

Reaching the Summit:  
*Changing Systems  
to Personal  
Choice  
and  
Control*

- MEETING PROGRAM -

NASDDDS Mid-Year Meeting ✧ April 27-29, 2005  
Portland Marriott City Center  
Portland, Oregon

# **NASDDDS**

## **2005 Mid-Year Meeting**

Reaching the Summit:  
*Changing Systems to Personal Choice and Control*



NASDDDS would like to thank Self-Advocates As Leaders (SAAL) in Oregon for assisting with meeting preparations and for sponsoring our Wednesday evening "Reaching the Summit" reception! Special thanks to SAAL Executive Director Cindy Helvington and SAAL members Trish Baker, Ann Blackburn, Judy Cunio, Charlene Dean, Gayle Gardner, Andy Owens, and Eddie Plourde for greeting everyone and making us feel at home as one community.



The Hot Rockers

– Crosby Ball, Jeff Collins, Ryan Tevlin, and Leslie Wood –  
a self-advocate band from the Windmill Center Musicians,  
will be entertaining us at the reception.



Kudos and gratitude to Mary Lee Fay (Administrator, Oregon Division of Seniors and People with Disabilities) and her staff for all of their hard work in hosting and preparing for this meeting. A big "thank you" to Linda Rolfe (Director, Washington Division of Developmental Disabilities) and her staff for all of their help and support.



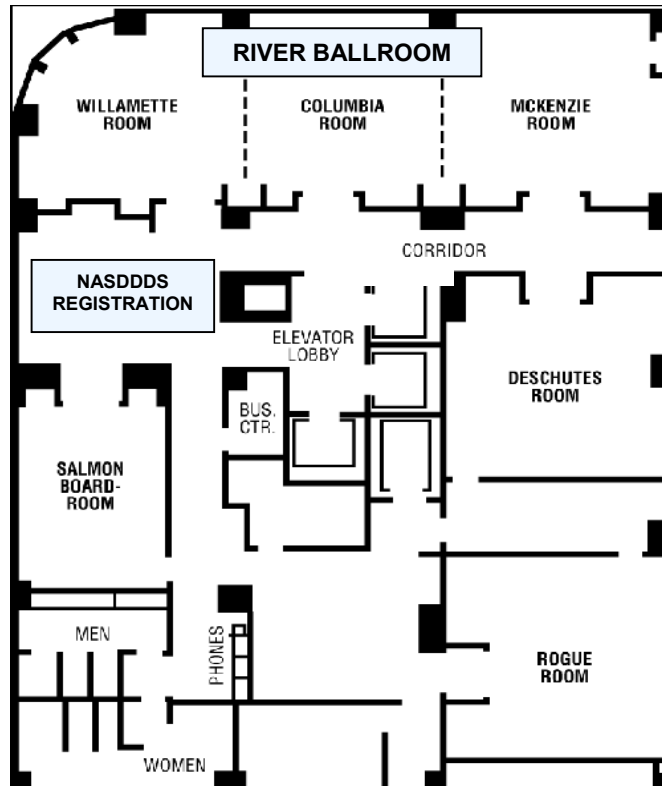
**NASDDDS**

**2005 Mid-Year Meeting**

# **Marriott City Center Floor Plan**

## **Third Floor Meeting and Banquet Facilities**

*All meeting-related functions are located on the THIRD FLOOR of the Marriott unless otherwise noted in the Program.*



### **ROOM**

### **FUNCTION**

Salmon Board Room	Board Meeting
River Ballroom Corridor	REGISTRATION, Continental Breakfast & Breaks
River Ballroom	Directors Forum and Plenary Sessions
River Ballroom	Welcome Reception
Willamette Room	Workshop Sessions
Columbia Room	Workshop Sessions
McKenzie Room	Workshop Sessions
Deschutes Room	Workshop Sessions
Banisters Restaurant (2nd Floor)	Luncheons



# NASDDDS 2005 Mid-Year Meeting Program at a Glance

## Wednesday, April 27

7:30 AM - 10:15 AM	NASDDDS Board of Directors Meeting <sup>+</sup>	Salmon Board Room
		<i>*Open to State Directors and NASDDDS staff only</i>
9:00 AM - 6:00 PM	REGISTRATION	River Ballroom Corridor
10:30 AM - 12:15 PM	State Directors Forum*	River Ballroom
		<i>*Open to State Directors and key MR/DD staff only</i>
12:15 PM - 1:00 PM	Buffet Luncheon	Banisters Restaurant (2nd Floor)
1:00 PM - 3:30 PM	State Directors Forum* <i>continues</i>	River Ballroom
3:30 PM - 3:45 PM	Afternoon Break	River Ballroom Corridor
3:45 PM - 5:00 PM	State Directors Forum* <i>continues</i>	River Ballroom
5:30 PM - 7:00 PM	Welcome Reception	River Ballroom

## Thursday, April 28

8:00 AM - 9:00 AM	Continental Breakfast	River Ballroom Corridor
8:00 AM - 4:45 PM	REGISTRATION	River Ballroom Corridor
8:45 AM - 10:30 AM	Welcome & Opening Plenary Session	River Ballroom
10:30 AM - 10:45 AM	Morning Break	River Ballroom Corridor
10:45 AM - 12:00 PM	Opening Plenary Session <i>continues</i>	River Ballroom
12:00 PM - 1:30 PM	LUNCHEON RAPS	Banisters Restaurant (2nd Floor)
1:30 PM - 3:00 PM	Workshop Sessions I	<i>See detailed <b>Program</b> for Specific Locations</i>
3:00 PM - 3:15 PM	Afternoon Break	River Ballroom Corridor
3:15 PM - 4:45 PM	Workshop Sessions II	<i>See detailed <b>Program</b> for Specific Locations</i>

