


A nighttime photograph of the Portland, Oregon skyline. The city lights are reflected in the water in the foreground. The sky is dark with some light clouds. The text "Multnomah County DEVELOPMENTAL DISABILITIES SERVICES" is overlaid in white at the top.

# Multnomah County DEVELOPMENTAL DISABILITIES SERVICES

**Portland, Oregon**



# Developing Quality Standards for Case Management Systems

PRESENTED BY

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NASDDDS MID-YEAR CONFERENCE

“REINVENTING QUALITY”

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(MATERIALS CO-DEVELOPED BY NANCY HESSELMAN)



# “Just the Facts, Folks”

- ∞ Multnomah County population: 639,000
- ∞ Estimated number of county residents with developmental disabilities in need of support: 6,390
- ∞ Division’s annual budget: \$55 million
- ∞ Division staffing: 86 staff, including 56 case managers
- ∞ Number served by case management: 3,010
- ∞ Multnomah County wait list: 1,515 waiting for residential, vocational, and other services

# It All Started With Budget Cuts...

- ∞ As the result of a budget reduction, previously-established case management quotas took on a new importance
- ∞ Case managers articulated frustration with perceived lack of concern for clients and abandonment of quality
- ∞ The Division made a commitment to training, development of tools to support case managers, and continuous quality improvement



# And Then There Was Strategic Planning...

**DDSD will complete a redesign of the Case Management system to improve services to consumers and families, ensure compliance with quality standards, expand service capacity, and support case managers in the performance of their jobs.**



# The Process and Goals

- ∞ Use focus groups to generate a process analysis of the case management system
- ∞ Convene a work group to develop case management quality standards
- ∞ Develop and implement a quality assurance system



# Focus Group Methodology

- ∞ Use of market research approach for information-gathering
- ∞ Outside facilitator
- ∞ Broad stakeholder representation
- ∞ Diverse membership
- ∞ Structured questions and discussion strategy
- ∞ Segment focus groups by category



# Common Focus Group Themes

- ∞ The pervasiveness of regulations
- ∞ Caseload and workload issues
- ∞ Specialization of duties
- ∞ Billable services
- ∞ Insufficient training
- ∞ Orientation of new staff
- ∞ Transition to person-centered planning processes
- ∞ Changing case managers



# Self-Determination and Public Process

- ∞ Does the process have a consumer majority or strong consumer participation?
- ∞ Do meetings support meaningful participation of consumers and self-advocates?
- ∞ Does the process include activities that solicit information from consumers and self-advocates?
- ∞ Is the process committed to use of information received from consumers and self-advocates?
- ∞ Does the process reflect and support community diversity?
- ∞ Do the results of the process reflect ongoing consumer, and self-advocate, and stakeholder involvement?



# Quality Standards Group

## ∞ Principles

- Stakeholder driven
- Diverse membership
- Information-based decision-making
- Product-oriented
- Time-limited



# Quality Standards Group

## ∞ The Charge

To propose a design for a quality evaluation system that emphasizes quality standards for individual performance but promotes best practice standards corporately for the whole agency.



# Quality Standards Group

## ∞ Action Plan

- Identify shared beliefs
- Review and cluster the focus group findings
- Develop a specific goal for each category
- Adopt a format for writing standards
- Improve shared knowledge of case management requirements and activities
- Develop standards for each area identified



# Quality Standards Group

## ∞ Action Plan (continued)

- Develop standards for Oregon Administrative Rule requirements
- Address system issues and make recommendations to the Division
- Disseminate recommended standards to stakeholders for comment
- Consider and incorporate feedback
- Advise on implementation strategies



# Sample Standards...

Area: Individual, Family and Community  
Relations

A.5. Responsiveness

“The case manager returns telephone calls  
within two (2) working days of receiving a  
call.”



# Sample Standards...

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Area: Individual Goals & Plans

B.4. Planning for the Future

“The case manager actively guides and supports the individual to articulate his/her needs and goals, and to plan for the future.”



# What We Want You to Remember

- 1] Not all decisions must be numbers driven.
- 2] Develop a comprehensive staff involvement strategy.
- 3] Self-determination principles must be reflected in the process and the product.
- 4] Clearly define system responsibilities.
- 5] Meaningful consumer and stakeholder involvement cannot stop with development of the standards.