Employment First

Quality Assurance/ Quality Improvement Update

2016
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Executive Summary

The purpose of this report is to present an update on implementation of the quality assurance and quality improvement strategies identified in the Employment First Quality Assurance/Quality Improvement Plan (QA Plan) first issued in July 2014.

These strategies are organized under the focal areas of Quality of Planning, Quality of Providers, Quality of Services, Quality of Training, Quality of Data, and Quality of Life. An update on every strategy is given in this report.

Many strategies involve measures developed by a cross-agency working team that were reported in 2015 for the first time. The results for State Fiscal Year 2016 include:

- Vocational Rehabilitation (VR) maintained last year’s results in key time frames, despite significant increase in individuals accessing VR. For example, VR moved 91% of ODDS individuals from application to eligibility within 60 days (last year: 90%), and did so with 1775 individuals found eligible, a 69% increase from last year.
- 716 individuals completed Discovery, a 203% increase from last year; and
- Of individuals that completed Discovery, 498, or 70%, had an open case in VR at some point in state fiscal year 2016, a 225% increase from the 153 in VR last year.

This report includes Post School Outcomes data from the Oregon Department of Education. These results for 2014 Office of Developmental Disabilities Services (ODDS) school leavers include:

- Of respondents that report working, 83% worked in non-sheltered settings; and
- Of respondents that report working, 67% made at least minimum wage.

This report also includes results from the Employment First Report. That report has established metrics, which show strong growth in VR outcomes for ODDS individuals, including:

- An annual increase of 29% in applications to VR;
- An annual increase of 39% for individuals entering an Individualized Plan for Employment; and
- An annual increase of 29% for individuals successfully closing with competitive integrated employment.
This QA Update shows a great deal of collaborative effort by multiple state agencies to move Employment First efforts forward. It shows that VR services and ODDS employment services are being accessed by much greater numbers, and that outcomes are improving for those seeking employment services and competitive integrated jobs.
Introduction

Policy and procedure changes at the state and federal level continue to make Employment First in Oregon a rapidly evolving landscape. These changes include new Workforce Innovation and Opportunity Act (WIOA) requirements for Vocational Rehabilitation (VR), the Oregon Department of Education (ODE), and other partners, as well as a new settlement agreement reached in the Lane v. Brown case. These changes also include new regulatory requirements for Home and Community Based Services rules (HCBS) administered through the Office of Developmental Disabilities Services (ODDS); as well as new state policies, such as no new entries to sheltered workshops as of July 1, 2015. While VR, ODDS, and ODE address and implement these large changes, they continue to work together towards the goal of Employment First for people with intellectual and developmental disabilities in Oregon. Quality assurance and quality improvement play an important role in ensuring the success and sustainability of these efforts.

Purpose

The purpose of this report is to present an update on implementation of the quality assurance and quality improvement strategies identified in the Employment First Quality Assurance/Quality Improvement Plan (QA Plan) issued in July 2014. This report is also intended to present the collaborative and independent work taking place across agencies to ensure the success of Oregon’s Employment First initiative.

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1 The Workforce Innovation and Opportunity Act (WIOA) makes important changes to the Rehabilitation Act of 1973 and other federal laws. WIOA is designed to help job seekers access employment, education, training, and support services to succeed in the labor market. WIOA places increased emphasis on serving students and youth with disabilities, with the goal of better preparing them for competitive integrated employment.

2 The Lane v. Brown Settlement is available at [www.iworkwesucceed.org](http://www.iworkwesucceed.org) under ‘Documents and Publications.’

3 HCBS service settings must be “integrated in and [support] full access of individuals receiving Medicaid HCBS to the greater community, including opportunities to seek employment and work in competitive integrated settings.” 42 CFR 441.301(c)(4)(i).

4 In order to further Oregon’s Employment First policy, effective July 1, 2015, ODDS will no longer fund Sheltered Work or services in a Sheltered Workshop setting, for individuals who are newly eligible for services, or individuals already using services but not in a Sheltered Workshop setting. See the Governor’s Executive Order 15-01 and Oregon Administrative Rule 407-025-0020(2).
Oregon is committed to and is engaged in developing a robust QA/QI system that reflects how systems and programs are performing together to meet goals and objectives, and that informs policy and strategic planning going forward. The QA Plan will change and evolve over time as implementation efforts continue.

**Methodology**

This Update continues to report the measures first reported in the 2015 QA Update, and continues to do so by State Fiscal Year (SFY). The 2016 SFY ran from July 1, 2015 through June 30, 2016, and that is the time frame reported on in this Update.

There have been major changes in the data systems at ODDS that will improve the accuracy of the data reported. In September 2014, ODDS employment services data moved to the revised eXPRS billing system, and reflects new service definitions. This will allow for more accurate tracking of specific services provided by ODDS.

Furthermore, the Employment Outcomes System (EOS), which provides provider-level data, was further revised this year to make it more user-friendly, not only for those entering the data but also for those looking up information on providers. The revised EOS was launched in March 2016.

For purposes of showing performance of the system over a longer period of time, this report also references the annual Employment First Data Report, which includes established metrics.

**Employment First Quality Assurance/Quality Improvement Focal Areas**

Employment First uses the following structural framework to highlight the quality assurance and quality improvement focal areas for this initiative: Quality of **Planning**, Quality of **Providers**, Quality of **Services**, Quality of **Training**, Quality of **Data**, and Quality of **Life**. Consistent with national trends, Oregon’s system focuses on quality outcomes with the ultimate goal of improving the employment outcomes for individuals with intellectual and developmental disabilities.

Using the above structural framework, this update will detail the current status of the Quality Assurance Strategies and Quality Improvement Initiatives originally published in the 2014 Quality Assurance Plan.

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Quality of Planning

If we are successful in achieving quality in this area, what does that success look like?

*Service planning documents across ODDS, VR and ODE reflect the needs and desires of individual; planning includes discussion and documentation around employment; plans across agencies reflect the same outcome and are coordinated and complementary. Success is more than just planning for and delivering the needed services. Quality of Planning is ultimately demonstrated by the outcomes individuals achieve.*

Key questions that will guide our work:

- Do plans, and does the planning process, meaningfully address employment services and reflect the expectation of integrated employment?
- Is planning and the documentation generated as consistent as possible across agencies to minimize the time the individual has to spend “starting over” or duplicating information or activities?
- What additional documentation would be helpful to ensure seamless transition between programs?
- What monitoring system(s) will we rely on for oversight of planning documents?
- Do we provide our services in as timely a manner as possible across all service segments?

