

OLTCO BUDGET NARRATIVE – 2017-2019

Agency Summary

Introduction

The Office of the Long-Term Care Ombudsman (OLTCO) is comprised of **three** program areas described below. An Agency Director, who also serves as the State Long Term Care Ombudsman, oversees the agency. The agency has a Deputy Director who oversees operations for the agency as a whole. All remaining staff are divided into the three following program areas:

1. **Long-Term Care Ombudsman**: The Long-Term Care Ombudsman (LTCO) Program is mandated by the Federal Older Americans Act and by Oregon statute. The office functions separately and independently from any other State agency. The LTCO program relies heavily on Certified Ombudsman volunteers to fulfill its statutory duty and mission. Seven paid Deputy Ombudsmen supervise these volunteers throughout the state, approximately 190 at the current time. Both staff and volunteers identify, address, and resolve complaints and concerns made by or on behalf of long term care facility residents, protecting both their rights and dignity. There are over 44,000 people living in 136 nursing homes, 525 assisted living and residential care facilities and approximately 1525 adult foster homes throughout the state at this time. It is the goal of the program to have a Certified Ombudsman volunteer assigned to every licensed facility. However, this is currently only the case for 54% of the 2236 facilities in the state. Fortunately, dedicated volunteer and paid staff routinely make visits to adult foster homes and facilities without an assigned Certified Ombudsman to meet with residents and to address specific complaints that have been called into the LTCO program.

Deputy Ombudsmen also coordinate all training efforts for paid staff and volunteers, address the concerns of individuals calling the statewide toll free number, and provide technical assistance to fellow Deputies and volunteers. The LTCO program is further supported by a volunteer recruiter, an administrative staff person, and a data analyst. Complaint data is utilized to make recommendations to the Oregon Legislature and Governor regarding existing and emerging long-term care issues. The Agency strives to maintain productive relationships in the highly political environment of senior organizations, advocacy groups, professional associations and other state agencies that impact the lives and care of facility residents.

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2. **Residential Facilities Ombudsman**: On July 1, 2014, the duties of the Office of the Long Term Care Ombudsman were expanded by SB 626 (2013) to include advocating for persons with developmental disabilities and mental health diagnosis living in licensed DD and MH facilities (herein “Residential Facilities”). There are approximately 8,400 persons living in approximately 2400 licensed adult foster homes and group homes in Oregon serving these vulnerable populations. The RFO program employs five Deputy Ombudsmen who provide advocacy for residents of residential facilities in a manner similar to that of the LTCO program under the supervision of the RFO Manager. The RFO program will eventually rely heavily upon volunteers to fulfill its duty and mission and is supported in doing so by a part time volunteer recruiter.

3. **Oregon Public Guardian**: SB 1553 (2014) established the new Oregon Public Guardian (OPG) within the OLTCO on July 1, 2014. The Public Guardian reports to the Agency Director and serves as a statewide court-appointed guardian and/or conservator, trustee and payee for incapacitated Oregonians who have no other resources to serve in such a capacity. As ordered by a Court, the Public Guardian is responsible for developing individual care plans for the state's most difficult-to-serve incapacitated clients, when their circumstances are not responsive to less costly or less intrusive interventions. The Public Guardian program subsequently serves as a fiduciary in a variety of areas, including estate issues, making all health, placement and fiscal decisions for clients, and taking legal action if necessary.

The Public Guardian currently employs two Deputy Guardians with the capacity to serve approximately 20-25 protected persons each. The need for guardianship services far exceeds this and thus multi-disciplinary panels have been formed in a number of counties throughout the state to screen referrals, seek less intrusive alternatives or resources, and only forward those cases truly requiring the services of the OPG. The OPG also strives to meet the need for services by contracting with other private and public guardianship agencies or individuals to increase their capacity for service, such as the contract recently executed between OPG and the Senior Citizens Council of Clackamas County to provide guardianship services to 10-14 persons. The program is authorized to utilize trained volunteers at the discretion and direction of the Public Guardian.

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All three program areas are represented on the newly renamed Residential Ombudsman and Public Guardian Advisory Board which meets on a monthly basis and is comprised of 11 citizen volunteers.