## Friday, April 29

8:00 AM - 9:00 AM	Continental Breakfast	River Ballroom Corridor
8:00 AM - 12:00 PM	REGISTRATION	River Ballroom Corridor
9:00 AM - 10:30 AM	Workshop Sessions III	<i>See detailed <b>Program</b> for Specific Locations</i>
10:30 AM - 10:45 AM	Morning Break	River Ballroom Corridor
10:45 AM - 12:00 PM	Wrap-Up Session	River Ballroom



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**Wednesday, April 27**

<b>Board of Directors Meeting</b>	<b>Salmon Board Room</b>
<b>7:30 AM - 10:15 AM</b>	The Board of Directors Meeting is open to NASDDDS staff and State Directors only.
<b>State Directors Forum</b>	<b>River Ballroom</b>
<b>10:30 AM - 5:00 PM</b>	The State Directors Forum is Open to NASDDDS Staff, State Directors, and key MR/DD staff only.
<b>Welcome Reception</b>	<b>River Ballroom</b>
<b>5:30 PM - 7:00 PM</b>	Self-Advocates As Leaders (SAAL) in Oregon welcomes all State Directors and other meeting attendees to this reception. Network with self-advocates, State Directors, NASDDDS staff, and others dedicated to creating inclusive communities. Entertainment by the Hot Rockers - Crosby Ball, Jeff Collins, Ryan Tevlin, and Leslie Wood, a self-advocate band from the Windmill Center Musicians. (Cash bar, Complimentary hors d'oeuvres)



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**Program at a Glance**

**Thursday, April 28**

<b>Opening Plenary</b>	<b>River Ballroom</b>			
<b>8:45 AM - 12:00 PM</b>	<p>Keynote Addresses and Plenary Panel Discussion:</p> <p>I Bob Gettings <i>Forging a Cross-Stakeholder Consensus and the 2005 Disability Summit</i></p> <p>II Charlene Dean, Vicki King, and Donald Stevens <i>Self-Advocates as Active Partners: Becoming a Part of the Community</i></p> <p>III Val Bradley, Charles Moseley, and Ric Zaharia <i>The Road to the Summit: Participation Requires More Than Just a Place at the Table</i></p>			
<b>Luncheon</b>	<b>Banisters Restaurant (2nd Floor)</b>			
<b>12:00 PM - 1:30 PM</b>	Luncheon Raps: <i>Topical discussions at designated tables to share insights and learn from one another.</i>			
<b>Workshop Sessions I</b>	<b>Willamette Room</b>	<b>Columbia Room</b>	<b>McKenzie Room</b>	<b>Deschutes Room</b>
<b>1:30 PM - 3:00 PM</b>	<p><b>I-A</b> Arizona's Fiscal Intermediary Model - Everything you wanted to know about FIs but were afraid to ask!</p> <p style="text-align: right;"><b>Rapoport</b></p>	<p><b>I-B</b> Maintaining Quality in an "Audit Crazy" Environment</p> <p style="text-align: right;"><b>Day Kelner</b></p>	<p><b>I-C</b> Comprehensive Support Services</p> <p style="text-align: right;"><b>Macintosh-Wilson Powers</b></p>	<p><b>I-D</b> Resource Allocation for Self-Directed Services</p> <p style="text-align: right;"><b>Nuss Seiler</b></p>
<b>Workshop Sessions II</b>	<b>Willamette Room</b>	<b>Columbia Room</b>	<b>McKenzie Room</b>	<b>Deschutes Room</b>
<b>3:15 PM - 4:45 PM</b>	<p><b>II-A</b> Individual Support and Self-Direction: Building a Person-Centered Support Brokerage System in New Jersey and Pennsylvania</p> <p style="text-align: right;"><b>Scott</b></p>	<p><b>II-B</b> Assuring Quality in Montana</p> <p style="text-align: right;"><b>Sturm Zeeck</b></p>	<p><b>II-C</b> Supporting People with Challenging Needs (Oregon)</p> <p style="text-align: right;"><b>Seaton</b></p>	<p><b>II-D</b> Achieving Community Membership Through Person-Centered Planning</p> <p style="text-align: right;"><b>Smull</b></p>



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<b>Workshop Sessions II</b>	<b>Willamette Room</b>	<b>Columbia Room</b>	<b>McKenzie Room</b>	<b>Deschutes Room</b>
<b>9:00 AM - 10:30 AM</b>	<b>III-A</b> Individual Support and Self-Direction: Supported Employment for All in Washington State <b>Rolfe, et al</b>	<b>III-B</b> Tennessee's Quality Management System <b>Nichols</b>	<b>III-C</b> Challenges of Supporting Californians with Co-Existing Conditions in a Complex System <b>Jackson</b>	<b>III-D</b> Restructuring Government and Results for Consumers <b>Butkus, et al.</b>
<b>Wrap Up Sessions</b>	<b>River Ballroom</b>			
<b>10:45 AM - 12:00 PM</b>	I Jean Tuller (10:45 - 11:30 AM) <i>What Have We Gleaned from the Meeting Workshops?</i> II Bill Lynch (11:30 a.m. - 12:00 PM) <i>Working with Your State Summit Teams</i>			

**MARK YOUR CALENDAR**  
 for the  
 Summit 2005: *Many Voices, One Vision*  
 September 22-23, 2005  
 in Washington, D.C.  
 sponsored by the  
 Alliance for Full Participation

Web Site:  
<http://www.allianceforfullparticipation.org>



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**Board of Directors Meeting**

LOCATION: Salmon Board Room

TIME: 7:30 AM - 10:15 AM

The Board of Directors Meeting is open to NASDDDS staff and State Directors only.

