

DEVELOPMENTAL DISABILITIES
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Ted Stetler, Board of Directors Chairman
Jack Chambers, CEO
Opportunity Resources, Inc.
2821 S. Russell St.
Missoula, MT 599801

Dear Mr. Chambers and Members of the Board,

Attached is the Annual Quality Assurance Report for September 2006 thru January 2008. The review was conducted based on standards identified in the Quality Assurance Process Handbook effective July 1, 2007. In addition to you receiving the report, a copy is also sent to the DDP Central Office, a copy is maintained in the contract file at the Regional Office, and a copy will be posted on the State of Montana Website.

It was my pleasure to conduct this review. I trust that you will find the attached report to be helpful information for continued growth and success for ORI and the people you serve and employ.

It was obvious to me that ORI is a leader as a prospering business and a valuable resource for those with disabilities.

Thank you for your continued support of the Developmental Disability Program Quality Assurance Process, the DDP's Contract compliance and your dedication to the people in your community.

Respectfully,

Sheri Pullium
Quality Improvement Specialist
State of Montana DDP

CC: Paula Tripp, Region V RM
Tim Plaska, Community Service Bureau Chief
John Zeeck, Quality Assurance Specialist
Perry Jones, Medicaid Waiver Specialist
Contract file

OPPORTUNITY RESOURCES

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QUALITY ASSURANCE ANNUAL REVIEW SEPTEMBER '06 THRU JANUARY '08

Scope of Review

Administrative

Opportunity Resources, Inc. (ORI) provides services to over 200 individuals with developmental disabilities in the Missoula community. ORI's services and supports include residential, day/vocational, supported employment, personal care thru senior and long term care, transportation, respite, and leisure/recreational activities in the Missoula valley.

Since last review, ORI teamed up with the Missoula Children's Theatre again for their 2nd annual theatre production fundraiser with the musical Oklahoma! ORI continues to operate an Art Gallery in downtown Missoula for the individuals they support to display their art work. The Ranch that they acquired last year is still in operation and providing meaningful work for several individuals whose dream is to work on a ranch. Sheep are raised for their wool which is used to make blankets that ORI sells. Many enjoy the fruits of their labor that is put into gardening. Pumpkins were grown and sold at ORI's 1st annual Fall Festival in October '07. An exciting turnout of 1800 people from the Missoula valley joined in the festivities. The fundraiser has led the way for many more annual Fall Festivals in the future. ORI is a leading employer in the Missoula community and a wonderful asset to the business community.

ORI was given a three year CARF accreditation again this year to be in effect thru 2010 for their Vocational/Work Services. CARF accreditation is not a requirement for the DD Contract and was not sought for their Residential Services.

ORI continues to operate two licensed group homes for adults with developmental disabilities. They also operate two congregate living apartment complexes that provide 24 hour on site staffing. They provide a number of supported living services to people living in their own homes. ORI contracts with Vocational Rehabilitation and Senior and Long Term Care programs as well as the Developmental Disabilities program.

ORI continues to strive to meet the needs of individuals who are medically fragile, dually diagnosed and potential offenders. To increase their health and safety care, they have on staff a Registered Nurse and Licensed Practical Nurse as well as an MSW/MA Counselor who specializes in sex offender treatment.

ORI undergoes annually the required A-133 compliance audit. The opinions on their compliance with major program requirements were unqualified for Fiscal Year ended June 30, 2006. There have been no major fiscal/invoicing concerns noted. When issues or questions come up, ORI fiscal staff are responsive.

The Therap web-based documentation system has continued to be a helpful tool to ORI in keeping up with requirements in documentation of data and incident management.

Specific Services Reviewed

Residential

ORI serves over 125 people in residential services under their DD contract. In this report, Residential Services is defined as to include Residential Habilitation, Personal Care, Adult Companion, Social Leisure and Recreation, and Health Maintenance Supports. These supports are provided in a variety of living environments including licensed group homes, congregate supported living apartments, adult foster home arrangements, and supports provided in individual's own homes. The needs of the individuals supported vary widely from 1 staff hour weekly to 24 hr/day staffing.

