staff and partners assure that employment is considered and discussed during decisions made by Medicaid staff and Medicaid funded programs; Affordable Care Act Implementation; and Oregon’s healthcare restructure (with creation of the Oregon Health Authority). |
| **Strategy**     | The Governor’s Employment Initiative |
| **Provider**     | NCHD, CWD |
| **Planned Completion Date** | 12/31/2011 |
| **Actual Completion Date** |  |

**Accomplishments**

NCHD is providing TA in areas of recruitment and rapid response to our TBTL statewide campaign, as a means of recruitment and follow up of target groups in the Initiative. The DHS administrator has developed a series of meetings about the Governor’s Employment Initiative and has made presentations about the Initiative at the Governor’s Workforce Board.

**Problems**

To some extent, this project must wait for the staffing and final workgroup development before real progress can occur.

**Status**

On schedule

**Outcome Data**

| **Unduplicated Count of individuals Supported by MIG Activities (If Available)** | 4842 |
| **Percentage Increase From the Prior Year in the Number of Title II Beneficiaries Who Returned to Work (Annual Report Only)** | -17.02% |
| **Percentage Increase From the Prior Year in the Number of Title XVI Beneficiaries Who Returned to Work (Annual Report Only)** | -2.73% |
### Resource Utilization

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Grant Funds Expended this Quarter</td>
<td>$201,312.93</td>
</tr>
<tr>
<td>Carry-Over Funds Actual (Annual Report Only)</td>
<td>$0.00</td>
</tr>
<tr>
<td>PMS expenditures end of period</td>
<td></td>
</tr>
<tr>
<td>PMS expenditures end date</td>
<td></td>
</tr>
<tr>
<td>Award Amount</td>
<td></td>
</tr>
</tbody>
</table>