**Registration**

LOCATION: River Ballroom Corridor

TIME: 9:00 AM - 6:00 PM

**State Directors Forum**

LOCATION: River Ballroom

TIME: 10:30 AM - 12:15 PM

The State Directors Forum is open to NASDDDS Staff, State Directors, and key MR/DD staff only

**Buffet Luncheon**

LOCATION: Banisters Restaurant (2nd Floor)

TIME: 12:15 PM - 1:00 PM

**State Directors Forum *continues***

LOCATION: River Ballroom

TIME: 1:00 PM - 3:30 PM

The State Directors Forum is open to NASDDDS Staff, State Directors, and key MR/DD staff only

**Afternoon Break w/refreshments**

LOCATION: River Ballroom Corridor

TIME: 3:30 PM - 3:45 PM



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**State Directors Forum *continues***

LOCATION: River Ballroom

TIME: 3:45 PM – 5:00 PM

The State Directors Forum is open to NASDDDS Staff, State Directors, and key MR/DD staff only

**Welcome Reception**

LOCATION: River Ballroom

TIME: 5:30 PM – 7:00 PM

Self-Advocates As Leaders (SAAL) in Oregon welcomes all State Directors and other meeting attendees to this reception. SAAL member Trish Baker will provide opening remarks, while SAAL greeters will make everyone feel at home. Network with self-advocates, State Directors, NASDDDS staff, and others dedicated to creating inclusive communities. Entertainment by the Hot Rockers - Crosby Ball, Jeff Collins, Ryan Tevlin, and Leslie Wood, a self-advocate band from the Windmill Center Musicians. (Cash bar, Complimentary hors d'oeuvres).



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**Continental Breakfast**

LOCATION: River Ballroom Corridor

TIME: 8:00 AM – 9:00 AM

**Registration**

LOCATION: River Ballroom Corridor

TIME: 8:00 AM – 4:45 PM

**OPENING PLENARY SESSIONS**

LOCATION: River Ballroom

**Welcome and Introductions**

LOCATION: River Ballroom

TIME: 8:45 AM – 9:00 AM

**Gerry Morrissey**

President, NASDDDS Board of Directors, and  
Commissioner,  
Massachusetts Department of Mental Retardation

**James Toews**

Former President, NASDDDS Board of Directors, and  
Assistant Director for Seniors and People with Disabilities,  
Oregon Department of Human Services

**Keynote Address I**

LOCATION: River Ballroom

TIME: 9:00 AM – 9:30 AM

**Forging a Cross-Stakeholder Consensus and the 2005 Disability Summit**

PRESENTER: **Bob Gettings**

Executive Director, NASDDDS

In 2003, ten national organizations representing self and family advocates, professionals, researchers, and public officials – including NASDDDS – banded together to form the



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Alliance for Full Participation. The primary reason the Alliance was formed was to sponsor a national Disability Summit where a representative group of stakeholders could join together to forge a consensus agenda aimed at assisting all individuals with developmental disabilities to become valued, contributing members of their local communities. Mr. Gettings will review the purposes and goals of the Disability Summit, which will be held September 21-24, 2005 in Washington, D.C. He also will discuss how the Summit's goals intersect with NASDDDS' strategic plan objectives as well as the future plans and goals of member state agencies.

### **Keynote Addresses II**

LOCATION: River Ballroom

#### **Self-Advocates As Active Partners: Becoming a Part of the Community**

PRESENTER: **Charlene Dean**, Self-Advocate

TIME: 9:30 AM - 9:50 AM

Ms. Dean is a passionate self-advocate in Oregon. She is a member of Self-Advocates As Leaders (SAAL), serves on its Policy Committee, and recently joined its Speaker's Bureau. She has much to say about self-advocates taking leadership roles to build inclusive communities.

PRESENTER: **Vicki King**, Self-Advocate

TIME: 9:50 AM - 10:10 AM

Ms. King lived isolated and unhappy in a Washington state institution for 19 years. Now she lives in a house with roommates, works as a department aid for the City of Vancouver, pays taxes and votes, volunteers for political campaigns, has friends, and recently got engaged. Ms. King will share her views on what it means to be part of the community, to work at her job, and to have a life.

PRESENTER: **Donald Stevens**, Self-Advocate

TIME: 10:10 AM - 10:30 AM

After overcoming a number of challenges to get the job he wanted, Mr. Stevens is now employed by Lowe's Home Improvement in Vancouver, Washington. He will speak about the importance of work.

#### **Morning Break w/refreshments**

LOCATION: River Ballroom Corridor

TIME: 10:30 AM - 10:45 AM



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**Plenary Panel Discussion**

LOCATION: River Ballroom

TIME: 10:45 AM – 12:00 PM

**The Road to the Summit:**

**Participation Requires More Than Just a Place at the Table**

PANELISTS:

**Val Bradley**

President, Human Services Research Institute

**Chas Moseley**

Director of Special Projects, NASDDDS

**Ric Zaharia, PhD**

Assistant Director, Division of Developmental Disabilities,  
Arizona Department of Economic Security

MODERATOR:

**Lee Price**

Director, Office of Mental Retardation,  
Virginia DMHMRSAS

In this panel presentation, Ms. Bradley and Drs. Moseley and Zaharia will explore key issues related to the development of individual supports, achieving quality lifestyles, and supporting individuals with the most intensive needs. They will introduce seven key questions that will frame subsequent workshop discussions on how states are changing systems to promote community membership:

1. What factors prompted the need for change?
2. What outcomes are desired?
3. What is the impact on state policy?
4. What key obstacles did you face in making change?
  - What obstacles did you overcome?
  - What obstacles do you still need to overcome?
5. What are the financial costs and implications?
6. What are the outcomes received to date?
7. What are the perspectives of self-advocates that would bear weight on the issues of change?



