



Transformation Agreement

April 1, 2014

Quarterly Update and Annual Progress Report

**Annual Reporting Period
April 1, 2013 – March 31, 2014**

Submission to the Centers for Medicare
and Medicaid Services

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- A. Housing Forum's Final Agenda

Introduction

In keeping with the Health System Transformation for Individuals with Developmental Disabilities Agreement as defined in the Standards Terms and Conditions of New York State's Partnership Plan Medicaid Section 1115 Demonstration, this document reports to the Centers for Medicare and Medicaid Services (CMS) the completion of the April 1, 2014 Transformation Deliverable Schedule which includes annual progress and quarterly updates in the following areas:

- Information on the transition of individuals from institutions that meet home and community based setting (HCBS) standards and qualifying for the Money Follows the Person (MFP) demonstration.
- Progress for increasing availability of supportive housing options and the number of housing units available to persons being transitioned from ICFs and meeting HCBS standards;
- Progress toward the number of individuals engaged in competitive employment and the number of individuals remaining in sheltered workshops.
- The number of participants self-direction training/education sessions conducted and the number of self direction enrollees.
- Status on the annual submission of the state's recently CMS approved Evaluation Plan

In addition to the above deliverables, the Final Plan to Increase Competitive Employment Opportunities for People With Developmental Disabilities and OPWDD's Final Self Direction Policy has been provided under separate cover. These documents have been updated to reflect recent discussion between the state and CMS.

Residential Transitions and Supportive Housing

Residential Transitions and Supportive Housing

(from CMS Special Terms and Conditions, Attachment H)

- a. *By January 1, 2014, New York will transition a total of 148 residents from the Finger Lakes and Taconic ICFs in accordance with the following milestones:*
- iii. the remaining 121 persons transitioned to community-based settings that meet CMS HCBS settings standards referenced in the 1915(i) Notice of Proposed Rulemaking published in the federal register in April 2012.*
- b. *At least 30% of those persons (or a total of 44 persons) transitioned from institutions, both campus-based and non-campus-based ICFs, will qualify for MFP (i.e. can be transitioned into an MFP qualified residence). New York will transition the balance of the persons in the Finger Lakes and Taconic ICF target population (who are not transitioned to MFP qualified residences) into residential settings that comport with CMS requirements for home and community-based settings as outlined in the 1915(i) NPRM. **New York must submit quarterly reports of the total number of persons transitioned to the community, the size and licensure category of the residential settings into which persons were transitioned (e.g. 4 person group home), and an assurance that the residential settings comport with CMS requirements.***

The Finger Lakes and Taconic ICFs were closed on December 31, 2013 and residents transitioned to settings in the community. During the time period January 1, 2014 through March 31, 2014 a total of 85 individuals moved out of OPWDD institutional settings and into settings meeting HCBS standards. Of the 85 individuals, 24

qualified for Money Follows the Person (MFP). The below table reports a total of 227 individuals transitioned into home and community based settings, of which 74 met MFP qualifications for the annual period of April 1, 2013 through March 31, 2014.

Individuals Assisted to Transition to Community Settings April 1, 2013 – March 31, 2014	
Meets HCBS Standards	MFP Compliant
227	74

Expanding Supportive Housing Options

Residential Transitions and Supportive Housing (from CMS Special Terms and Conditions, Attachment H)

- c. New York will provide quarterly updates on the progress for increasing the availability of supportive housing options, including “non-traditional housing models” such as the “Home of Your Own”, Family Care, Shared Living, Customized Residential Options, and AFI. **Each quarterly update will include the number of new housing units that are available to persons being transitioned from ICFs, and meet CMS standards for HCBS settings.**

OPWDD, in its continuous mission to increase the availability of supportive housing options for people with intellectual and developmental disabilities moving from institutions to the community, made tremendous progress this quarter. Among the hallmarks are strengthening of federal, state, and local partnerships; expanding participation in the Home of Your Own (HOYO) program; planning and developing the Division of Person Centered Supports, Office of Home & Community Living, 1st 2014 Housing Forum; ensuring that the “Next Steps” outlined in the January 1 Quarterly Report are accomplished and/or moving forward. All of which leads to the Creation of a Continuum of Housing Options for people with intellectual and developmental disabilities.

Strengthening Federal Partnerships

CMS Housing Capacity Building Initiative:

During this quarter, OPWDD increased activities with the CMS-funded Housing Capacity Building Initiative Project Team through the implementation of one Webinar and two Coaching Calls. The Webinar was held on February 19th for OPWDD central and regional housing staff, and for New York State MFP Personnel. DOH and OPWDD MFP staff participated in the initiative. The main purpose of the Webinar was to provide an overview of non-certified housing models that are utilized across all disability groups and low income populations, and to highlight the correlation between the two. Another major emphasis was on state agency/cross systems affordable and accessible housing opportunities.