Budget Summary Graphics

Here is a tabular comparison of the 2015-2017 LAB and the 2017-2019 ARB:

	2015-2017 LAB	% of Total	2017-2019 GRB	% of Total
Total Expenditures				
General Fund	6,172,203	89.6%	6,419,208	87.8%
Other Fund	719,522	10.4%	894,922	12.2%
Total Expenditures	6,891,725	100%	7,314,130	100%
Program Expenditures (GF & OF)				
LTCO and RFO	4,727,456	68.6%	5,668,121	77.5%
OPG	2,164,269	31.4%	1,646,009	22.5%
Total Program Expenditures	6,891,725	100%	7,314,130	100%
Program Components				
LTCO/RFO Personal Svcs	3,543,676	51.4%	4,254,683	58.1%
OPG Personal Svcs	839,066	12.2%	838,830	11.5%
LTCO/RFO S & S	1,183,780	17.2%	1,413,438	19.3%
OPG S & S	1,325,203	19.2%	807,179	11.1%
Total Program Components	6,891,725	100%	7,314,130	100%

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Mission Statement and Statutory Authority

The Office of the Long Term Care Ombudsman is an independent state agency with the overarching mission to protect individual rights, promote independence, and ensure quality of life through informed advocacy and education for Oregonians living in long-term care and residential facilities and Oregonians with decisional limitations.

More specifically, the agency provides the following services to the following individuals:

1. Residents of licensed long-term care facilities and residents of licensed mental health and developmental disability homes (herein “Residential Facilities”) with complaint investigation, resolution and advocacy for improvements in resident care. The purpose of the Long-Term Care Ombudsman, established under Title VII of the Older Americans Act (OAA), is to investigate and resolve complaints made by, or on behalf of, persons who are residents of licensed long term care and to advocate for their interests. In Oregon, this mandate has been expanded to include individuals living in residential facilities.

Oregon's citizens living in licensed nursing facilities, residential care facilities, and assisted living facilities and adult foster and group homes deserve quality care. They should enjoy freedom to make choices about their care and freedom from abuse or neglect.

2. Incapacitated Oregonians in need of guardian and conservator services. The statewide court-appointed guardian and/or conservator, trustee and payee serves incapacitated Oregonians who have no resources to obtain these services in the private sector nor any other individuals in their lives that can serve in this capacity. As ordered by a Court, the Public Guardian is responsible for developing individual care plans for the state's most difficult-to-serve incapacitated clients, when their circumstances are not responsive to any less costly or invasive interventions.

The Office of the Long-Term Care Ombudsman reports to the Governor’s Office. It derives its statutory authority from ORS 441.402 – 441.419. The statute states in part “The Office of the Long-Term Care Ombudsman is established. The Long-Term Care Ombudsman shall function separately and independently from any other state agency . . .” The Agency is monitored and supported by the Residential Facilities Advisory Committee, per ORS 441.416, as amended.

Legislatively Adopted

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The Office employs the State Long-Term Care Ombudsman, who also serves as the Agency Director. The Ombudsman is appointed by the Governor and confirmed by the Senate. An Annual Report is sent by the Agency to the Administration on Aging detailing the specific resident complaints and emerging issues arising from its advocacy for residents of licensed long term care facilities in Oregon.

Agency Strategic Business Plans

The Office of the Long-Term Care Ombudsman has three main strategic objectives:

1. Improving the quality of services provided to residents of long-term care facilities through education and advocacy that is focused on the protection of resident rights, dignity, and quality of life. In order to accomplish this primary objective, the Agency strives to:
 - a. Increase the number of trained and fully-qualified Certified Ombudsman volunteers in order to have volunteers assigned to and advocating for residents living in every licensed long term care facility in the State.
 - b. Increase the frequency and effectiveness of consumer, community, and stakeholder education regarding the LTCO program and resident rights.
 - c. Increase the level of collaboration between the LTCO and other State partners who are responsible for the safety of, and services to, individuals residing in long-term care.
2. Improving the quality of services provided to residents of residential facilities through education and advocacy that is focused on the protection of resident rights, dignity, and quality of life. In order to accomplish this primary objective, the Agency strives to:
 - a. Increase the number of trained and fully-qualified Certified Ombudsman volunteers in order to have volunteers assigned to and advocating for residents living in every licensed residential facility in the State.
 - b. Increase the frequency and effectiveness of consumer, community, and stakeholder education regarding the RFO program and resident rights.