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### **Luncheon Raps**

LOCATION: Banisters Restaurant (2nd Floor)

TIME: 12:00 PM - 1:30 PM

Do you have a problematic endeavor you're trying to carry out in your state? Would you like to informally share your concerns and get ideas from colleagues in other states working on similar efforts? Put it all on the table during "Luncheon Raps" where we will share and learn from each other. Luncheon tables will be designated with various topics including:

1. Self-Directed Services (Individual Budgeting, Case Management/Support Brokerage) – Host: Karen Smith (Delaware)
2. Supporting Self-Advocacy – Hosts: Charlene Dean (Oregon), Vicki King (Washington), and Donald Stevens (Washington);
3. Facility Closure and Housing Issues – Host: George Braddock (Oregon);
4. Staff Training and Workforce Development – Host: Michael Linak (Wisconsin);
5. Improving Quality – Host: Laura Nelson, MD (Arizona);
6. Health and Health Services – Host: Daintry Bartoldus (Hawaii)
7. HCBS Waivers – Host: Valerie Smith (Delaware);
8. Institution Downsizing – Host: Lee Price (Virginia); and
9. Other.

### **BREAKOUT SESSIONS I**

#### **SESSION I-A Arizona's Fiscal Intermediary Model – Everything you wanted to know about FIs but were afraid to ask!**

LOCATION: Willamette Room

TIME: 1:30 PM - 3:00 PM

PRESENTER/FACILITATOR: **Ed Rapoport**

Business Operations Administrator,  
Division of Developmental Disabilities, Arizona DES

The fiscal intermediary (FI) plays a key role in enabling self-determination for individuals with developmental and other disabilities. Mr. Rapoport will highlight the progress and challenges of Arizona's efforts in introducing fiscal intermediaries into the service system and initiate discussions on this essential ingredient in self-directed community-based services.



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**SESSION I-B Maintaining Quality in an “Audit Crazy” Environment**

LOCATION: Columbia Room

TIME: 1:30 PM – 3:00 PM

PRESENTERS/FACILITATORS: **George Kelner, PhD**

Acting Director,  
Division of Services for People with Disabilities,  
Utah Department of Human Services

**Paul Day**

Associate Director,  
Division of Services for People with Disabilities,  
Utah Department of Human Services

Dr. Kelner and Mr. Day will provide an overview of Utah’s quality management program and the changes made in response to recent legislative and internal audits. They will also discuss their recent HCBS Waiver audit with CMS using the Quality Framework as the audit tool.

**SESSION I-C Comprehensive Support Services**

LOCATION: McKenzie Room

TIME: 1:30 PM – 3:00 PM

PRESENTERS/FACILITATORS: **Eranell Macintosh-Wilson**

Associate Commissioner for Mental Retardation,  
Division of Mental Retardation,  
Alabama DMH/MR

**Richard Powers, MD**

Director,  
Bureau of Geriatric Psychiatry,  
Alabama DMH/MR

Individuals with developmental disabilities who also have medical and/or mental health issues need special supports. How does a state create and build the capacity to serve these individuals with challenging needs? Ms. Macintosh-Wilson and Dr. Powers will describe their state's efforts to support individuals with DD and psychiatric conditions.



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**SESSION I-D Resource Allocation for Self-Directed Services**

LOCATION: Deschutes Room

TIME: 1:30 PM – 3:00 PM

PRESENTERS/FACILITATORS: **Laura Nuss**

Director, Strategic Planning, Development, and  
Quality Management, Connecticut DMR

**Wanda Seiler**

Director, Division of Developmental Disabilities,  
South Dakota Department of Human Services

What are effective ways to individualize budgets for self-directed services? Ms. Nuss and Ms. Seiler will explain current strategies in Connecticut and South Dakota that use data sources, statistical modeling, and systems change approaches.

**Afternoon Break w/refreshments**

LOCATION: River Ballroom Corridor

TIME: 3:00 PM – 3:15 PM

**BREAKOUT SESSIONS II**

**SESSION II-A Individual Support and Self-Direction:  
Building a Person-Centered Support Brokerage System  
in New Jersey and Pennsylvania**

LOCATION: Willamette Room

TIME: 3:15 PM – 4:45 PM

PRESENTER/FACILITATOR: **Patti Scott**

CEO, Neighbours, Inc.

Support brokers help people with developmental disabilities to fulfill their individualized plan by supporting them to take charge of their services, to manage their individual budget, to develop strong community connections and natural supports, and to become actively contributing citizens of their community. Learn how Neighbours, Inc, in New Jersey and Pennsylvania, has engaged effective and creative approaches to support brokerage and engage in active discussion about new approaches for your state.



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**SESSION II-B Assuring Quality in Montana**

LOCATION: Columbia Room

TIME: 3:15 PM - 4:45 PM

PRESENTERS/FACILITATORS: **Jeff Sturm**

DD Program Director, Disabilities Services Division,  
Montana DPHHS

**John Zeeck**

Quality Assurance Specialist,  
Montana DPHHS

As a result of a CMS on-site visit and a grant for technical assistance from the Human Services Research Institute, Montana undertook to completely revise its Quality Assurance Process. The result has been a process that relies on frequent on-site visits and ongoing review of provider services with an eye to the waiver health and safety assurances. Mr. Sturm and Mr. Zeeck will share insights into the making of Montana's quality assurance and kindle discussions on improving quality in other states.