The first *Coaching Call* was held on February 27th and explored ways to make better use of current resources such as housing choice vouchers and Public Housing Authorities (PHAs). The second Coaching Call was held on March 13th and focused on non-PHA resources such as USDA, multifamily and Low Income Tax Credits. All of the activities strengthened the housing knowledge base of OPWDD and DOH personnel on housing options that exist currently in the community.

HUD Housing Counseling Activities:

OPWDD expanded training activities, credit counseling and 1st Time Homebuyer education classes for people with intellectual and developmental disabilities, their families and their workforce through increased activities with the Assets for Independence (AFI), Matched Savings Program. More than 499 individuals and families were trained during this Quarter; 50 have continued to save for their first home; and, 16 new applicants began saving for their first home this Quarter.

Strengthening State and Local Partnerships

Medicaid Redesign Team (MRT) Supportive Housing Program

OPWDD held a special session with Elizabeth Misa, Director of the Governor's Medicaid Redesign Team (MRT) Supportive Housing Workgroup, and local providers of OPWDD services that participated in the MRT project and people with intellectual and developmental disabilities who moved to a less restrictive residential setting – using MRT funds. The purpose of this historic meeting was to learn from providers and individuals about their successes, challenges, barriers and recommendations for future activities. Denard Cunnings from Long Term Care at DOH, and Henri Williams, Director of Housing at OASAS also participated in the meeting. One of the major outcomes is to request the expansion of OPWDD's MRT program and, another is to visit some of the participants 'new' home in the future.

Eight service providers participated in the session and six individuals told their stories in person, through video, DVD presentations, or by other forms of media. It was evident through this MRT Supportive Housing Initiative that individuals with intellectual and developmental disabilities (ID/DD) who have lived in more restrictive and supervised settings could be supported in the community with the proper support services being available to them. OPWDD plans to continue to work with DOH/MRT leaders and workgroup members to expand this successful program.

NYS Homes and Community Living (HCR)

OPWDD is continuing to strengthen its partnership with HCR, the lead agency for housing in the state. Several meetings have been held this Quarter to discuss the implementation of the 47 units awarded to OPWDD providers during the Early Round of HCR's Request for Proposals (Unified Funding). In addition to these 47 units, OPWDD is engaged in dialogue with HCR and the Office of Temporary and Disability Assistance (OTDA) to fund, with MRT monies, a project with one of OPWDD provider agencies in Western, New York. This opportunity would be cross systems and an example of integrated supportive housing.

OPWDD's Office of Home and Community Living 1st Housing Forum in 2014

On March 31, 2014, OPWDD's Division of Person Centered Supports, Office of Home and Community Living, hosted a Housing Forum. The idea behind the forum grew out of OPWDD's need to continue the creation of a Continuum of Housing Options for people with intellectual and developmental disabilities and the training conducted by the CMS/TA Project Team.

This Statewide Regional Forum was presented to national and regional stakeholders and experts through Webcast, Video Sites and on Face Book, Twitter and YouTube. The forum featured the innovative work and best practices in Region One as outlined in the attached Housing Forum's Final Agenda (Appendix 1). The purpose was to:

- To introduce forum participants to the region's housing resources and their track record of innovative practice in the provision of housing services;
- To describe the challenges facing our housing system and how we propose to move ahead on a long term plan for housing services within the region;
- To hear housing experts internal to and external from OPWDD system as we interact on ways to better advance housing choice within the region.

Residential opportunities within Region One are unsustainable in its current form, both unaffordable and falling short of consumer expectations. Additional pressure will be placed on the system by the elimination of institutional beds and the requirements of the Olmstead Plan. OPWDD needs to rebalance resources and investments for residential and community living to provide more choices, promote greater integration and is more easily modified in the face of changing demand.

Jennifer Burnett, Division of Community Systems Transformation, Disabled and Elderly Health Programs Group, Center for Medicaid and CHIP Services, Centers for Medicare and Medicaid Services, U.S. Department of Health & Human Services, Jennifer Ho, Senior Policy Advisor for Housing and Services to the Secretary, U.S. Department of Housing and Urban Development and other people will participate on the agenda, including people from financial institutions, university settings, advocacy, families, state and local officials and non-profit housing developers.

The Home of Your Own (HOYO) Program:

The HOYO program has had a great deal of activity this quarter due to the increase in the number of applicants seeking to purchase their first home and the increase in participation in the Assets for Independence (AFI) 1:8 Matched Savings Program. During this Quarter, 499 people received homeownership counseling and training. These trainings were provided primarily in New York City by the downstate housing staff for families, people with ID/DD and the workforce. In order to meet the needs of most of the population, housing counseling classes are offered on Saturdays and via video sites.