A. Quality Assurance Activities

Goal 1: Continue to monitor and evaluate employment service planning across all agencies to assure informed choice and compliance with integrated employment service expectations

1. Goal 1, Strategy 1: Timeliness of Service Planning

**Strategy:** Continue to monitor and evaluate timeliness of service planning across all programs (ODDS, VR, ODE).

**Update:** Key time frames to monitor, established in the 2015 Update, are:
VR:
- Application to eligibility;
- Eligibility to plan;
- Application to employment outcome.

ODDS:
- Length of time in employment path community and employment path facility;
- Length of time employed after transfer to ODDS employment supports.

The Employment First QA Analyst assessed the availability of data for the 2016 QA update with the Employment First and VR data analysts. For this report, data was available for the VR time frames.  

Why are these identified time frames important measures to focus on for VR? Failing to provide services in a timely manner can be a barrier to ODDS clients accessing VR services, and can ultimately affect the quality of the individual outcomes achieved and the individual’s satisfaction with those services. For instance, the 2013 Oregon VR and State Rehabilitation Council Comprehensive Statewide Needs Assessment survey showed that both clients and VR staff believed that timeliness of service is a high priority in improving employment outcomes.  

Application to Eligibility

Results: Federal regulations require VR to complete the eligibility determination within 60 days of application. Exceptions are made for exceptional and unforeseen circumstances, extended evaluations, and trial work periods. Of the 1,775 individuals found eligible in SFY 2016, 1601 (90%) were given an eligibility determination within the required time frame. This percentage does not include individuals who were

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6 See Goal 2, Strategy 5 on page 20 of this Update for more information on availability of ODDS results.
8 All VR data published in this report represents ODDS clients at VR, not the general VR population.
9 34 CFR 361.41 (b)(1).
granted extensions under the above exceptions. While this is almost exactly the same as last year’s percentage (91%), the total number found eligible increased by 722 individuals. This shows VR’s ability to maintain a 90% success rate for the 60 day requirement despite much higher numbers moving through VR. The total average days from application to eligibility were 45, an increase of seven days from last year.

2. VR Application to Eligibility (Graph 1)

![Graph 1](image)

**Eligibility to Plan**

**Results:** New WIOA regulations require VR to complete the Individualized Plan for Employment within 90 days of eligibility, unless VR and the individual agree to an extension.\(^\text{10}\) This requirement went into effect on January 1, 2015 for any applications submitted after that date (not all eligible cases awaiting plan after that date). Therefore, data pulled by plan date includes individuals not subject to the 90 day requirement.

\(^\text{10}\) “Workforce Innovation and Opportunity Act” (PL 113-128, July 22, 2014), Section 413(b)(4)(B). Final regulation: 34 CFR 361.45(e), not yet updated in the online Federal Register.
However, that is the group examined here in order to include everyone that entered plan in SFY 2016.

3. **VR Eligibility to Plan (Graph 2)**

![Graph 2](image_url)

1,482 ODDS individuals entered a VR Individualized Plan for Employment in SFY 2016. Of these individuals, 934 (63%) entered plan within 90 days of their eligibility determination, and 1,151 (78%) entered plan within 180 days of eligibility. The average was 123 days. **Graph 2** shows the eligibility to plan results in 100 day increments.

This particular measure’s numbers are not directly comparable to last year’s, because last year examined time to plan for individuals who closed in SFY 2015. This year looks at every ODDS individual who entered plan in 2016, regardless of whether they closed. This methodology better reflects what occurred in SFY 2016 for time to plan
because an individual can enter and stay in plan multiple years before they close, meaning the results under the prior methodology represented multiple years of eligibility to plan time frames. The current methodology is everyone who entered plan in SFY 2016, making the time frame results more current.

Application to Rehabilitation

Rehabilitation at VR means a successful closure: a successful employment outcome that is maintained for at least 90 days (for “an appropriate period of time, but not less than 90 days, necessary to ensure the stability of the employment outcome…” 34 CFR 361.56.) For the rest of this report, rehabilitation will be called “employment outcome.” There is no federal requirement regarding time to employment outcome.

Results: Of 567 ODDS individuals closed with an employment outcome in state fiscal year 2016, 169 (30%) reached that outcome within 300 days of application, and 380 (67%) within 600 days. The average was 533 days (17.8 months). Compared to last year, the percentages closing successfully within 300 and 600 days are almost the same (last year was 33 and 69%, respectfully). However, the total number closing successfully with employment (567) is 135 more than last year, a 31% increase. Similarly to the application to eligibility timeframe, this shows that VR has successfully maintained timeframes with a significant increase in clients.

The activities that occur during the time period from application to employment outcome include eligibility determination, development and implementation of the IPE, achieving the employment outcome, and maintaining the outcome for at least 90 days. This means the results include at least 90 days on the job. Services that occur before closure may include job development and placement, job coaching, supported employment, a school or training program, transition services, and other possibilities based on the needs and goals of the individual.12

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11 These plans must include the specific desired employment outcome and the services needed to achieve this outcome (34 CFR 361.46(a)).
12 34 CFR 361.48.
4. **VR Application to Employment Outcome (Graph 3)**

![Graph 3](image)

*Number of Days from VR Application to Employment Outcome* for ODDS Individuals Closed with Job in State Fiscal Year 2016

- **67% within 600 days**
- **30% within 300 days**

It is also important to note that “the time elapsed between application and closure is not necessarily a measure of individual success in employment outcomes. Applicants who are students may delay looking for employment until after completing secondary or postsecondary education. Moreover, some applicants may receive services beyond the 90th day of employment, extending the date of case closure in comparison to job entry.”

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5. **Goal 1, Strategy 2: Enhance Employment-Related Aspects of ODDS QA Field Reviews**

**Strategy:** Work with ODDS QA Staff to enhance the monitoring of the employment-related aspects of the current ODDS QA Field Reviews.