Staff interviewed in these settings were compassionate, knowledgeable about the people they support, and committed to providing an environment that promotes independence and dignity. Consistency was found among the staff needing more training around mandatory reporting and the process in reporting to appropriate authority. See QAOS # 12

Individuals receiving residential supports interviewed were consistent in satisfaction with services.

Health and Safety

I was privileged to visit both Group Homes and the Congregate Apartments. All were clean and in order. The homes and individual's rooms were decorated and represented their personality and taste. Hot water temperatures were at or below the required 120 degrees. Fire extinguishers and smoke detectors were found to be updated and fire drills complete as required for all group home and congregate sites.

I want to specifically point out the Riverside congregate supported living apartments. All documentation, medication records, IPs, and programs were complete and without error. They do a tremendous job in all areas. An observation that may add to their success is the organization of the individual's books and programs and the "Welcome to my apartment" document that greets every new staff, substitute, and PCA worker. See QAOS# 10

The Therap program is a helpful communication tool that keeps ORI staff, Case Management staff, and DD staff in daily contact with each other about the individuals they support. The tracking aspect increases documentation accuracy when recording medical appointments and periodic checks such as weight, blood sugar, and seizure activity. An important observation noted during the residential site visits were multiple medication documentation errors and administration errors that were not being entered in the Therap General Events Reports which trigger the State's mandatory Incident Report Form. Due to the lack of medication documentation and lack of reporting them on Therap, not all medication errors are being recognized, reported, hence not being addressed in incident management committee. See QAOS # 8

ORI assumes medical management for individuals who receive residential services. Per DDP policy, staff must receive medication certification prior to assisting or supervising medication administration. The agency is in compliance with this policy.

There are individuals with PRN protocols. All protocols and requirements around PRN administration are in compliance with DDP Incident Management Policy.

In the Annual Review of '06, deficiencies noted included:

- 1) Self medication training objectives required by ARM, do not always meet the requirements of the rule. **This Annual Review of '07 noted an over all improvement in this area based on a 10% random sample.**
- 2) A fire extinguisher was missing a current annual inspection tag in one of the supported living setting. **This Annual Review of '07 noted no issues with annual fire extinguisher inspections.**
- 3) Quarterly Status Reports were not submitted consistently. **This Annual Review of '07 noted no problems in QSRs being sent to Case Managers.**
- 4) Inconsistency was noted in the variety and quality of daily leisure activities and recreational outings across service settings. **This Annual Review of '07 noted that activities were more consistently documented and matched with the individual's dreams recorded in the IP. However, it was observed in one of the samples that there was lack of documentation for an individual's social objective monthly. See QAOS #9**

Service Planning and Delivery

There were 17 individuals selected for the sample. These 17 people represent a cross section of all areas of ORI services. After review of consumer files at the main office and at the various site locations, current and complete individual plans were inconsistent. Primary issue to note is that objectives and goals were immeasurable and unclear or absent. As an off shoot from this, documentation of tracking objectives were either lacking or not adequate in assuring objectives are showing progress, being done, or relevant. In addition, concern was noted that pertinent information was missing from IPs which would be necessary for those supporting the individual to know. See QAOS# 9

ORI is an exciting place. There are things to do and events to look forward to. Across all areas it is evident that people are doing things they enjoy and are a part of the life of the community. It is consistent that people are members of the YMCA and participate regularly in events affiliated with the Y. People attend events at the University of Montana such as ballgames and concerts. People are going on dates, out for dinner and to movies. People are going downtown and to Caras Park for the "Out to lunch" in the park. Annual summer camps and trips to theme parks are among favorites.

Individuals with rights restrictions are the exception and these programs are within compliance. ORI assures promotion of individual rights by having an advisory board made up of individuals they serve. These individual representatives come to meetings with the CEO and other pertinent staff and address issues that they and their peers may have. Their suggestions and recommendations play a significant part in ORI policy and daily functions of the organization. QAOS# 11

Staffing

ORI does bi-annual surveys on their 250 staff. Their staff satisfaction rates are considerably high and are apparent when you have the opportunity to speak to them or attend meetings with them. The screening and hiring process is very thorough and all documentation is present for criminal and background checks and driving background checks. Training and orientation is consistently documented and thorough. An observation made was that there is no training on Individual Plans and for writing goals and objectives. As we go into July '08 there will be a new system in place that replaces IPs for PSPs. Providers will be encouraged to attend trainings in this system.