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- c. Increase the level of collaboration between the RFO and other State partners who are responsible for the safety of, and services to, individuals residing in residential care.
3. Expanding the availability of public guardianship and conservatorship services so that every incapacitated Oregonian who needs the assistance of a guardian and conservator, but lacks the means to obtain these services, nor has anyone able or willing to serve in this capacity, can benefit from the advocacy, support, and protection of skilled guardians and conservators.

Each of these strategic objectives has many components. Here are the principal elements:

1a. Increase the number of trained and fully qualified LTCO Certified Ombudsman volunteers so that every licensed long-term care facility has a volunteer assigned.

Context: The LTCO program is the only State program that provides a consistent, weekly presence in Oregon's long-term care facilities. While licensing, adult protective services and case management fill a critical role in monitoring the services provided to residents of long term care, the frequency at which they are able or mandated to be physically present and lay eyes on a facility or resident is minimal and often sporadic. The higher level of monitoring and presence provided by the LTCO is only possible in facilities in which a volunteer Certified Ombudsman is assigned.

Goal: Develop and maintain a volunteer recruiting and retention program that provides a stable supply of trained and fully qualified local Certified Ombudsman volunteers to be assigned to every licensed long-term care facility in every county in the State.

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Current Status: The LTCO program currently has volunteers providing coverage to approximately 55% of long-term care facilities in Oregon.

<u>District</u>	<u>Number of Facilities (No AFH)</u>	<u># of Facilities Covered by a CO</u>	<u>% of Facilities Covered</u>	<u>Number of Beds (No AFH)</u>	<u># of Beds Covered by a CO</u>	<u>% of Beds Covered</u>	<u>Volunteer need by Facility Count</u>	<u>Volunteer need by Bed Count</u>
1	116	78	67.24%	7976	5754	72.14%	16	13
2	112	57	50.89%	7212	3316	45.98%	21	26
3	99	23	23.23%	6398	1415	22.12%	36	39
4	63	41	65.08%	4069	2749	67.56%	14	12
5	94	82	87.23%	4972	4436	89.22%	5	4
6	74	44	59.46%	3183	1965	61.73%	14	12
7	112	43	38.39%	6754	2300	34.05%	27	33
State	670	368	54.93%	40564	21935	54.08%	134	139

LAB Summary:

It will not be possible for the LTCO to achieve this objective under the 17-19 LAB for the following reasons:

- 1) Retention of existing volunteers: LTCO volunteers save the state over \$2.5 million dollars biennially. Despite this, the 17-19 budget cycle did not result in the approval of the Policy Option Package that would have allowed for the ongoing reimbursement of mileage to volunteers at their current rate. **The denial of the Policy Option Package combined with the further reductions in inflation and travel made it necessary for the LTCO to reduce mileage reimbursements to volunteers effective July 1, 2017.** It is believed that as of September, 2017 as

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many as five volunteers have resigned from the program as a result of this change. Since each volunteer visits an average of 135 individuals, that equates to 675 residents of long-term care in Oregon that will not receive the level of advocacy they deserve.

- 2) Recruitment of new volunteers: The 17-19 budget cycle did not result in the approval of the Policy Option Package that would have allowed for the ongoing reimbursement of mileage and other travel expenses to recruitment staff and prospective volunteers for training. **The denial of the Policy Option Package continued with the further reductions in inflation and travel made it necessary for the LTCO to suspend all recruitment and training efforts for a six month period of time (July 1, 2017 to December 31, 2017).** It is difficult to estimate how many applicants may have been lost as a result of this moratorium on training. However, three months into this period of time, the LTCO has lost 10 volunteers, five through natural attrition and five as a possible result of mileage reimbursement reduction, and has no ability to replenish the volunteer corps at the current time.
- 3) Volunteer Capacity: Sufficient volunteer management and retention cannot occur without paid staff having the time and work load distribution to make this feasible. The Agency now has seven full-time LTCO Deputy Ombudsman assisting and supervising Certified Ombudsman volunteers statewide. The Deputies average supervising 25-30 Certified Ombudsman volunteers each. The Institute of Medicine's study of Ombudsman services recommends a paid staff to volunteer ratio of 1:20. At the current level of supervision, the Deputies in Oregon average supervising more Certified Ombudsmen volunteers than in all but four US states and territories (according to the annual AOA LTCO reports). Without more Deputies, it is not feasible to increase the number of Certified Ombudsman volunteers beyond an average of 35 volunteers per Deputy while still expecting the level of support and Deputy service that will result in maximum volunteer performance and retention. In order to achieve 100% coverage, 2.5 additional Deputy positions and a full time Administrative Support Specialist to supervise an additional 105 volunteers would be required. **The denial of the policy option package that would have provided additional deputy positions essentially stunts the LTCO program at 57.5 – 60% facility coverage.**