Fifty individuals, families and workforce members are continuing to save for their first home; 16 new applicants started saving this Quarter for their first home. 30 received credit counseling/credit repair; and 6 are actively involved in foreclosure prevention activities.

The Office of Home and Community Living received a Notice from HUD for their 2014 NOFA. OPWDD has taken steps to apply for funding from HUD and is seeking to align its housing strategic goals and priorities with the Department's NOFA priorities. One of the major changes by HUD is to allow some of the housing counseling programs (of which OPWDD is one) to apply for and receive funding for a two-year period, rather than the existing one-year. These Grants are provided by HUD to assist people with ID/DD, families and others understand the home buying process, renting, foreclosure prevention and other housing options. The

other major purpose of grant funding is to allow approved housing counselors to travel to various locations to obtain, and then maintain their certification status.

Since the 2013 Statewide Family Care Conference, the Family Care Program has received increased attention from individuals who are seeking to become providers, provider agencies and from regional coordinators. As a result, and one outcome, is the creation of a Family Care Advisory Workgroup that was formed to support issues and concerns generated from a regional, state and national perspective.

Total Number of New Housing Units Developed	
New Home Owners	9
Available Supportive Housing Units connected to the Governor's Medicaid Redesign Team Supportive Housing Development Program and, OPWDD's partnership with the NYS Homes & Community Renewal (NYSHCR)	90

Increasing Supported Employment Services and Competitive Employment

*Supported Employment Services and Competitive Employment
(from CMS Special Terms and Conditions, Attachment H)*

5. Supported Employment Services and Competitive Employment

- a. **The state must provide CMS with a quarterly report documenting the state's progress toward the agreed-upon goal of increasing the number of persons engaged in competitive employment, through Supported Employment, by 700 persons above the previous 12 month enrollment, with no exceptions for attrition during the period of April 1, 2013 and March 31, 2014. Given the expected fluctuations triggered by school timelines (e.g. graduations), New York will increase the number of persons in competitive employment by no less than 250 persons by October 1, 2013, with no exceptions for attrition.** Only integrated gainful employment at minimum wage or higher will be considered competitive employment. The quarterly report also must include a description of activities the state has undertaken during the quarter to increase the number of demonstration participants engaged in competitive employment.
- b. Effective July 1, 2013, New York will no longer permit new admissions to sheltered workshops. **The state will report the number of enrollees that remain in sheltered workshops in each quarterly report as required under paragraph 62.**
- d. **The state will report to CMS on an annual basis the number of students who are aging out of the educational system and who have been determined eligible for OPWDD services, the number who enter VR, and the number who enter OPWDD because they are not found ready by DVR, and any websites/sources for employment data.**

Supported Employment Services and Competitive Employment

During this reporting period OPWDD continued to work to create the infrastructure and capacity that will support significant improvements in competitive employment outcomes for individuals receiving supported employment services. Infrastructure and capacity building activities included: creation of the new Pathway to Employment Service, training of supported employment providers, improvements in the collection of employment data, initiatives to incentivize the transition of individuals from day habilitation and workshops to employment, initial efforts to redesign Supported Employment rates, strengthening partnerships with ACCES-VR and the Office for Special Education, and working with the State Employment Leadership Network (SELN).

Pathway to Employment

The definition of “career planning” from the September 2011 CMS Bulletin on Employment was used as a guide in creating the Pathway to Employment service. During the design of Pathway to Employment presentations and meetings were convened with parent organizations, self advocacy groups, voluntary and state operated day service providers, Medicaid service coordinators, regional staff of ACCES-VR, Commission for the Blind and Office for Special Education and high school administrators. These various dialogues were used to educate stakeholders about Pathway to Employment, solicit input on the design of the service and encourage utilization of the service once it becomes available. Regulations for Pathway to Employment have been developed and shared with stakeholders. The new service takes effect June 1, 2014. In addition to the regulation, an Administrative Memo (ADM) is currently in development which will provide further guidance and clarity on the delivery of Pathway to Employment services. It is anticipated that the ADM will be released by the end of May. There were also several internal discussions within OPWDD regarding the design and rollout of Pathway to Employment. These discussions included regional office staff that regularly interact with stakeholders and will be facilitating enrollment into the service, central operations and IT staff that will be tracking service delivery and billing, and research and quality improvement staff responsible for development of outcome measures.

Supported Employment Training

In anticipation of the roll out of Pathway to Employment, meetings were convened across the state with voluntary and state operated providers that might be interested in the service. Since a provider must already be authorized for supported employment services before Pathway to Employment services can be delivered, OPWDD facilitated three trainings for 100 providers who had not previously delivered supported employment services. Employment Trainings were also convened for approximately 300 Medicaid Service Coordinators. OPWDD also continued its efforts to increase the capacity of supported employment providers to deliver high quality services by continuing the Innovations in Employment Training Series. During this reporting period 558 supported employment and day habilitation staff representing 76 voluntary and state operated providers received training in employment discovery, assessment, job development and job coaching.

