

DEPARTMENT OF
PUBLIC HEALTH AND HUMAN SERVICES



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November 22, 2006

Ms. Patricia Baumgart
ORI Board President
253 Preston St.
Missoula, TM 59804

Dear Ms. Baumgart:

Please find attached the Quality Assurance Summary Report for Opportunity Resources, Inc. The review covers the period January 2005 through and including August 2006. I apologize for the delay in completion of this written report.

There are currently no outstanding concerns; all noted deficiencies have been appropriately addressed. If you have any questions or comments, I would be happy to discuss them with you. Feel free to call me at (406) 329-5418. I look forward to continuing to work with the staff at ORI.

Respectfully,

Paula M. Tripp
Quality Improvement Specialist

Cc: Jack Chambers, CEO ORI
Tim Plaska, Community Service Bureau Chief DDP
John Zeeck, Quality Assurance Specialist DDP
Ken Brown, Director of Services ORI
Jenece Jacobs-Sharkey, Director of Services ORI
Region V DDP Contract File

Scope of Review **Administrative**

Opportunity Resources, Inc. (ORI) provides services to over 350 individuals in the Missoula community. Of that, over 200 individuals with developmental disabilities receive supports from ORI. The agency provides residential, day/vocational, respite, and recreational supports in and around the Missoula valley.

ORI operates two licensed group homes for adults with developmental disabilities. They also operate two 'congregate' living apartment complexes. There are a number of supported living services provided in community rentals, with some sites including 24-hour staffing. In addition to ORI's contracts with the Developmental Disabilities Program, they provide contracted services for Vocational Rehabilitation and Senior and Long Term Care.

The most recent addition of services provided is Personal Care services funded through Senior and Long Term Care. For the contract with DDP, ORI has added services for four individuals discharged from Montana Developmental Center who are medically-fragile. To ensure health care, ORI now has a registered nurse and licensed practical nurses on staff. ORI has also expanded their provision of services to individuals who are dually-diagnosed as developmentally disabled and potential offenders. In order to meet these individual's needs, an MSW/MA sex offender counselor is on staff.

The agency is currently carf accredited. The current three-year accreditation will expire in November 2007. Three-year accreditation is the highest status attained by carf.

Since the last review, Opportunity Resources acquired ranch property through a donation. The property is located in Frenchtown. The agency is cultivates wool from their sheep and makes blankets which are sold at the ORI main office.

Opportunity is well known and active in the Missoula community. This spring, the Missoula Children's Theatre sponsored The Boys Next Door as a fundraiser for ORI. The Palace Hotel in downtown Missoula opened "Opportunity at the Palace" art gallery for individuals in services to display their work. The gallery also participates in the Gallery Walk the first Friday of each month.

Opportunity participates in the required A-133 audit. The results of their audits continue to be unqualified. Their most recent audit was in January 2006. The agency manages a huge budget over multiple programs and contracts with the

Montana Department of Public Health and Human Services. There have been no major fiscal / invoicing concerns noted. When any issues or questions have arisen ORI fiscal staff have always been responsive.

ORI has begun using therap, a web-based Incident Management and data management system. The therap program has assisted ORI in meeting the requirements of the DDP Incident Management Policy and documentation requirements. ORI has also assigned one staff member as their Investigator, this assists with consistency of investigations and investigative reports.

Specific Services Reviewed

A. Residential

Opportunity Resources serves over 85 people in residential services for their DD contract. Residential services include both of the licensed group homes, the congregate supported living apartments, numerous community apartment rentals, adult foster care arrangements via supported living funding, and services to individuals who reside in their parents homes.

The individuals in supported living services receive anywhere from one hour per week of support to 24 hour/day staffing. The needs of individuals served vary greatly. ORI continues to develop new services to meet the needs of Montanans with developmental disabilities.

i. HEALTH AND SAFETY

The therap program assists human services agencies by providing a web-based forum to document and access medication and medical information, face sheet documents, health professional office visit information, medication errors, weight monitoring and log notes. The staff at ORI use the features of therap to their own advantage to ensure good internal communications. The DD Case managers also have therap access, and are able to keep up to the minute in daily activities and concerns for the individuals on their case loads.

The agency assumes medical management for individuals who receive residential services. For individuals in congregate services, an lpn manages medical appointments. For others, the supported living coordinator or habilitation staff accompany the individual to appointments.

Per DDP policy, staff must receive medication certification prior to assisting or supervising medications. No concerns have been noted in this area. The training a supervisor offers a medication practicum class in addition to the DDP med test. If a staff has multiple medication errors or errors in procedure they

are required to attend to practicum class. On a daily basis, ORI staff assist and supervise hundreds of individual medications. The rate of medication errors is less than 1 per day. This is well below the national average of medication errors in health care facilities (hospitals and nursing homes). ORI's diligence in medication management is commendable. Refer to QAOS #1 for specifics.

Some individual's participate in self-medication training objectives per DDP Administrative Rules. The consistency of implementation of training programs is somewhat dependent on the manager of particular services/sites. The training programs do not always meet the requirements of the rule. Refer to the Individual Planning (IP) section of this report for more specifics. Refer to QAOS #2 for specifics.

ORI serves many individuals who have challenging behaviors and / or seizure disorders. ORI staff and IP Teams work closely with physicians to ensure that any prn medications for seizures or behaviors are accompanied by clear written protocols for staff to follow.

In addition to group home licensing, ORI also meets OSHA standards at their facilities. ORI has a fully-functional Safety Committee, membership on the committee covers all areas of service. The Safety Committee meets routinely and completes reviews of evacuation drills, First Aid and safety supplies, safety concerns reported by staff or as the outcome of investigations, and facilities checklists. The Safety Committee's work is exemplary. Refer to QAOS #3 for specifics.