**SESSION II-C Supporting People with Challenging Needs (Oregon)**

LOCATION: McKenzie Room

TIME: 3:15 PM - 4:45 PM

PRESENTER/FACILITATOR: **Mary Anne Seaton**

Chief Administrative Officer,  
Oregon Technical Assistance Corporation

Helping people with autism become more independent through training families and service staff is an area of expertise held by the Oregon Technical Assistance Corporation (OTAC). Learn more about their approach to training families and staff on the needs of people with autism and discuss comparisons with autism service training programs in your state.



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**SESSION II-D Achieving Community Membership Through  
Person-Centered Planning**

LOCATION: Deschutes Room

TIME: 3:15 PM – 4:45 PM

PRESENTER/FACILITATOR: **Michael W. Smull**  
Support Development Associates

Person-centered planning is a critical technology to help understand the lifestyle an individual wants to live and how that person can achieve it. “Unlike many technologies,” Michael Smull explains, “person-centered planning is value-laden. While each of the person-centered planning technologies has a different focus and a different process, all of them are rooted in a profound respect for the individual and an expectation that the individual will be included in her or his community.” Join Michael Smull in a meaningful discussion of achieving community membership through person-centered planning.

**Adjourn for the Day**

TIME: 4:45 PM



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**Continental Breakfast**

LOCATION: River Ballroom Corridor

TIME: 8:00 AM – 9:00 AM

**Registration**

LOCATION: River Ballroom Corridor

TIME: 8:00 AM – 12:00 PM

**BREAKOUT SESSIONS III**

**SESSION III-A Individual Support and Self-Direction:  
Supported Employment for All in Washington State**

LOCATION: Willamette Room

TIME: 9:00 AM – 10:30 AM

PRESENTERS/FACILITATORS: **Linda Rolfe**

Director,  
Division of Developmental Disabilities (DDD),  
Washington Department of Social & Health Services

**Jane Boone**

Program Coordinator,  
Thurston County DD Programs, Washington DDD

**Ray Jensen**

Division Director,  
King County DD Programs, Washington DDD

**Mary Strehlow**

Program Manager,  
Clark County DD Programs, Washington DDD

**Stuart Torgerson**

Program Coordinator,  
Snohomish County DD Programs, Washington DDD

Training and helping individuals with developmental disabilities work in meaningful jobs is essential to fostering self-direction and creating fulfilling lives. Ms. Rolfe and staff will share



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some exciting innovations in supported employment in four Washington state counties and generate engaging discussion of supported employment initiatives throughout the country. Central to this session is the concept of the need for partnership/collaboration in implementing a policy that says working age adults with developmental disabilities are expected to work. Stuart Torgerson of Snohomish County will discuss community and vendors as partners in making employment work. Jane Boone of Thurston County will describe the need for transition programs in public schools and Vocational Rehabilitation to work together with DDD and the county in achieving work as an outcome for graduating seniors with disabilities. (Thurston County schools currently graduate 77 percent of their students with developmental disabilities with good jobs.) Mary Strehlow of Clark County will explain how individuals with developmental disabilities and their families take an active part in expecting and developing jobs. Ray Jensen of King County will explore what kinds of outcomes we can expect when everyone is focusing on employment. (King County has some of the best employment outcomes in the nation when comparing wages earned, hours of work, and benefits.)

## **SESSION III-B Tennessee's Quality Management System**

LOCATION: Columbia Room

TIME: 9:00 AM - 10:30 AM

PRESENTER/FACILITATOR: **Pat Nichols**  
Director of Quality Assurance,  
Tennessee Division of MR Services

Pat Nichols, Director of Quality Assurance for the Tennessee Division of Mental Retardation Services, will review methodologies used in building a system for improving quality in Tennessee and how the state has worked with CMS and the courts to help shape the system.

## **SESSION III-C Challenges of Supporting Californians with Co-Existing Conditions in a Complex System**

LOCATION: McKenzie Room

TIME: 9:00 AM - 10:30 AM

PRESENTER/FACILITATOR: **Julie Jackson**  
Deputy Director,  
California Department of Developmental Services

California is a large and complex state that faces many challenges in building the capacity to support individuals with co-existing conditions at the state and regional level. Ms. Jackson



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will review the approaches California has taken in supporting Californians with co-existing conditions and involve attendees in dialogue about their supports for individuals with co-existing conditions.

**Session III-D Restructuring Government and Results for Consumers**

LOCATION: Deschutes Room

TIME: 9:00 AM – 10:30 AM

PRESENTERS/FACILITATORS: **Jane J. Gallivan**

Program Director,  
Adult Mental Retardation Services,  
Maine Department of Health and Human Services

**Gerry Morrissey**

Commissioner,  
Massachusetts Department of Mental Retardation

**James Toews**

Assistant Director,  
Seniors and People with Disabilities,  
Oregon Department of Human Services

MODERATOR:

**Stan Butkus**

Director,  
South Carolina  
Department of Disabilities and Special Needs

Several states have re-structured their human service sectors, are in the process of implementation or contemplating the possibility of different organizational configurations. This session will focus on the experiences of several states-the rationale, projected and actual benefits, implementation challenges and lessons learned. Among key questions to be discussed are the impact on individuals served and the ability to advance disability specific policy goals, i.e. themes identified in NASDDDS' strategic plan.

**Morning Break w/refreshments**

LOCATION: River Ballroom Corridor

TIME: 10:30 – 10:45 A.M.