**Update:** ODDS QA staff continue to use the employment tab on the Developmental Disabilities Quality Assurance Field Review tool. This tab asks questions related to the employment goal and Career Development Plan (CDP) of the individual file being reviewed. The questions are designed to determine if conversations are occurring regarding employment, if CDPs are being completed with goals related to obtaining, maintaining, and/or advancing in individual integrated employment, and if the services necessary to meet those goals are being provided. The questions on this tab were updated this year to make them more user-friendly, and to ensure the most useful information pertinent to Employment Services planning at the case management level is being captured. Results from this tab are reviewed internally, in order to guide training and technical assistance efforts and policy and procedure planning.

6. **Goal 1, Strategy 3: VR Program Effectiveness**

**Strategy:** Work with VR QA Staff to develop data to support continued analysis and evaluation of effectiveness of program activities.

**Update:** The cross agency working team brainstormed VR process steps and outcomes to monitor for the 2015 report, and these same measures are reported again here. They are:

- Job development performance/vendor level outcomes: number of placements, and wages and hours of those placements;
- Wages;
- Hours worked per week;

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14 ODDS QA reviews every brokerage and CDDP on a two year cycle using the field review tool, with approximately 400 files reviewed per year.
• Of state fiscal year 2016 closures, number that went to plan. Of those in plan, number that closed VR with stable employment (successful closure requires at least 90 days on the job).₁⁵

Results:

Provider level outcomes: Due to new Lane v. Brown settlement reporting requirements, the VR vendor level data is now reported in the semi-annual Employment First report. In lieu of duplicating pages of data here, please see that report for VR vendor level results, found at www.iworkwesucceed.org under Data Reports.

Wages: VR successfully closed 567 ODDS individuals in state fiscal year 2016. The wages for these individuals at VR closure ranged from $9.25 to $17.92 per hour, with an average of $9.66 per hour. This is an 11 cent increase from last year’s average.

Hours Worked: The average hours worked at VR job placements for all ODDS individuals in state fiscal year 2016 were 16.5 hours per week. There were 380 job placements (67%) over 10 hours per week, and 121 (21%) over 20 hours per week. These percentages and the average are very close to last year’s. The implementation of the 20 hour policy at VR and ODDS¹⁶ may affect the hours per week that individuals attain over the next year. This policy states that the recommended standard for planning and implementing supported employment services will be the opportunity to work at least 20 hours per week, recognizing that based on individual choice, preferences and circumstances, some people may choose to work at that level while others may not.

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₁⁵ VR’s methodology for a rehabilitation rate is the number rehabilitated divided by those that closed AND made it to plan. In order to align with this Federal VR practice, this report now uses this methodology (in contrast to number rehabilitated divided by total closures, as used in the 2015 QA report, and as used in Employment First data reports).

¹⁶ The 20 hour policy and supporting documents, including FAQ’s, can be seen at www.iworkwesucceed.org under Documents and Publications.
Plan and closure: Of the 1,267 ODDS individuals that closed in VR in state fiscal year 2016, 890 (70.2%) entered an IPE at some point before they closed (compared to 62% last state fiscal year). There were 567 closed successfully with an employment outcome, or 64% of those that entered plan (compared to 63% last state fiscal year\textsuperscript{17}). This increase and maintenance of rates is occurring with a higher caseload at VR (numbers applying, found eligible, entering plan, and closing with employment have all increased for ODDS individuals at VR. See this report as well as the Employment First Semi-Annual Report, available at www.iworkwesucceed.org under Data Reports.)

\textsuperscript{17} This percentage was not reported in the 2015 QA Update. It is also different from the percentage reported in the Employment First Report, see footnote 15 for details.
8. Goal 1, Strategy 4: ODE Data Related to Employment Service Planning

**Strategy:** Monitor and evaluate data available from ODE related to effectiveness of employment service planning.

**Update:** ODE collects data on employment outcomes and goals for students. The Post School Outcomes Survey (PSO) is a phone survey given to students one year after their graduation, and the Exit Survey is given upon graduation. Both ask questions related to a student’s employment and plans for employment. The *Lane v. Brown* settlement agreement requires new data points for the PSO, as well as reporting. This new PSO was conducted in 2016, with reporting of the new data available in 2017. In the meantime, the PSO elements reported in the 2015 QA Update will be reported again here. In the future, however, ODE will take over PSO reporting.

**Post School Outcomes Data**

This PSO data reflects students who left school between July 1, 2013 and June 30, 2014 that did not return for special education services in 2014-15 in any state school district. These students are called “school leavers.” School districts conducted PSO interviews between June 1 and September 30, 2015. The numbers report what the student did in the first 12 months after leaving school. That means these interviews do not include Summer 2015 activity, only what was done by June 2015. Of the 2,195 PSO interviews conducted in 2015, 341 were matched as individuals in the ODDS system.\(^{18}\) All percentages and data reported below are on these ODDS individuals. All definitions/descriptors are those used by ODE and the PSO.

**Results:** The Post School Outcomes Survey counts any of the following as work: In a company, business or service with people with and without disabilities, in the military, in supported employment, self-employed, family business, sheltered employment, and employed while in jail or prison. In this case, 17.4% of ODDS respondents that worked since leaving school reported that they were working in sheltered employment (7.3% of total ODDS respondents).

\(^{18}\) Due to differences in ODE and ODDS classification of individuals, it is not possible to determine the statistical significance of this sample at this time.
1. ODE Job Location (Table 1)

<table>
<thead>
<tr>
<th>Job Location</th>
<th>Of ODDS Respondents that Worked, % at Each Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Company, business, or service with people with and without disabilities</td>
<td>57.6%</td>
</tr>
<tr>
<td>Self-employed</td>
<td>2.8%</td>
</tr>
<tr>
<td>In Supported Employment (paid work with services and wage support to the employer)</td>
<td>11.8%</td>
</tr>
<tr>
<td>Family’s business</td>
<td>2.8%</td>
</tr>
<tr>
<td>In sheltered employment (where most workers have disabilities)</td>
<td>17.4%</td>
</tr>
<tr>
<td>Other</td>
<td>4.2%</td>
</tr>
<tr>
<td>Don’t Know/ No answer</td>
<td>2.8%</td>
</tr>
</tbody>
</table>

Table 1

42% of ODDS respondents reported working at any time in the first 12 months after leaving school (see graphs on next page); this is the same percentage as last year’s PSO results. 78% worked at least 3 months, also the same as last year. 53% worked at least 20 hours a week, a 5% increase from last year. This includes work at any of the job locations listed in Table 1 above, and did not need to be three consecutive months. 67% of those that worked earned at least minimum wage, a 2.5% increase from last year.