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1b. Increase the frequency and effectiveness of consumer, community, and stakeholder education regarding the LTCO program and resident rights.

Context: The focus of this objective is two pronged.

1. The first is to provide resident/consumer education that promotes the ability of long term care residents and families to advocate on their own behalf. Although the LTCO program directly provides advocacy for all residents in licensed long term care settings, it is equally important to empower individuals to do so for themselves, thus allowing for the reallocation of limited program resources to individuals who may be unable to do so.
2. The second focus of this objective is to increase the overall visibility and knowledge about the LTCO program. Staff and volunteers are consistently surprised by the number of facility staff, residents and community members who have not heard of the LTCO program or are unclear about its function and mission. This reduces the number of issues brought to the attention of the office for resolution and ultimately leaves residents without the advocacy they deserve.

Goals:

1. Increase number of resident right presentations at facilities and attendance at resident council meetings by 10%.
2. Increase the quantity of resident rights publications and information distributed to families, residents and the general community by 10%.
3. Increase the number of outreach presentations made to community members, groups, and organizations by 10%.
4. Increase the number of articles, press releases or other media products regarding the LTCO program by 10%.

Current Status:

- In 2015, there were 624 resident right presentations and attendance at resident council meeting.

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- In 2015 there were approximately 2,500 resident rights publications distributed.
- In 2015 there were 404 community education activities performed by staff and volunteers.
- In 2015 there were 24 media contact with the LTCO.

Considerations: Accomplishing these goals is predicated on having the volunteers and staff time available to do so. While all of these activities have been part of the LTCO program for many years, they often are forced to take a back seat to the immediate need to resolve resident concerns and address time sensitive matters. Ultimately this creates a cycle in which the lack of education and awareness leads to critical rights issues going unaddressed. The provision of a small number of additional deputies combined with administrative support would make these goals achievable.

1c. Increase the level of collaboration between the LTCO and other State partners who are responsible for the safety of, and services to, individuals residing in long-term care.

Context: Recent failures to assure the safety of children in residential settings have highlighted the need for frequent and effective communication between all system partners. Given that the LTCO maintains the highest level of actual presence in the State's long term care facilities, our ability to communicate observations, concerns and issues with protective services, licensing and other partners is critical, as is their response to the information being shared. Because the OLTCO has no enforcement authority, volunteers and their Deputies resolve complaints through negotiation, diplomacy, and assertiveness. However, some matters require the attention and intervention of Adult Protective Services and/or Licensing in DHS. It is ultimately their responsibility to monitor facilities for compliance with regulations and issue, remove, or restrict the licenses of owner/operators and/or issue fines. When these offices do not respond promptly to serious matters referred by LTCO, the well being of the residents and the effectiveness of the Agency are both compromised.

Goal: To assure that information regarding the long term care service delivery system is shared amongst partners and that identified concerns are addressed in a collaborative manner.

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Current Status: During the 15-17 biennium, the Agency Director has completed the following tasks and will continue these efforts into the 17-19 biennium.