Incentivizing Transitions from Workshops and Day Habilitation to Employment

New York has used its state budget making process as an opportunity to incentivize better employment outcomes for people with developmental disabilities. Approximately \$30 million in non Medicaid dollars is used to fund workshops. The Executive Budget proposed a \$4.5 million reduction in this funding. The proposed reduction would take effect July 1, 2014. OPWDD is working with impacted providers to identify individuals who could transition to the new Pathway to Employment service, Supported Employment, Community Habilitation or other more appropriate services that create opportunities for individuals to be engaged in their community. The Executive Budget also proposed the transition of approximately 6,500 individuals to Pathway to Employment and/or Supported Employment services. It is anticipated that these proposed budgetary actions will be passed by the New York State Legislature by April 1, 2014.

Redesigning Supported Employment

During this reporting period, initial work began on the redesign of supported employment services. Current supported employment fees are billed on a monthly basis. Efforts are underway to transition supported employment from a monthly to an hourly service. OPWDD will be working with the Department of Health to establish new fees that incentivize employment and include performance based outcomes.

Strengthening Partnerships with ACCES-VR and the Office for Special Education

The Partnership in Employment Systems Change Grant continues to serve as a venue to strengthen collaborative efforts between OPWDD, ACCES-VR and the Office for Special Education. During this reporting period, ACCES-VR and OPWDD have had several discussions regarding our mutual efforts to improve employment outcomes for youth transitioning from high school. As ACCES-VR seeks to engage students and families in their services two-years prior to exiting high school, discussions with OPWDD have focused on ways to share data so that students and families are also aware of Pathway to Employment and other OPWDD services. Discussions have also focused on a joint ACCES-VR and OPWDD process for identifying individuals who may be interested in receiving Pathway to Employment services. This process will include agreed upon documentation indicating when an individual will not be receiving ACCES-VR services. This documentation will be maintained by providers for audit purposes. OPWDD has also collaborated with the Office of Special Education to provide employment information to high schools. Utilizing the Employment Training Program, OPWDD convened two train-the-trainer sessions with teachers on how to incorporate discovery into their transition planning. In addition meetings were convened with 20 high schools interested in participating in the Employment Training Program and transitioning students to employment upon their exit from high school.

Employment Outcomes

During this reporting period, efforts continued to collect employment data. Monthly reports were submitted to OPWDD on the total number of individuals with developmental disabilities enrolled in supported employment, number of individuals employed in an integrated setting earning minimum wage and the number of individuals who are not employed. There was also a focus on improving the integrity of data by scrutinizing employment settings to ensure that segregated settings were not captured in the competitive employment data. The March 31, 2013 baseline of individuals with developmental disabilities enrolled in

supported employment was updated and is now 9,972. Of these individuals 7,044 were competitively employed in an integrated setting earning at least minimum wage. Due to a lag in the reporting of data from supported employment providers, data is only available thru February 2014. As of the end of February there were 10,313 people enrolled in supported employment of which 7,362 were engaged in competitive employment which is a net increase of 318. Several factors led to the lower than anticipated growth in competitive employment including the lag in data collection and fluctuations in seasonal employment. In addition, with the exception of the July 1, 2013 policy to end new enrollments in workshops all other initiatives designed to improve employment outcomes will not be operational until 2014. Efforts between April 1, 2013 and March 31, 2014 focused on infrastructure and capacity building to ensure that enrollees in supported employment services received quality services. Over this same period there was a focus on building the infrastructure and capacity for new initiatives like Pathway to Employment and restructuring of supported employment fees to ensure that they will be successfully implemented. Once the Pathway to Employment service is available, it is anticipated that students transitioning from high school, workshop participants and individuals receiving day habilitation services will begin to utilize the service. An immediate decrease in workshop and day habilitation enrollment is not anticipated since individuals are expected gradually decrease the number of hours they receive these services as they increase hours in Pathway to Employment or Supported Employment. By June 2015, it is anticipated that competitive employment outcomes will begin to significantly increase due to delivery of Pathway to Employment and the restructuring of Supported Employment.

State Employment Leadership Network (SELN)

During this reporting period, OPWDD has had been receiving technical assistance from SELN. During on-site visits the SELN team has had an opportunity to meet with providers, parents, advocates; OPWDD regional offices and central office leadership; Medicaid service coordinators; and quality improvement, strategic planning/performance measurement, fiscal, revenue support and budget staff of OPWDD. The purpose of these meetings was to better understand the infrastructure within OPWDD that supports the achievement of better employment outcomes for individuals receiving supported employment services. The technical assistance team will use this information to make recommendations for system changes that can be made to assist OPWDD in implementing the Employment Transformation Plan. Preliminary feedback has already been provided on ways to strengthen collaboration between OPWDD, ACCES-VR and the Office for Special Education; ways to improve the collection of employment data; factors to consider in the restructuring of Supported Employment fees; and how to create an internal infrastructure that supports implementation of the Employment Transformation Plan.