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**WRAP-UP SESSION**

LOCATION: River Ballroom

**What Have We Gleaned from the Meeting Workshops?**

TIME: 10:45 AM - 11:30 AM

PRESENTER: **Jean Tuller**  
Executive Director,  
Oregon Technical Assistance Corporation

Jean Tuller, Executive Director of the Oregon Technical Assistance Corporation (OTAC) will outline the key issues raised and the next steps to prepare for the National Disability Summit proposed during this meeting based on expert notes taken by OTAC staff during the workshop sessions.

**Working with Your State Summit Teams**

TIME: 11:30 AM - 12:00 PM

PRESENTER: **Bill Lynch**  
Executive Director,  
Oregon Council on Developmental Disabilities

Bill Lynch, Executive Director of the Oregon Council on Developmental Disabilities (OCDD), will share strategies used in Oregon and other states for effective collaboration with state teams in preparation for the 2005 Disability Summit. The mission of OCDD is to “join with Oregonians with developmental disabilities and their families to promote change, through self-determination, leading to a more accessible, inclusive and culturally responsive world.”

**Meeting Adjourns**

TIME: 12:00 PM

Please Be Sure To Turn In Your  
Meeting Evaluation Form and Recycle Your Badge  
at the  
Registration Desk  
At The End Of The Meeting



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# **Presenter Bios**

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**Jane Boone**, when she was "barely out of elementary school I'm sure," said Washington state DD Director Linda Rolfe, started working in Thurston County, Washington, in 1980, and fell in love with the field of developmental disabilities after a Program Analysis of Service Systems (PASS) workshop that same year. "Since then," says Rolfe, "she has been doing absolutely brilliant work in employment as well as being a great manager." Ms. Boone now serves as Program Coordinator of Thurston County's DD services.

**Val Bradley**, President of the Human Services Research Institute, helps design skills standards for human services workers, directs the CMS national technical assistance initiative in quality assurance, and co-directs the National Core Indicators – a national project on performance measurement. She co-edited *Creating Individual Supports for People with Developmental Disabilities* and a recent book on quality titled, *Quality Enhancement in Developmental Disabilities*. Ms. Bradley is the recent past Chair of the President's Committee on Intellectual Disability. She is also the President Elect of the American Association on Mental Retardation.

**Stan Butkus** has been the Director of the South Carolina Department of Disabilities and Special Needs since 1996. . He also serves as Secretary/Treasurer for the National Association of State Directors of Developmental Disabilities Services (NASDDDS) and is a member of its Governmental Affairs Committee. Dr. Butkus has extensive experience in the field of developmental disabilities in roles ranging from live-in community group home coordinator to regional management and state leadership. In South Carolina, he has established policies and practices to increase self-determination through an independent person-centered planning process, simplified funding through a capitated model, and implemented personal outcome evaluation methodologies. The latter has led to the creation of an organizational performance enhancement process. In earlier roles he worked in Virginia, he directed that state's office of mental retardation, served as CEO of a large institution, and later, worked as an associate commissioner for community and facility services. Prior to that, Dr. Butkus was employed in Maine and New Hampshire at the regional and state levels. Academic training includes a doctoral degree in social welfare and graduate degrees in social work, public administration, and special education.

**Paul Day** is currently the Associate Director of the Division of Services for People with Disabilities (DSPD) in Utah's Department of Human Services (DHS). He has over 17 years of experience in developmental disabilities programs and has conducted a variety of research on quality management in DD/MR programs. Mr. Day holds a Master's degree in Public Administration.

**Charlene Dean** is a passionate self-advocate from Tillamook, Oregon, whose self-advocacy efforts accelerated when she enrolled into a program called the "Integrated Services Network Support Services Brokerage" in 2001. Charlene serves on the local advisory council for the Integrated Services Network Support Services Brokerage, where she and other advocates take the lead role in



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advocating for adults with developmental disabilities in Tillamook County. She became a member of the Self-Advocates As Leaders (SAAL) Policy Committee in 2004 and recently joined the Speakers' Bureau, in which she will travel around Oregon with other self-advocates to train people with developmental disabilities, family members, professionals, elected officials, and community advocates. Charlene has already been engaging in community building and organizing in Tillamook. She represents SAAL on the Staley Implementation Group, which focuses on maintaining and improving brokerage services in the state of Oregon. In her free time, Charlene enjoys reading, playing basketball, and socializing with friends. Charlene lives along the Wilson River with her mother, Lona, and her cat, Simba.

**Jane J. Gallivan** is the Director of Adult Mental Retardation Services for Maine's Department of Health and Human Services. She was formerly on staff at Pineland Center prior to its closure. Before assuming her current position, she served as a regional manager for Mental Retardation Services.

**Bob Gettings** has served as Executive Director of NASDDDS since the organization opened its first headquarters office in 1970. In this capacity, he is responsible for representing the interests of the fifty state developmental disabilities agencies in Washington, D.C. and facilitating communication among the states concerning the most effective means of serving citizens with lifelong disabilities. Prior to joining the Association, Mr. Gettings was on the staff of the President's Committee on Mental Retardation and the National Association for Retarded Children. Mr. Gettings has written and lectured extensively regarding the impact of federal legislative and administrative policy on the delivery of state and local services to persons with mental retardation and other developmental disabilities and is widely recognized as a leading expert in this area. He also helped many states solve a variety of service delivery problems over the years and, consequently, is well-versed in program developments and trends across the country. A Life Member of the American Association on Mental Retardation (AAMR), Mr. Gettings recently was recognized by the National Historic Trust on Mental Retardation as one of the 36 major contributors to the MR field during the 20th Century.