- a. Spearheaded efforts to obtain a signed memorandum of understanding between APD, DHS, and the Office of Adult Abuse Preventions and Investigations (OAAPI). Drafted in 2014, this document is now executed and will provide a more effective and efficient information flow.
- b. Met with leaders of APD, OLRO (now SOQ) and OAAPI on a routine basis to discuss specific case concerns as well as more systemic issues such as the timely investigation of serious abuse allegations in Nursing Facility settings and the legalities of resident contracts being utilized by some providers.
- c. Met regularly with stakeholder groups to discuss issues that affect resident's of long term care settings such as the implementation of new Home and Community Based Services rules, possible changes to the Advanced Directive or POLST documents, and consumer protection issues.

2a. Continue the development, growth, and implementation of the RFO program so that every licensed residential facility is visited by a RFO staff member or RFO Certified Ombudsman.

Context: This new program began on July 1, 2014 with the passage of SB 626 in the 2013 regular session and much of the 15-17 biennium was devoted to the development and roll out of the program after the recruitment of the Residential Facility Ombudsman September 2015. Objectives cited in the 15-17 budget which have been met include the expansion of the Residential Facilities Advisory Committee, expansion of the OLTCO office space to accommodate the program, the partial recruitment and organization of staff for the program, design and implementation of phase I of the complaint record keeping system, and the inception of handling resident complaints.

Goal:

1. Continue to provide in-home visits to all the licensed homes where consumers live in order to introduce and offer program services through RFO program staff. By the end of the current biennium, an additional 30%

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(approximately 500) homes and facilities in the state will have received initial written, verbal and in person information from the RFO program and individuals residing in these homes will have received an initial visit.

2. Recruit final RFO staff position (Volunteer coordinator .5 FTE)
3. Design and implement a pilot training program for RFO volunteer certified ombudsman that reflects the needs of the Developmental Disabilities, Mental Health and children populations. Allowing for local and community involvement in the service and more complete reach to consumers. Target 10% recruitment to homes in the chosen area. Monitor and alter training and process and then expand.

Current Status: RFO has completed home visits to 15 of the 36 rural Oregon counties. Geographically covering 41.6% of the state. This represents 247 homes or 10.7% of the total number of homes statewide. Eight additional counties are in progress. Representing an additional 141 homes estimated to be completed by early winter 2018. The volunteer portion of the RFO program is currently under development. Due to position freeze in the last year hiring of the .5 FTE volunteer recruiter for RFO has been delayed as well as Program Coordinator. Despite the delay, soft recruitment activities have begun. Active recruitment and application process is expected to begin by February 2018 with trainings and certifications beginning March 2018 in select pilot counties. The target recruitment for each of the pilot areas will be 10% of the total number of homes for the area. The pilot will then be altered according to feedback and expanded.

Factors, considerations and strategies:

- 1) There are approximately 2300 residential facilities serving individuals with intellectual/developmental disabilities and mental health conditions in Oregon. Geographical distribution of these homes results in a division of the state into seven districts for the RFO Deputies to manage. Since there are only five Deputies available to the RFO program, two districts (currently Eastern Oregon) will be the shared responsibility of the RFO Deputy team.

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- 2) Visitation of facilities covered by the RFO has been rolled out in geographical phases effective July 1, 2016 with the first visits occurring in the Eastern part of the state followed by Lake/Klamath locales. This area represents the largest geographical expanse with long distances between communities and homes covered by the program.
- 3) As these visitations occur, complaints brought forth by residents will be handled by the Deputy assigned to the district in which the consumer resides. However, this is not a sustainable long term model and efforts to recruit and train volunteer RFO Certified Ombudsmen to conduct ongoing visits and complaint resolution will be occurring concurrently.

2b. Increase the frequency and effectiveness of consumer, community, and stakeholder education regarding the RFO program and resident rights.

Context: As a new program, it is essential to make all parties aware of its presence and its mission. Creating a uniform and clear understanding from the inception of the RFO program is essential to assuring its success going forward. Doing so in a variety of communication strategies will be critical in reaching all interested stakeholders.

Goal:

1. The RFO program will develop multiple forms of communication materials suitable for distribution to provider agencies, partner agencies, consumers, family members and other stakeholders.
2. The RFO program will conduct in person presentations to these same individuals in all established regions throughout the state.

Current Status: Over the past year of operation, initial products in the form of required posters, contact magnets, and written materials have been produced. The audience has also been identified in most cases, although will consistently be under revision. Communication of program mission, individual rights and access to services and delivery of this information requires additional development in consideration of the Development Disability and

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Mental health populations (accessible website, social media, audio/video options text to voice as well as Braille). These options are being explored for optimal outreach to the individuals we serve.