Transformation Deliverables Employment Summary

OPWDD's Employment Plan has been updated to reflect final agreements made between the state and CMS and has been shared under separate cover. The plan further details OPWDD's strategies and plan toward increasing competitive employment.

As communicated in a series of conversation with CMS staff, the state's capacity to report employment data initially required time to work with partner agencies to establish an accurate baseline. The below table summarize employment outcomes through February 2014 as highlighted in the employment outcomes subsection on page 7 above. As of the end of February there were 10,313 people enrolled in supported

employment of which 7,362 were engaged in competitive employment which is a net increase of 318. As mentioned previously, OPWDD anticipates that competitive employment outcomes will begin to significantly increase due to delivery of Pathway to Employment and the restructuring of Supported Employment.

Individuals Receiving SEMP and Competitively Employed			
April 1, 2013 – March 31, 2014			
	March 31, 2013 (baseline)	February 2014	Net Increase
Number of individuals receiving SEMP	9,972	10,313	341
Numbers of individuals who are competitively employed	7,044	7,362	318

As of December 31, 2013 there were 8,020 enrollees in sheltered workshops. By the end March 31, 2014 workshop enrollment remained constant. The Employment Transformation Plan outlines strategies for workshop participants to transition to competitive employment, retirement or other community inclusion options.

OPWDD anticipates 2,296 students will be eligible for OPWDD services when they exit the educational system in 2014. It is unknown at this time the number of students who will receive ACCES-VR service or will be determined ineligible for such services. This data is not currently tracked by OPWDD.

Increasing Self-Direction

*Consumer Self-Direction
(from CMS Special Terms and Conditions, Attachment H)*

*b. New York will increase the number of people offered the option to self-direct their services through increased education to all stakeholders in a consistent manner statewide. This education will be provided to at least 1,500 beneficiaries (with designated representatives as needed) per quarter beginning on April 1, 2013. **New York will submit a quarterly report of the number of training/education sessions conducted and the number of persons attending the sessions.** New York will share training materials and curricula for these sessions with CMS, and make them available statewide by May 1, 2013.*

e. New York will provide a report to CMS no later than July 1, 2013, on the current number of persons with IDD and other disabilities who self-direct their services under this demonstration.

iii. By April 1, 2014, 470 new beneficiaries will self-direct services.

f. By January 1, 2014, New York will submit to CMS for approval the state’s policies on self-direction that demonstrate its commitment to and implementation of self-direction.

Self Direction Policy

OPWDD is committed to provide opportunities for individuals to exercise the maximum amount of control over how they receive supports and services through self directed support options. Through employer and/or budget authority and the ability to customize plans of support, people with developmental disabilities can engage as full citizens in communities of their choosing to live and work or engage in meaningful activities.

The submission of New York's final policies on self direction demonstrating its commitment to and implementation of self-direction is provided under separate cover and reflects feedback received and discussed with the state's CMS counterparts.

While significant progress has been made toward the transformation goals, there are various reforms needed to meet the broader goals of transformation related to self-direction. Specifically, work is moving forward to implement agreements made between OPWDD and CMS to revise the current consolidated supports services model to meet federal guidelines and streamline self direction. With a target implementation date of October 1, 2014, the state has begun the process of reaching out to stakeholders and will conduct a series of initial statewide videoconferences for individuals and families in the early weeks of April 2014.

Self Direction Education to Beneficiaries

The NYS Office for People with Developmental Disabilities (OPWDD) has promoted self direction for individuals receiving supports through educational efforts by OPWDD staff and stakeholder groups. Educational efforts include community training sessions and new staff practices at the "Front Door" which ensure that individuals coming to OPWDD to access services make an informed choice regarding self directed service options

Consistent with the transformation goal to expand education about self-direction service options in a consistent manner to all stakeholders statewide, OPWDD has educated more than 1,500 individuals and family members in self-direction sessions during the quarter ending on March 31, 2014, with a total count of 2,744 individuals and 94 training sessions, as noted in the table below. Self-direction education sessions are actively attended by individuals and family members. OPWDD will continue to focus education activities on self-direction according to the education goals described in the table below.