Because the PSO is meant to capture outcomes up through 12 months after leaving school, the results for a particular class of leavers is reported two years after their graduation year (for example, 2014 school leavers are contacted between June and September of 2015, with data available for a July report in 2016.) Therefore, the 2014 and 2015 PSO outcomes may include those that exited school and entered sheltered workshops before the July 1, 2015 deadline barring new entries to workshops.¹⁹ Major

¹⁹ After July 1, 2015, sheltered workshops in Oregon can no longer accept new clients. See Oregon Administrative Rule 407-025-0020(2); See also ODDS Policy Transmittals 15-006, 15-007, and 15-022 found here: [http://www.dhs.state.or.us/policy/spd/transmit/pt2015.htm](http://www.dhs.state.or.us/policy/spd/transmit/pt2015.htm)
changes may not be apparent until the 2017 PSO outcomes survey (conducted for 2016 leavers, with results available in 2018). That group of leavers will not have the option to enter sheltered workshops, and the PSO will be attempted for 100 percent of leavers at that time (see Quality of Data section, Quality Improvement Initiative 1).

2. ODE Graphs (Graph 5-8)

Graphs 5-8
Goal 2: Develop and implement TARGETED MONITORING strategies to help evaluate the quality of employment service planning across all agencies

3. Goal 2, Strategies 1 and 2: Checklist/Procedures for Qualitative ODDS File Review

**Strategies:** Work with ODDS QA Staff to develop checklist and procedures for in-depth qualitative file review, and 2. Pursue coursework or additional training on qualitative research techniques for QA Staff who will be conducting qualitative field reviews.

**Update:** As of 2016, ODDS Regional Employment Staff accompany the ODDS QA team on their reviews of CDDPs and Brokerages. These regional staff complete qualitative monitoring during these onsite visits to CDDPs and Brokerages, as well as during visits they make to Provider Organizations. This includes review of the CDP (see strategy below), review of Decisions Not to Pursue Employment (DNEs), and review of the new Individual Support Plan (ISP) attachment including documentation of 20 hour policy requirements. There is then follow up training and technical assistance with CDDPs, Brokerages, and Provider Organizations.

4. Goal 2, Strategy 3: Monitor and Evaluate Effectiveness of New Career Development Plan

**Strategy:** Develop plan for monitoring and evaluating effectiveness of ODDS’s new Career Development Plan (CDP) form and planning process.

**Update:** As part of their on-site reviews (see prior strategy) Regional Employment Specialists conduct reviews of CDPs. This review includes checking for a measurable integrated employment outcome, confirming the employment service is appropriate for the outcome, and making sure the action plan demonstrates a path to integrated employment, among other questions. Additionally, ODDS is also in process of

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20 The CDP is now part of the new One ISP (meaning one uniform format for an Individual Support Plan), implemented January - June 2015. Every new or renewed ISP is required to have a CDP, unless the individual makes an informed decision not to pursue employment. In those situations the individual submits a Decision Not to Explore Employment (DNE). A DNE explicitly states that an individual does not wish to seek employment, and the reason for this decision. The One ISP and CDP are currently paper documents only, not electronic documents.
completing a review of all CDPs completed for sheltered workers, which includes both qualitative and quantitative measures. The goal is to have this review complete before the end of 2016.

5. **Goal 2, Strategy 4: Analyze Effectiveness of Specially-Trained VR Counselors**

**Strategy:** Work with VR to analyze effectiveness of VR strategy to assign ODDS consumers to specially-trained VR Counselors (DD Specialists).

**Update:** Data and information specific to the DD specialists is pulled and analyzed internally by a cross agency working team.

6. **Goal 2, Strategy 5: Monitor ODDS Time-Limited Services**

**Strategy:** Develop and implement strategy for monitoring ODDS time-limited services and reviewing time in status.

**Update:** Due to the changes in ODDS data systems, the amount of time an individual receives employment path community or facility services can now be tracked. This data can only be tracked as of the time of the data system transition (September 2014), making the data not illustrative at this time of how long individuals are spending in these services.

**B. Quality Improvement Initiatives**

1. **ODE Summary of Performance (content)**

**Strategy:** Work with ODE to evaluate feasibility of enhancing the requirements for the Summary of Performance to be a more robust “school leaving” document (consider modeling after National Transition Documentation Summit).

**Update:** A Summary of Performance is a summary of the student’s academic achievement and functional performance, including recommendations on how to assist the student in meeting their postsecondary goals. Changes to the summary of performance have been put on hold as ODE focuses on changes that will improve the

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21 These changes are described in this Update under ‘Methodology’.
22 OAR 581-015-2105(5).
Post School Outcomes Survey collection and reporting. However, ODE continues to train on the summary of performance as a useful document to assist in the transition process. See Goal 1, Strategies 1,2, and 3 under Quality of Training for data on the Better Employment Success Together (BEST) training, a training administered by ODE, ODDS and VR on the transition process and employment services, which included discussion on the summary of performance.

2. **ODE Summary of Performance (utilization)**

**Strategy:** Work with ODE to evaluate feasibility of requiring that a Summary of Performance be provided to all individuals in the Target Population under Executive Order No. 15-01 (ODDS individuals aged 16-24).

**Update:** The Summary of Performance (SOP) is required under the reauthorization of the Individuals with Disabilities Education Act of 2004 (IDEA 2004). The SOP must be given to students that graduate with a regular diploma or age out. This means that students that stay in the education system until age 21 automatically receive a Summary of Performance upon exit, which includes individuals in the target population.

Additionally, ODE guidance is that all students that leave school with a modified diploma, an extended diploma, or an alternative certificate should also receive an SOP, which includes individuals in the target population. The SOP is completed during the final year of a student’s high school education, and the timing of completion of the SOP may vary depending on the student’s post-secondary goals.

**Quality of Providers**

If we are successful in achieving quality in this area, what does that success look like?