Providers will be required to know and understand the PSP process as well as write appropriate visions, outcomes and actions. I look forward to seeing this added to the staff orientation and training. The State of Montana has implemented a new mandatory web-based training program called College of Direct Supports. ORI has successfully begun using this training system and have kept up with requirements of assuring all full and part time employees complete the assigned training lessons.

As with any provider in Montana, staffing continues to be a difficult challenge to manage. Summer tended to be the roughest time in the past year and staffing has been more encouraging in the last 4 or 5 months. No major staffing issues pertaining to ratios are noted during this review period. There are the occasional programs that have been difficult to get up and running because of lack of staff. ORI exhausts every effort in recruiting needed staff and retaining dedicated employees and should be recognized for this.

A training observation consistently came up around new and substitute staff being assigned to work with individuals without having the appropriate knowledge and training on the individual's program and care. In multiple areas of ORI services this was a concern. See QAOS# 12

Incident Management

The Incident Management Committee meets on a weekly basis. This forum is intended to address trends, review incidents and investigations, and develop proactive strategies to prevent incidents in the future. This committee is in the process of improving on the implementation of the IMC to assure all of the above is addressed.

There have been a number of critical investigations. ORI and the DDP report to Licensing and Adult Protective Services (APS) and work closely with them to ensure protection for individuals in services. Incident Reports and Investigations are done within the required timeline. Submitting the final paperwork to the Regional office on a timely basis has been inconsistent. Approval has just been given to recognize electronic signatures and it is hoped that this will address the issue. Compliance with the DDP IMC policy will be monitored throughout the next year.

Work, Day and Community Employment

ORI serves over 250 individuals with developmental disabilities in multiple workshop environments, enclaves, community employment and retirement day programs. Employment is where ORI individuals shine the brightest. People are loving their work, in jobs they are passionate about and contributing to their community. Jobs can include in-house contracts with the post office and area business' piece work, running a ranch, working with wood at the woodshop, maintenance and clean up at downtown government buildings, hotels, or at the smoke jumper's station. There are also supported employment services assisting individuals in attaining and maintaining their individual jobs in the community. As folks age and want a more flexible day, ORI provides a senior day program that focuses on community involvement, volunteer, socialization and recreation.

Health and Safety

ORI work sites all run a tight ship. They focus heavily on work safety and are monitored closely by OSHA. The Wood Products site and the Ranch site had a zero rate of employee day off due to injury. This is an accomplishment to be proud of. The Production Assembly Division (PAD) as well had a very minimal rate of injury this past '07 year. Medication documentation at all work sites including the PAD and Wood Products are complete and meet state requirements. As with

the residential areas, effective documentation on the objectives is needed and progress should be observed as Region V moves to the PSP and rates system in July '08. Staff are knowledgeable in the work they do and with the individuals they support.

For additional information regarding Service Planning and Delivery, Staffing and Incident Management please refer to the areas above under Administrative and Residential.

Community Supports

ORI currently serves 48 people through the Community Supports Waiver Program. The Community Supports agreements address many of the approved waiver categories and the program has been very successful. The flexibility of this funding allows individuals and ORI to be more creative in how supports are delivered. ORI continues to be a leader in finding new and progressive ways to meet the service needs of the community. There were five individuals in the sample for the Community Supports services.

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

Transportation

ORI has 74 vehicles in their fleet. There are 11 buses purchased with grants from the Montana Department of Transportation who still hold the title. All vehicles follow the same requirements that the 11 DOT vehicles follow regarding mandatory first aid kits, fire extinguishers being in all vehicles, all drivers required to complete a driver's orientation, driver's background checks and passenger assistance training. There is a mechanic on staff to assure safe and proper functioning of the vehicles.

The agency participates in meeting a community need by providing rides to seniors and adults with disabilities on Saturdays and Sundays.

There have been no major vehicle accidents this '07 year.

Case Management

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

Conclusion

It has been my pleasure getting to know the wonderful staff and individuals that make up the ORI family. Their talents and skills contribute significantly to the success of the agency. I look forward to continued success and progress in the 2008 year.

Respectfully submitted:

Sheri Pullium
Quality Improvement Specialist
State of Montana Developmental Disabilities Program