2c. Increase the level of collaboration between the RFO and other State partners who are responsible for the safety of, and services to, individuals residing in long-term care.

Context: As a new program, it is essential for the RFO program to establish protocols and procedures for how information regarding the program and identified concerns is shared with system partners. Recent failures in children's residential settings have highlighted the need for this type of formally established communication between all parties responsible for assuring the health, safety and right of individuals living in residential facilities. This would include, but not be limited to, a communication system in which information is provided to the RFO program about the outcome of issues brought to the attention of abuse investigators or licensing authority as well as the sharing of data regarding licensed facility settings.

Goal: To assure that information regarding the long term care service delivery system is shared amongst partners and that identified concerns are addressed in a collaborative manner.

Current Status: The OLTCO already has established means of communication with system partners in the long term care arena. These are being established with partners in the I/DD and mental health systems.

3. Expanding the availability of public guardianship and conservatorship services so that every incapacitated Oregonian who needs the assistance of a guardian and conservator, but lacks the means to obtain these services, nor has anyone able or willing to serve in this capacity, can benefit from the advocacy, support, and protection of skilled guardians and conservators.

Context: This new program began on July 1, 2014 having been established by SB 1553 in the February 2014 legislative session. Much of the 15-17 biennium was devoted to the development and roll out of the program. Objectives cited in the 15-17 budget which have been met include the expansion of the Residential Facilities Advisory

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Committee, recruitment of a Public Guardian, recruitment of Deputy Guardians, design of the standard under which the program accepts cases, and begin taking cases.

Goal: Increase the capacity of the Oregon Public Guardian Program through the efficient use of paid and volunteer positions and contracted resources.

Factors, considerations and strategies:

- a. The current capacity of the OPG program with two deputy guardians is a total of 40-50 cases (20-25 each) at a time. Current estimates are that there is need for no less than 1200-1300 public guardianships statewide excluding Multnomah and Jackson County, which are the only counties in Oregon with a public guardian program.
- b. Contracts have been entered into with the Senior Citizens Council of Clackamas County that allow for additional guardianship services of 10-14 individuals. The 17-19 LAB does not allow for additional contracts for guardianship services.
- c. Work completed to date is largely sufficient to advise the appropriate decision makers in the Executive and Legislative branches of the need, the cost, and the effectiveness of expanding the program toward the goal of serving Oregonians who need the services of the Oregon Public Guardian and Conservator. Specific issues such as the need for Department of Justice representation at a much higher rate than was initially projected, as well as the failure to allow for overtime costs associated with an agency that provides services on a 24/7 basis, and the need for the structural capacity of the program to be bolstered have been identified.
- d. Growth must occur in a strategic and well-planned manner. The addition of staffing capacity in and of itself will not address the guardianship needs of incapacitated Oregonians. Thorough capacity for screening, legal due process, asset management, and case planning must be well established before sustainable growth can occur. The 17-19 biennium will substantially advance those efforts, but will likely not result in meeting the fiduciary needs of all individuals in need of them.

Agency Efforts, Improvements and Initiatives

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In order to implement and achieve the strategic business plans of the agency, the following efforts and initiatives have taken place in the 15-17 biennium and will be carried forward into the 17-19 biennium:

- a. Strategic planning: The OLTCO initiated the process of agency wide as well as individual programmatic strategic planning. The initial focus was on a unified vision and mission for the Agency, followed by the development of programmatic visions and missions. Programmatic goals falling under the principals of advocacy for basic rights and quality of care, consumer education and protection, and policy development and systemic advocacy are under development.
- b. Fiscal efficiencies: The OLTCO is always looking for ways in which it can conserve resources and has implemented the following strategies within the past six months.
 - a. Increased used of the SPOTS card for both time efficiency and fiscal rebate purposes.
 - b. Reassessment of the use of motor pool vehicles vs. private and rental vehicles as well as other alternative transportation options to maintain presence in outer reaches of state in a cost efficient and time efficient manner.
 - c. Increased use of Go To Meeting and Go To Webinar to connect with volunteers and stakeholders in an effective manner without incurring extensive travel costs.
 - d. Implementation of revised telecommuting and mileage reimbursement policies in conjunction with DAS to assure equitable and accurate reimbursement for paid staff.
 - e. Utilization of volunteer programs provided by other agencies, such as the Easter Seals SCEP program, to complete tasks and projects not able to completed by paid staff due to work load constraints.
 - f. Re-evaluation of purchasing practices related to training supplies, business cards, e-mail services, security alarm services and other operations to assure the lowest cost options are being utilized.
 - g. Examination and reduction of staff time in meetings in which their attendance is non-essential or is duplicative of other staff presence.