Self-Direction Education Totals January 1 – March 31, 2014			
Self-direction Education Target	Education Goal	Total Number of Individuals	Total Number of Sessions
New people requesting supports from the OPWDD system and people who are transitioning from the education system into the OPWDD system of supports.	Increase awareness of self-direction options among the people engaging in supports from OPWDD	2,454	50
Individuals who are currently receiving OPWDD supports and services and new individuals who have expressed an interest in self-directing services.	For people who are expressing interest in self-direction, the goal is to ensure understanding of the key concepts of self-directed supports.	86	16
Individuals who are actively seeking to self-direct services with budget and employer authority	Detailed understanding of the operational components of self-directed supports; clear understanding of the responsibilities associated with self-direction.	204	28
	Total	2,744	94

A cumulative look at the past year’s educational efforts, as outlined in the table below, demonstrates OPWDD’s commitment to self direction education reaching approximately 12,774 individuals in more than 544 training sessions across the state.

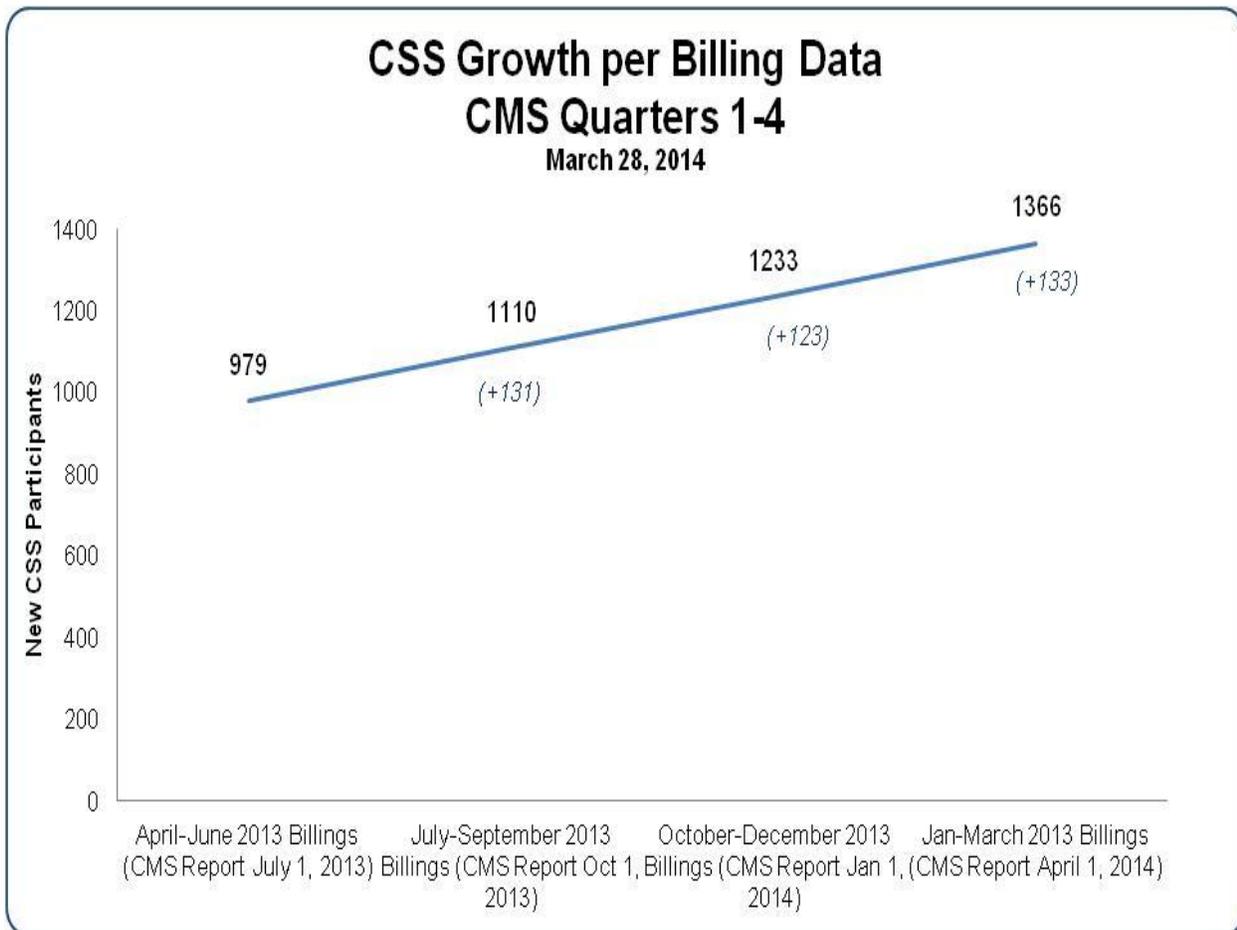
Self Direction Education Training April 1, 2013 – March 31, 2014		
	Number of Individuals	Number of Sessions
April 1 – June 30, 2013	1,844	85
July 1 – September 31, 2013	3,746	98
October 1 – December 31, 2013	4,440	267
January 1 – March 31, 2014	2,744	94
Total	12,774	544