Providers embrace the belief that individuals with I/DD can work in integrated settings; there is consistency in qualifications and credentialing by position across programs, and core competencies are in

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23 Summary of Performance requirements can be seen on page 42 of the Oregon Transition Resource Handbook: http://www.ode.state.or.us/gradelevel/hs/transition/transitionhandbook.pdf
place. There is support for transformation of providers who wish to transition from facility-based services to community-based services. Benchmark performance standards for providers (i.e., outcomes relating to wages, hours, length of time in job) are established and used to evaluate performance and quality of outcomes achieved for individuals.

Key questions that will guide our work:

- What competencies will we require of individuals or organizations providing employment services?
- What performance-based measurements can we put in place to measure provider productivity and quality?
- What strategies are we going to use to monitor providers?
- How can we facilitate the sharing of best practices among providers?

C. Quality Assurance Activities

GOAL 1: Monitor implementation of core competencies for employment service providers

1. Goal 1, Strategy 1: Core Competency-Based Qualifications for ODDS Providers

Strategy: Work with ODDS and DHS Facility Licensing (formally OLRO) to support implementation of core competency-based qualifications for ODDS independent and agency employment service providers.

Update: All new employment professionals entering the supported employment workforce in Oregon on or after January 1, 2015 must complete core competency training within 90 days of providing the employment service. Employment professionals include all employees of provider organizations, personal support workers, and independent contractors who provide any employment service. Furthermore, effective January 1, 2015, all employment professionals regardless of hire date must demonstrate the core competencies within one year of employment, and complete a competency based training annually thereafter. ODDS has implemented a training checklist used to verify the completion of Core Competency trainings during
DHS facility licensing onsite reviews. ODDS is also in the process of completing online core competency modules that would demonstrate basic core competency.

**GOAL 2: Develop and implement targeted monitoring strategies to help evaluate the quality of employment services providers and delivery of employment services**

2. **Goal 2, Strategy 1: Certification and Field Review Process**

**Strategy:** Work with DHS Facility Licensing Staff to revise licensing and certification regulatory requirements and field review process, as needed, to reflect integrated employment expectations.

**Update:** Beginning July 1, 2016, all new provider agencies must be certified under OAR 411-323 and endorsed under the employment rule (OAR 411-345) prior to providing an employment service. Those who were already provider organizations will have to renew under this rule when their current certification expires. This requires an understanding of the current Supported Employment rules.

Additionally, ODDS now requires that at least one person at every agency (or Independent Contractor) must have a credential in order to verify training and understanding of employment core competencies.

ODDS verifies these requirements upon enrollment, and DHS facility licensing verifies during reviews.

**GOAL 3: Develop and implement performance-based tools to evaluate employment service providers, incorporating customer feedback where possible**

3. **Goal 3, Strategy 1: VR Vendor Outcomes**

**Strategy:** Report on VR Vendor Results, specific to outcomes for ODDS individuals.

**Update:** Due to new Lane v. Brown settlement reporting requirements, the VR vendor level data is now reported in the semi-annual Employment First report. In lieu of duplicating pages of data here, please see that report for VR vendor level results, found at [www.iworkwesucceed.org](http://www.iworkwesucceed.org) under Data Reports.

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24 Checklist found here: [https://www.oregon.gov/DHS/SENIORS-DISABILITIES/DD/Pages/Employment-Service-Provider-Resources.aspx](https://www.oregon.gov/DHS/SENIORS-DISABILITIES/DD/Pages/Employment-Service-Provider-Resources.aspx)
4. **Goal 3, Strategy 2: Performance-Based Standards for ODDS Employment Service Providers**

**Strategy:** Organize and make available to the public the outcomes for ODDS employment service providers.

**Update:** ODDS provider level data is now available at [https://spdweb.hr.state.or.us/EOS/Data](https://spdweb.hr.state.or.us/EOS/Data). Under the ‘Provider’ dropdown, select any individual provider you would like to see information for. Data included is number of individuals in each type of employment service, average hours worked per week, and average wage.


**Strategy:** Monitor performance of school leavers by district through Post-School Outcomes (PSO) data.

**Update:** The PSO data on school district report cards is not only ODDS individuals; it represents all special education students. ODE and DHS are updating the ODE/DHS data sharing agreement to include additional data points from the Post-School Outcomes (PSO) survey, data points from the Exit Survey, and school district identification of ODDS individuals. This will allow for internal review of school district performance. For PSO outcomes included in this report, see Goal 1, Strategy 4 under Quality of Planning.

**D. Quality Improvement Initiatives**

1. **Provider Quality Assurance Programs**

**Strategies:** 1. Work within DHS to evaluate existing requirements for provider quality assurance programs to determine whether changes are needed to standards, monitoring, reporting, and other requirements to support implementation of the Employment First Initiative, and 2. Meet with providers, brokerages, and CDDPs in order to gather information on their QA systems and data collection methods.

**Update:** 1. Cross agency staff determined that changes are not needed at this time to existing requirements for provider quality assurance programs. 2. The Employment
First QA and Data Analysts have begun meeting with brokerages, CDDPs, and providers regarding their QA systems and data collection methods, and will continue this work in the coming fiscal year.

Quality of Services

If we are successful in achieving quality in this area, what does that success look like?

*Program outcomes are achieved; more individuals are working in integrated jobs in their communities. Focus is on delivery of employment services in the most integrated setting possible, not enrollment and involvement in an employment program. Funding paid to providers of services is tied to service quality and outcomes.*

Key questions that will guide our work:

- How will we evaluate whether we are providing the right services?
- How will we evaluate the quality of services provided?
- How do we assess whether we are incentivizing the provision of integrated employment services?
- Are we providing services in as timely a manner as possible?

E. Quality Assurance Activities

**GOAL 1: Continue to monitor and evaluate outcomes across all agencies and in all service settings to assure compliance with integrated employment service expectations**

1. **Goal 1, Strategy 1: Established Program Outcomes and Targets**

**Strategy:** Monitor established program outcomes and targets to look for trends to inform Employment First quality assurance and quality improvement efforts (Requirements and metrics in Executive Order 15-01, Metrics in Integrated Employment Plan, Metrics established for EF Strategic priorities).
**Update:** The Employment First Report, published annually in September,\(^{25}\) reports on the Executive Order, *Lane v. Brown* settlement, and Integrated Employment Plan metrics. These metrics are monitored by the statewide Employment First Stakeholder Policy Group. The September 2016 report shows continued positive increases in the number of applicants to VR, individuals entering IPE at VR, and successful closures with competitive integrated employment from VR. The report includes:

“The Vocational Rehabilitation (VR) Employment Services to ODDS Clients in State Fiscal Year (SFY) 2016:

- 1,832 applicants to VR, an annual increase of 29 percent;
- 1,474 individuals entered an Individualized Plan for Employment (IPE), an annual increase of 39 percent; and
- 563 successful closures with Competitive Integrated Employment, an annual increase of 29 percent.”