- c. Operational efficiencies:

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- a. Increased use of metrics and measurables to assess workload distribution, monitor staff performance, target volunteer recruitment efforts, and target volunteer training and support needs.
 - b. Addition of Deputy Director to assess, streamline, and manage technology needs, Agency fiscal status, HR issues, Agency policies and procedures, and overall workflow.
- d. LTCO volunteer retention and relationships: While the recruitment of volunteers is an essential part of the LTCO program, the appreciation and retention of our existing volunteers is equally if not more important. While much of that responsibility falls on the district Deputies, it is critical that the Director and Deputy Director of the agency play a part in this as well. With that in mind the following efforts have been made over the past nine months and will remain in place going forward.
- a. Arranging formal volunteer management training for Deputy staff to provide them with and build upon their existing skills in volunteer management and retention.
 - b. Director and/or Deputy Director presence at no fewer than two of the fifteen monthly volunteer meetings held throughout the state each month.
 - c. Resurrection of a quarterly volunteer newsletter.
 - d. E-mail communication from the Director to all volunteers regarding pertinent agency, program, or stakeholder issues on at least a bi-weekly basis.
 - e. Communication, meetings and facility visits with individual volunteers by Director and Deputy Director throughout month.
 - f. Improved and revised training, policy and procedural materials for volunteers.
- e. LTCO Memory Care Initiative: In 2016 the OLTCO launched a one-year memory care initiative to identify best practices and challenges in providing care to some of Oregon’s most vulnerable individuals and to improve upon LTCO services to residents with dementia. 40+ Ombudsmen received specialized training on dementia and the provision of memory care services and were assigned to over 30% of the memory care facilities throughout the

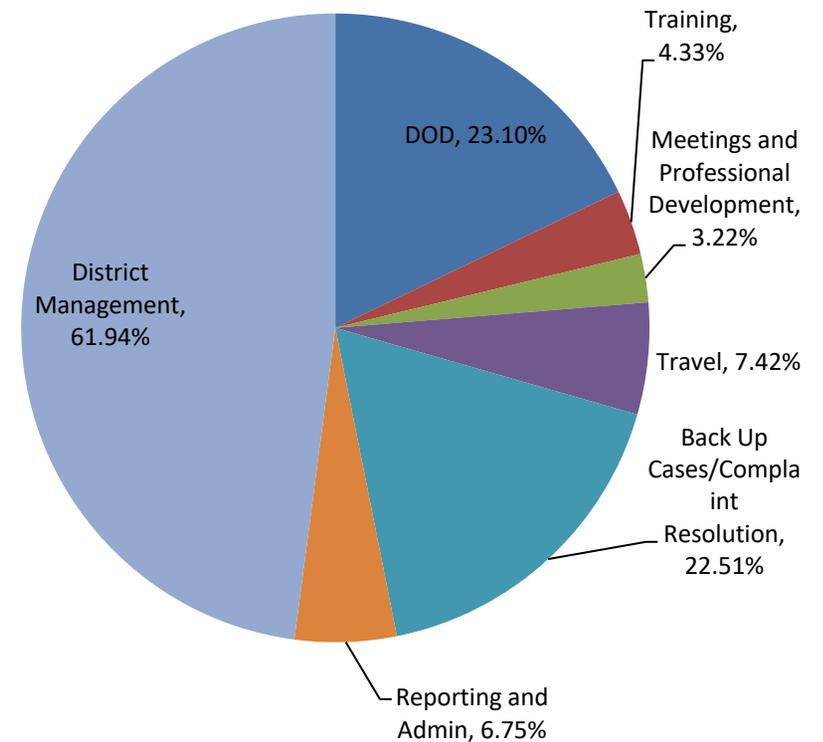
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state. Through the data collection that these individuals will undertake in the coming year, as well as the information shared with LTCO by facility administration and staff, the LTCO program hopes to be able to formulate an accurate and fact based picture of the current state of memory care service delivery, where it is succeeding, and where improvements could be made.