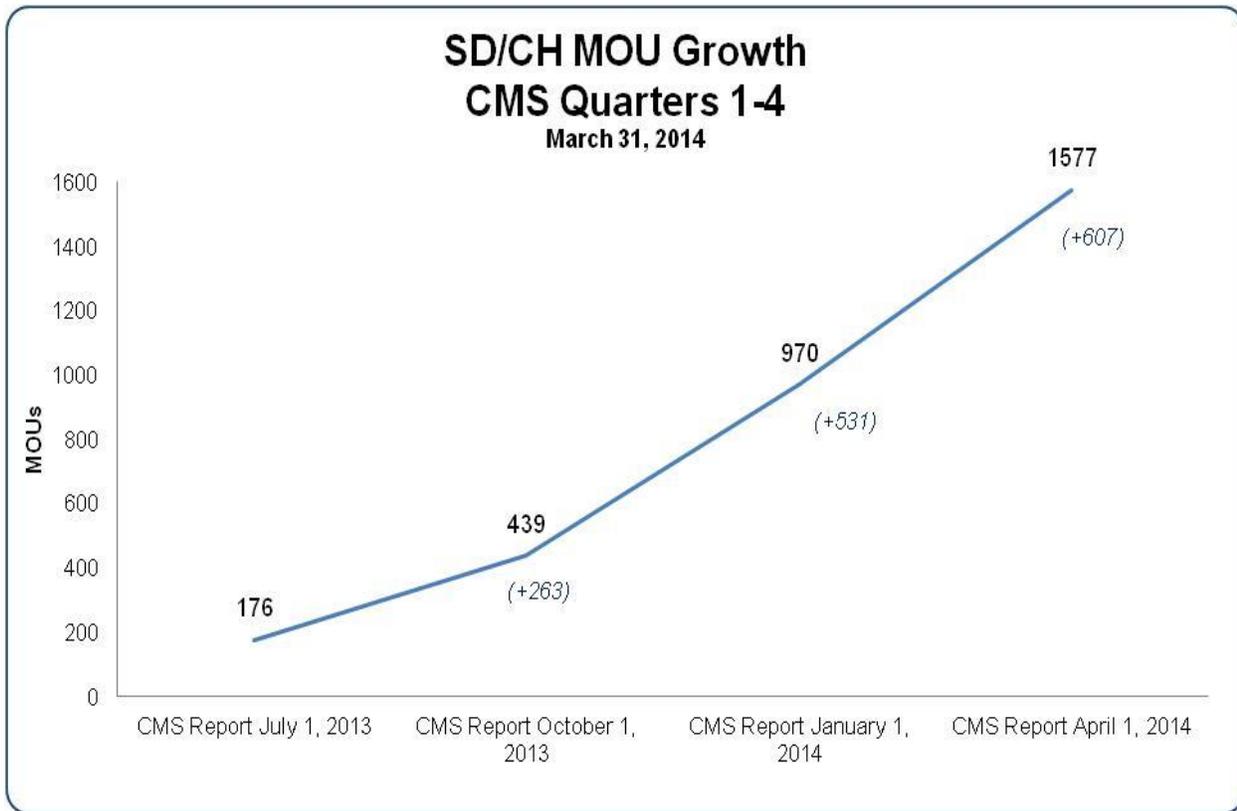
Beneficiaries with Developmental Disabilities who currently Self-Direct their Services

Since January 1, 2014 an additional 740 individuals are self directing services. Based on eMedNY data 133 additional participants self direct using Consolidated Supports and Services (CSS). Also, an additional 607 individuals self-direct their Community Habilitation service. As shown in the table below, OPWDD has exceeded the goal of 470 new beneficiaries self-directing their services by April 1, 2014.

Increasing Numbers of Individuals Self Directing	
July 1, 2013 (baseline)	1,155
October 1, 2013	394
January 1, 2013	654
April 1, 2014	740
Total individuals self-directing to date	2,943

The following charts show the quarterly increases for participants self directing using CSS and those who self direct their Community Habilitation services.





Progress on Approved Evaluation Design

OPWDD’s Evaluation and Accountability Plans were approved in March. In the interim, the evaluation team has completed the requisite NCI field collection and helped collate and confirm data for the CMS quarterly report in the areas of person centered service delivery, housing, employment, and self-direction. Analysis has also begun for the initial cohort of individuals taking the Quality of Life survey before leaving institutional settings for community living (as part of the Money Follows the Person protocol). It is the states intent that a report submitted in July will contain a summary of all evaluation activities undertaken over the twelve months of the CMS-OPWDD agreement.