The report also includes settlement goals:

“The Settlement Agreement Service Goal: Executive Order 15-01 required at least 2,200 transition-age or sheltered workers to be given an employment service\(^{26}\) from July 1, 2013 to June 30, 2016. This number was surpassed with 2,971 individuals receiving a new employment service.”

These results show that Oregon Employment First efforts are positively impacting employment outcomes, with marked improvement in applications, numbers in plan, and numbers successfully closing at VR, as well as numbers accessing employment services generally, including ODDS employment services.

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\(^{25}\) The Employment First Report is available at [www.iworkwesucceed.org](http://www.iworkwesucceed.org) under ‘Data Reports’.

\(^{26}\) For an individual to be counted as being provided an Employment Service under Executive Order 15-01, they must have received one or more of the following: Discovery services through ODDS; a Vocational Assessment through VR; an Individual Plan for Employment with VR; Job Development services through ODDS; or Supported Employment Services through ODDS.
2. **Goal 1, Strategy 2: Monitor and Evaluate Timeliness of Service Delivery**

**Strategy:** Monitor and evaluate timeliness of service delivery across all programs (ODDS, VR, ODE).

**Update:** See Goal 1, Strategy 1 under Quality of Planning.

3. **Goal 1, Strategy 3: Additional Outcome Measures for Service Quality**

**Strategy:** Determine feasibility and availability of data for establishing additional outcome measures for service quality to inform Employment First quality assurance and quality improvement efforts.

**Update:** No additional measures will be reported at this time. However, this strategy remains in this plan in order to maintain discussions of potential new measures.

4. **Goal 1, Strategy 4: QA Measures Related to HCBS Settings Rules**

**Strategy:** Develop additional quality assurance measures to ensure compliance with HCBS community-based settings rules in non-residential service settings where employment services are provided.

**Update:** CMS requires every state to have an approved Transition Plan to bring settings in which it provides Home and Community Based Services (Medicaid HCBS) into compliance with new federal regulations.²⁷

HCBS service settings must be “integrated in and support[] full access of individuals receiving Medicaid HCBS to the greater community, including opportunities to seek employment and work in competitive integrated settings.”²⁸ CMS issued guidance regarding application of the rules to non-residential settings in December 2014. As

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²⁷ Information regarding Oregon’s statewide HCBS Transition Plan can be found at: [www.oregon.gov/dhs/seniors-disabilities/HCBS/Pages/Index.aspx](http://www.oregon.gov/dhs/seniors-disabilities/HCBS/Pages/Index.aspx)

²⁸ 42 CFR 441.301(c)(4)(i).
outlined under this guidance, pre-vocational service settings must, at minimum, encourage interaction with the general public.  

As part of Oregon’s HCBS Transition Plan, ODDS has completed the initial assessments of all employment and non-residential service providers in the state of Oregon. ODDS Regional Employment Specialists are in the process of completing onsite reviews for all facility-based providers, in order to ensure compliance. Providers will then be issued an HCBS Status Report, at which time they submit a plan to come into compliance if they are found to be out of compliance. Sheltered workshops are presumed to not meet HCBS requirements. ODDS required transformation plans from workshops by September 30, 2016. ODDS will review and assist providers before approving transformation plans in the coming year.

**GOAL 2: Develop and implement targeted monitoring strategies to help evaluate the quality of employment services being provided to individuals with I/DD**

5. **Goal 2, Strategies 1 and 2: Checklist/Procedures for Qualitative ODDS File Review**

**Strategies:** 1. Work with ODDS QA Staff to develop checklist and procedures for in-depth (qualitative) file review, and 2. Pursue coursework or additional training on qualitative research techniques for QA Staff who will be conducting qualitative field reviews.

**Update:** See Goal 2, Strategies 1 and 2 under Quality of Planning.

6. **Goal 2, Strategy 3: Effectiveness of New Discovery/Career Exploration Service**

**Strategy:** Develop plan for monitoring and evaluating effectiveness of new Discovery/Career Exploration service in improving employment outcomes.

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**Update:** Discovery is a short-term ODDS employment service that provides exploration of employment through work experiences, informal interviews, and other activities designed to explore the individual’s interests and strengths.

Measures first reported in the 2015 QA Update were:
- Number billing for Discovery service, and number of those in VR;
- Discovery service end date, VR application date by individual

**Results:** In state fiscal year 2016, 716 individuals completed Discovery, a 203% increase from last year. This dramatic increase in Discovery can be attributed to it being a new service: many providers chose to start offering it, and many individuals chose to access the new service. Of those individuals, 498 had an open case in VR at some point in state fiscal year 2016, as compared to 153 last year. The majority of individuals (55%) applied for VR **before or during** their Discovery service, not after. This is down from 69% last year, showing more people are choosing to complete Discovery before applying to VR (45% completed Discovery first this year, compared to 31% last year).

### 7. Goal 2, Strategy 4: Transition Between Programs

**Strategy:** Improve monitoring and evaluation as individuals move between systems to ensure people maintain employment and needed supports.

**Update:** Last year the cross agency working team prioritized this item, and decided the transition from ODDS to VR was equally as important. These initial measures were brainstormed:

**ODDS to VR Transition:** What ODDS employment services did individuals use during three month period prior to VR application?