**Julie Jackson** has worked in the field of developmental disabilities for 27 years, the last 20 of which have been with the California Department of Developmental Services. Currently the Chief Deputy Director of DDS, Ms. Jackson has shaped state policy in the areas of clinical services, community placement, quality management, housing, employment, supported living, self-determination, early intervention, prevention, and autism.

**Ray Jensen** is another Washington state PASS graduate and his developmental disability work experience includes private employment agency management. For the last 20 years, he has been serving at the county level as manager of county employment services to people with



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developmental disabilities. Under his management as Division Director for DD services in King County, the county has achieved some of the highest overall wages and benefits results in the nation.

**George Kelner** is the Acting Director of the Division of Services for People with Disabilities (DSPD) in Utah's Department of Human Services (DHS). He's been with DHS for 21 years and has worked in the DSPD for 12 years where he served as its Associate Director from 2000 to 2004. From 1983 to 1993, he worked in Youth Corrections. He holds a PhD in educational psychology and has over 30 years experience administering and evaluating public service agencies.

**Vicki King** has been an office assistant for the City of Vancouver in Washington for the last six years. As a former resident of Rainier School, a state institution where she lived for 19 years, Ms. King has a great deal to share about the importance of living and working in her own community.

**Bill Lynch** has served in developmental disability advocacy and research since the early 1980s. He has worked for the Oregon Council on Developmental Disabilities for the past 11 years, the last two years as Executive Director. He is currently serving as the Alliance for Full Participation Oregon Team Liaison.

**Eranel Mcintosh-Wilson** is the Associate Commissioner for Mental Retardation Services at the Alabama Department of Mental Health and Mental Retardation (DMH/MR), and has been an AAMR Fellow since 1965. She has served on several Governor's Councils (Michigan, Oklahoma, Illinois, and Alabama) and has been a consultant for federal and presidential projects on developmental disabilities.

**Gerry Morrissey** is the Commissioner for the Massachusetts Department of Mental Retardation, a position he has held since April 1997. In this role, he is responsible for overseeing the delivery of state services and supports to individuals with mental retardation and their families throughout the Commonwealth. The Department strives to help these individuals lead full and independent lives. He also serves as President of NASDDDS. Mr. Morrissey has worked in state government for both the Department of Mental Health and the Department of Mental Retardation for more than 23 years. Prior to being appointed Commissioner of DMR, Morrissey served as Deputy Commissioner for three years.

**Chas Moseley, EdD**, is the Director of Special Projects for NASDDDS. In this role, he manages Association projects and research, performs state and federal policy analysis, and provides technical assistance to states on Medicaid, self-determination, systems change, individual budgeting, and a variety of other areas. Prior to this position, he was the Co-Director of the



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National Program Office on Self-Determination, a project of the Robert Wood Johnson Foundation at the Institute on Disability, University of New Hampshire, and an adjunct professor at the University of New Hampshire. Before coming to the university, Dr. Moseley was the Director of Vermont's Division of Developmental Services where he led the efforts to close the state's institution, transition services to individualized community-based alternatives, and restructure service delivery by incorporating principles of self-directed services. He has consulted nationally and internationally on individualized service design, institutional closure, public policy, and system change.

**Pat Nichols** has been involved in the field of mental retardation/developmental disabilities for 29 years. She has held several positions within the Tennessee Division of Mental Retardation Services, beginning as an entry-level social worker serving rural West Tennessee. After holding several other positions, she is currently the Director of Quality Assurance for the division. Ms. Nichols is also a member of AAMR.

**Laura Nuss** has been managing home- and community-based (HCBS) waiver programs and state financing systems or strategies for the past six years, most recently for the past three years in Connecticut. Ms. Nuss is the principal investigator for the federal Centers for Medicaid and Medicare (CMS) Independence Plus grant to develop a new Level of Need assessment tool and subsequent individual budgeting methodology for the Connecticut Department of Mental Retardation that will lead to the shift from program funding to individualized funding for all services.

**Richard Powers, MD**, is the Director of the Bureau of Geriatric Psychiatry and oversees the Dementia Education and Training Act Program for the Alabama Department of Mental Health and Mental Retardation. He is a trained psychiatrist, geriatric psychiatrist, and neuropathologist. Dr. Powers received his training from the University of Kentucky in Lexington, KY and the Johns Hopkins Hospital in Baltimore, MD. He is currently Associate Professor of Pathology in the Division of Neuropathology at the University of Alabama at Birmingham.

**Ed Rapoport** is the current Business Operations Administrator for the State of Arizona's Division of Developmental Disabilities. He has been in this position for four years over-seeing all aspects of business and finance including personnel, management information systems, budget, finance, contracts, accounts payable/receivable, client funds, and legislation. Prior to his current position, Mr. Rapoport worked for the Division as the Southern Region Business Manager involved in local issues and direct client care. He brings a unique knowledge of his direct care experiences to running the business operations for the Division. Before his employment at the Division, Mr. Rapoport worked for Arthur Anderson where he did management consulting related to government finance and health care. He is a Certified Public Accountant (CPA) and Certified Government



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Financial Manager (CGFM). He participates on many public and private boards and is an active member in many national organizations.

**Linda Rolfe** has 37 years of experience in developmental disabilities, five of which have been as the Director of the Division of Developmental Disabilities in the Aging and Disability Administration for the Washington State Department of Social and Health Services. She is yet another Washington state PASS graduate. "For me," she said, "it was a life changing event."