NYS OPWDD Office of Home and Community Living **Rebalancing Residential Resources**



1st. Housing Forum of 2014

One Region's Approach to Building a Sustainable Infrastructure that Provides Choice, Promotes Integration, and is Responsive to Changing Needs/Demands

March 31, 2014 • 10:00am-3:30pm

Andrew M. Cuomo
Governor



Laurie A. Kelley
Acting Commissioner

New York State Office for People With Developmental Disabilities

Office of Home and Community Living

PRESENTS

“Rebalancing Residential Resources”

One Region’s Approach to Building a Sustainable Infrastructure that Provides Choice, Promotes Integration, and is Responsive to Changing Needs/Demands

March 31, 2014

HOUSING FORUM AT A GLANCE

AGENDA

WELCOME & OPENING REMARKS

10:00-10:30am

Laurie A. Kelley, Acting Commissioner, NYS OPWDD

Jennifer Burnett, Director, Division of Community Systems

Transformation, Disabled and Elderly Health Programs Group, Center for Medicaid and CHIP Services, Centers for Medicare and Medicaid Services, U.S. Department of Health & Human Services

Mark Kissinger, Director, Division of Long Term Care, NYS Department of Health

Lucinda Grant-Griffin, Ph.D., Director, Office of Home and Community Living, HUD-Approved Housing Counseling Program, NYS OPWDD

SESSION PURPOSE AND ORGANIZATION

10:30 -10:35am

Gerald Huber, Deputy Commissioner, Division of Person Centered Supports, NYS OPWDD

Kirk M. Maurer, Director, DDRO, Region 1, NYS OPWDD

**ENVIRONMENTAL SCAN OF REGION 1 HOUSING SYSTEM:
CURRENT AND POTENTIAL USERS**

10:35-10:50am

J.R. Drexelius, Governmental Relations Counsel, Developmental Disabilities Alliance of Western NY (DDAWNY)

CURRENT SYSTEM PERFORMANCE: WHAT IS KNOWN, WHAT IS NOT KNOWN: How Future System Performance Should Be Quantified

10:50-11:10am

Kirk Maurer, Director, DDRO, Region 1, NYS OPWDD

Barbara DeLong, Family Committee Co-Chair, DDAWNY

**HOUSING CHALLENGES IN THE LARGER CONTEXT OF
AFFORDABLE HOUSING**

11:10-11:30am

*George Hezel, Clinical Professor of Law and Director of the Affordable
Housing Clinic, University at Buffalo School of Law*

**REVIEW OF CURRENT BEST PRACTICES IN PROVISION OF
HOUSING SUPPORTS BY THE REGION'S DEVELOPMENTAL
DISABILITY PROVIDERS**

11:30-12:00pm

*Ernest J. Haywood, Vice President of Residential Services and
Development, Lifetime Assistance, Inc.*

LUNCH (on your own)

12:00-12:30pm

BANKING INDUSTRY PERSPECTIVE

12:30-12:45pm

Alexandra Wehr, Vice President of Corporate Banking, First Niagara Bank

NON-PROFIT DEVELOPER PERSPECTIVE

12:45-1:00pm

*Michael Riegel, Vice President of Housing Development, Belmont Housing
Resources for WNY, Inc.*

**PERSPECTIVE FROM REGIONAL HUD AND HCR
REPRESENTATIVES**

1:00-1:30pm

*Joan K. Spilman, Field Office Director, U.S. Department of Housing and
Urban Development, Buffalo Field Office*

Leonard Skrill, Assistant Commissioner, NYS Homes and Community Renewal

PANEL DISCUSSION ON ISSUES RAISED

1:30-2:45pm

CLOSING REMARKS

2:45-3:00pm

*Jennifer Ho, Senior Policy Advisor for Housing and Services to the Secretary,
U.S. Department of Housing and Urban Development*

WHERE DO WE GO FROM HERE? NEXT STEPS

3:00-3:30pm

**DISCUSSION LED BY ANN V. DENTON,
CMS/TA Housing Capacity Building Initiative for Community Living,
New Editions Consulting, Inc.**

- U.S. Department of Housing and Urban Development
Jennifer Ho
- U.S. Department of Health & Human Services
Jennifer Burnett
- NYS Office for People With Developmental Disabilities
Lucinda Grant-Griffin; Gerald Huber; Kirk Maurer; Housing Staff; Chester Finn
- NYS Department of Health
- USDA Rural Development Section 502 & Multifamily Homes
- New Editions Consulting, Inc.
Ernest McKenney

Reasonable Accommodations

Anyone requiring a reasonable accommodation, please contact NYS OPWDD's Office of Home and Community Living by calling 518-473-1973 or e-mailing housing.initiatives@opwdd.ny.gov.

Registration Information

Webinar:

<https://attendee.gotowebinar.com/register/1391510386995013378>

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Division of Person-Centered Supports
Gerald Huber, Deputy Commissioner

Office of Home & Community Living
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