f. LTCO Workload Management: The demand for services from the LTCO is ever increasing and requires monthly monitoring and management to assure that Deputies are able to meet the competing demands for their time.

a. The number of facilities throughout the state is increasing, thus are the number of residents who may reach out to the LTCO for assistance and the number of volunteers needed to be assigned to those facilities. When there is not an assigned volunteer, responsiveness to the residents of those facilities often falls to the Deputy.

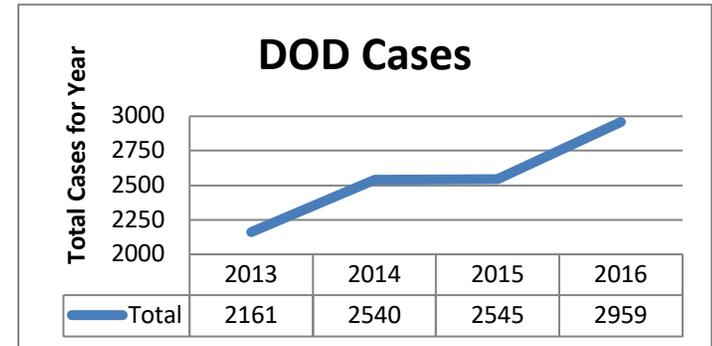
b. Assuring that volunteers are adequately supported is key to their retention as well as their ability to successfully serve the residents of the facility to which they are assigned. Furthermore, it is critical that the efforts of both volunteers and staff are documented and able to be quantified, utilized for analysis, and communicated to partners. Assisting volunteers with their duties and reporting requirements, as well as completing reports themselves, is another workload responsibility of Deputies.



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c. Volunteer training for both new and existing volunteers is the responsibility of the Deputy who is managing those volunteers as well as the LTCO training specialist. Approximately fourteen training sessions are held annually for new volunteers and monthly meetings that include a training component are held on a monthly meeting thereafter.

d. Calls to the toll free complaint line are on an upward year over year trend and the issues being addressed such as billing, resident contractual agreements, and involuntary move out notices are increasingly complex and time consuming. Deputies currently share differing levels of responsibility for the response to these calls by serving as the Deputy on Duty (DOD).



e. Day to day travel as well as overnight travel can be a significant workload impact, especially when serving the more rural portions of the state. The Agency continuously assesses the most efficient means of accomplishing travel, both from a time and fiscal impact perspective, as well as the job satisfaction perspective of the Deputy.

Criteria for 2017 - 2019 Budget Development

The Legislatively Approved Budgets:

1) Maintains all OLTCO staffing.

Legislatively Adopted

2017-19

OLTCO BUDGET NARRATIVE – 2017-2019

- 2) Reduces the current funding for LTCO Instate Travel including the removal of the 3.8% inflation provision for this line item. In 15-17, the expenses in this category, primarily due to mileage reimbursement to volunteers, exceeded the budgetary allocation by approximately \$88,000. **Therefore, significant cuts to travel, statewide recruitment and training of new volunteers and elimination statewide training of existing volunteers will be necessary.**
- 3) Maintains the current funding for IT support across the agency. Originally the OPG and RFO budgets did not have any funding allocated for this purpose. The “respin” exercise during this year’s budget preparation allows for some reallocation of funds into these categories. **However, the agency budget for IT support continues to be underfunded by approximately \$188,000 biennially.**
- 4) Decreases the Professional Services portion of the OPG budget by \$600,000. **This impacts the ability to contract with local service providers for services to approximately 100 additional protected persons.**

Performance Measures

The most recently submitted Annual Performance Progress Report is included beginning on the next page.

Major Information Technology Projects or Initiatives

Except as set forth above, the Agency does not anticipate any major information technology projects or initiatives in the 2017 – 2019 biennium.