**Patti Scott** has a deep commitment to a world in which all people are included and have equal opportunity. In 1995, she co-founded Neighbours, Inc., an innovative agency that affords people with disabilities the opportunity to take control of their own lives. Ms. Scott is currently Chief Executive Officer of Neighbours. In the past nine years, Neighbours has supported 35 people in New Jersey to move into their own homes, control their own supports and resources, and live full, rich lives in their local communities. Neighbours has also been involved in service brokerage through New Jersey's self-determination project (brokering for over 60 people) and is currently working with five counties in Pennsylvania to develop brokerage, self-determination, and community connections. Ms. Scott has provided presentations and consultancy work internationally on the topics of self-determination, community living, home ownership, social capital, and developing community connections. She has addressed national conferences in the USA, the UK, India, Jerusalem, and Malta. Recent work include a series of workshops throughout Pennsylvania on developing community connections; Dauphin County's Self-Determination conference; a Community Living Institute organized by Neighbours; and The Council on Quality and Leadership's Fall Conference on Social Capital. Ms. Scott is the author of several publications relating to issues of self-determination, including "Living Your Own Life With People You Can Count On," "The Support Broker's Manual," "Self-Determination in the City of Brotherly Love," "You and Your Budget," and "You and Your Personal Assistants." She is a graduate of the University of Michigan, co-chair of TASH's Community Living Committee, Department Manager of The Quality Mall's Service Coordination department, and a board member of New Jersey's Provider Association. Neighbours, Inc was the recipient of AAMR's 2001 Full Community Inclusion Award.

**Mary Anne Seaton** is a parent to a son with autism and former chair of the Oregon Council on Developmental Disabilities. She has worked in the DD field since 1977, with 28 years spent on advocacy and daily-living strategy training. Ms. Seaton has been a mentor of Treatment and Education of Autistic and related Communication for handicapped children at the University of North Carolina (TEACCH-UNC) for 21 years and has worked at the Oregon Technical Assistance Corporation since 1995.

**Wanda Seiler** has been the Director of the South Dakota Division of Developmental Disabilities for five years. She also serves as a member of NASDDDS' Board of Directors. In 2004, she led an



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initiative to rebase and remodel the state's Service Based Rate (SBR) system, refining and improving the reliability of a reimbursement system created in 1996. Prior to her current position, Ms. Seiler served as Assistant Director of the South Dakota Division of Mental Health and as a Policy Analyst for the state's Medicaid agency.

**Michael Smull**, Chair of The Learning Community for Essential Lifestyle Planning and (TLC-ELP), and Director of Support Development Associates, has been working with people with disabilities for the past 33 years. He has had extensive experience in nearly all aspects of developing community services. Mr. Smull is the co-developer of essential lifestyle planning and has worked in 47 states, Canada, the UK, and Belgium.

**Donald Stevens** is a hydro technician for Lowe's in Vancouver, Washington, and likes to describe his job as "the vocation of my dreams." Donald is an active member of his church, a dedicated participant of People First of Washington, and is an avid traveler – especially when there is a NASCAR race involved.

**Mary Strehlow** has been involved in human services since infancy. Prior to her experience in developmental disabilities, she worked in different programs serving elders and individuals with mental health challenges in Washington state. Ms. Strehlow has served in Washington state's Division of Developmental Disabilities since 1983, and was a case manager in her first position. She took leave from her state position to earn her Master's degree in social work and spent some time as an intern and on contract with Clark County. She was officially hired as the Program Manager for Developmental Disabilities programs in Clark County in 1988 and hasn't looked back since.

**Jeff Sturm**, with over 25 years of human services experience, is the Director of the Developmental Disabilities Program in Montana. In addition to directing the community services of this program, he also oversees the Montana Developmental Center, Montana's ICF/MR.

**James Toews** (rhymes with waves) of Portland is Assistant Director for Seniors and People with Disabilities in Oregon's Department of Human Services (DHS). Toews joined DHS in 1985, where he administered programs for clients with developmental disabilities. He served as Director of Governmental Affairs and Executive Director of the Association for Retarded Citizens of Oregon and Protective Services Director for the Logan Center for Retardation Services in South Bend, Indiana. Toews is a graduate of Goshen College in Goshen, Indiana.

**Stuart Torgerson** has worked in the field of developmental disabilities for 29 years. Besides being another PASS graduate, he has direct service experience in residential and employment



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programs; has worked as a case manager, and for the last 19 years has served as Program Coordinator of developmental disabilities programs in Snohomish County in Washington state.

**Jean Tuller** is the Executive Director of the Oregon Technical Assistance Corporation, a nonprofit organization that promotes full participation in community life for individuals with disabilities and families through the delivery of training, technical assistance, and related services. Formerly, she was the Special Programs Director for the National Program Office on Self-Determination at the University of New Hampshire. She was based at the Center for Medicaid and State Operations at the Centers for Medicare and Medicaid Services (CMS). At CMS, her policy analysis responsibilities included self-determination and Medicaid implementation of the Americans with Disabilities Act, especially as it has been interpreted in the *Olmstead v. L.C.* Supreme Court decision. She previously served as Project Director for the Maryland Self-Determination Initiative, a broad-based systems change effort. Jean holds a Masters Degree in Public Administration from the University of Massachusetts and graduated from the Senior Executive Management Program of the Kennedy School of Government at Harvard University.

**Ric Zaharia** has served 5 years as the Director of the Division of Developmental Disabilities in Arizona, 5 years as the Developmental Disabilities Director in Utah, and 35 years in the field beginning as direct support staff

**John Zeeck** is the Quality Assurance and Administrative Rules and Policy Specialist for the Developmental Disabilities Program in Montana. He is responsible for the ongoing development and implementation of the Quality Assurance Process and is the Chair of the Quality Council for the Program.