**VR to ODDS Transition:** Start date of ODDS job coaching, and VR closure date. This will show if ODDS supports start before VR supports end, allowing for a smooth transition between these two sources of employment support. It will also show lengths of time it is taking for individuals to transfer to long-term supports once they start employment through VR.
Results: ODDS to VR Transition:

These results were not available for the 2015 QA Update, and are available for the first time here. 1,832 ODDS individuals applied to VR in SFY 2016, and 690 of those were using day or employment services, represented in the following table:

<table>
<thead>
<tr>
<th>Services Accessed by ODDS Individuals Three Months Prior to VR Application</th>
<th>Number of Individuals per Service*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employment Path Services - Facility</td>
<td>285</td>
</tr>
<tr>
<td>Employment Path Services - Community</td>
<td>249</td>
</tr>
<tr>
<td>Day Support Activities - Community</td>
<td>182</td>
</tr>
<tr>
<td>Discovery</td>
<td>166</td>
</tr>
<tr>
<td>Day Support Activities - Facility</td>
<td>150</td>
</tr>
<tr>
<td>Individual Supported Empl - Ongoing Job Coaching</td>
<td>97</td>
</tr>
<tr>
<td>Small Group Supported Employment</td>
<td>93</td>
</tr>
<tr>
<td>Attendant Care (Comprehensive waiver only)</td>
<td>18</td>
</tr>
<tr>
<td>Individual Supported Empl - Initial Job Coaching</td>
<td>16</td>
</tr>
<tr>
<td><strong>Total Individuals (in day or employment services)</strong></td>
<td><strong>690</strong></td>
</tr>
</tbody>
</table>

* This is a distinct count, meaning the same individual can be counted in multiple services. That is why the total individuals is smaller than the total of distinct counts.

The above results show that the most accessed day or employment service prior to VR application (when measured by numbers of people accessing the service) was Employment Path Facility, followed by Employment Path Community. This is in line with efforts to move people from employment path services to integrated employment services, as guidance from CMS has reinforced that employment path services are time-limited.  

VR to ODDS Transition: In state fiscal year 2016, 191 ODDS individuals utilized ODDS job coaching after VR job placement. Of these individuals, 162 (85%) began their ODDS job coaching before their VR closure date, and 10 (6%) within one week of their VR closure. This is a marked improvement from last year, where 57% began before VR closure, and 10% within one week. This shows that efforts to involve

30 See CMSC Informational Bulletin titled “Updates to the 1915(c) Waiver Instructions and Technical Guide regarding employment and employment related services”, issued September 16, 2011.
31 To ensure that the ODDS supported employment was correlated to the correct VR job placement, all individuals in supported employment that began before the VR employment date were removed from this analysis.
ODDS long-term job supports before VR closure are working, thereby making transition between the programs smoother. Of individuals using both services, only 19 (10%) started ODDS job coaching more than one week after their VR closure date. This could be the result of attempting natural supports first, and then utilizing long-term job coaching if it is needed later.

**GOAL 3: Measure success of students in each school district in achieving integrated employment outcomes.**

8. **Goal 3, Strategy 1: School District Level Results**

**Strategy:** Analyze Post-School Outcomes data to identify districts meeting and not meeting state engagement targets for integrated employment.

**Update:** ODE currently tracks district level performance internally, which guides training and technical assistance efforts. Additionally, ODE and DHS have updated their data sharing agreement to include additional data points from the Post-School Outcomes (PSO) survey, data points from the Exit Survey, and school district of ODDS clients. This will allow for further internal analysis of ODDS client measures at the school district level.

**Quality of Training**

If we are successful in achieving quality in this area, what does that success look like?

*Training utilizes emerging, best or evidence-based practices, is available in a variety of formats, and there is ample availability to providers, stakeholders and community partners. Individuals who receive training improve their ability to help people achieve integrated employment outcomes.*

**Key questions that will guide our work:**

- How do we ensure that people are trained and competent to provide employment services?
- How do we determine whether we are providing enough training in the areas where it is needed?
How do we measure the effectiveness of the training being conducted? How can we facilitate the sharing of best practices among Vocational Rehabilitation Counselors, Service Coordinators, Personal Agents, and Providers?

F. Quality Assurance Activities

GOAL 1: Monitor progress in providing foundational Employment First training to staff and other individuals involved in providing employment services (to help build culture and expectation for integrated employment)

1. Goal 1, Strategies 1, 2 and 3: Foundational Employment First Training

Strategies: 1. Compile and analyze attendance data on trainings being offered to staff and individuals involved in employment service planning for individuals with I/DD (“EF 101”—vision, values, history) to determine reach and coverage of messaging, and 2. Review post-training survey data to determine impact. 3. Ensure trainings are conducted in such a way as to provide data for tracking reach (i.e., number of attendees).

Update: Over the last year, VR, ODDS, and ODE collaborated on the BEST training: Better Employment Success Together. This training covered effective and collaborative transfers from schools to VR or DD services, from DD to VR services, and from VR to DD services. It also covered Discovery and Job Stabilization, and encouraged registration as an employment group (i.e. school case managers and teachers, VR counselors, Service Coordinators and Personal Agents).

There were nine BEST trainings administered statewide with a total of 354 attendees. Surveys were given to attendees that included rating their understanding of a topic before and after a presentation, satisfaction measures, and general questions. The results of these surveys are used by program staff to determine effectiveness and improve future trainings.
GOAL 2: Evaluate effectiveness of core competency training being provided for employment specialists.

2. Goal 2, Strategy 1: Effectiveness of Training; Demonstration of Competency

**Strategy:** Monitor outcomes of the core competency testing modules taken by employment services staff.

**Update:** ODDS is currently in the process of completing online core competency modules that will demonstrate basic core competency. Performance on these modules will be monitored once they go live.

GOAL 3: Evaluate effectiveness of transformation grants given to facility-based employment providers that assist in transforming them into integrated employment service providers.

**Strategy:** Monitor, review, and provide feedback on performance of transformation providers.

**Update:** Transformation providers and their Training and Technical Assistance Provider submit interim and final reports to ODDS. These reports document their progress and challenges as they work towards the goals identified in their strategic plans. ODDS then gives feedback on the reports, and may request further information before approving them as a contract deliverable. These reports will continue on a rolling basis, as transformation providers continue to receive training and technical assistance, and new providers are awarded transformation grants.

**Quality of Data**

If we are successful in achieving quality in this area, what does that success look like?

*Data collection, sharing and analysis allows QA Staff to monitor and evaluate activities, informs key policy and strategy decisions and quality*
improvement efforts, and helps monitor progress in implementing the Executive Order.