During site visits, fire extinguishers and smoke detectors were found to be updated and functional except at one apartment. Fire drills are completed as required for all congregate sites, implementation of fire safety procedures in supported living seems to vary by site. Refer to QAOS #4 for specifics.

Sites visited were found to be neat, clean, and in order. One community rental site is rented to two women who use wheel chairs. There is considerable damage to the sheetrock and door jambs. Doors and jambs have been removed and replaced with curtains. The agency may want to consider significant repair as a purely aesthetic concern, no health or safety concern is noted.

Hot water temperatures in the group homes were found to be at or below the required 120 degrees. Cleaning and household supplies are stored in secure locations in all sites. Storage at individual supported living sites varies depending on individual's needs.

ii. SERVICE PLANNING AND DELIVERY

There were nine individuals selected for the sample. These nine folks represent a cross-section of all areas of ORI residential services. Individual Plans are completed for all individuals.

Quarterly status reports are available on site for individuals, however there is some problem with routing the quarterlies to the case managers. While individual responsible staff were able to detail their procedure and able to produce copies of missing quarterlies, the glitch seems to occur once quarterlies are turned in to supervisors. Discussions with supervisory/management staff reflects that there is no system in place to track/monitor completion and submission of quarterly status reports to the case manager at DDP. Refer to QAOS #5 for specifics.

In some cases where a self-medication objective is not in a person's IP, there is a program in place at the residence. These programs are 'service' objectives, whereby the intent is to assist in maintaining the skill rather than skill acquisition. When skill acquisition training is in place, it rarely meets the required criteria for graduation.

Opportunity Resources does have a well written grievance procedure for consumer. The grievance procedure as well as individual statements of consumer rights and responsibilities are reviewed annually in preparation for the annual IP meeting. The agency does have some Right's Restrictions in place but these are implemented only for serious health and safety concerns. There are accompanying training a support programs and the IP Teams review them at least annually. Consumer satisfactions surveys are completed annually, no major concerns are noted.

Leisure, recreation and community integrated activities vary by site. Documentation at the licensed group homes varies by staff. Staff training appears to be warranted. Refer to QAOS #6 for specifics.

iii. STAFFING

As with most human service agencies, ORI is experiencing staffing shortages. In years past, they could count on applicants when the college students returned to the Missoula Valley. Now it is more common for positions to remain vacant. At this time ORI is meeting minimum staffing ratios by paying staff for overtime. All employees in the sample had the required Department of Justice Background checks.

ORI has a detailed orientation and annual inservice training program. The agency provides training the Mandt System in addition to required First Aid and CPR training. At the site visited, the staff survey was implemented. All staff did well on the survey of training areas. There are no concerns noted in this area.

iv. INCIDENT MANAGEMENT

As described earlier in this report, ORI has implemented the DDP Incident Management Policy. Their use of therap, for web-based incident reporting, has assisted in implementation of the Policy. Investigations are generally completed within the 5 day timeline. In situations where staff cannot be accessed, extensions are requested in writing.

The weekly Incident Management Committee meeting is a forum to review incidents, address trends, review investigations and develop proactive strategies. The meetings are held as defined.

Since implementation of the Policy, there have been a number of investigations. The agency reports to Licensing and Adult Protective Services (APS) as necessary. ORI staff work closely with APS to ensure safety and protection for individuals in services.

B. Work/Day/Community Employment

ORI serves over 150 individuals with developmental disabilities in work, day, employment and retirement services. The majority of individuals served also receive residential supports, but some individuals receive day or work only services. There were 14 individuals in the sample for day/vocational services.

ORI consumers are working on in-house contracts, out in the community in enclaves, at the Wood Products facility, and in community-based supported employment. In addition to employment, ORI also offers a Senior Day service which focuses on community involvement, volunteer work, socialization and recreation.

For more specific information regarding Health & Safety, Service Planning and Delivery, Staffing and Incident Management please refer to areas above under Residential Services.

C. Community Supports

Since the Community Supports waiver was approved in 1999, ORI has served over 40 people through this program. The agency continues to be responsive to the Missoula waiting list and needed services for the local community. The community supports agreements address many of the approved waiver categories, and the program is well liked by recipients. There were five individuals in the sample for Community Supports services.

For more specific information regarding Health & Safety, Service Planning and Delivery, Staffing and Incident Management please refer to areas above under Residential Services.

D. Transportation

ORI has over 20 vehicles in their fleet. Twelve of the buses were purchased with grants from the Montana Department of Transportation. In addition to transportation services to individuals receiving residential and or day/vocational services, ORI also participates in meeting a community need by providing rides to seniors and adults with disabilities on Sundays.

The agency maintenance staff take care of on-site maintenance issues. They complete a monthly safety checklist for each vehicle. Staff who are driving complete a safety “walk around” prior to each departure. The agency training department completes mandatory Passenger Assistance training.

This year an ORI vehicle was involved in a major head-on accident outside of Missoula. The accident was not the fault of the ORI staff member, and at the time there were three consumers in the vehicle. The Montana Highway Patrol indicated that if the passengers in the ORI vehicle had not been wearing seatbelts, their injuries would have been fatal.

E. Case Management

ORI Case management was not reviewed as a part of this review.

Conclusion

Opportunity Resources is a large provider of services to individuals with various disabilities. This review was specific to their contracts for serving individuals with developmental disabilities.

Submitted by:

Paula M. Tripp, MEd/QMRP