Key questions that will guide our work:

- How do we track and measure our progress in implementing the Executive Order? What outcomes; what metrics?
- Are we using available data to inform policy and program changes as needed and to continuously improve provision of employment services to individuals with I/DD across agencies?
- Bottom line: Are we increasing the number of individuals with I/DD getting integrated jobs?

G. Quality Assurance Activities

GOAL 1: Create integrated, cross-agency data collection and reporting systems to improve reporting on employment outcomes

1. Goal 1, Strategy 1: Data Sharing Agreements with Agency Partners

Strategy: Enter into data sharing agreements with key agency partners to improve reporting on outcomes.

Update: DHS has data sharing agreements in place with ODE and Oregon Employment Department (OED), allowing the Employment First data analyst to draw from multiple sources when analyzing the outcomes for ODDS clients. ODDS and VR have data sharing arrangements that do not require a formal agreement, because both programs are within the Department of Human Services.

2. Goal 1, Strategy 2: Data Quality

Strategy: Revise data sharing agreements as needed to continuously improve the quality of the available data.

Update: Data sharing agreements continue to be updated as needed. This year, ODE and DHS updated their data sharing agreement to include additional data from the
Post-School Outcomes (PSO) survey, data from the Exit Survey, and district level data. The agreement also adds more individuals that can view and work with the data.

**GOAL 2: Collaborate with ODDS to improve reporting and available data on ODDS employment service planning, utilization and outcomes through implementation of Plan of Care system in eXPRS.**

3. **Goal 2, Strategies 1 and 2: Data Collection and Reporting from ODDS Systems**

**Strategies:** 1. Migrate data collection and reporting from EOS to Plan of Care (POC) when POC comes online, and 2. Work with ODDS to analyze needed changes to EOS system after POC comes online.

**Update:** Billing under Plan of Care (POC) began September 2014. All Day and Employment Services are now collected through POC and the eXPRS billing system. These systems reflect new service definitions, allowing for more accurate tracking of specific ODDS services. The Employment Outcomes System (EOS), which collects provider-level data, was revised to reflect the new service definitions and to supplement these new systems. The new EOS launched March 2015, and was further updated in 2016 in order to streamline the process for providers entering data, and to create a more user-friendly interface for individuals accessing provider information.

**H. Quality Improvement Initiatives**

1. **Post-School Outcomes Survey (sample size)**

**Strategy:** Collaborate with ODE, VR and ODDS to do further analysis on recommendation to increase the Post-School Outcomes Survey to be a 100 percent sample of school leavers each year. Develop plan for implementation of recommendation.

**Update:** This item was accomplished. Beginning in 2016, ODE will direct school districts to contact all school-leavers for the PSO survey. This will increase the number of respondents and improve the accuracy of the data.
Quality of Life

If we are successful in achieving quality in this area, what does that success look like?

Our efforts are making a difference in people’s lives. Individuals who have integrated, community employment report high satisfaction with life; health and happiness; engagement in their community; income, increased opportunities and the potential for development of wealth. Demand for employment services by self-advocates and families increases. Individuals are moving from isolation to inclusion in the life of the community through employment.

Key questions that will guide our work:

- How do we recognize, value and communicate that the benefits of employment impact the whole life of a person?

I. Quality Assurance Activities

GOAL: Ensure that our efforts to improve delivery of employment services to individuals with I/DD are making a positive difference in their quality of life.

1. Goal 1, Strategy 1: Quality of Life Indicators from National Core Indicators Survey

Strategy: Analyze outcomes using key quality of life indicators from ODDS’s National Core Indicators (NCI) Survey Data for individuals reporting integrated employment versus sheltered employment or not employed.

Update: Oregon is preparing to engage in the Adult Consumer Survey with the National Core Indicators Project, through the National Association of Developmental Disability Directors (NASDDDS). A stratified random sample of approximately 800 names will be pulled from Oregon’s database of adults receiving case management and
one other funded service. Background information is also gathered, using data sources available to the Department.

Questions related to employment include: the type of employment or other daily activities engaged in during a typical two week period; whether community employment is a goal in the person’s service plan; questions related to paid time off; how long the person has been in their current job; whether the person is self-employed, and the type of job a person has. The Adult Consumer Survey asks questions about whether a person works or is engaged in other activities, their satisfaction, and whether they would like to seek a change.

Oregon’s University Center for Excellence in Developmental Disability Services (UCEDDS), a part of the Oregon Health Sciences University, will oversee the interviewing process and data entry. The Office of Developmental Disability Services (ODDS) will stay closely linked to the process, with interviewing beginning in Fall 2016. All survey data must be completed and entered into the national data base by June 30, 2017. More information will be coming out regarding the survey, the sampling process and the value of this feedback to all interested in I/DD services in Oregon. NCI will publish a report of Oregon’s data in comparison to other participating states by early 2018.

J. Quality Improvement Initiatives

1. NCI Survey Data

Strategy: Work closely with ODDS to look for ways to continuously improve the relevance and utility of the NCI data.

Update: In preparation for the administration of the NCI in Fall 2016, ODDS NCI staff worked with Employment First staff on the choice of employment questions. See previous strategy for full NCI update.

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32To meet the threshold of a significantly valid sample, a total of 400 surveys must be completed and entered into the NCI data base. The survey is conducted through a trained interviewer, who submits the responses electronically. The survey process assures participant confidentiality. Names are not used when submitting the data.
Conclusion

Measures in this report, as well as the semi-annual Employment First report, show that Oregon outcomes are improving for ODDS individuals seeking employment services and competitive integrated jobs. This year there was again annual increases in the number of ODDS applicants to VR, individuals found eligible at VR, entering IPE at VR, and successfully closing from VR with competitive integrated employment. Despite large increases, VR maintained last year’s outcomes for crucial time frames, including eligibility and successful closure.

There is also upward movement at ODDS employment services, including a large increase in individuals accessing the Discovery service, and an increase in individuals accessing their ongoing job coaching from ODDS before closing at VR. At ODE, the Post School Outcomes Survey has been updated to better reflect integrated employment outcomes, and will be administered to a larger sample: an attempted 100% of school leavers.

These results show that Oregon agencies continue to work collaboratively to achieve positive outcomes for individuals seeking employment. With the advent of new policies and agreements, such as the 20 hour policy, the hard work will continue.

Questions or any feedback on this plan can be directed to the Employment First Team at employment.first@state.or.us.